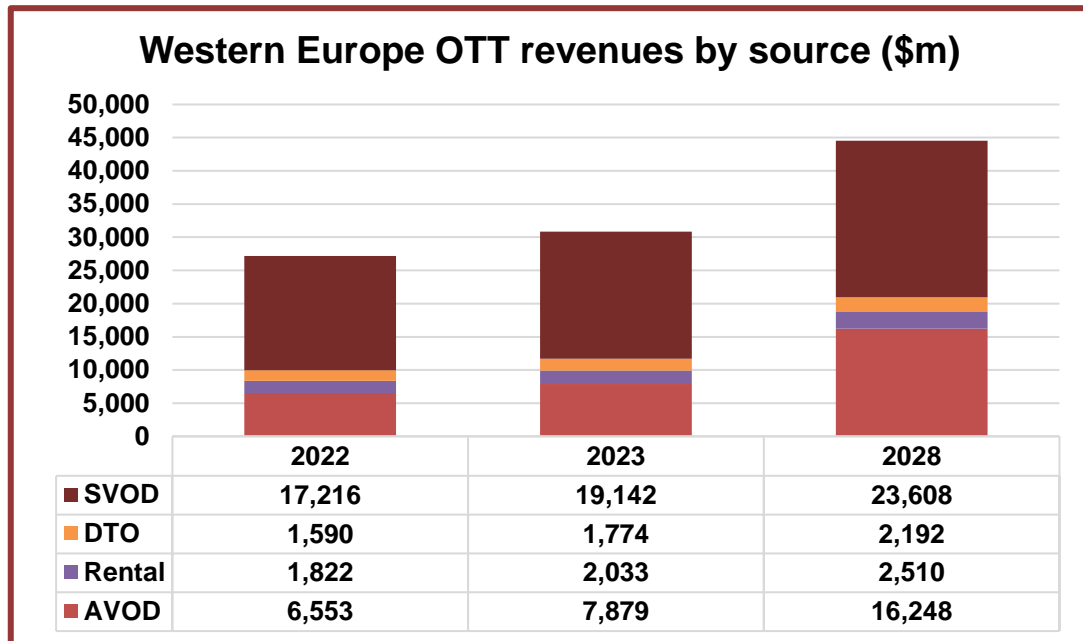


## Western European OTT to add \$18 billion

Western European OTT TV episode and movie revenues will reach \$45 billion in 2028; up from the \$27 billion recorded in 2022. The UK will account for \$10 billion in 2028, with Germany at \$8 billion and France \$7 billion. From the \$18 billion additional revenues, the UK will contribute \$3.6 billion, Germany \$3.6 billion and France \$2.3 billion.



Simon Murray, Principal Analyst at Digital TV Research, said: “AVOD will grow faster than SVOD. AVOD revenues will increase by \$10 billion between 2022 and 2028 to reach \$16 billion. SVOD revenues will total \$24 billion by 2028 – up from \$17 billion in 2022.”

# [Western Europe OTT TV & Video Forecasts](#)

## Table of Contents

Published in March 2023, this 146-page PDF and excel report covers movies and TV episodes. The report comes in two parts:

- Insight: Detailed country-by-country analysis in a 90-page PDF document.
- Excel workbook covering each year from 2015 to 2028 for 18 countries by household penetration, by SVOD subscribers and by OTT revenues for movies and TV episodes, AVOD revenues by major platform. As well as summary tables by country and by platform. NEW FOR 2023: Filter worksheet – every row on one spreadsheet, allowing for easy comparisons.

