

PRESS RELEASE

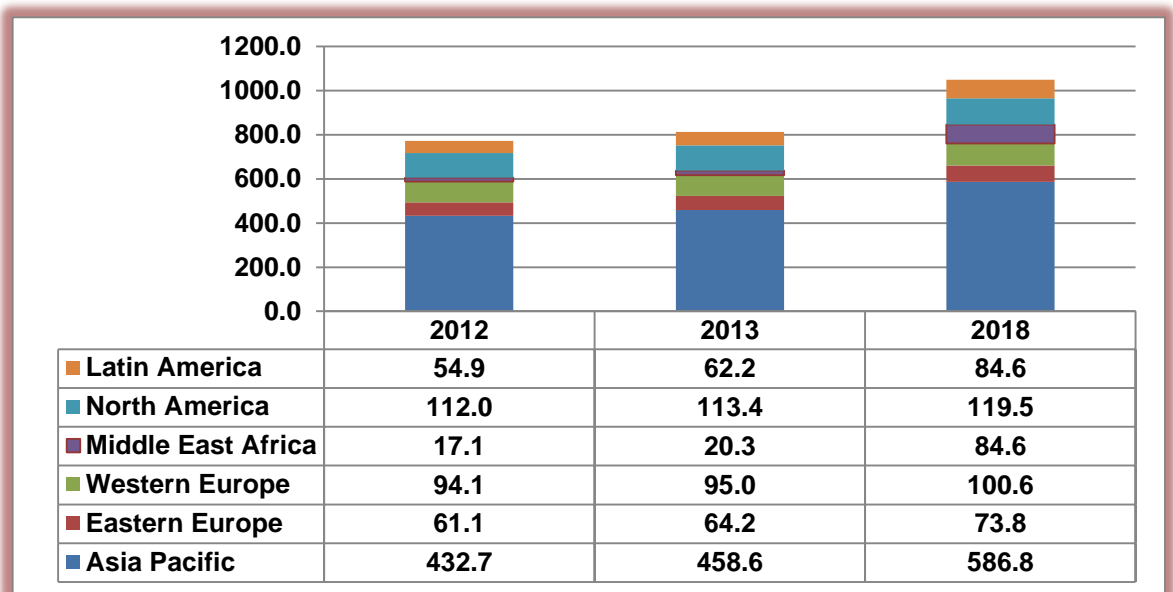
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One billion pay TV subscribers by 2018

Global pay TV households will reach nearly 1 billion by 2018, up from 772 million in 2012 and 814 million in 2013. According to the **Digital TV World Household Forecasts** report, the Asia Pacific region will contribute 59% (587 million) of the global total by 2018.

Based on forecasts for 97 countries by Digital TV Research, China will have the most pay TV subs, at 313 million by end-2018, followed by 158 million in India and 107 million in the US. These three countries will account for 58% of global pay TV households by 2018.

Global pay TV households by region (million)



Source: Digital TV Research Ltd

Pay TV penetration (analog and digital combined) reached 53.6% of TV households by end-2012, and will rise to 55.7% by end-2013 and 63.1% by 2018. Penetration at end-2018 will range from 86% in North America to 29% in the Middle East and Africa. Pay TV penetration will remain highest in the Netherlands, at 99.5% by end-2018.

Top 10 pay TV countries at end-2018

Households (million)		Penetration (%)	
China	312.9	Netherlands	100
India	158.0	Denmark	97
USA	106.8	Belgium	96
Russia	32.3	Hong Kong	96
Brazil	30.5	South Korea	95
Japan	27.0	Sweden	92
Germany	23.1	Norway	91
Mexico	19.0	Puerto Rico	91
South Korea	16.9	Singapore	89
UK	16.3	Estonia	87

Source: Digital TV Research Ltd

The number of digital TV homes will increase by 667 million between 2012 and 2018 to 1,453 million. The digital TV total will climb by 127 million in 2013 alone. Global digital penetration of TV households will climb from 54.7% at end-2012 to 62.5% by end-2013 and on to 92.0% by 2018.

Of the 667 million digital TV homes to be added between 2012 and 2018, 240 million will come from digital cable to take its total to 513 million. Primary FTA DTT [homes taking DTT but not subscribing to cable, DTH or IPTV] will acquire an additional 225 million – bringing its total to 363 million. Pay DTT will add 7 million to total 16 million. Pay IPTV will increase by 98 million to 167 million, with pay DTH up 73 million to 251 million and FTA DTH up 31 million to 143 million.

The universe is not static as 141 million TV households will be added between 2012 and 2018 to bring the total to 1,580 million. Of the additions, 95 million will come from the Asia Pacific region, of which 36 million will be in China and an extra 35 million in India.

There were still 652 million analog TV households by end-2012. However, this total will fall by 104 million in 2013 alone, with only 127 million remaining by 2018. Analog penetration of TV households will drop from 45.3% at end-2012 to only 8.0% by 2018. There will be 77 million analog terrestrial homes and 49 million analog cable ones by end-2018.

*For more information about the **Digital TV World Household Forecasts**, please contact: Simon Murray, simon@digitaltvresearch.com, Tel: +44 20 8248 5051*