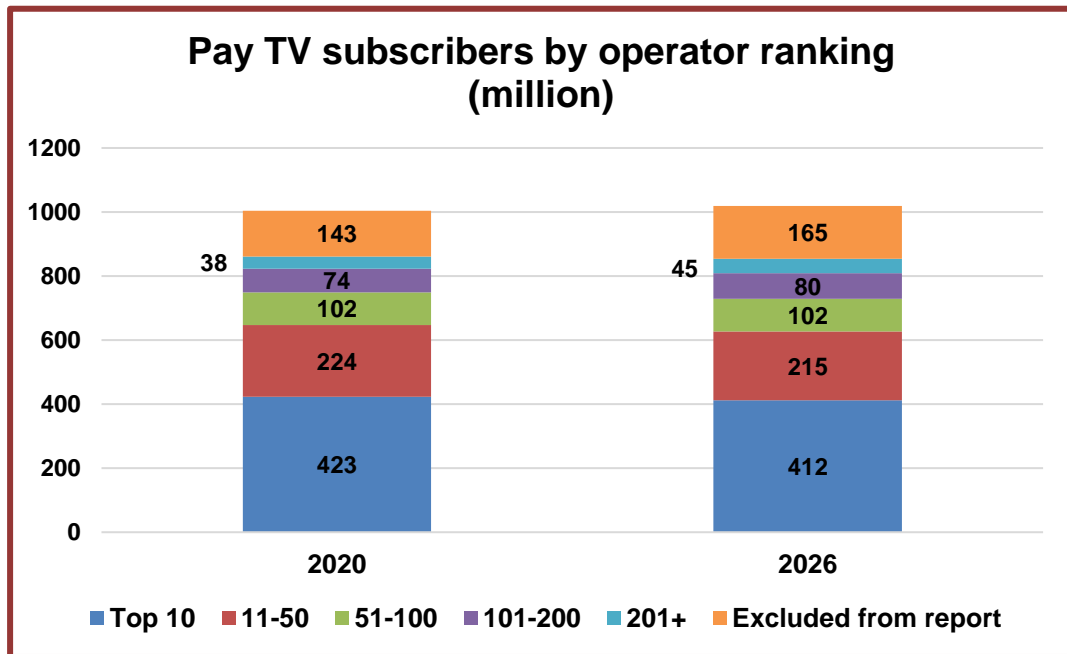


Global pay TV fragments

The top 503 pay TV operators will reach 853 million subscribers from the 1.02 billion global total by 2026. The top 50 operators accounted for 64% of the world's pay TV subscribers by end-2020, with this proportion dropping to 62% by 2026.



The top 50 will lose 20 million subscribers over the next five years. However, operators beyond the top 100 will gain subscribers over the same period.

Simon Murray, Principal Analyst at Digital TV Research, said: “Most industries consolidate as they mature. The pay TV sector is doing the opposite – fragmenting. Most of the subscriber growth will take place in developing countries where operators are not controlled by larger corporations.”

By end-2020, 13 operators had more than 10 million pay TV subscribers. China and India will continue to dominate the top pay TV operator rankings, partly as their subscriber bases climb but also due to the US operators losing subscribers.

Between 2020 and 2026, 307 of the 503 operators (61%) will gain subscribers, with 13 showing no change and 183 losing subscribers (36%).

In 2020, 28 pay TV operators earned more than \$1 billion in revenues, but this will drop to 24 operators by 2026.

The [Global Pay TV Operator Forecasts](#) report covers 503 operators with 726 platforms [132 digital cable, 116 analog cable, 279 satellite, 142 IPTV and 57 DTT] across 135 countries.

[Global Pay TV Operator Forecasts](#)

Table of Contents

Published in May 2021, this 250-page electronically-delivered report comes in two parts:

- A 68-page PDF giving a global executive summary and forecasts. Profiles for the top 10 countries (Brazil, China, France, Germany, India, Japan, Mexico, Russia, UK and USA)
- An excel workbook giving comparison tables and country-by-country forecasts in detail for 503 operators across 135 territories for every year from 2010 to 2026. The report covers 726 platforms: 279 satellite TV; 132 digital cable; 116 analog cable; 142 IPTV; and 57 DTT.

The report costs £1,600/€1,760/\$1,920 for a 1-5 user license.

