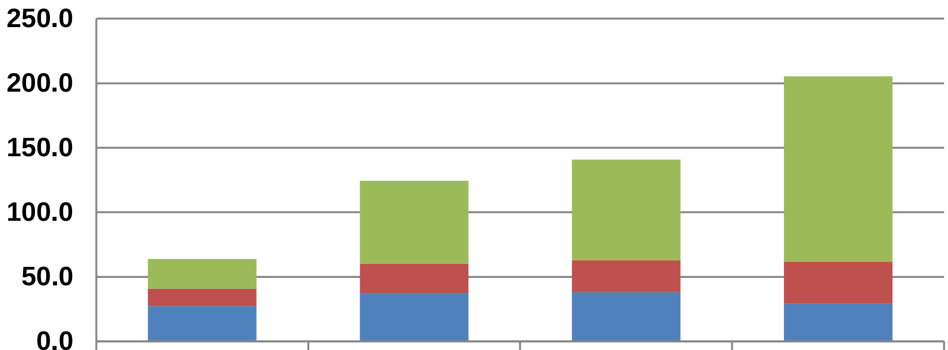
Triple-play revenues to reach $144 billion

Telcos and cable operators are investing heavily in their networks to upgrade their subscribers to bundles (triple-play or double-play). These operators will reap the rewards of this investment as total subscription revenues (pay TV (including on-demand), broadband and fixed-line telephony) will increase by 65% from $124 billion in 2012 to $205 billion in 2018, according to the **Triple-Play Forecasts** report from Digital TV Research.

Subscription revenues by bundle ($ billion)



	2008	2012	2013	2018
Triple-play	23.1	64.4	77.9	143.9
Double-play	13.3	22.5	24.8	32.2
Standalone TV	27.4	37.5	38.0	29.3

Source: Digital TV Research Ltd

Covering 97 countries, triple-play subscription revenues will reach $144 billion in 2018, up by $80 billion on the 2012 total. Triple-play revenues will command 70% of total subscription revenues by 2018, up from 52% in 2012 and 36% in 2008.

The US ($60 billion – double the 2012 total) will account for 42% of the world's triple-play revenues by 2018, although this is down from a 59% share in 2008.

Simon Murray, Principal Analyst at Digital TV Research, said: "Triple-play revenues overtook standalone TV revenues in 2009. Standalone TV revenues will start falling from 2013 as subscribers defect to bundles and as cable and DSL/fiber operators offer lower-priced packages due to greater competition from other platforms."

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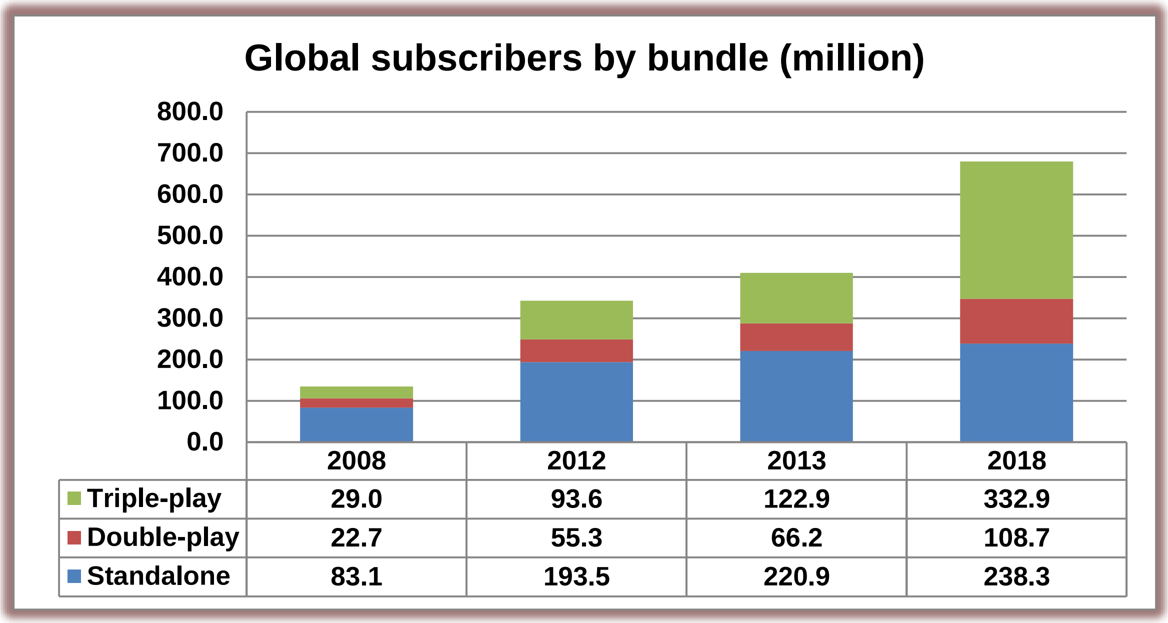

