

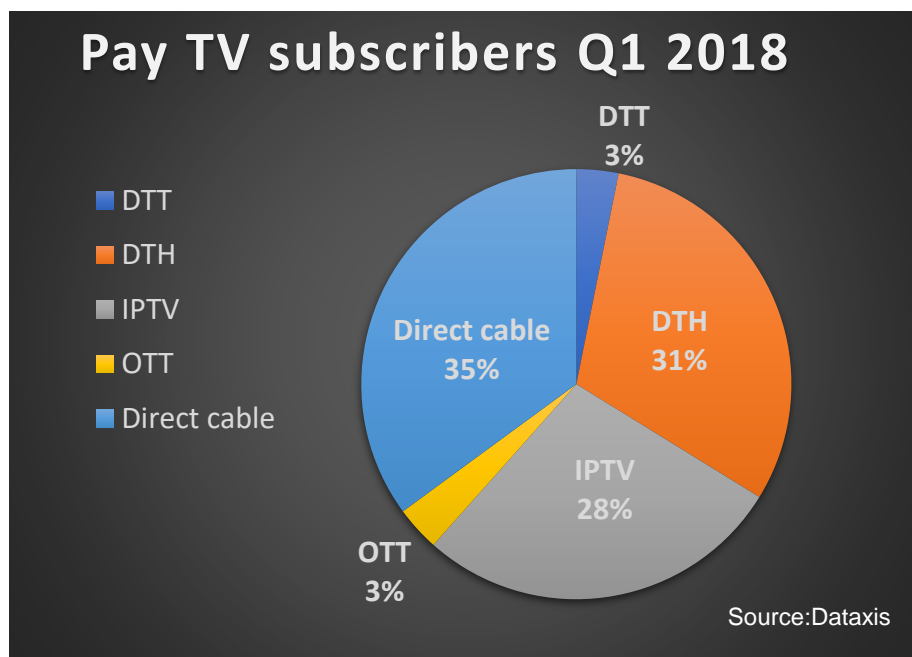
European Pay TV market reached 185 million subs in Q1 2018

Following Dataxis' latest research, the European pay TV market reached 185 million subscribers during the first quarter of 2018 and grew only by 0,3% compared to Q4 2017. This is the lowest net add ever observed by Dataxis.

	Q1 16	Q2 16	Q3 16	Q4 16	Q1 17	Q2 17	Q3 17	Q4 17	Q1 18
DTT	5 922	5 944	5 338	5 302	5 379	5 581	5 817	5 854	5 834
DTH	56 440	56 610	56 861	57 253	57 148	57 156	57 012	57 016	56 604
IPTV	42 553	43 569	44 527	45 702	46 673	47 690	48 970	50 315	51 322
OTT	2 159	2 413	2 503	3 288	4 151	4 759	5 463	6 141	6 208
Direct cable	65 517	65 540	66 070	65 558	64 897	64 855	64 779	64 949	64 803
Total pay TV	172 591	174 077	175 299	177 103	178 248	180 040	182 040	184 274	184 769
TV HH	297 463	297 463	297 463	297 463	298 789	298 789	298 789	298 789	299 678
% pay TV	58,0%	58,5%	58,9%	59,5%	59,7%	60,3%	60,9%	61,7%	61,7%

Source:Dataxis

35% of the Pay TV subscribers receive direct cable, 31% satellite and 28% IPTV. OTT and DTT both represents only 3% of the subscribers' total.



Direct cable¹ is still the most used technology in Europe and represents almost 65 million subscribers, including 42 million for only digital cable, but decreased slightly in Q1 2018. Liberty Global/ Vodafone accounts for 31% of the subscribers. The indirect cable market amounts to 18 million customers.

¹ A distinction is made between cable service directly provided by an operator to a customer and cable distributed via landlords to the tenants of a building. According to Dataxis, the indirect cable market amounts to 18 million customers.

The satellite (DTH) market decreased more substantially in Q1 2018, with 400 000 fewer subscribers than in Q4 2017 (-0,72%). Dataxis estimates that Sky Group and Tricolor (Russia), which together hold 50% of the market, have lost 140 000 and 80 000 customers respectively.

The DTT market remained stable in Q1 2018, losing only 0,35% of its subscribers, but tends to decline despite the launch of Freenet in Germany in 2017, which accounts for 18% of the DTT subscribers and gained 47 000 customers during the last quarter.

On the other hand, the IPTV market in Europe continued its growth in Q1 2018, with 1 000 000 more subscribers compared to Q4 2017 (+2,0%). The main players in this market are Orange (France) and Rostelecom (Russia), which account for respectively 10% and 13% of the IPTV subscribers.

Despite representing only 3% of the pay TV market, OTT grew significantly in terms of subscribers, especially when compared to Q4 2016 (+47%). Play Now (Poland) holds 25% of the total OTT subscribers.

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FOR MORE INFORMATION

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ABOUT DATAxis

Dataxis is a global firm specializing in the delivery of detailed market research, high quality events, and powerful media covering the TV and Telecom industries in more than 200 countries. Dataxis has offices in Europe, Latin America and Africa. Dataxis Intelligence launched its quarterly online service in 2003 and quickly became recognized as a leading source of information for major operators, technology suppliers, content providers and governmental bodies around the globe. The online intelligence service and market reports provide key indicators, statistics, forecasts and analysis of all TV and Telecom operators worldwide. Please visit www.dataxis.com |

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