For more information, [please click here](#) or contact lydia@digitaltvresearch.com

SPECIAL OFFER: Three reports for the price of two

Get our three Global Pay TV Forecasts reports for the price of two. The three reports covered in this deal are:

- [***Global Pay TV Revenue Forecasts***](#)
- [***Global Pay TV Subscriber Forecasts***](#)
- [***Global Pay TV Operator Forecasts***](#)

Please email lydia@digitaltvresearch.com to receive more details.



digital TV research

Countries and operators covered:

Country	No of Operators	Operators
Albania	3	Digitalb; Tring; Albtelecom
Algeria	3	beIN; OSN; Algerie Telecom
Angola	6	ZAP TV, DStv, Canal Plus, StarSat, Angola Telecom, TV Cabo
Argentina	5	Cablevision; Supercanal; DirecTV; Telefonica; Claro
Australia	1	Foxtel
Austria	5	Telekom Austria; Magenta; Sky; Liwest; HD Austria
Bahrain	3	beIN; OSN; Batelco
Bangladesh	1	Akash
Belarus	3	MTIS, Zala, A1
Belgium	6	Proximus; SFR; Telenet; VOO; Telesat/TV Vlaanderen; Orange
Benin	4	DStv; Canal Plus; StarSat; StarTimes
Bolivia	2	Tigo; Entel
Bosnia	3	Telemach, M:Tel; Total TV
Botswana	3	DStv; GOtv; StarSat
Brazil	4	Claro; Telefonica/Vivo; Sky; Oi
Bulgaria	3	Bulsatcom, Vivacom, A1
Burkina Faso	3	DStv; Canal Plus; StarSat
Burundi	4	DStv; Canal Plus; StarSat; StarTimes
Cambodia	3	CDN; One TV; Sky One
Cameroon	4	DStv; Canal Plus; StarSat; StarTimes
Canada	8	Rogers; Videotron; Cogeco; Shaw Communications; Shaw Direct; Bell TV; Telus; Max TV
CAR	3	Canal Plus; StarSat; StarTimes
Chad	3	Canal Plus; StarSat; StarTimes
Chile	6	VTR; Telefonica; Claro; DirecTV; Entel; Telsur
China	4	China Radio & TV; China Telecom; BestTV; China Unicom
Colombia	5	Claro; UNE; ETB; DirecTV; Movistar
DR Congo	4	DStv; Canal Plus; StarSat; StarTimes, Easy TV
Rep Congo	5	DStv; Canal Plus; StarSat; StarTimes; Easy TV
Costa Rica	5	Tigo; Cabletica; Claro; Sky; Telecable
Cote d'Ivoire	5	Canal Plus, DStv, StarTimes; StarSat; Easy TV
Croatia	2	Max TV/T-HT/Evo, A1
Cyprus	3	Cytavision; Cablenet; Primetel
Czech Rep	5	Vodafone, O2, Telly, Skylink; T-Mobile
Denmark	6	Allente; You See; Stofa; Boxer; TDC; Telia
Dominican Rep	3	Tricom; Claro; Sky
Ecuador	4	DirecTV; CNT; Claro; TV Cable
Egypt	3	beIN; OSN; Telecom Egypt



Country	No of Operators	Operators
El Salvador	3	Claro; Tigo; Sky
Eq. Guinea	2	Canal Plus, DStv
Estonia	3	Elisa; Telia; Home 3
Ethiopia	2	DStv; StarSat
Finland	5	Elisa; Telia; DNA; Digita; Allente
France	6	Orange; SFR; CanalSat; Free; Bouygues; TNT
Gabon	5	Canal Plus, DStv, StarTimes; StarSat
Gambia	2	Canal Plus, DStv
Georgia	2	Magtisar; Sliknet
Germany	7	Vodafone; DT/T-Home; Sky; Unitymedia; Telecolumbus; HD+; Freenet
Ghana	4	Canal Plus, DStv, GOtv; StarSat
Greece	3	Nova, Cosmote, Vodafone
Guatemala	3	Claro; Tigo; Sky
Guinea	5	Canal Plus, DStv, StarTimes; StarSat; Easy TV
Honduras	3	Claro; Tigo; Sky
Hong Kong	2	i-cable; Now TV
Hungary	6	T-Home, Digi TV, Vodafone, Invitel, MinDig, Direct One
Iceland	2	Vodafone, Siminn
India	10	Hathway; GTPL; Siti; In Digital; DEN; Dish TV; Tata Sky; Airtel; Sun Direct; MTNL
Indonesia	7	Linknet; Transvision; Indovision; Top TV; Okevision; Orange TV; Telkom
Ireland	3	Virgin; Sky; eir
Israel	2	HOT; Yes
Italy	4	Sky; Telecom Italia, Vodafone
Japan	3	SkyPerfecTV; J:Com; NTT
Jordan	3	beIN; OSN; Orange
Kazakhstan	2	Alma; KT
Kenya	6	Zuku cable, Zuku satellite, DStv, StarTimes, GOtv, StarSat
Kuwait	2	beIN; OSN
Latvia	3	Baltcom, Tet; Home3
Lebanon	2	beIN; OSN
Liberia	2	DStv; StarSat
Lithuania	3	TEO, Cgates, Home3
Luxembourg	2	Tele des P&T; Eltrona
Macedonia	3	A1; Max TV; Total TV
Madagascar	4	DStv; Canal Plus; StarSat; StarTimes
Malawi	4	Zuku, DStv, GOtv; StarSat
Malaysia	2	Astro; TM
Mali	2	Canal Plus; StarSat
Malta	2	Melita; Go



