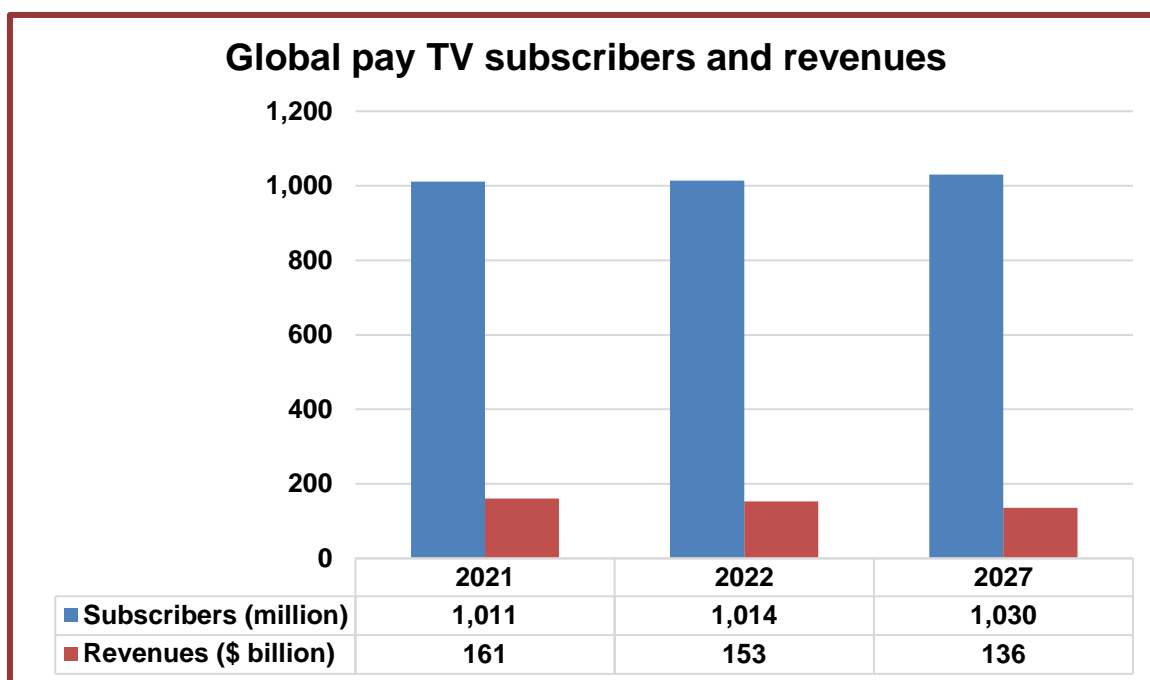


Global pay TV to add subs but lose revenues

Digital TV Research forecasts 19 million more pay TV subscribers across 138 countries between 2021 and 2027, but revenues will decline by \$25 billion over the same period.



Simon Murray, Principal Analyst at Digital TV Research, said: “Between 2021 and 2027, 86 countries will add pay TV subs and 52 countries will lose subscribers. Most of the countries gaining pay TV subscribers are developing nations, with low ARPUs. The US will be the biggest loser – down by 12 million subscribers.”

IPTV will add 79 million subscribers globally between 2021 and 2027 to take its total to 439 million. Satellite TV will lose 10 million subscribers between 2021 and 2027.

Revenues will decline in 70 of the 138 countries between 2021 and 2027. The US will fall by \$19 billion. Global satellite TV revenues will drop by \$14 billion, with digital cable down by \$10 billion. Analog cable will lose \$1 billion. IPTV will grow slightly.

[Global Pay TV Forecasts](#)

Table of Contents

Published in May 2022, the [Global Pay TV Forecasts](#) report, a combination of three previous reports (Global Pay TV Subscriber Forecasts, Global Pay TV Revenue Forecasts and Global Pay TV Operator Forecasts), covers 138 countries in 246 pages in three parts:

- A 64-page PDF giving a global Executive Summary, comparison tables and rankings. 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 from 2010 to 2027 in detail for 491 pay TV operators with 726 platforms [131 digital cable, 116 analog cable, 278 satellite, 145 IPTV and 56 DTT].
- A 10-page PowerPoint presentation of the key global trends.

The report costs £2,200/€2,530/\$2,970 for a 1-5 user license.

