

Global active HDTV homes by platform (million)

	2007	2008	2009	2012
DTT	3.5	6.4	9.8	29.4
Digital Cable	12.7	22.7	36.6	90.5
Pay DTH	7.7	12.8	19.6	46.5
Pay IPTV	0.6	1.7	3.3	12.1
Global Total	24.5	43.5	69.3	178.9

Source: Informa Telecoms & Media

Reflecting HD set homes, digital cable is the dominant platform for active HD homes. Cable operators can use HD as a differentiator against their rivals. Many DTH platforms offer HD channels, but HD channels soak up a lot of valuable – and sometimes scarce – transponder capacity, which can sometimes limit the number of HD channels on offer. Like cable, IPTV operators have the technology to offer a good selection of HD channels, but they are generally less proactive in providing new HD channels before the cable operators.

Global HDTV homes by region as a % of digital TV households

	2007	2008	2009	2012
Asia Pacific	32	33	36	45
Europe East/Middle East	8	12	16	31
Europe West	20	26	32	49
Latin America	5	9	14	29
North America	52	62	72	86
Global Total	34	39	44	55

Source: Informa Telecoms & Media

By end-2008, nearly 40% of the world's digital TV homes will own an HD set. This proportion will rise to 55% by 2012 – not a great leap in itself, though the number of digital TV households will increase by 69% over the same period.

Global active HDTV homes by region as a % of digital TV households

	2007	2008	2009	2012
Asia Pacific	21	31	43	71
Europe East/Middle East	0	1	3	13
Europe West	2	3	6	23
Latin America	0	0	1	9
North America	21	31	43	71
Global Total	10	15	20	35

Source: Informa Telecoms & Media

In a similar fashion, active HDTV homes as a percentage of digital TV households will rise to 15% by end-2008 from 10% at end-2007. The proportion will be 20% by end-2009 – double the figure of two years earlier.

The global average will be 35% by 2012, as high as 71% in both North America and Asia Pacific but as low as 9% in Latin America.

Global HDTV Forecasts

	2004	2005	2006	2007	2008	2009	2010	2011	2012
TV households (000)	981,500	1,000,122	1,017,815	1,034,292	1,051,088	1,068,208	1,085,692	1,103,069	1,120,767
HDTV homes (000)	19,672	33,187	52,496	81,296	116,902	155,786	193,094	234,705	279,846
HDTV homes/TV households (%)	2.0	3.3	5.2	7.9	11.1	14.6	17.8	21.3	25.0
HDTV active homes (000)	1,566	5,113	12,178	24,511	43,547	69,280	97,485	134,039	178,551
HDTV active homes/ TV households (%)	0.2	0.5	1.2	2.4	4.1	6.5	9.0	12.2	15.9
HDTV active homes/ HDTV homes (%)	8.0	15.4	23.2	30.2	37.3	44.5	50.5	57.1	63.8
Digital TV households (000)	113,178	140,948	185,859	242,230	299,385	350,421	399,884	453,378	506,488
HDTV homes/ Digital TV households (%)	17.4	23.5	28.2	33.6	39.0	44.5	48.3	51.8	55.3
HDTV active homes/ Digital TV households (%)	1.4	3.6	6.6	10.1	14.5	19.8	24.4	29.6	35.3
DTT households (000)	12,822	23,306	34,815	48,425	63,462	73,304	83,679	94,029	103,719
DTT HDTV homes (000)	1,876	5,477	9,753	15,868	24,782	32,354	40,808	49,656	58,485
DTT HDTV active homes (000)	141	861	1,836	3,457	6,365	9,816	14,859	21,769	29,403
DTT HDTV active homes/ DTT households (%)	1.1	3.7	5.3	7.1	10.0	13.4	17.8	23.2	28.3
Digital Cable TV households (000)	37,435	46,732	69,493	98,192	127,260	156,773	185,462	217,075	249,080
Digital cable HDTV homes (000)	6,931	11,650	19,927	33,266	49,471	69,581	88,633	110,500	134,953
Digital cable HDTV active homes (000)	1,126	2,804	6,301	12,713	22,668	36,581	50,244	68,000	90,523
Digital cable HDTV active homes/ Digital cable TV households (%)	3.0	6.0	9.1	12.9	17.8	23.3	27.1	31.3	36.3
Pay DTH households (000)	61,715	68,372	76,359	84,889	92,257	98,946	104,423	110,736	116,862
Pay DTH HDTV homes (000)	10,629	15,481	21,344	28,601	36,275	44,570	51,440	58,765	66,560
Pay DTH HDTV active homes (000)	295	1,419	3,900	7,735	12,836	19,619	27,088	36,039	46,530
Pay DTH HDTV active homes/ Pay DTH households (%)	0.5	2.1	5.1	9.1	13.9	19.8	25.9	32.5	39.8
Paying IPTV households (000)	1,206	2,538	5,192	10,724	16,405	21,398	26,321	31,539	36,828
Paying IPTV HDTV homes (000)	236	578	1,471	3,562	6,373	9,281	12,213	15,783	19,848
Paying IPTV HDTV active homes (000)	4	30	141	606	1,678	3,263	5,293	8,231	12,096
Paying IPTV HDTV active homes/ Paying IPTV households (%)	0.3	1.2	2.7	5.7	10.2	15.3	20.1	26.1	32.8

