

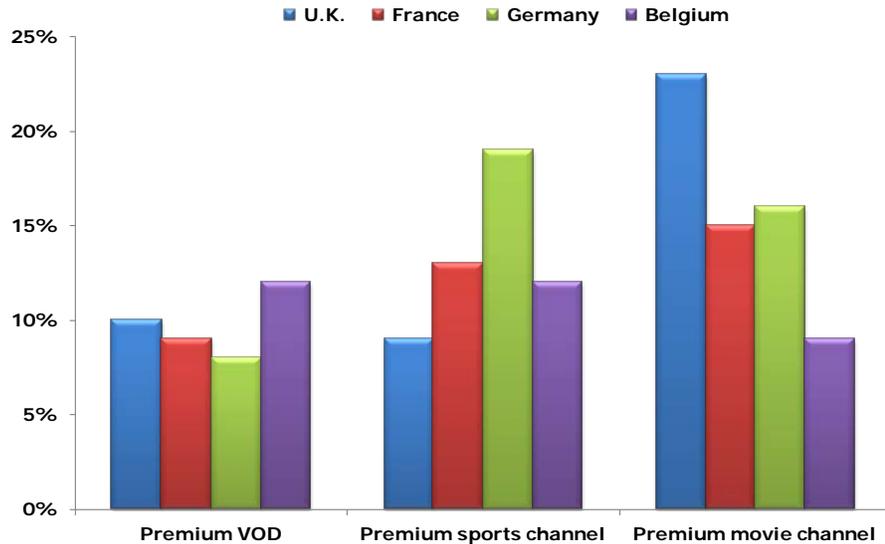
**Synopsis**

This report analyzes the market for consumer TV services in Western Europe, Eastern Europe, and the Asia-Pacific region, including cable, IPTV, and satellite/DTH. It examines service provider activities and global, regional, and market-specific trends in several service areas, including pay TV, terrestrial/OTA TV, multiscreen, HD, set-top boxes, OTT services, video on-demand, and PVR/DVR features. The report assesses regulatory changes and competitive positioning and includes subscriber forecasts through 2017.

**Premium TV Features**

**Use of Premium Pay-TV Features**

"Which of the following TV features does your household use on a monthly basis?"  
(Among Pay-TV Subscribers)



Source: *Television Services: European and Asia-Pacific Outlook*  
© Parks Associates 2013

**Publish Date:** 2Q 13

"The TV service markets in Western Europe, Eastern Europe, and the Asia-Pacific Region are more dynamic than ever before," said Brett Sappington, director of research, Parks Associates. "Operators seek to overcome low ARPUs and are introducing a variety of services to entice greater spending from subscribers. At the same time, new competitive threats stand to drain away subscribers to new services. The trends in today's market are already defining which companies will be the winners of tomorrow's subscribers and revenues."

**Contents**

**The Bottom Line**

**Dashboard**

**1.0 Report Summary**

- 1.1 Purpose and Scope of Report
- 1.2 Data Sources

**2.0 Counting Televisions**

**3.0 Global Trends**

- 3.1 Multiscreen Takes Hold
- 3.2 IPTV and Satellite Out-Innovate Cable
- 3.3 IPTV Growth: Slower than Expected
- 3.4 Piracy Limits Profitable Business Options
- 3.5 Economic Conditions Hinder Growth
- 3.6 Consolidation Continues

- 3.7 OTT Services Continue Growth
- 3.8 Taxes Policies Hinder Growth
- 3.9 Moving Consumers to Premium Services
- 3.10 Interest in Apps and the Second Screen
- 3.11 Differences in Content Availability
- 3.12 Quotas on Foreign Content
- 3.13 Set-top Box Cost Challenges
- 4.0 Trends in Western Europe**
  - 4.1 Economics and Profitability
  - 4.2 Regulation
  - 4.3 Multiscreen
  - 4.4 HD Services
  - 4.5 Digitization
  - 4.6 Launch of the Horizon Set-top Box
- 5.0 Trends in Eastern Europe**
  - 5.1 Low ARPU and Revenues
  - 5.2 Digitization
  - 5.3 HD Services
  - 5.4 Regulation
  - 5.5 Satellite Services
  - 5.6 Multiscreen
- 6.0 Trends in Asia-Pacific**
  - 6.1 Revenues and Billing
  - 6.2 OTT and Online Video
  - 6.3 VOD
  - 6.4 Multiscreen
  - 6.5 Content Restrictions
  - 6.6 Digitization
- 7.0 Forward Thinking**
  - 7.1 Interest in 4K
  - 7.2 HEVC / H.265
  - 7.3 Cloud-based PVR Services
  - 7.4 Recommendations
- 8.0 Forecasts**
  - 8.1 Methodology and Assumptions
  - 8.2 TV Household and Pay-TV Subscriber Growth
- 9.0 Glossary and Index**
  - 9.1 Glossary
  - 9.2 Index

Figures	
	Global TV Households by Technology
	Global Pay TV Share by Technology
	Availability of Multiscreen / TV Everywhere Services in Western Europe
	Price of Basic TV Packages – Eastern Europe
	Digital Switchover Completion Dates for Eastern Europe
	Availability of Multiscreen / TV Everywhere Services in Eastern Europe
	Availability of Multiscreen / TV Everywhere Services in Asia-Pacific
	Television Services Forecast Methodology
	TV Households Forecast – Europe and Asia-Pacific



## Television Services: European and Asia-Pacific Outlook

By Brett Sappington, Director of Research

2Q 2013

Pay TV Subscriptions Forecast – Western Europe  
Pay TV Subscriptions Forecast – Eastern Europe  
Pay TV Subscriptions Forecast – Asia-Pacific

### Attributes

**Parks Associates**  
15950 N. Dallas Pkwy  
Suite 575  
Dallas, TX 75248

800.727.5711 toll free  
972.490.1113 phone  
972.490.1133 fax

parksassociates.com  
sales@  
parksassociates.com

Authored by Brett Sappington  
Executive Editor: Tricia Parks  
Published by Parks Associates

© May 2013 Parks Associates  
Dallas, Texas 75248

All rights reserved. No part of this book may be reproduced, in any form or by any means, without permission in writing from the publisher.

Printed in the United States of America.

#### **Disclaimer**

Parks Associates has made every reasonable effort to ensure that all information in this report is correct. We assume no responsibility for any inadvertent errors.