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

## SVOD forecasts for the following 142 platforms across 18 countries:

Country	SVOD ops	SVOD Platforms
<b>Austria</b>	8	Netflix; Amazon Prime Video; Disney+; Apple TV+; Sky X; Joyn; RTL+; Paramount+
<b>Belgium</b>	8	Netflix; Amazon; Disney+; Apple TV+; Streamz; Proximus; HBO; Paramount+
<b>Denmark</b>	10	Netflix; Amazon Prime Video; Disney+; Apple TV+; HBO; Viaplay; C More; TV2 Play; SkyShowtime; Discovery+
<b>Finland</b>	9	Netflix; Amazon; Disney+; Apple TV+; HBO; Viaplay; C More; SkyShowtime; Ruutu+
<b>France</b>	9	Netflix; Amazon; Disney+; Apple TV+; OCS; Salto; MyCanal; HBO; Paramount+
<b>Germany</b>	10	Netflix; Amazon Prime Video; Disney+; Apple TV+; Sky Ticket; Joyn; Magenta TV App; Giga; RTL+; Paramount+
<b>Iceland</b>	5	Netflix; Amazon Prime Video; Disney+; HBO; Viaplay
<b>Ireland</b>	6	Netflix; Amazon Prime Video; Disney+; Apple TV+; Sky Now; Paramount+
<b>Italy</b>	8	Netflix; Amazon; Disney+; Apple TV+; Sky Now; TIMVision; Mediaset Infinity; Paramount+
<b>Luxembourg</b>	4	Netflix; Amazon Prime Video; Disney+; Apple TV+;
<b>Malta</b>	4	Netflix; Amazon Prime Video; Disney+; Apple TV+;
<b>Netherlands</b>	10	Netflix; Amazon Prime Video; Disney+; Apple TV+; Videoland; NPO Plus; NL Ziet; Ziggo Movies & Series; HBO; SkyShowtime; Viaplay
<b>Norway</b>	10	Netflix; Amazon Prime Video; Disney+; Apple TV+; HBO; Viaplay; C More; TV2 Play; SkyShowtime; Discovery+
<b>Portugal</b>	7	Netflix; Amazon Prime Video; Disney+; Apple TV+; HBO; NOS Play; SkyShowtime
<b>Spain</b>	9	Netflix; Amazon Prime Video; Disney+; Apple TV+; HBO; Movistar+ Lite; MiTele Plus; Atresplayer Prem; Sky Showtime
<b>Sweden</b>	9	Netflix; Amazon Prime Video; Disney+; Apple TV+; HBO; Viaplay; C More; Discovery+; SkyShowtime
<b>Switzerland</b>	7	Netflix; Amazon Prime Video; Disney+; Apple TV+; Premium Plus; Blue+; Paramount+
<b>UK</b>	8	Netflix; Amazon Prime Video; Disney+; Apple TV+; Sky Now TV; Britbox; ITVX; Paramount+

## AVOD forecasts for the following platforms across as well as Netflix, Disney+, Paramount+, HBO, YouTube and Facebook:

Country	AVOD Platforms
<b>Austria</b>	Joyn; RTL
<b>Belgium</b>	RTL Play; VTM Go
<b>Denmark</b>	TV2; Discovery; Viafree
<b>Finland</b>	MTV; Discovery; Ruutu
<b>France</b>	TF1; M6; France Televisions; MyCanal
<b>Germany</b>	RTL; Joyn
<b>Ireland</b>	RTE; TV3
<b>Italy</b>	Mediaset; RAI; Discovery
<b>Netherlands</b>	Videoland; Talpa; NPO
<b>Norway</b>	TV2; Viafree; Discovery
<b>Portugal</b>	SIC; RTP; TVI
<b>Spain</b>	MiTele; Atresmedia; RTVE
<b>Sweden</b>	TV4; Viafree; Discovery
<b>Switzerland</b>	Play Suisse
<b>UK</b>	ITV; All 4; Viacom/My5/Pluto; Now/Sky

# SAMPLE: Bahrain OTT TV & video insight

OTT TV & video revenues are forecast to reach \$72 million by 2028, up from \$40 million in 2022. AVOD revenues will reach \$15 million by 2028, triple from \$5 million in 2022.

SVOD will contribute \$50 million in 2028, up from \$31 million in 2022. There will be 513,000 gross SVOD subscriptions by 2028 compared with 308,000 at end-2022. About 63% of TV households will pay for at least one SVOD subscription by 2028.

SVOD will contribute \$47 million in 2027, up from \$25 million in 2021. There will be 483,000 gross SVOD subscriptions by 2027 compared with 261,000 at end-2021. About 62% of TV households will pay for at least one SVOD subscription by 2027.

Main assumptions behind the forecasts
Mobile dominates the broadband sector.
Broadband penetration is high
High disposable incomes.
Ex-pat community has a strong demand for foreign content.
Disney+ start as a standalone platform in June 2022
Piracy remains a significant problem

**Netflix** launched in January 2016. We forecast 156,000 subscribers by 2028; up from 124,000 at end-2022. English and Arabic content is available.

**Amazon Prime Video** started operations in November 2016 as part of its global rollout. Subscriptions cost \$5.99/month, with little original or local content. We forecast 37,000 Amazon Prime Video subscribers by 2028.

