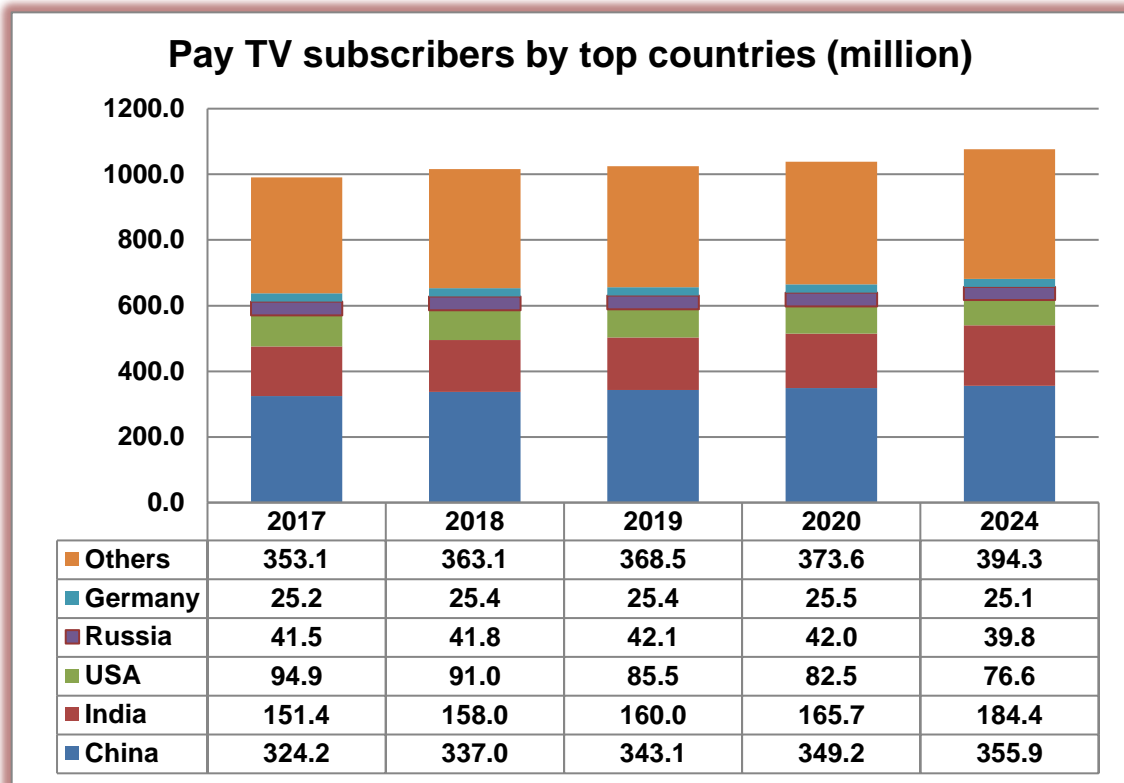


Global pay TV subscriptions up, revenues down

Digital TV Research forecasts 60 million additional pay TV subscribers between 2018 and 2024 to take the global total to 1.08 billion. China will provide 19 million additional subs and India 26 million. However, the US will lose 14.4 million pay TV subscribers between 2018 and 2024 – down by 16%.



Source: Digital TV Research Ltd

Simon Murray, Principal Analyst at Digital TV Research, said: “We have updated our forecasts based on June 2019 reports. The US is the world’s worst performer – with no uplift expected over the next five years. Other countries will experience a slowdown – or even some small declines in subscriber numbers – but no other country will match the gloomy projections for the US.”

China will continue to supply a third of the world’s pay TV subscribers, with 356 million expected by end-2024. India will bring in another 17% of the total by 2024 – or 184 million. Therefore, China and India will together provide half the world’s pay TV subscribers by 2024.

IPTV is the pay TV winner. IPTV will add 100 million subscribers between 2018 and 2024 to take its total to 357 million. Pay IPTV penetration will climb to a fifth of TV households by 2024, up from only 2.5% at end-2010 and 15.4% at end-2018.

Global pay TV revenues [subscription fees and PPV movies and TV episodes] peaked in 2016 at \$205 billion. Revenues will fall by 17% to \$171 billion in 2024. This is lower than 2010 - despite the number of pay TV subscribers rising by 359 million between 2010 and 2024. US pay TV revenues peaked in 2015, at \$106 billion, but the total will drop to \$70 billion in 2024.

