digital TV research

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2	Digital TV Middle East & North Africa Forecasts	February	£800/$1200/€1000
3	Digital TV Asia Pacific Forecasts	March	£800/$1200/€1000
4	Digital TV Latin America Forecasts	March	£800/$1200/€1000
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9	Digital TV Middle East & Africa Databook	May	£450/$675/€560
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23	Multiscreen TV & Video Forecasts	November	£1000/$1500/€1250
	Total		£20400/$30600/€25500

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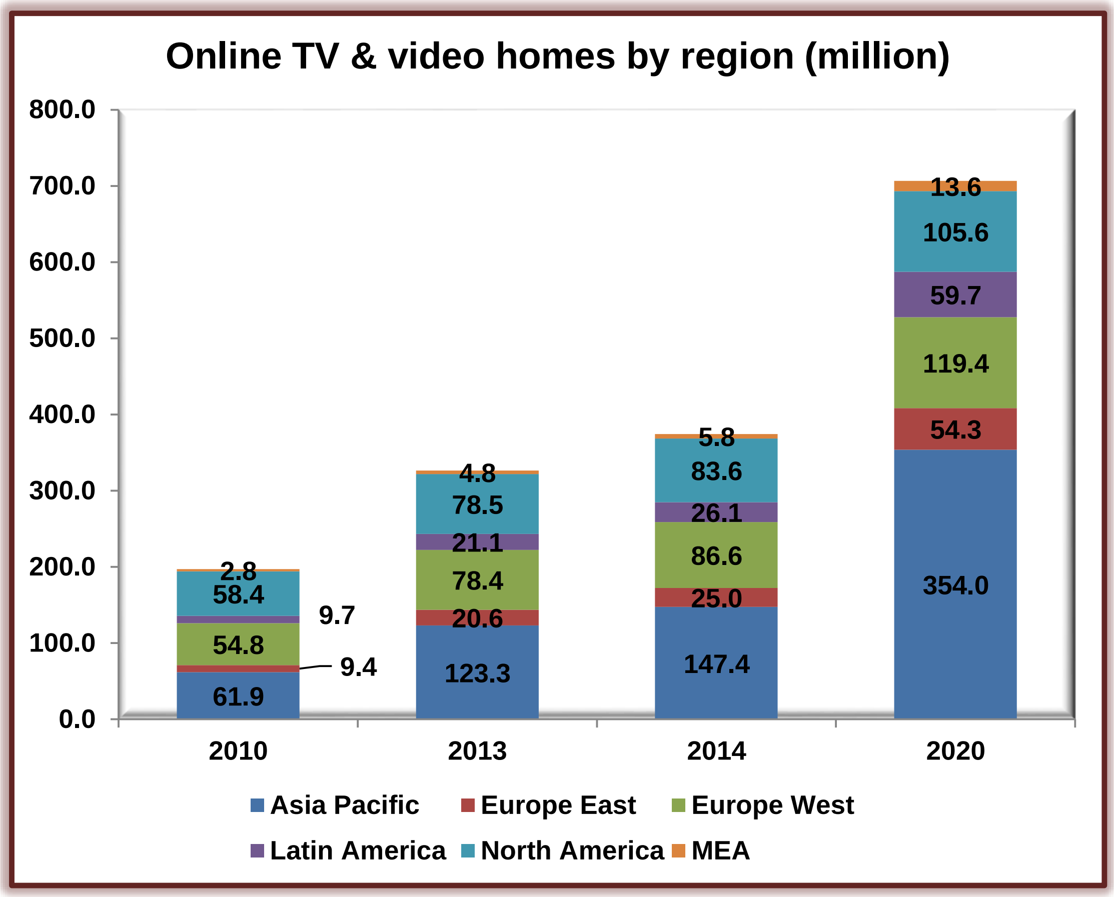
OTT to reach nearly half the world's TV households by 2020

The number of households watching online TV and video (over fixed broadband networks and across 51 countries) will reach 706.53 million in 2020, up from 196.90 million in 2010 and the 374.43 million expected in 2014, according to a report from Digital TV Research.



Source: Digital TV Research

Asia Pacific will gain 231 million more OTT TV homes between 2013 and 2020 – or 61% of the global additions over the same period, according to [the **Global Online TV & Video Household Forecasts** report.] China alone will add 140 million, taking its 2020 total to 206 million – or more than the whole of Europe. China will overtake the US in 2014 to take top slot.

By 2020, 47.6% of the world's TV households will view online television and video, up from 15.4% in 2010. South Korea (79.8%) will have the highest proportion by country by 2020, with India (21.9%) at the other end of the scale.

