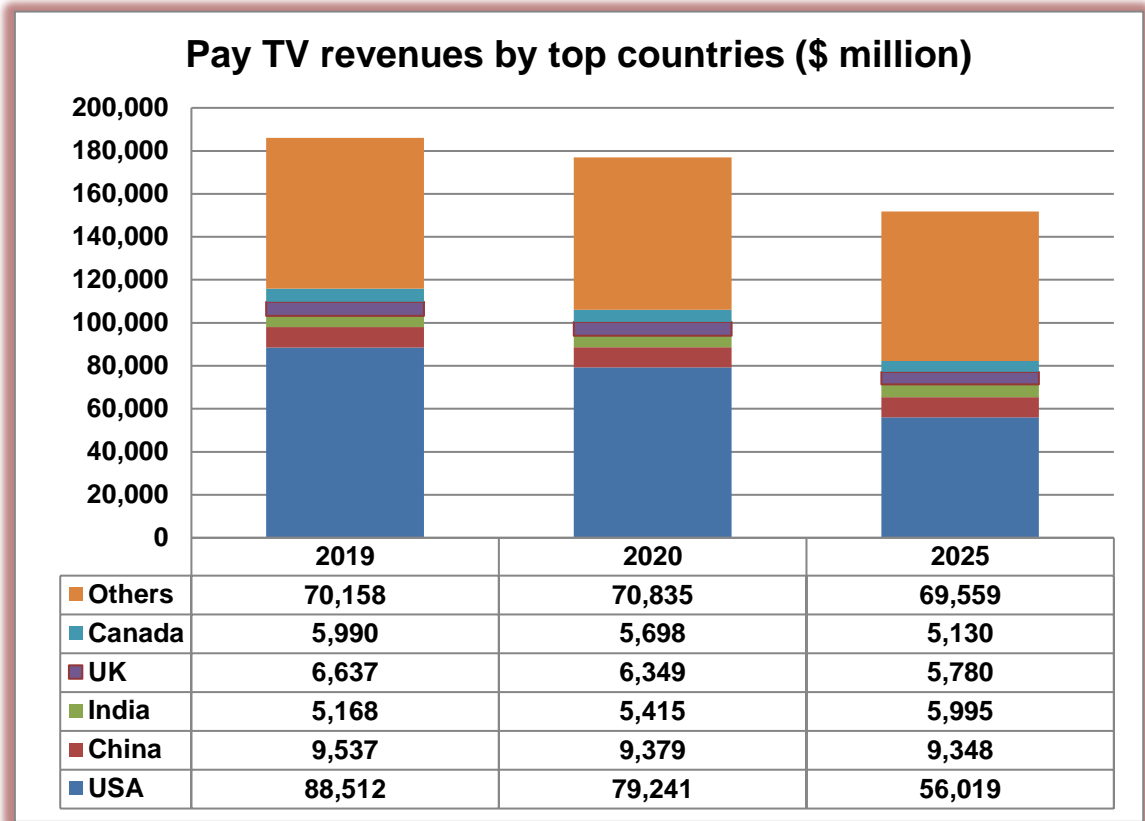


Global pay TV revenues down, subscriptions up

Global pay TV revenues peaked in 2016 at \$202 billion. Revenues will fall to \$152 billion in 2025. This is lower than 2010's \$175 billion - despite the number of pay TV subscribers rising by 345 million between 2010 and 2025. Revenues fell by \$9 billion in both 2018 and 2019.



Source: Digital TV Research Ltd

The top five countries will account for 54% of global pay TV revenues by 2025; down from 62% in 2019. The US will lose \$23 billion between 2019 and 2025. US pay TV revenues peaked in 2015, at \$105 billion, but will drop to \$56 billion in 2025. The UK and Canada will each lose nearly \$1 billion – but India will add \$0.8 billion.

Despite poor results in some countries, there is still plenty of life left in pay TV. Digital TV Research forecasts 34 million additional pay TV subscribers between 2019 and 2025. This takes the global total to 1.06 billion. The number of pay TV subscribers passed 1 billion in 2018.

