

# Digital TV World Household Forecasts:

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Published in July 2012, this 250-page electronically-delivered report comes in three parts:

- A 86-page PDF file providing a global Executive Summary and Comparison Tables.
- A 81-page PDF file providing data from 2011 to 2017 for the 80 countries listed below (*please see next page for line-by-line detail of what is included for each country*).
- An excel workbook providing relevant background data for each country, so that the reader can drill down for detail at operator level.

### Countries covered:

Executive summary	Algeria	Angola	Argentina
Australia	Austria	Bahrain	Belgium
Brazil	Bulgaria	Canada	Chile
China	Colombia	Cote D'Ivoire	Croatia
Cyprus	Czech Rep.	Denmark	Egypt
Estonia	Finland	France	Germany
Ghana	Greece	Hong Kong	Hungary
India	Indonesia	Ireland	Israel
Italy	Japan	Jordan	Kenya
Kuwait	Latvia	Lebanon	Lithuania
Malaysia	Mexico	Morocco	Netherlands
New Zealand	Nigeria	Norway	Oman
Pakistan	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	UAE	UK
Ukraine	USA	Venezuela	Vietnam
Zambia			



**Forecasts (2011-2017) contain the following detail for each country:**

<b>TV households</b>	<b>Digital cable subs</b>	<b>Analog cable subs</b>
<b>Pay IPTV subscribers</b>	<b>Pay digital DTH subscribers</b>	<b>Digital free DTH households</b>
<b>Analog DTH Households</b>	<b>Analog terrestrial households</b>	<b>Primary FTA DTT households</b>
<b>Primary Pay DTT households</b>	<b>Digital homes</b>	<b>Analog homes</b>
<b>Pay TV subscribers</b>		
<b>Digital cable subs/TV HH %</b>	<b>Analog cable subs/TV HH %</b>	<b>Pay IPTV subs/TV HH %</b>
<b>Pay DTH/TV HH %</b>	<b>Digital free DTH/TV HH %</b>	<b>Analog DTH/TV HH %</b>
<b>Analog terrestrial/TVHH %</b>	<b>Primary FTA DTT/TV HH %</b>	<b>Primary pay DTT/TV HH %</b>
<b>Digital/TV HH %</b>	<b>Analog/TV HH %</b>	<b>Pay TV Subs/TV HH %</b>
<b><i>Stand-alone digital cable subs</i></b>	<b><i>Dual-play digital cable subs</i></b>	<b><i>Triple-play digital cable subs</i></b>
<b><i>Stand-alone pay IPTV subs</i></b>	<b><i>Dual-play pay IPTV subs</i></b>	<b><i>Triple-play pay IPTV subs</i></b>



## 1.3 billion digital TV households by 2017

Based on forecasts for 80 countries, the number of digital TV homes will double between 2011 and 2017 to 1,323 million. The **Digital TV World Household Forecasts** report estimates that global digital penetration will climb from 48.6% at end-2011 to 86.7% by 2017.

Of the 648 million digital TV homes to be added between 2011 and 2017, 259 million will come from digital cable. Primary FTA DTT [homes taking DTT but not subscribing to cable, DTH or IPTV] will bring in a further 174 million, with pay DTT adding 5 million. Pay IPTV will increase by 114 million, with pay DTH up 66 million and FTA DTH 31 million.