Country	No of Operators	Operators
Mexico	5	Megacable; Televisa cable; Sky; Dish; TotalPlay
Moldova	2	Sun; Moldtelecom
Mongolia	2	Univision; DDish
Montenegro	2	Total TV; CT
Morocco	3	beIN; OSN; Maroc Telecom
Mozambique	6	ZAP TV, DStv, StarSat, StarTimes; GOtv, TV Cabo
Myanmar	2	SkyNet; 4TV/MRTV (Forever)
Namibia	3	DStv, GOtv; StarSat
Nepal	1	Dish Media
Netherlands	5	Ziggo; Canal Digitaal; Tele 2; KPN/Digitenne
New Zealand	2	Sky; Vodafone
Nicaragua	3	Claro; Sky; Tigo
Niger	3	DStv; Canal Plus; StarSat
Nigeria	5	GOtv, DStv, StarTimes, StarSat; Canal Plus
Norway	5	Allente; Riks TV; Telenor; Telia; Altibox
Oman	3	beIN; OSN; Omantel
Pakistan	1	PTCL
Panama	4	Claro; Sky; Cable & Wireless; Cable Onda
Paraguay	2	Tigo; Claro
Peru	3	Telefonica; Claro; DirecTV
Philippines	2	Sky Cable/Sky Direct; Cignal
Poland	8	UPC, Vectra, Inea, Toya, TP/Orange, Cyfra Polsat, Canal Plus, Netia
Portugal	4	Meo/PT; NOS; Nowo; Vodafone
Puerto Rico	4	Liberty; Claro; DirecTV; Dish
Qatar	3	beIN; OSN; Ooredoo
Romania	5	RCS-RDS/Digi TV, Vodafone, Telekom Romania, Orange TV, Focussat
Russia	8	Akado, ER Telecom, MTS, Rostelecom, Beeline/Veon, NTV Plus, Tricolor, Orion
Rwanda	5	DStv, StarTimes, StarSat; GOtv, Canal Plus
Saudi Arabia	4	beIN; OSN; Invision; Mobily
Senegal	4	Canal Plus, DStv, Orange; StarSat
Serbia	2	SBB, Telekom Srbija
Sierra Leone	4	DStv; Canal Plus; StarSat; StarTimes
Singapore	2	StarHub; SingTel TV
Slovakia	5	UPC, Skylink, Slovak Telekom, freeSat, Orange TV
Slovenia	5	Telemach, Neo TV, Total TV, T-2, A1
South Africa	3	DStv, StarSat, GOtv
S Korea	9	LG Hellovision; T Broad; D'Live; CMB; Hyundai HCN; KT Olleh; Skylife; B TV; LG U+



Country	No of Operators	Operators
Spain	4	Vodafone; Telefonica/Movistar; Euskaltel; Orange
Sri Lanka	2	Dialog; Peo
Sweden	5	Tele 2; Allente; Telia; Boxer; Telenor
Switzerland	3	Swisscom; UPC; Sunrise
Syria	1	beIN
Taiwan	4	Taiwan Broadband; TWM; CNS; CHT
Tanzania	4	Zuku, DStv, StarTimes, StarSat
Thailand	3	Truevisions; TOT; AIS
Togo	3	Canal Plus, DStv, StarSat
Tunisia	2	beIN; OSN
Turkey	5	Turksat; Turkcell; TNet; Digiturk; D-Smart
Uganda	5	Zuku, DStv, StarTimes, GOtv, StarSat
UAE	4	beIN; OSN; Du; eLife
UK	4	Sky; Virgin; BT; TalkTalk
Ukraine	4	Volia; Triolan; Ukrtelecom; Viasat
USA	8	Comcast; Charter; Cox; Altice; AT&T U-Verse; DirecTV; Fios TV; DISH Network
Uruguay	2	DirecTV; Cablevision
Uzbekistan	2	Uztelecom; Uzdigital
Venezuela	4	Intercable, DirecTV; Movistar, CANTV
Vietnam	8	SCTV; VTVcab; HTV-TMS; VNPT; Viettel; FPT; K+; Viva TV
Zambia	5	Zuku, DStv, StarTimes, GOtv, StarSat
Zimbabwe	2	DStv, StarSat