China will continue to supply a third of the world's pay TV subscribers, with 328 million expected by end-2025. India will bring in another 183 million. Therefore, China and India will together provide half the world's pay TV subscribers by 2025.

[Pay TV Forecasts Update](#)

Table of Contents

Published in October 2020 and based on company reports to June 2020, the [Pay TV Forecasts Update](#) report covers 166 pages in two parts:

- A 95-page PDF giving a global Executive Summary and profiles for the top 20 countries.
- A 71-page excel workbook providing global and top 20 country forecasts (2010-2025).

The report costs £1,200/€1,320/\$1,440 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/Vivo; 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 | 11 | Hathway; GTPL; Siti; In Digital; DEN; Dish TV; Tata Sky; Airtel; Sun Direct; Independent; MTNL |
| Italy | 4 | Mediaset; Sky; Telecom Italia; Vodafone |
| 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, Canal Plus, 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 | LG Hellovision; T Broad; D'Live; CMB; Hyundai HCN; KT Olleh; Skylife; B TV; LG U+ |
| Spain | 4 | Ono/Vodafone; Telefonica/Movistar; Euskatel; Orange |
| Sweden | 6 | Canal Digital; Viasat; Tele 2; Telia; Boxer; Telenor |
| Turkey | 5 | Turksat; Turkcell; TNet; Digiturk; D-Smart |
| UK | 4 | Sky; Virgin; BT; TalkTalk |
| USA | 10 | Comcast; Charter; Cox; Altice; Mediacom; U-Verse; DirecTV; Fios TV; DISH Network; Frontier |

Forecasts (for each year from 2010 to 2025) contain this detail for the top 20 countries as well as global comparisons:

| France pay TV forecasts | | | | | | | | | | | | | | | | |
|--------------------------------------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|
| | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 | 2022 | 2023 | 2024 | 2025 |
| Households (000) | | | | | | | | | | | | | | | | |
| TV households (000) | | | | | | | | | | | | | | | | |
| Digital cable subs (000) | | | | | | | | | | | | | | | | |
| Analog cable subs (000) | | | | | | | | | | | | | | | | |
| Pay IPTV subscribers (000) | | | | | | | | | | | | | | | | |
| Pay digital Satellite TV subs (000) | | | | | | | | | | | | | | | | |
| Free-to-air Satellite TV HH (000) | | | | | | | | | | | | | | | | |
| Analog terrestrial households (000) | | | | | | | | | | | | | | | | |
| Primary FTA DTT households (000) | | | | | | | | | | | | | | | | |
| Primary Pay DTT households (000) | | | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | | | |
| Digital homes (000) | | | | | | | | | | | | | | | | |
| Analog homes (000) | | | | | | | | | | | | | | | | |
| Pay TV subscribers (000) | | | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | | | |
| Digital cable subs/TV HH | | | | | | | | | | | | | | | | |
| Analog cable subs/TV HH | | | | | | | | | | | | | | | | |
| Pay IPTV subs/TV HH | | | | | | | | | | | | | | | | |
| Pay Satellite TV/TV HH | | | | | | | | | | | | | | | | |
| Free-to-air Satellite 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 | | | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | | | |
| Stand-alone digital cable subs (000) | | | | | | | | | | | | | | | | |
| Double-play digital cable subs (000) | | | | | | | | | | | | | | | | |
| Triple-play digital cable subs (000) | | | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | | | |
| Stand-alone pay IPTV subs (000) | | | | | | | | | | | | | | | | |
| Double-play pay IPTV subs (000) | | | | | | | | | | | | | | | | |
| Triple-play pay IPTV subs (000) | | | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | | | |

France pay TV forecasts

| | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 | 2022 | 2023 | 2024 | 2025 |
|---|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|
| Revenues (US\$ million) | | | | | | | | | | | | | | | | |
| <i>Stand-alone digital cable revs</i> | | | | | | | | | | | | | | | | |
| <i>Double-play digital cable TV revenues</i> | | | | | | | | | | | | | | | | |
| <i>Triple-play digital cable TV revenues</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>Double-play IPTV revenues</i> | | | | | | | | | | | | | | | | |
| <i>Triple-play IPTV revenues</i> | | | | | | | | | | | | | | | | |
| IPTV subscription revenues | | | | | | | | | | | | | | | | |
| IPTV on-demand revenues | | | | | | | | | | | | | | | | |
| IPTV revenues | | | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | | | |
| Satellite TV subscription revenues | | | | | | | | | | | | | | | | |
| Satellite TV on-demand revenues | | | | | | | | | | | | | | | | |
| 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>Double-play digl cable TV subs</i> | | | | | | | | | | | | | | | | |
| <i>Triple-play digital cable TV subs</i> | | | | | | | | | | | | | | | | |
| Ave digital cable (subs & VOD) | | | | | | | | | | | | | | | | |
| Analog cable TV subs | | | | | | | | | | | | | | | | |
| <i>Stand-alone IPTV subs</i> | | | | | | | | | | | | | | | | |
| <i>Double-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 | | | | | | | | | | | | | | | | |



France pay TV forecasts

| | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 | 2022 | 2023 | 2024 | 2025 |
|---|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|
| Pay TV subscribers by operator (000) | | | | | | | | | | | | | | | | |
| SFR (digital cable) | | | | | | | | | | | | | | | | |
| SFR (analog cable) | | | | | | | | | | | | | | | | |
| SFR (IPTV) | | | | | | | | | | | | | | | | |
| Altice (total) | | | | | | | | | | | | | | | | |
| Orange (IPTV) | | | | | | | | | | | | | | | | |
| Orange (satellite) | | | | | | | | | | | | | | | | |
| Orange (Total) | | | | | | | | | | | | | | | | |
| Free (IPTV) | | | | | | | | | | | | | | | | |
| Bouygues (IPTV) | | | | | | | | | | | | | | | | |
| CanalSat (satellite) | | | | | | | | | | | | | | | | |
| TNT (DTT) | | | | | | | | | | | | | | | | |
| Others | | | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | | | |
| Share of pay TV subscribers by operator % | | | | | | | | | | | | | | | | |
| SFR (digital cable) | | | | | | | | | | | | | | | | |
| SFR (analog cable) | | | | | | | | | | | | | | | | |
| SFR (IPTV) | | | | | | | | | | | | | | | | |
| Altice (total) | | | | | | | | | | | | | | | | |
| Orange (IPTV) | | | | | | | | | | | | | | | | |
| Orange (satellite) | | | | | | | | | | | | | | | | |
| Orange (Total) | | | | | | | | | | | | | | | | |
| Free (IPTV) | | | | | | | | | | | | | | | | |
| Bouygues (IPTV) | | | | | | | | | | | | | | | | |
| CanalSat (satellite) | | | | | | | | | | | | | | | | |
| TNT (DTT) | | | | | | | | | | | | | | | | |
| Others | | | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | | | |
| Subscription & VOD revenues (US\$ million) | | | | | | | | | | | | | | | | |
| SFR (digital cable) | | | | | | | | | | | | | | | | |
| SFR (analog cable) | | | | | | | | | | | | | | | | |
| SFR (IPTV) | | | | | | | | | | | | | | | | |
| Altice (total) | | | | | | | | | | | | | | | | |
| Orange (IPTV) | | | | | | | | | | | | | | | | |
| Orange (satellite) | | | | | | | | | | | | | | | | |
| Orange (Total) | | | | | | | | | | | | | | | | |
| Free (IPTV) | | | | | | | | | | | | | | | | |
| Bouygues (IPTV) | | | | | | | | | | | | | | | | |
| CanalSat (satellite) | | | | | | | | | | | | | | | | |
| TNT (DTT) | | | | | | | | | | | | | | | | |
| Others | | | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | | | |



France pay TV forecasts

| | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 | 2022 | 2023 | 2024 | 2025 |
|---|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|
| Share of pay TV revenues by operator (%) | | | | | | | | | | | | | | | | |
| <i>SFR (digital cable)</i> | | | | | | | | | | | | | | | | |
| <i>SFR (analog cable)</i> | | | | | | | | | | | | | | | | |
| <i>SFR (IPTV)</i> | | | | | | | | | | | | | | | | |
| <i>Altice (total)</i> | | | | | | | | | | | | | | | | |
| <i>Orange (IPTV)</i> | | | | | | | | | | | | | | | | |
| <i>Orange (satellite)</i> | | | | | | | | | | | | | | | | |
| <i>Orange (Total)</i> | | | | | | | | | | | | | | | | |
| <i>Free (IPTV)</i> | | | | | | | | | | | | | | | | |
| <i>Bouygues (IPTV)</i> | | | | | | | | | | | | | | | | |
| <i>CanalSat (satellite)</i> | | | | | | | | | | | | | | | | |
| <i>TNT (DTT)</i> | | | | | | | | | | | | | | | | |
| <i>Others</i> | | | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | | | |
| Average Revenue Per User (ARPU - US\$) | | | | | | | | | | | | | | | | |
| <i>SFR (digital cable)</i> | | | | | | | | | | | | | | | | |
| <i>SFR (analog cable)</i> | | | | | | | | | | | | | | | | |
| <i>SFR (IPTV)</i> | | | | | | | | | | | | | | | | |
| <i>Orange (IPTV)</i> | | | | | | | | | | | | | | | | |
| <i>Orange (satellite)</i> | | | | | | | | | | | | | | | | |
| <i>Free (IPTV)</i> | | | | | | | | | | | | | | | | |
| <i>Bouygues (IPTV)</i> | | | | | | | | | | | | | | | | |
| <i>CanalSat (satellite)</i> | | | | | | | | | | | | | | | | |
| <i>TNT (DTT)</i> | | | | | | | | | | | | | | | | |



Digital TV Research publication schedule for 2020

| | 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 | February | £800/€880/\$960 |
| 6 | North America Pay TV Forecasts | February | £600/€660/\$720 |
| 7 | North America OTT TV and Video Forecasts | March | £600/€660/\$720 |
| 8 | Asia Pacific Pay TV Forecasts | March | £1200/€1320/\$1440 |
| 9 | Asia Pacific OTT TV and Video Forecasts | March | £1200/€1320/\$1440 |
| 10 | Latin America Pay TV Forecasts | March | £1200/€1320/\$1440 |
| 11 | Latin America 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 | Smartphone SVOD Forecasts | June | £1000/€1200/\$1300 |
| 23 | SVOD Forecasts by Vendor | July | £1200/€1320/\$1440 |
| 24 | OTT TV and Video Databook | August | £800/€880/\$960 |
| 25 | SVOD Databook | August | £800/€880/\$960 |
| 26 | Pay TV Databook | August | £800/€880/\$960 |
| 27 | Eastern Europe SVOD Forecasts | September | £1000/€1200/\$1300 |
| 28 | Western Europe SVOD Forecasts | September | £1000/€1200/\$1300 |
| 29 | North America SVOD Forecasts | September | £600/€660/\$720 |
| 30 | Latin America SVOD Forecasts | September | £1000/€1200/\$1300 |
| 31 | Asia Pacific SVOD Forecasts | September | £1000/€1200/\$1300 |
| 32 | Middle East & North Africa SVOD Forecasts | September | £1000/€1200/\$1300 |
| 33 | Africa SVOD Forecasts | October | £1000/€1200/\$1300 |
| 34 | SVOD Forecasts Update | October | £1600/€1760/\$1920 |
| 35 | Pay TV Forecasts Update | October | £1200/€1320/\$1440 |
| 36 | SVOD Platform Forecasts | December | £800/€880/\$960 |

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