[Pay TV Forecasts Update](#)

Table of Contents

Published in September 2019 and based on company reports to June 2019, the [Pay TV Forecasts Update](#) report covers 224 pages in three parts:

- A 108-page PDF giving a global Executive Summary, comparison tables and rankings. Profiles for the top 20 countries.
- A 71-page excel workbook providing global and top 20 country forecasts (2010-2024).
- A 45-page PowerPoint presentation with 44 charts, covering developments globally and for the top 20 countries.

The report costs £1,000/€1,200/\$1,300 for a 1-5 user license.

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



Operators covered in detail for the top 20 countries:

Country	No of Operators	Operators
Australia	1	Foxtel
Brazil	4	Claro; Telefonica; Sky; Oi
Canada	8	Rogers; Videotron; Cogeco; Shaw Communications; Shaw Direct; Bell TV; Telus; Max TV
China	4	China Radio & TV; China Telecom; BesTV; China Unicom
France	6	Orange; SFR; CanalSat; Free; Bouygues; TNT
Germany	7	Vodafone; DT/T-Home; Sky; Unitymedia; Telecolumbus; HD+; Freenet
India	12	Hathway; GTPL; Siti; In Digital; DEN; Dish TV; Tata Sky; Videocon; Airtel; Sun Direct; Independent; MTNL
Italy	3	Mediaset; Sky; Telecom Italia
Japan	3	SkyPerfectTV; J:Com; NTT
Mexico	5	Megacable; Televisa cable; Sky; Dish; TotalPlay
Poland	9	Multimedia Polska, UPC, Vectra, Inea, Toya, TP/Orange, Cyfra Polsat, NC+, Netia
Russia	8	Akado, ER Telecom, MTS, Rostelecom, Beeline/Veon, NTV Plus, Tricolor, Orion
Saudi Arabia	4	beIN; OSN; Invision; Mobily
South Africa	3	DStv, StarSat, GOtv
South Korea	9	CJ Hellovision; T Broad; D'Live; CMB; Hyundai HCN; KT Olleh; Skylife; B TV; LG U+
Spain	5	Ono/Vodafone; Telefonica/Movistar; Euskatel; Orange; Telecable
Sweden	6	Canal Digital; Viasat; Com Hem; Telia; Boxer; Telenor
Turkey	5	Turksat; Turkcell; TNet; Digiturk; D-Smart
UK	4	Sky; Virgin; BT; TalkTalk
USA	11	Comcast; Charter; Cox; Altice; Cablevision; Cable One; U-Verse; DirecTV; Fios TV; DISH Network; Frontier

Forecasts (for each year from 2010 to 2024) contain this detail for the top 20 countries as well as global comparisons:

Australia pay TV forecasts															
	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024
Total households (000)															
TV households (000)															
Digital cable subs (000)															
Analog cable subs (000)															
Pay IPTV subscribers (000)															
Pay Satellite TV subs (000)															
Free-to-air satellite TV households (000)															
Analog terrestrial hholds (000)															
Primary FTA DTT hholds (000)															
Primary Pay DTT hholds (000)															
Digital homes (000)															
Analog homes (000)															
Pay TV subscribers (000)															
Total DTT households (000)															
Digital cable subs/TV HH															
Analog cable subs/TV HH															
Pay IPTV subs/TV HH															
Pay Satellite TV/TV HH															
Free-to-air sat TV/TV HH															
Analog terrestrial/TVHH															
Primary FTA DTT/TV HH															
Primary pay DTT/TV HH															
TVHH/Total HH															
Digital/TV HH															
Analog/TV HH															
Pay TV Subs/TV HH															
Total DTT/TV HH															
Stand-alone dig cab subs (000)															
Dual-play dig cab subs (000)															
Triple-play dig cab subs (000)															
Stand-alone pay IPTV subs (000)															
Dual-play pay IPTV subs (000)															
Triple-play pay IPTV subs (000)															