**Apple TV+** (\$7.99/month) started in Bahrain with its global rollout in November 2019. We expect 14,000 subscribers by 2028. Zain distributes Apple TV+.

**Disney+** ended its distribution deal with OSN in June 2022 by starting as a standalone platform (\$8.99/month, \$88.99/year). We forecast 65,000 subs by 2028.

**HBO Max and Paramount+** are not expected to start in the Arabic-speaking countries due to their deals with OSN.

**OSN** launched its SVOD platform in August 2017. It costs BHD4-10/month. As well as 27 linear channels, OSN carries Paramount+ and HBO content. OSN signed a distribution agreement with Netflix in February 2018 and another with STC in June 2018. We forecast 45,000 subscribers by 2028.

After a cost-cutting drive, OSN now places more emphasis on its SVOD platform than its satellite TV one. OSN has exclusive deals with seven Hollywood studios. It will increase Arabic content to a quarter of the total.

Transmitting in English, Arabic and French, **StarzPlay** has more than 6,000 hours of Hollywood content as well as 2,000 hours of Arabic content. Discovery+ is available as a branded content block. We forecast 81,000 subscribers in Bahrain by 2028, up from 56,000 at end-2022.

MBC's **Shahid VIP** provides 10 linear channels as well as on-demand content. Shahid has promised original content. Shahid also distributes Fox Plus. Shahid VIP is carried by mobile operators STC and Zain (BHD3/month). We expect 82,000 subscribers by 2028, up from 56,000 at end-2022. Shahid is its AVOD platform.

**beIN Connect** provides access to 34 linear channels available on the satellite TV package as well as 2,000 on-demand TV episodes and 300 on-demand movies – free to satellite TV subs or \$18/month to others.

Hong Kong's **Viu** started operations in Bahrain, Egypt, Jordan, Kuwait, Oman, Qatar, Saudi Arabia and UAE in February 2017. With 40,000 hours on offer, local content is included as well as international fare to appeal to ex-pats.

Viu recorded 60.7 million monthly active users across 16 markets by mid-2022. Viu had 9.1 million paying subscribers by mid-2022. Most of these subscribers are in South East Asia.

Main operators by subscribers (000)				
Operator	Pay TV subs	Fixed bb subs	Mobile subs	SVOD platforms
Batelco	58	-	-	OSN+
beIN	18	-	-	-
OSN	18	-	-	-
STC	-	-	-	Shahid VIP; OSN+; STC TV; Spuul
Zain	-	-	1,000	Zee5; Apple TV+; Shahid VIP, Viu; OSN+

**beIN** renewed several key sports rights, which will help to push its subscriber numbers back up.

Traditionally appealing to expatriates, **OSN** is attracting more local subscribers. OSN has exclusive deals with seven Hollywood studios. It increased Arabic content to a quarter of the total. We estimate that the company had 18,000 satellite TV subscribers by end-2022.

**Batelco** started offering IPTV services via its FTTH network (up to 500Mbps) in September 2011. Batelco had 58,000 IPTV subs at end-2022. Batelco offers OSN's SVOD platform (BHD4.20/month).

Principally a mobile operator, **STC (formerly called Viva)** carries OSN+ (BHD4/month), STC TV (BHD3/month for 100 linear channels and 20,000 on-demand titles), Shahid VIP (BHD3/month) and Hindi-language Spuul (BHD2/month). STC is owned by Saudi Telecommunications Company.

**Zain** carries Zee5 (BHD1.90/month), Apple TV+, Viu (BHD2/month), OSN+ (BHD4.20/month) and Shahid VIP (BHD3.49/month). With 1 million subscribers, Zain is 55.4% owned by the Zain Group.

## SAMPLE: Bahrain OTT TV & video forecasts

	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028
Population (000)														
Total households (000)														
TV households (000)														
Fixed broadband hholds (000)														
Smartphone subscribers (000)														
Tablet subscribers (000)														
Online advertising total (\$ mil.)														
AVOD revenues (\$ mil.)														
Online rental revenues (\$ mil.)														
DTO revenues (\$ mil.)														
SVOD revenues (\$ mil.)														
OTT TV & video revs (\$ mil.)														
SVOD subscribers (000)														
<i>SVOD subscribers/TVHH</i>														
SVOD subscriptions (000)														
<i>SVOD subscriptions/TVHH</i>														
<i>SVOD subscriptions/SVOD subscribers</i>														
SVOD subscribers by operator (000)														
Netflix														
Amazon														
Disney+														
Apple TV+														
StarzPlay														
Shahid VIP														
OSN														
Others														
SVOD revenues by operator (\$ mil.)														
Netflix														
Amazon														
Disney+														
Apple TV+														
StarzPlay														
Shahid VIP														
OSN														
Others														