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Digital TV Research forecasts 199 million SVOD (subscription video on demand) subscribers by 2020, up from 21 million in 2010 and an expected 83 million by end-2014. North America's share of the total will fall from 80% in 2010 to 57% in 2014 and onto 34% in 2020 – revealing how much the sector will grow outside the US. However, the US will contribute 62 million of the 2020 total, with second-placed Japan (20 million) some way behind.

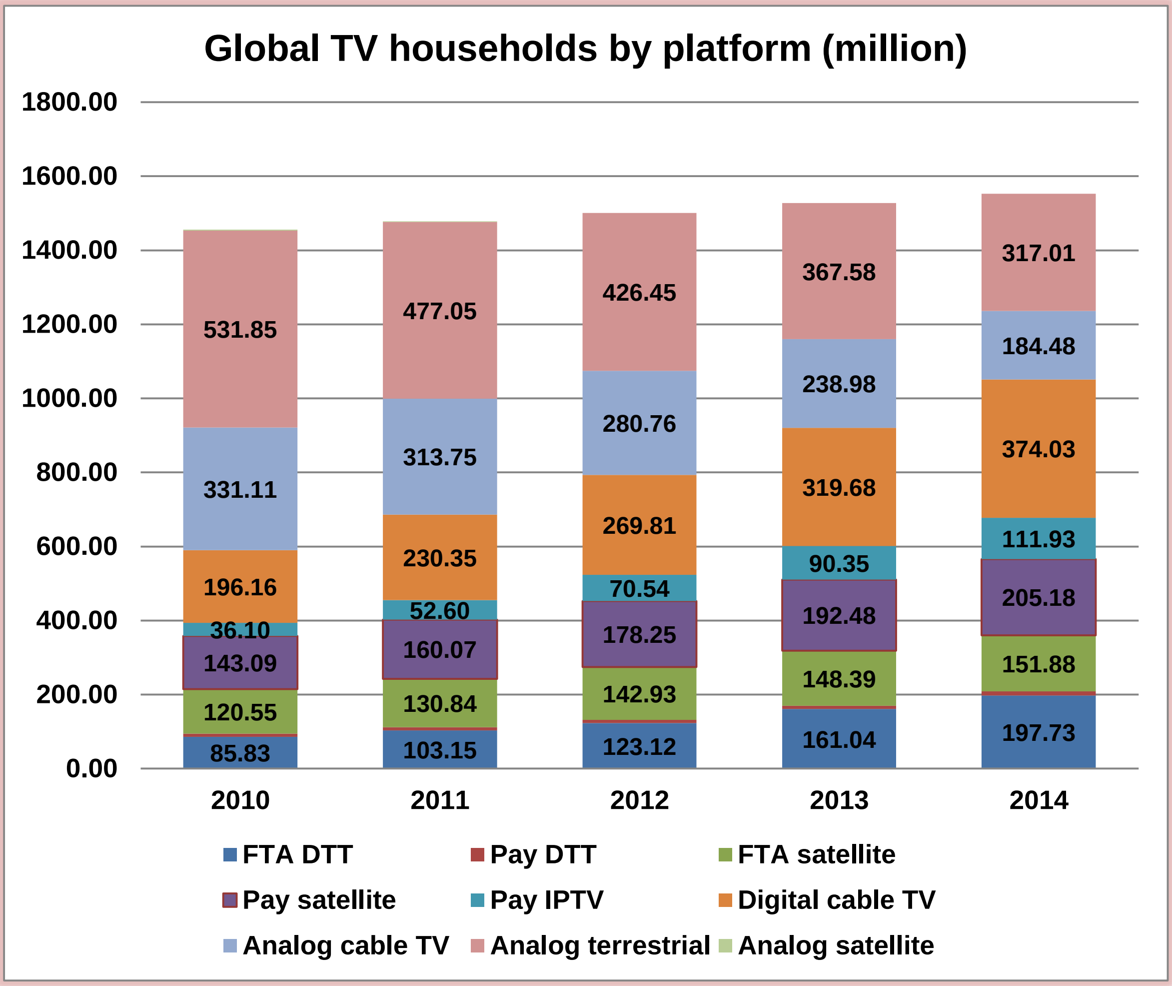
Top five countries by SVOD subscribers (000)			
	2014		**2020**
USA	43,529	USA	61,575
Japan	9,569	Japan	19,569
UK	5,415	China	14,438
Germany	3,761	UK	10,698
South Korea	3,661	Germany	10,253
Source: Digital TV Research			

By 2020, 13.4% of the world's TV households will subscribe to SVOD package, up from only 1.6% in 2010 and an expected 6.1% by end-2014. The proportion in 2020 will vary from 49.6% in the US and 48.5% in Sweden to 2.0% in India and Vietnam. Ten countries will have SVOD penetration in excess of a third of TV households by 2020.