	2008	2012	2013	2018
Triple-play	29.0	93.6	122.9	332.9
Double-play	22.7	55.3	66.2	108.7
Standalone	83.1	193.5	220.9	238.3

Source: Digital TV Research Ltd

Triple-play subscriptions will reach 333 million by 2018; up by more than 300 million since 2008 and up by 239 million on the 2012 total. China will have 115 million triple-play subscribers by 2018 (with only 9 million recorded at end-2012) – or 34% of the global total.

The number of triple-play households will overtake the standalone TV total in 2016. The standalone TV total will begin to decline from 2016 as more and more homes convert to bundles.

About 21% of the world's TV households (covering 97 countries) will subscribe to triple-play services by 2018. This is up from just 7% penetration at end-2012 and only 2% at end-2008.

Despite rapid growth in IPTV subscriptions, cable will contribute nearly two-thirds of triple-play subscribers by 2018. Triple-play penetration will remain a lot higher in DSL and fiber homes (71% by 2018) than in cable homes (42%). However, the DSL and fiber proportion will not grow by too much, whereas the cable proportion will double from 18% in 2012.

*For more information about the **Triple-Play Forecasts** report, please contact:*
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Triple-Play Forecasts:

Table of Contents

Published in November 2013, this 310-page electronically-delivered report comes in three parts:

- An 88-page PDF giving a global executive summary and comparison tables.
- A 98-page PDF giving country-by-country forecasts in detail for 97 territories.
- An excel workbook providing triple-play, double-play and standalone subscriber and revenue forecasts from 2008 to 2018 for 97 countries as well as handy comparison tables.

Countries covered:

Albania	Algeria	Angola	Argentina
Australia	Austria	Bahrain	Belarus
Belgium	Bolivia	Bosnia	Brazil
Bulgaria	Canada	Chile	China
Colombia	Costa Rica	Cote d'Ivoire	Croatia
Cyprus	Czech Rep.	Denmark	Dominican Rep.
Ecuador	Egypt	El Salvador	Estonia
Finland	France	Germany	Ghana
Greece	Guatemala	Honduras	Hong Kong
Hungary	India	Indonesia	Ireland
Israel	Italy	Japan	Jordan
Kenya	Kuwait	Latvia	Lebanon
Lithuania	Macedonia	Malaysia	Mexico
Moldova	Montenegro	Morocco	Netherlands
New Zealand	Nicaragua	Nigeria	Norway
Oman	Pakistan	Panama	Paraguay
Peru	Philippines	Poland	Portugal
Puerto Rico	Qatar	Romania	Russia
Saudi Arabia	Serbia	Singapore	Slovakia
Slovenia	South Africa	South Korea	Spain
Sweden	Switzerland	Syria	Taiwan
Tanzania	Thailand	Tunisia	Turkey
Uganda	Ukraine	UAE	UK
USA	Uruguay	Venezuela	Vietnam
Zambia			

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Forecasts (2008-2018) contain the following detail for each country:

TV households	**Digital cable subs**	
Stand-alone digital cable subs	***Double-play digital cable subs***	***Triple-play digital cable subs***
Pay IPTV subscribers		
Stand-alone pay IPTV subs	***Double-play DSL/fiber subs***	***Triple-play DSL/fiber subs***
Total standalone TV subs	**Total double-play subs**	**Total triple-play subs**
RGUs in digital cable homes	**RGUs in DSL & fiber homes**	**RGUs in cable and DSL/fiber homes**
Digital cable subs revenues		
Stand-alone digital cable revs	***Double-play digital cable revenues***	***Triple-play digital cable revenues***
DSL & fiber subscription revenues		
Stand-alone IPTV revenues	***Double-play DSL & fiber revenues***	***Triple-play DSL & fiber revenues***
Average Revenue Per User		
Stand-alone digital cable subs	***Double-play digital cable subs***	***Triple-play digital cable subs***
Stand-alone IPTV subs	***Double-play DSL & fiber subs***	***Triple-play DSL & fiber subs***