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

Africa: Forecasts for the following 35 countries and 129 platforms:

Country	No of ops	Platforms
Angola	5	ZAP TV, DStv, StarSat, Angola Telecom, TV Cabo
Benin	4	DStv; Canal Plus; StarSat; StarTimes
Botswana	3	DStv; StarSat
Burkina Faso	3	DStv; Canal Plus; StarSat
Burundi	4	DStv; Canal Plus; StarSat; StarTimes
Cameroon	4	DStv; Canal Plus; StarSat; StarTimes
CAR	3	Canal Plus; StarSat; StarTimes
Chad	3	Canal Plus; StarSat; StarTimes
DR Congo	5	DStv; Canal Plus; StarSat; StarTimes; Easy TV
Rep Congo	5	DStv; Canal Plus; StarSat; StarTimes; Easy TV
Cote d'Ivoire	5	Canal Plus, DStv, StarTimes; StarSat; Easy TV
Eq. Guinea	2	Canal Plus, DStv
Ethiopia	3	DStv; StarSat; Canal Plus
Gabon	4	Canal Plus, DStv, StarTimes; StarSat
Gambia	2	Canal Plus, DStv
Ghana	4	Canal Plus, DStv, GOtv; StarSat
Guinea	5	Canal Plus, DStv, StarTimes; StarSat; Easy TV
Kenya	6	Zuku cable, Zuku satellite, DStv, StarTimes, GOtv, StarSat
Liberia	2	DStv; StarSat
Madagascar	4	DStv; Canal Plus; StarSat; StarTimes
Malawi	4	Zuku, DStv, GOtv; StarSat
Mali	2	Canal Plus; StarSat
Mozambique	6	ZAP TV, DStv, StarSat, StarTimes; GOtv, TV Cabo
Namibia	3	DStv, GOtv; StarSat
Niger	3	DStv; Canal Plus; StarSat
Nigeria	5	GOtv, DStv, StarTimes, StarSat; Canal Plus
Rwanda	5	DStv, StarTimes, StarSat; GOtv, Canal Plus
Senegal	4	Canal Plus, DStv, Orange; StarSat
Sierra Leone	4	DStv; Canal Plus; StarSat; StarTimes
South Africa	3	DStv, StarSat, GOtv
Tanzania	5	Zuku, DStv, StarTimes, StarSat; Azam TV
Togo	3	Canal Plus, DStv, StarSat
Uganda	5	Zuku, DStv, StarTimes, GOtv, StarSat
Zambia	5	Zuku, DStv, StarTimes, GOtv, StarSat
Zimbabwe	2	DStv, StarSat

Asia Pacific: Forecasts for the following 22 countries and 69 platforms:

Country	Ops	Platform forecasts
Australia	1	Foxtel
Bangladesh	1	Akash
Cambodia	3	CDN; One TV; Sky One
China	4	China Radio & TV; China Telecom; BesTV; China Unicom
Hong Kong	2	i-cable; Now TV
India	9	Hathway; GTPL; Siti; DEN; Dish TV; Tata Sky; Airtel; Sun Direct; MTNL
Indonesia	7	Linknet; Transvision; Indovision; Top TV; Okevision; MNC Play; Telkom
Japan	3	SkyPerfecTV; J:Com; NTT
Laos		
Malaysia	2	Astro; TM
Mongolia	2	Univision; DDish
Myanmar	2	SkyNet; 4TV/MRTV (Forever)
Nepal	1	Dish Media
New Zealand	1	Sky; Vodafone
Pakistan	1	PTCL
Philippines	2	Sky Cable/Sky Direct; Signal
Singapore	2	StarHub; SingTel TV
S Korea	9	LG Hellovision; T Broad; D'Live; CMB; Hyundai HCN; KT Olleh; Skylife; B TV; LG U+
Sri Lanka	2	Dialog; Peo
Taiwan	4	Taiwan Broadband; TWM; CNS; CHT
Thailand	3	Truevisions; TOT; AIS
Vietnam	8	SCTV; VTVcab; HTV-CMS; VNPT; Viettel; FPT; K+; Viva TV

North America: Forecasts for the following:

Country	No of ops	Platform forecasts
Canada	8	Rogers; Videotron; Cogeco; Shaw Communications; Shaw Direct; Bell TV; Telus; Max TV
USA	8	Comcast; Charter; Cox; Altice; U-Verse; DirecTV; Fios TV; DISH Network

Latin America: Forecasts for the following 19 countries and 68 operators:

Country	No of ops	Platform forecasts
Argentina	5	Flow; Supercanal; DirecTV; Telefonica; Claro
Bolivia	2	Tigo; Entel
Brazil	3	Claro; Telefonica/Vivo; Sky
Chile	6	VTR; Telefonica; Claro; DirecTV; Entel; Telsur
Colombia	5	Claro; UNE; ETB; DirecTV; Movistar
Costa Rica	5	Tigo; Cabletica; Claro; Sky; Telecable
Dominican Rep	3	Altice/Tricom; Claro; Sky
Ecuador	4	DirecTV; CNT; Claro; TV Cable
El Salvador	3	Claro; Tigo; Sky
Guatemala	3	Claro; Tigo; Sky
Honduras	3	Claro; Tigo; Sky
Mexico	5	Megacable; Televisa cable; Sky; Dish; TotalPlay
Nicaragua	3	Claro; Sky; Tigo
Panama	4	Claro; Sky; Cable & Wireless; Tigo
Paraguay	2	Tigo; Claro
Peru	3	Telefonica; Claro; DirecTV
Puerto Rico	4	Liberty; Claro; DirecTV; Dish
Uruguay	2	Cablevision; DirecTV
Venezuela	3	Intercable; Movistar; CANTV

MENA: Forecasts for the following 20 countries and 49 platforms:

Country	No of ops	Platform forecasts
Algeria	3	beIN; OSN; Algerie Telecom
Armenia	0	
Azerbaijan	0	
Bahrain	3	beIN; OSN; Batelco
Egypt	3	beIN; OSN; Telecom Egypt
Georgia	2	Magtisar; Sliknet
Israel	2	HOT; Yes
Jordan	3	beIN; OSN; Orange
Kazakhstan	2	Alma; KT
Kuwait	2	beIN; OSN
Lebanon	2	beIN; OSN
Morocco	3	beIN; OSN; Maroc Telecom
Oman	3	beIN; OSN; Omantel
Qatar	3	beIN; OSN; Ooredoo
Saudi Arabia	4	beIN; OSN; Jawwy IPTV ; Mobily
Syria	1	beIN
Tunisia	2	beIN; OSN
Turkey	5	Turksat; Turkcell; TNet; Digiturk; D-Smart
UAE	4	beIN; OSN; Du; eLife
Uzbekistan	2	Uztelecom; Uzdigital



Eastern Europe: Forecasts for the following 22 countries and 85 operators:

Country	Ops	Operators
Albania	3	Digitalb; Tring; Albtelecom
Belarus	3	MTIS, Zala, A1
Bosnia	3	Telemach, M:Tel; Total TV
Bulgaria	3	Bulsatcom, Vivacom, A1
Croatia	3	Max TV/T-HT, Evo, A1
Cyprus	3	Cytavision; Cablenet; Primetel
Czech Rep	5	Vodafone, O2, Telly, Skylink; T-Mobile
Estonia	3	Elisa; Telia; Home 3
Greece	3	Nova, Cosmote; Vodafone
Hungary	5	T-Home, Digi TV, Vodafone, MinDig, Direct One
Latvia	3	Baltcom, Tet; Home 3
Lithuania	3	TEO, Cgates, Home 3
Macedonia	3	A1; Max TV; Total TV
Moldova	3	Sun; Moldtelecom; TV Box
Montenegro	3	Total TV; CT; Telemach
Poland	8	UPC, Vectra, Inea, Toya, TP/Orange, Polsat, Canal Plus, Netia
Romania	5	Digi TV, Vodafone, Telekom Romania, Orange TV, Focussat
Russia	8	Akado, ER Telecom, MTS, Rostelecom, Beeline/Veon, NTV Plus, Tricolor, Orion
Serbia	2	SBB, Telekom Srbija
Slovakia	4	UPC, Skylink, Slovak Telekom; Orange TV
Slovenia	5	Telemach, Neo TV, Total TV, T-2, A1
Ukraine	4	Volia; Triolan; Kyivstar; Viasat

Western Europe: Forecasts for the following 18 countries and 75 operators:

Country	Ops	Operators
Austria	5	Telekom Austria; Magenta; Sky; Liwest; HD Austria
Belgium	5	Proximus; Telenet; VOO; Telesat/TV Vlaanderen; Orange
Denmark	6	Allente; You See; Stofa; Boxer; TDC; Telia
Finland	4	Elisa; Telia; DNA; Allente; Digita
France	6	Orange; SFR; CanalSat; Free; Bouygues; TNT
Germany	6	Vodafone; DT/T-Home; Sky; Telecolumbus; HD+; Freenet
Iceland	2	Vodafone, Siminn
Ireland	3	Virgin; Sky; eir
Italy	3	Sky; Telecom Italia; Vodafone
Luxembourg	2	Tele des P&T; Eltrona
Malta	2	Melita; Go
Netherlands	5	Ziggo; Canal Digitaal; Tele 2; KPN/Digitenne
Norway	5	Allente; Riks TV; Telenor; Telia; Altibox
Portugal	4	Meo/PT; NOS; Nowo; Vodafone
Spain	4	Vodafone; Telefonica/Movistar; Euskaltel; Orange
Sweden	5	Allente; Tele 2; Telia; Boxer; Telenor
Switzerland	3	Swisscom; UPC; Sunrise
UK	4	Sky; Virgin; BT; TalkTalk



SAMPLE: Turkey pay TV forecasts

	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027
Total households (000)																		
TV households (000)																		
Digital cable subs (000)																		
Analog cable subs (000)																		
Pay IPTV subscribers (000)																		
Pay satellite TV subs (000)																		
FTA 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																		
FTA 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																		
Revenues (US\$ million)																		
Digital cable TV																		
Analog cable TV																		
IPTV																		
Satellite TV																		
DTT																		
Total revenues																		
Average Revenue Per User (ARPU - US\$)																		
Digital cable TV																		
Analog cable TV																		
IPTV																		
Satellite TV																		
DTT																		
Average monthly ARPU																		



SAMPLE: Turkey pay TV forecasts

	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027
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																		
Pay TV revenues by operator (\$ million)																		
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 revenues by operator %																		
Turksat (digital cable)																		
Turksat (analog cable)																		
Turksat (total)																		
Turkcell (IPTV)																		
TTNet (IPTV)																		
TTNet (satellite)																		
TTNet (total)																		
Digiturk (satellite)																		
D-Smart (satellite)																		
Other																		



Digital TV Research report schedule for 2022

Title	Publication	Price
1 Africa Pay TV Forecasts	January	£1400/€1600/\$1875
2 Middle East & North Africa Pay TV Forecasts	January	£1400/€1600/\$1875
3 SVOD Forecasts Update (based on December 2021 results)	February	£1800/€2050/\$2400
4 Africa OTT TV and Video Forecasts	February	£1400/€1600/\$1875
5 Middle East & North Africa OTT TV and Video Forecasts	February	£1400/€1600/\$1875
6 North America Pay TV Forecasts	February	£700/€800/\$940
7 North America OTT TV and Video Forecasts	February	£700/€800/\$940
8 Latin America Pay TV Forecasts	March	£1400/€1600/\$1875
9 Latin America OTT TV and Video Forecasts	March	£1400/€1600/\$1875
10 Asia Pacific Pay TV Forecasts	March	£1400/€1600/\$1875
11 Asia Pacific OTT TV and Video Forecasts	March	£1400/€1600/\$1875
12 Western Europe Pay TV Forecasts	March	£1400/€1600/\$1875
13 Western Europe OTT TV and Video Forecasts	March	£1400/€1600/\$1875
14 Eastern Europe Pay TV Forecasts	April	£1400/€1600/\$1875
15 Eastern Europe OTT TV and Video Forecasts	April	£1400/€1600/\$1875
16 Global OTT TV & Video Forecasts	May	£2000/€2300/\$2600
17 Global Pay TV Forecasts	May	£2200/€2530/\$2970
18 Global AVOD Forecasts	May	£1800/€2050/\$2400
19 Global SVOD Forecasts (based on March 2022 results)	June	£1800/€2050/\$2400
20 Africa SVOD Forecasts	August	£1200/€1380/\$1600
21 Middle East & North Africa SVOD Forecasts	August	£1200/€1380/\$1600
22 Latin America SVOD Forecasts	August	£1200/€1380/\$1600
23 North America SVOD Forecasts	August	£600/€690/\$800
24 Eastern Europe SVOD Forecasts	September	£1200/€1380/\$1600
25 Asia Pacific SVOD Forecasts	September	£1200/€1380/\$1600
26 Western Europe SVOD Forecasts	September	£1200/€1380/\$1600
27 SVOD Forecasts Update (based on June 2022 results)	September	£1800/€2050/\$2400
28 Pay TV Forecasts Update	December	£2200/€2530/\$2970
29 SVOD Forecasts Update (based on September 2022 results)	December	£1800/€2050/\$2400

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