Please click here for more information on **the Global Online TV & Video Household Forecasts report**

One billion digital TV homes by year-end

There will be more than 1 billion digital TV households across 138 countries by end-2014, up by 130 million on 2013 and by 461 million from the 590 million recorded in 2010, according to a report from Digital TV Research. The **Digital TV World Household Databook** estimates that digital cable TV has become the most popular platform, with 374 million subscribers expected by end-2014. Digital cable overtook analog cable in 2013 and analog terrestrial in 2014. The number of homes paying for IPTV will more than triple between 2010 and 2014.



Source: Digital TV Research

Global digital TV penetration will reach two-thirds of TV households by end-2014; up from 40.5% at end-2010. Digital TV penetration will range from 97.1% in North America down to 51.5% in Latin America.

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Thirteen countries will have 100% digital TV penetration by end-2014, with a further 25 over 90%. However, penetration will be lower than 50% of TV households in 45 countries, with El Salvador the lowest (13%). Digital TV penetration will more than double in 68 countries between 2010 and end-2014.

Of the 461 million digital TV households to be added between 2010 and 2014, 292 million (nearly two-thirds of total additions) will be in the Asia Pacific region, bringing its total to 517 million.

Top 10 countries by digital TV households at end-2014 (million)	
China	289.25
USA	114.63
India	96.44
Japan	42.18
Brazil	36.34
Germany	30.04
Russia	29.65
France	27.01
UK	26.33
Italy	24.93
Source: Digital TV Research Ltd	

China became the largest digital TV household nation in 2010; more than doubling to 289 million digital TV homes (27.5% of the world's total) by end-2014. The USA will retain second place, with third-placed India adding 59 million digital homes to take its total to 96 million by end-2014. Brazil will nearly quadruple its total to reach 36 million by end-2014. The top five countries account for 55% of the world's digital TV households.

The number of pay TV households (analog and digital) will reach 886 million by end-2014, up from 715 million in 2010. The top five countries will account for nearly two-thirds of the total. China will add 63 million pay TV subs between 2010 and 2014, with India bringing in an extra 31 million and Brazil 10 million. Pay TV subscriptions will more than quadruple in 13 countries between 2010 and 2014. However, the number of pay TV subscribers will fall in six countries.

Global pay TV penetration will increase from 49.1% in 2010 to 57.1% in 2014. By end-2014, penetration will be as low as 19% in the Middle East and North Africa but as high as 85% in North America. Pay TV penetration will exceed 70% of TV households in 32 countries by end-2014, but 55 countries will be below 30% of TV households. Pay TV penetration will fall in 11 countries (including the US) between 2010 and 2014.

Please click here for more information on the **Digital TV World Household Databook**

France digital data

French penetration by primary TV platform (%)

	Dec-09	Dec-10	Dec-11	Dec-12	Dec-13
DTT	65.5	66.8	62.3	59.6	57.9
Analog terrestrial	12.9	4.1	0.1	0.0	0.0
Digital cable	7.5	8.2	8.0	9.0	8.4
Analog cable	4.1	3.0	2.8	0.0	0.0
ADSL	18.6	23.9	30.8	37.1	40.7
All satellite	25.6	25.7	24.4	24.7	25.0

Source: CSA

Gross TV households by reception signals (%)

	2008	2009	2010	2011	2013
DTT only	50.8	50.6	46.9	41.9	33.3
Satellite only	15.3	15.0	12.6	12.9	12.1
Cable only	8.1	6.6	5.6	4.8	5.1
DSL only	6.7	9.0	10.4	15.1	19.9
DTT & satellite	7.3	6.8	8.2	6.5	6.8
DTT & ADSL	4.1	4.8	7.5	9.5	14.1
2 forms of reception	4.6	5.0	5.9	6.5	5.4
3+ forms of reception	2.3	2.2	3.0	2.9	3.0

Source: CSA

IPTV subscribers (000)

	DSL HH	IPTV subs	% of DSL homes taking IPTV
4Q10	19,862	10,663	53.7
4Q11	20,984	12,190	58.1
4Q12	21,981	13,702	62.3
4Q13	22,461	14,615	65.1
2Q14	22,630	14,997	65.7

Source: ARCEP

Orange IPTV subscriber growth in France (000)

	IPTV/DTH homes	Pay TV subs	*of which Orange Sport/Cinema*	*of which 3rd party*
4Q10	3,505	1,962	*889*	*1,073*
4Q11	4,374	2,113	*771*	*1,342*
4Q12	5,067			
4Q13	5,619			
3Q14	5,902			

