

MIS 2013

MEASURING THE INFORMATION SOCIETY

Digital TV broadcasting trends



TV spread

A vast majority of households worldwide have a TV



1.4 BILLION HOUSEHOLDS WITH AT LEAST ONE TV

ALMOST **80%** OF ALL HOUSEHOLDS WORLDWIDE HAVE A TV

MOST GROWTH IN HOUSEHOLDS WITH A TV WAS IN THE DEVELOPING WORLD

87 MILLION ADDED BETWEEN 2008 AND 2012

BUT **350 MILLION** HOUSEHOLDS IN DEVELOPING COUNTRIES DO NOT HAVE A TV



ONLY **1/3** OF HOUSEHOLDS IN AFRICA HAVE A TV

digital TV

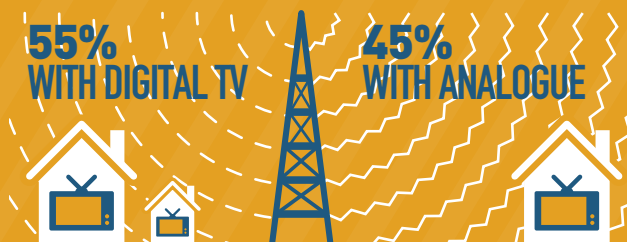
Digital technologies are replacing analogue TV

MORE HOUSEHOLDS WITH DIGITAL TV THAN WITH ANALOGUE TV IN THE AMERICAS, ARAB STATES AND EUROPE

FEWER HOUSEHOLDS WITH DIGITAL TV THAN WITH ANALOGUE TV IN AFRICA, ASIA & PACIFIC AND CIS

HOUSEHOLDS WITH DIGITAL TV AS A PERCENTAGE OF HOUSEHOLDS WITH A TV

SINCE **2012** THERE WERE MORE HOUSEHOLDS WITH DIGITAL TV THAN WITH ANALOGUE TV



	2008	2009	2010	2011	2012
DEVELOPING	17%	22%	29%	35%	42%
DEVELOPED	53%	61%	68%	75%	81%
WORLD	30%	36%	43%	49%	55%

multi-channel TV

Increasing competition from new digital platforms

BETWEEN 2008 & 2012 **DIGITAL CABLE DTT & IPTV** FROM 7% TO 14% OF HOUSEHOLDS WITH A TV

FROM 3% TO 8% (x2)

FROM 1% TO 4% (x4)

53% OF HOUSEHOLDS WITH A TV HAVE A PAY-TV SUBSCRIPTION

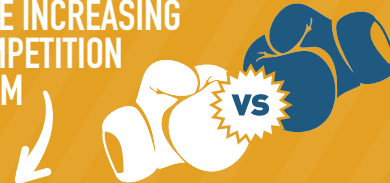
TOP 10 COUNTRIES BY PERCENTAGE OF HOUSEHOLDS WITH PAY TV

1. NETHERLANDS
2. NORWAY
3. BELGIUM
4. HONG KONG (CHINA)
5. KOREA (REP.)
6. DENMARK
7. MALTA
8. SWEDEN
9. UNITED STATES
10. CANADA

TRADITIONAL MULTICHANNEL TV PLATFORMS

CABLE AND DTH SATELLITE

FACE INCREASING COMPETITION FROM



IPTV SERVICE PROVIDERS AND DTT CHANNELS

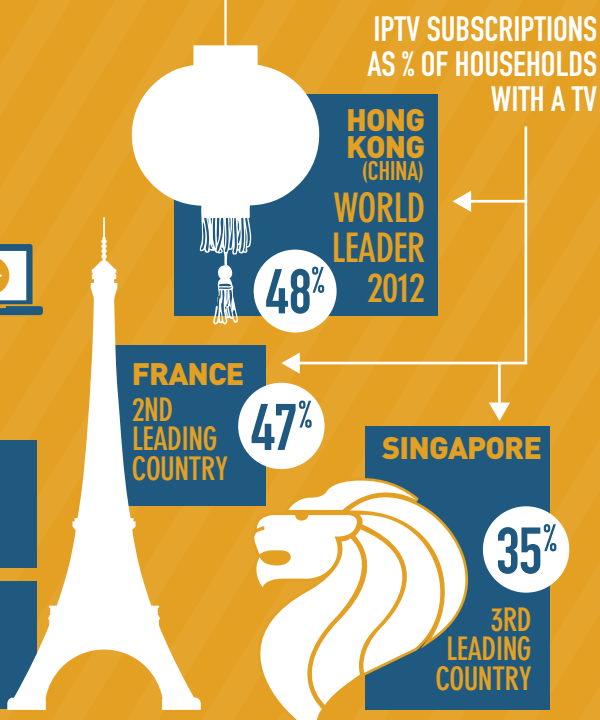
TV and the Internet

Convergence of broadband and TV markets

IPTV AS % OF HOUSEHOLDS WITH A TV IN 2012

9% DEVELOPED COUNTRIES

3% DEVELOPING COUNTRIES



OTT TV OVER-THE-TOP (OTT) AUDIOVISUAL CONTENT PROVIDERS ARE GAINING MARKET SHARE



STREAMING OTT TV AND VIDEO REQUIRES EXTENSIVE BROADBAND CAPACITY