Turkey pay TV operator forecasts

	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026
Pay TV subscribers (000)																	
Pay TV revenues (\$ million)																	
Pay TV subscribers by operator (000)																	
Turksat (digital cable)																	
Turksat (analog cable)																	
Turksat (total)																	
Turkcell (IPTV)																	
TTNet (IPTV)																	
TTNet (satellite)																	
TTNet (total)																	
Digiturk (satellite)																	
D-Smart (satellite)																	
Other																	
Share of pay TV subs by operator %																	
Turksat (digital cable)																	
Turksat (analog cable)																	
Turksat (total)																	
Turkcell (IPTV)																	
TTNet (IPTV)																	
TTNet (satellite)																	
TTNet (total)																	
Digiturk (satellite)																	
D-Smart (satellite)																	
Other																	
Subscription & VOD revenues (US\$ million)																	
Turksat (digital cable)																	
Turksat (analog cable)																	
Turksat (total)																	
Turkcell (IPTV)																	
TTNet (IPTV)																	
TTNet (satellite)																	
TTNet (total)																	
Digiturk (satellite)																	
D-Smart (satellite)																	
Other																	



Turkey pay TV operator forecasts

	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026
Share of pay TV revenues by operator %																	
<i>Turksat (digital cable)</i>																	
<i>Turksat (analog cable)</i>																	
<i>Turksat (total)</i>																	
<i>Turkcell (IPTV)</i>																	
<i>TTNet (IPTV)</i>																	
<i>TTNet (satellite)</i>																	
<i>TTNet (total)</i>																	
<i>Digiturk (satellite)</i>																	
<i>D-Smart (satellite)</i>																	
<i>Other</i>																	
Average Revenue Per User (ARPU - US\$)																	
<i>Turksat (digital cable)</i>																	
<i>Turksat (analog cable)</i>																	
<i>Turkcell (IPTV)</i>																	
<i>TTNet (IPTV)</i>																	
<i>TTNet (satellite)</i>																	
<i>Digiturk (satellite)</i>																	
<i>D-Smart (satellite)</i>																	



Digital TV Research publication schedule for 2021

	Title	Publication	Price
1	Africa Pay TV Forecasts	January	£1200/€1320/\$1440
2	Africa OTT TV and Video Forecasts	January	£1200/€1320/\$1440
3	Middle East & North Africa Pay TV Forecasts	January	£1200/€1320/\$1440
4	Middle East & North Africa OTT TV and Video Forecasts	February	£1200/€1320/\$1440
5	SVOD Platform Forecasts Update	February	£800/€880/\$960
6	North America Pay TV Forecasts	February	£600/€660/\$720
7	North America OTT TV and Video Forecasts	February	£600/€660/\$720
8	Latin America Pay TV Forecasts	March	£1200/€1320/\$1440
9	Latin America OTT TV and Video Forecasts	March	£1200/€1320/\$1440
10	Asia Pacific Pay TV Forecasts	March	£1200/€1320/\$1440
11	Asia Pacific OTT TV and Video Forecasts	March	£1200/€1320/\$1440
12	Eastern Europe Pay TV Forecasts	April	£1200/€1320/\$1440
13	Eastern Europe OTT TV and Video Forecasts	April	£1200/€1320/\$1440
14	Western Europe Pay TV Forecasts	April	£1200/€1320/\$1440
15	Western Europe OTT TV and Video Forecasts	April	£1200/€1320/\$1440
16	Global OTT TV & Video Forecasts	May	£1800/€1980/\$2160
17	Global SVOD Forecasts	May	£1600/€1760/\$1920
18	Global Pay TV Subscriber Forecasts	May	£1600/€1760/\$1920
19	Global Pay TV Revenue Forecasts	May	£1600/€1760/\$1920
20	Global Pay TV Operator Forecasts	June	£1600/€1760/\$1920
21	Global AVOD Forecasts	June	£1600/€1760/\$1920
22	Africa SVOD Forecasts	August	£1000/€1200/\$1300
23	Middle East & North Africa SVOD Forecasts	August	£1000/€1200/\$1300
24	Asia Pacific SVOD Forecasts	August	£1000/€1200/\$1300
25	Latin America SVOD Forecasts	September	£1000/€1200/\$1300
26	North America SVOD Forecasts	September	£500/€600/\$650
27	Eastern Europe SVOD Forecasts	September	£1000/€1200/\$1300
28	Western Europe SVOD Forecasts	October	£1000/€1200/\$1300
29	SVOD Forecasts Update	October	£1600/€1760/\$1920
30	Pay TV Forecasts Update	November	£1600/€1760/\$1920
31	SVOD Platform Forecasts Update	December	£800/€880/\$960

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