Source: Orange

France digital data

Numericable operating data (000)					
	2010	**2011**	**2012**	**2013**	**Sep-14**
Digital TV subs	1,275	1,238	1,228	1,264	1,285
of which multiplay	*917*	*938*	*972*	*1,041*	*1,083*
White label	103	206	297	363	362
Analog subs	195	133	103	81	68
Total	1,573	1,577	1,628	1,709	1,715
TV RGUs total	1,292	1,217	1,163	1,140	1,134
Telephony subs	850	897	946	1,024	1,070
Broadband subs	928	950	985	1,054	1,095
La Box fiber			*121*	*300*	*420*
Mobile subs	7	47	113	186	236
RGUs	3,078	3,064	3,207	3,404	3,535
RGU/sub	2.09	2.27	2.41	2.53	2.61
ARPU €	39.0	40.4	40.7	41.5	42.4
3-play pene %	16.9	17.3	17.2	17.0	15.2
Churn (%)	17.2	19.4	18.6	19.0	19.8
Source: Numericable					

Canal Plus Group subscribers (000s)				
	2012	**Jun-13**	**2013**	**Jun-14**
France: Premium channel individual	6,117	6,016	6,091	6,020
France: Premium channel other (incl. Canalsat, CanalPlay)	3,602	3,467	3,443	3,404
Mainland France subs	9,719	9,483	9,534	9,424
International individual	4,077	3,993	4,352	4,753
of which Poland	*2,467*	*2,305*	*2,197*	*2,175*
of which Overseas	*480*	*479*	*485*	*494*
of which Africa	*706*	*787*	*1,083*	*1,368*
of which Vietnam	*424*	*422*	*587*	*717*
International institutional	658	663	785	902
Total individual	**10,194**	**10,009**	**10,443**	**10,773**
Total	**14,454**	**14,139**	**14,671**	**15,079**
ARPU in mainland France €	43.2	43.6	44.2	44.0
Churn rate in mainland France %	13.8	15.1	14.9	14.2

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Spain digital TV data

Split of Pay TV Subscribers by Platform (000)

	2009	2010	2011	2012	2013	1Q14
Satellite	1,846	1,773	1,756	1,720	1,621	1,632
Cable	1,280	1,321	1,353	1,267	1,142	1,129
IPTV	799	854	913	787	817	948
DTT	153	348	383	290	237	232
Other	0	0	0	14	28	30
Total	**4,078**	**4,296**	**4,406**	**4,077**	**3,845**	**3,970**

Source: CNMC

Multichannel TV subscribers by major operator (000)

	2009	2010	2011	2012	2013	1Q14
Canal Plus	1,846	1,774	1,756	1,734	1,649	1,661
Telefonica	703	784	830	707	741	861
Ono	975	960	932	873	790	782
Gol TV	153	347	383	290	237	232
Telecable de Asturias	134	139	138	134	126	127
Euskatel	83	130	158	136	107	102
R Cable	88	92	95	103	98	95
Orange	84	70	68	71	76	86

Source: CNMC

Canal Plus/Digital Plus operational highlights

	2009	2010	2011	2012	2013	1H14
DTH Subs (000)	1,846	1,785	1,838	1,720	1,621	1,597
Non-DTH subs (000)		12	82	121	134	
iPlus DVR subs (000)	100	305	503	587	630	654
Annualized churn (%)	18.2%	15.8%	13.6%	15.4%	18.0%	15.4%
ARPU (€)	39.3	41.7	41.1	41.5	42.7	43.0

Source: Prisa TV

Spain digital TV data

Ono operational highlights

	2009	2010	2011	2012	2013	Jun-14
Marketable homes (000)	7,004	7,030	7,043	7,063	7,169	7,283
Residential customers (000)	1,902	1,898	1,900	1,842	1,746	1,775
RGUs (000)	3,967	4,019	4,060	4,494	4,878	5,268
RGUs per customer	2.17	2.22	2.25	2.44	2.79	2.97
TV subs (000)	975	953	923	873	790	778
Broadband subs (000)	1,326	1,380	1,429	1,583	1,531	1,571
Telephony subs (000)	1,666	1,686	1,708	1,852	1,828	1,868
Triple/quad-play subs as % of total	35.6%	38.6%	40.0%	40.0%	52.0%	58.0%
Dual-play subs as % of total	46.0%	44.3%	45.0%	46.0%	33.0%	30.0%
Single-play subs as % of total	18.5%	17.1%	15.0%	14.0%	12.0%	12.0%
TiVo subs (000)	0	0	8	95	323	424
Net churn (%)	13.9%	15.5%	18.8%	20.4%	20.0%	16.1%
Blended ARPU (€)	50.98	51.50	52.40	53.60	55.10	52.20