## SAMPLE: Bahrain OTT TV & video forecasts

	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028
<b>SVOD ARPU by operator (\$)</b>														
Netflix														
Amazon														
Disney+														
Apple TV+														
StarzPlay														
Shahid VIP														
OSN														
<b>Hybrid AVOD-SVOD subscribers by operator (000)</b>														
Netflix														
Disney+														
HBO Max														
Paramount+														
<b>AVOD revenues by platform (\$ million)</b>														
Netflix														
Disney+														
HBO Max														
Paramount+														
YouTube														
Facebook/Instagram														
Other														



## Digital TV Research report schedule for 2023

	Title	Publication	Price
1	<a href="#">Africa Pay TV Forecasts</a>	January	£1250/€1440/\$1500
2	<a href="#">Middle East &amp; North Africa Pay TV Forecasts</a>	January	£1250/€1440/\$1500
3	<a href="#">SVOD Forecasts Update (based on December 2022 results)</a>	February	£1600/€1840/\$1900
4	<a href="#">Africa OTT TV and Video Forecasts</a>	February	£1250/€1440/\$1500
5	<a href="#">MENA OTT TV and Video Forecasts</a>	February	£1250/€1440/\$1500
6	<a href="#">North America Pay TV Forecasts</a>	February	£700/€805/\$875
7	<a href="#">North America OTT TV and Video Forecasts</a>	February	£700/€805/\$875
8	<a href="#">Latin America Pay TV Forecasts</a>	March	£1250/€1440/\$1500
9	<a href="#">Latin America OTT TV and Video Forecasts</a>	March	£1250/€1440/\$1500
10	<a href="#">Asia Pacific Pay TV Forecasts</a>	March	£1250/€1440/\$1500
11	<a href="#">Asia Pacific OTT TV and Video Forecasts</a>	March	£1250/€1440/\$1500
12	<a href="#">Western Europe Pay TV Forecasts</a>	March	£1250/€1440/\$1500
13	<a href="#">Western Europe OTT TV and Video Forecasts</a>	March	£1250/€1440/\$1500
14	<a href="#">Eastern Europe Pay TV Forecasts</a>	April	£1250/€1440/\$1500
15	<a href="#">Eastern Europe OTT TV and Video Forecasts</a>	April	£1250/€1440/\$1500
16	<a href="#">Global OTT TV &amp; Video Forecasts</a>	May	£1600/€1840/\$1900
17	<a href="#">Global Pay TV Forecasts</a>	May	£2000/€2300/\$2400
18	<a href="#">Global AVOD Forecasts</a>	May	£1600/€1840/\$1900
19	<a href="#">Global SVOD Forecasts (based on March 2023 results)</a>	June	£1600/€1840/\$1900
20	<a href="#">Africa OTT &amp; TV Update</a>	August	£1250/€1440/\$1500
21	<a href="#">MENA OTT &amp; TV Update</a>	August	£1250/€1440/\$1500
22	<a href="#">Latin America OTT &amp; TV Update</a>	August	£1250/€1440/\$1500
23	<a href="#">North America OTT &amp; TV Update</a>	August	£700/€805/\$875
24	<a href="#">Eastern Europe OTT &amp; TV Update</a>	September	£1250/€1440/\$1500
25	<a href="#">Asia Pacific OTT &amp; TV Update</a>	September	£1250/€1440/\$1500
26	<a href="#">Western Europe OTT &amp; TV Update</a>	September	£1250/€1440/\$1500
27	<a href="#">SVOD Forecasts Update (based on June 2023 results)</a>	September	£1600/€1840/\$1900
28	<a href="#">AVOD Forecasts Update</a>	September	£1600/€1840/\$1900
29	<a href="#">OTT TV &amp; Video Forecasts Update</a>	September	£1600/€1840/\$1900
30	<a href="#">Pay TV Forecasts Update</a>	October	£2000/€2300/\$2400
31	<a href="#">SVOD Forecasts Update (based on September 2023 results)</a>	December	£1600/€1840/\$1900

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