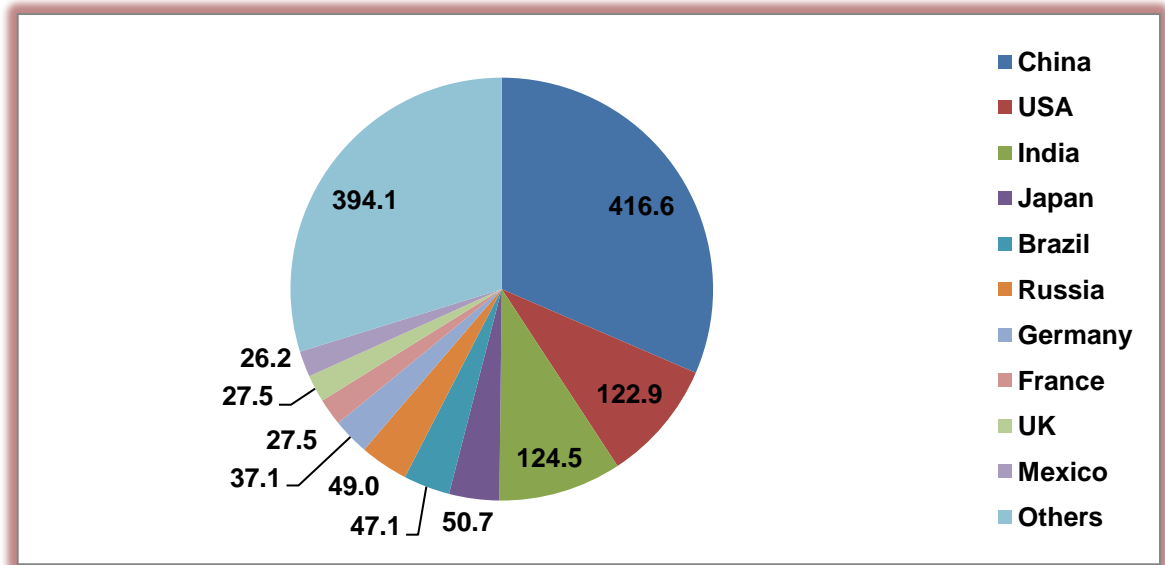
There were still 714 million analog TV households (both terrestrial and cable, with a few analog DTH ones) by end-2011. However, this total will fall to 202 million by end-2017. Analog penetration will drop from 51.4% at end-2011 to 13.3% by end-2017.

There will be 140 million analog terrestrial homes and 62 million analog cable ones by end-2017. However, digital cable subscriptions will reach 494 million homes, followed by 220 million pay digital DTH and 139 million free-to-air digital DTH. Pay IPTV will contribute another 165 million households, up from only 51 million at end-2011. Meanwhile, FTA (free-to-air) DTT homes will reach 291 million, with pay DTT generating a further 15 million.

Digital cable will be the most popular TV platform by end-2017, accounting for 32.4% of the world's TV households, with analog cable still serving 4.1% of TV homes. Pay digital DTH penetration will be 14.4%, with FTA digital DTH accounting for 9.1%. Pay IPTV penetration will climb to 10.8%, up from only 3.7% at end-2011. About 16.7% of homes will be primary FTA DTT at end-2016, with 0.9% pay DTT. Analog terrestrial TV will be taken by 9.2% of the world's TV households, down from 31.8% at end-2011.

Of the 648 million digital TV households to be added between 2011 and 2017, 440 million (68%) will be in the Asia Pacific region, bringing its total to 714 million. China became the largest digital TV household nation in 2010, and will boast 417 million digital homes by end-2017. Second-placed India will overtake the US in 2017.

## Top 10 digital TV countries at end-2017 (million)



Source: Digital TV Research Ltd

Global digital penetration will reach 87% by end-2017, up from 49% at end-2011. Regional penetration at end-2017 will vary from 100% in North America to 76% in Latin America. However, Latin America and Asia Pacific will record strong conversion to digital. By 2017, 47 countries will be completely digital compared with only Finland and Spain at end-2011.

Pay TV penetration (analog and digital combined) reached half of the world's TV households by end-2010, and will rise to 63% by end-2017. Penetration at end-2017 will range from 87% in North America to 22% in the Middle East and Africa. Pay TV penetration will remain highest in the Netherlands, at 99.5% by end-2017. However, China will have the most pay TV subs, at 315 million by end-2017, followed by India with 145 million.