

One in four homes to own a satellite dish by 2018

Covering 97 countries, the number of pay satellite TV (DBS or DTH) homes will reach 251 million by 2018, up from 178 million at end-2012 and 103 million at end-2008, according to a new report from Digital TV Research.

Global satellite TV forecasts							
	2012	2013	2014	2015	2016	2017	2018
TV households (mil.)	1,438.9	1,461.6	1,484.4	1,507.6	1,531.3	1,555.5	1,580.2
Pay digital DTH subs (mil.)	178.5	195.1	209.6	222.1	232.8	242.2	251.2
Digital free-to-air DTH households (mil.)	118.0	123.1	127.1	131.1	134.9	138.9	142.6
Pay DTH/TV HH	12.4%	13.3%	14.1%	14.7%	15.2%	15.6%	15.9%
Free-to-air DTH/TV HH	8.2%	8.4%	8.6%	8.7%	8.8%	8.9%	9.0%
DTH revenues (\$ mil.)	82,870	86,869	90,045	92,425	94,165	95,456	96,669

Source: digital TV research Ltd.

From the 73 million pay satellite TV subscribers added between 2012 and 2018, India will provide 24.4 million, Brazil 9.2 million, Indonesia 6.8 million and Russia 5.9 million. However, the **Global Satellite TV Forecasts** report estimates that pay satellite TV subscriber totals will fall in 11 countries between 2012 and 2013 as subs convert to other platforms.

Top five pay satellite TV countries by subscribers (000)

2012		2018	
India	36,728	India	61,138
USA	34,140	USA	36,621
Russia	10,793	Brazil	19,044
Brazil	9,844	Russia	16,661
UK	9,603	Indonesia	12,064

Source: Digital TV Research Ltd

India will lead the pay satellite TV sector with 61.1 million subscribers in 2018, followed by the US. India overtook the US in 2012 to take top slot. Brazil and Russia will take third and fourth places respectively.

The US will remain DTH market leader by revenues generated, although its share of the total will fall from 43.5% in 2012 to 38.7% in 2018. Brazil will add the most DTH revenues (\$3.5 billion) between 2012 and 2018 – nearly doubling its total in the process.

However, satellite TV revenues will decline for 20 countries between 2012 and 2018. Much of this is due to greater competition forcing satellite TV platforms to offer cheaper packages which will lead to lower ARPUs. Furthermore, low-cost DTH packages are making a significant impact in several countries.

Including free-to-air households, nearly 400 million homes will directly receive TV signals via satellite dishes by 2018, up by almost 100 million on the end-2012 figure. India will be responsible for adding 30 million over this period. A quarter of global TV households will have a satellite TV dish by 2018, up from 21% in 2012 and 14% in 2008.

Global Satellite TV Forecasts:

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Published in August 2013, this 188-page electronically-delivered report comes in three parts:

- A 66-page PDF giving a global Executive Summary and regional and country analysis (Asia Pacific, Eastern Europe, Latin America, Middle East & Africa, North America, Western Europe, Summary and comparison forecasts, satellite TV country forecasts).
- An excel workbook providing satellite TV forecasts from 2008 to 2018 for the 97 countries listed below as well as handy comparison tables.

Countries covered:

Albania	Algeria	Angola	Argentina
Australia	Austria	Bahrain	Belarus
Belgium	Bolivia	Bosnia	Brazil
Bulgaria	Canada	Chile	China
Colombia	Costa Rica	Cote d'Ivoire	Croatia
Cyprus	Czech Rep.	Denmark	Dominican Rep.
Ecuador	Egypt	El Salvador	Estonia
Finland	France	Germany	Ghana
Greece	Guatemala	Honduras	Hong Kong
Hungary	India	Indonesia	Ireland
Israel	Italy	Japan	Jordan
Kenya	Kuwait	Latvia	Lebanon
Lithuania	Macedonia	Malaysia	Mexico
Moldova	Montenegro	Morocco	Netherlands
New Zealand	Nicaragua	Nigeria	Norway
Oman	Pakistan	Panama	Paraguay
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	Ukraine	UAE	UK
USA	Uruguay	Venezuela	Vietnam
Zambia			

Forecasts (2008-2018) contain the following detail for each country:

TV households	Pay digital satellite TV subscribers	Digital free-to-air satellite TV households
Pay satellite TV/TV HH %	Digital free-to-air satellite TV/TV HH %	
Satellite TV subscription revenues	Satellite TV on-demand revenues	Satellite TV revenues
Pay satellite TV ARPU (subs)	Pay satellite TV ARPU (subs and PPV)	