Source: Informa Telecoms & Media

Australia HDTV forecasts

	2004	2005	2006	2007	2008	2009	2010	2011	2012
TV households (000)	7,292	7,391	7,490	7,591	7,694	7,798	7,899	7,998	8,094
HDTV homes (000)	95	264	535	848	1,195	1,551	1,946	2,378	2,839
HDTV homes/TV households (%)	1.3%	3.6%	7.1%	11.2%	15.5%	19.9%	24.6%	29.7%	35.1%
HDTV active homes (000)	5	25	63	121	224	391	637	956	1,354
HDTV active homes/TV households (%)	0.1%	0.3%	0.8%	1.6%	2.9%	5.0%	8.1%	11.9%	16.7%
HDTV active homes/HDTV homes (%)	5.2%	9.4%	11.7%	14.2%	18.7%	25.2%	32.7%	40.2%	47.7%
Digital TV households (000)	1,890	2,643	3,569	4,239	4,778	5,169	5,559	5,944	6,309
HDTV homes/Digital TV households (%)	5.0%	10.0%	15.0%	20.0%	25.0%	30.0%	35.0%	40.0%	45.0%
HDTV active homes/Digital TV households (%)	0.3%	0.9%	1.8%	2.8%	4.7%	7.6%	11.5%	16.1%	21.5%
DTT households (000)	652	1,240	1,668	2,012	2,385	2,629	2,860	3,081	3,314
DTT HDTV homes (000)	33	124	250	402	596	789	1,001	1,232	1,491
DTT HDTV active homes (000)	5	25	63	121	209	315	450	616	820
DTT HDTV active homes/DTT households (%)	0.8%	2.0%	3.8%	6.0%	8.8%	12.0%	15.8%	20.0%	24.8%
Digital Cable TV households (000)	280	368	708	781	793	803	811	817	823
Digital cable HDTV homes (000)	14	37	106	156	198	241	284	327	370
Digital cable HDTV active homes (000)	0	0	0	0	5	24	57	98	148
Digital cable HDTV active homes/ Digital cable TV households (%)	0.0%	0.0%	0.0%	0.0%	0.6%	3.0%	7.0%	12.0%	18.0%
Pay DTH households (000)	958	1,035	1,193	1,439	1,583	1,706	1,825	1,944	2,052
Pay DTH HDTV homes (000)	48	104	179	288	396	512	639	777	923
Pay DTH HDTV active homes (000)	0	0	0	0	10	51	128	233	369
Pay DTH HDTV active homes/ Pay DTH households (%)	0.0%	0.0%	0.0%	0.0%	0.6%	3.0%	7.0%	12.0%	18.0%
Paying IPTV households (000)	0	0	0	7	17	32	64	103	120
Paying IPTV HDTV homes (000)	0	0	0	1	4	10	22	41	54
Paying IPTV HDTV active homes (000)	0	0	0	0	0	0	2	8	16
Paying IPTV HDTV active homes/ Paying IPTV households (%)	0.0%	0.0%	0.0%	0.0%	0.0%	0.8%	3.5%	8.0%	13.5%

Source: Informa Telecoms & Media

Major structural/regulatory changes:

- * Elections in late 2007 saw a Labour government voted in for the first time in a decade.
- * The outgoing government loosened rules on cross-media ownership and foreign investment in media companies.
- * Pay TV penetration is low partly due to the lack of competition, including the absence of IPTV. However, this could change as the government awarded a next generation broadband network licence for rural areas, with many expecting a similar tender for the major urban areas.
- * DTT has enjoyed some success, and is likely to thrive in the next few years as the government distributes more channel licences.
- * The existing FTA channels will receive digital channel licences.
- * No new national FTA licence award will take place before 2010 at the earliest.
- * DTT HD available since 2001, but there are three HD formats, including 576p which is not considered true HD by many
- * Foxtel started two HD channels and HD VOD in early 2008.
- * The main FTA channels are broadcasting in HD, including Seven whose HD channel started a different schedule to its SD one in October 2007
- * HD set and STB prices are falling rapidly.