Australia pay TV forecasts

	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024
Revenues (US\$ million)															
<i>Stand-alone digital cable revs</i>															
<i>Dual-play digital cable TV revs</i>															
<i>Triple-play digital cable TV revs</i>															
Digital cable TV subs revenues															
Digital cable TV on-demand revs															
Digital cable TV revenues															
Analog cable TV subs revs															
Cable TV revenues															
<i>Stand-alone IPTV revenues</i>															
<i>Dual-play IPTV revenues</i>															
<i>Triple-play IPTV revenues</i>															
IPTV subscription revenues															
IPTV on-demand revenues															
IPTV revenues															
Satellite TV subscription revs															
Satellite TV on-demand revs															
Satellite TV revenues															
DTT subscription revs															
DTT on-demand revenues															
DTT revenues															
Subscription revenues															
On-demand revenues															
Total revenues															
Average Revenue Per User (ARPU - US\$)															
<i>Stand-alone digital cable subs</i>															
<i>Dual-play digital cable TV subs</i>															
<i>Triple-play digital cable TV subs</i>															
Average digital cable (subs & VOD)															
Analog cable TV subs															
<i>Stand-alone IPTV subs</i>															
<i>Dual-play IPTV subs</i>															
<i>Triple-play IPTV subs</i>															
Average IPTV (subs and VOD)															
Pay Satellite TV (subs)															
Pay Satellite TV (subs and PPV)															
Pay DTT (subs)															
Pay DTT (subs and PPV)															
Average monthly ARPU															



Australia pay TV forecasts

	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024
Pay TV subscribers by operator (000)															
Foxtel/Optus (digital cable)															
Foxtel (satellite)															
Foxtel/Telstra (IPTV)															
Foxtel (total)															
Other															
Share of pay TV subs by operator %															
Foxtel/Optus (digital cable)															
Foxtel (satellite)															
Foxtel/Telstra (IPTV)															
Foxtel (total)															
Other															
Subscription & VOD revenues (\$ million)															
Foxtel/Optus (digital cable)															
Foxtel (satellite)															
Foxtel/Telstra (IPTV)															
Foxtel (total)															
Other															
Share of pay TV revenues by operator %															
Foxtel/Optus (digital cable)															
Foxtel (satellite)															
Foxtel/Telstra (IPTV)															
Foxtel (total)															
Other															
Average Revenue Per User (ARPU \$)															
Foxtel/Optus (digital cable)															
Foxtel (satellite)															
Foxtel/Telstra (IPTV)															
Source: digital TV research															



Digital TV Research publication schedule for 2019

	Title	Publication	Price
1	Sub-Saharan Africa Pay TV Forecasts	January	£1000/€1200/\$1300
2	Sub-Saharan Africa OTT TV and Video Forecasts	January	£1000/€1200/\$1300
3	Middle East & North Africa Pay TV Forecasts	January	£1000/€1200/\$1300
4	Middle East & North Africa OTT TV and Video Forecasts	February	£1000/€1200/\$1300
5	Asia Pacific Pay TV Forecasts	March	£1000/€1200/\$1300
6	Asia Pacific OTT TV and Video Forecasts	March	£1000/€1200/\$1300
7	Latin America Pay TV Forecasts	April	£1000/€1200/\$1300
8	Latin America OTT TV and Video Forecasts	April	£1000/€1200/\$1300
9	North America Pay TV Forecasts	April	£500/€600/\$650
10	North America OTT TV and Video Forecasts	April	£500/€600/\$650
11	Eastern Europe Pay TV Forecasts	May	£1000/€1200/\$1300
12	Eastern Europe OTT TV and Video Forecasts	May	£1000/€1200/\$1300
13	Western Europe Pay TV Forecasts	June	£1000/€1200/\$1300
14	Western Europe OTT TV and Video Forecasts	June	£1000/€1200/\$1300
15	Global OTT TV & Video Forecasts	June	£1800/€2160/\$2340
16	Global SVOD Forecasts	June	£1500/€1800/\$1950
17	Global Pay TV Subscriber Forecasts	June	£1500/€1800/\$1950
18	Global Pay TV Revenue Forecasts	June	£1500/€1800/\$1950
19	Global Pay TV Operator Forecasts	June	£1500/€1800/\$1950
20	Global AVOD Forecasts	June	£750/€900/\$975
21	SVOD Forecasts Update	September	£1000/€1200/\$1300
22	OTT TV and Video Databook	September	£750/€900/\$975
23	SVOD Databook	September	£750/€900/\$975
24	Pay TV Databook	September	£750/€900/\$975
25	Pay TV Forecasts Update	September	£1000/€1200/\$1300

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