Source: Ono

Telefonica pay TV subscriber growth (000)

	Dec-10	Dec-11	Dec-12	Dec-13	Jun-14
Brazil	486.3	698.6	601.2	640.1	687.8
Chile	341.2	390.8	424.0	503.2	559.9
Colombia	205.3	255.0	284.8	347.6	384.1
Peru	690.6	799.0	901.6	897.1	887.3
Venezuela	69.3	114.3	215.3	385.6	463.2
Latin America	***1,792.7***	***2,257.7***	***2,426.8***	***2,773.6***	***2,982.3***
Spain	788.2	833.2	710.7	672.7	1,209.5
Germany	77.2	83.3	57.2	0.0	0.0
Czech Republic	129.2	135.6	141.4	156.0	0.0
Total	**2,787.3**	**3,309.8**	**3,336.2**	**3,602.2**	**4,191.9**

Source: Telefonica

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German digital TV data

TV advertising and pay TV revenues		
€ billion	Net TV advertising expenditure	Pay TV & VOD revenues
2002	3.96	0.79
2003	3.81	0.89
2004	3.86	0.94
2005	3.93	1.04
2006	4.11	1.09
2007	4.16	1.09
2008	4.04	1.15
2009	3.64	1.07
2010	3.95	1.26
2011	3.98	1.46
2012	4.04	1.89
2013	4.13	2.05
2014	4.24	2.30
Source:	VPRT: German market forecasts	

Connected TV penetration (%)		
	Installed base	Connected
Total connected	22.9	15.0
Smart TV	16.0	9.5
Games console	9.1	5.8
Blu-ray player	5.0	2.9
Hybrid STB	2.9	2.1
Streaming STB	2.6	2.6
Source:	ALM	
Note: Total 38.557 million households		

Digital TV penetration (%)				
mid-year	TV households (000)	Digital only	Digital & Analog	Analog only
2012	37,977	70.6%	7.2%	22.2%
2013	38,157	73.4%	7.4%	19.2%
2014	38,557	78.2%	5.6%	16.2%
2014	38,557	30,169	2,155	6,233
Source:	ALM			

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German data update						
Split of TV households by platform (million)						
	Cable	***of which digital***	**Satellite**	**Terrestrial**	**DSL**	**Total**
2005	1,694		5,671	1,500	0	33,904
2006	2,456		6,609	1,788	0	33,904
2007	3,220		9,012	3,647	0	36,981
2008	4,102	*21.0*	10,290	3,921	112	37,277
2009	6,051	*30.6*	11,654	4,209	379	37,412
2010	7,290	*37.8*	12,699	4,167	878	37,464
2011	8,038	*42.5*	14,547	4,436	1,144	37,668
2012	8,779	*48.2*	17,320	4,756	1,636	37,977
2013	9,867	*55.9*	17,624	4,199	1,872	38,157
2014	11,229	*62.9*	17,779	3,865	1,899	38,557
Source: **ALM**						

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European Union release windows (days after theatrical release)							
	DVD	Online	PPV/VOD	Pay TV	SVOD	Free TV	Free VOD
Austria	120-180	120-180	120-180	180-360		120-540	
Belgium	120		120	360	720-1,080	720	1,080
Bulgaria	90	90				180	
Cyprus	120	60-90		360		720	
Czech	90-180	90-180	90-180	270-360		360-540	
Denmark	85-120	85-120	85-120	360		720	
Estonia	90	90		90			
Finland	105-180	120-360		360-720		360-720	
France	92-120		92-120	300-720	1,080	660-900	1,440
Germany	120-180	120-180	120-270	180-360		180-540	180-540
Greece	30-90	60-180		150-360		510-720	
Hungary	180			360		720	
Ireland	90-120	90-150	90-150	270-360		720-810	
Italy	105	105	105	105		450	
Latvia	90					90	
Lithuania	90	180	270	360		720	
Luxembourg	119	119					
Netherlands	120	165		480		720	
Poland	90-180		105-210	180-360	450	540-720	
Portugal	120		120			360	
Romania	120-180	180-270	180-270	270-450		360-1,080	
Slovakia	120	120		360		720	
Slovenia	90-150	90-150	360	360		540-720	
Spain	90-120	90-120	90-120	360-540		720	
Sweden	105-180	105-180	360	540		900	
UK	90-120	90-150	90-150	270-360		720-810	
Source:	European Commission						