



# digital TV research

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**October 2022**

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25	<a href="#">Asia Pacific SVOD Forecasts</a>	September	£1200/€1380/\$1600
26	<a href="#">Western Europe SVOD Forecasts</a>	September	£1200/€1380/\$1600
27	<a href="#">SVOD Forecasts Update (based on June 2022 results)</a>	September	£1800/€2050/\$2400
28	<a href="#">Pay TV Forecasts Update</a>	September	£2200/€2530/\$2970
29	<a href="#">SVOD Forecasts Update (based on September 2022 results)</a>	December	£1800/€2050/\$2400

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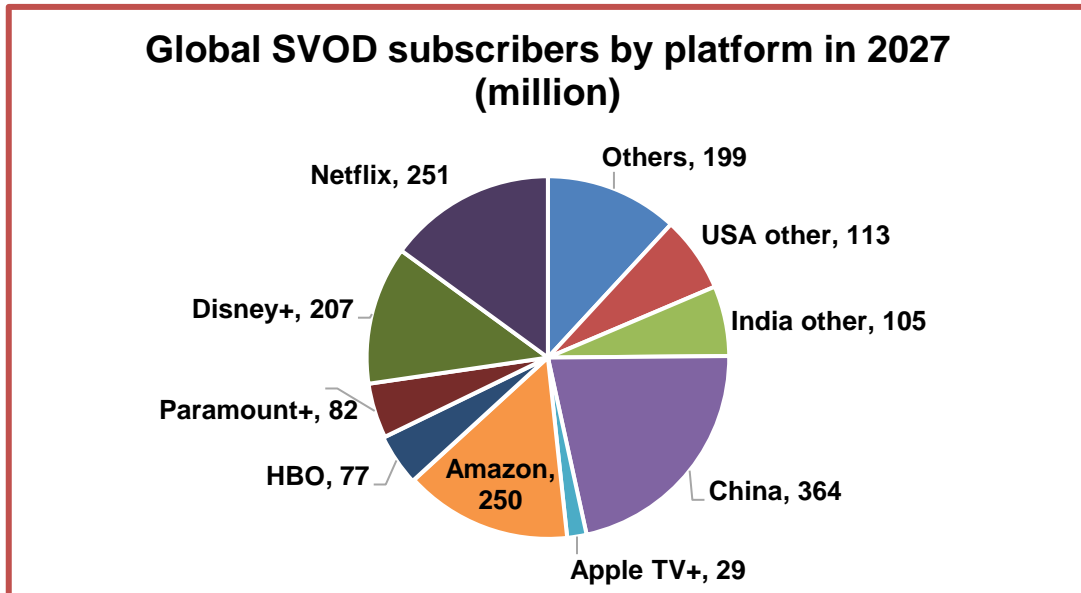
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## Netflix to remain SVOD world leader

Global SVOD subscriptions will increase by 475 million between 2021 and 2027 to reach 1.68 billion. Six US-based platforms will account for 47% of the world's total in 2027.



Simon Murray, Principal Analyst at Digital TV Research, said: “Our forecasts in June had Disney+ [274 million subscribers] overtaking Netflix [253 million subs] by 2027. These forecasts assumed that Disney+ Hotstar would retain the India Premier League cricket rights. It didn't - hence the 67 million lower forecast for Disney+.”

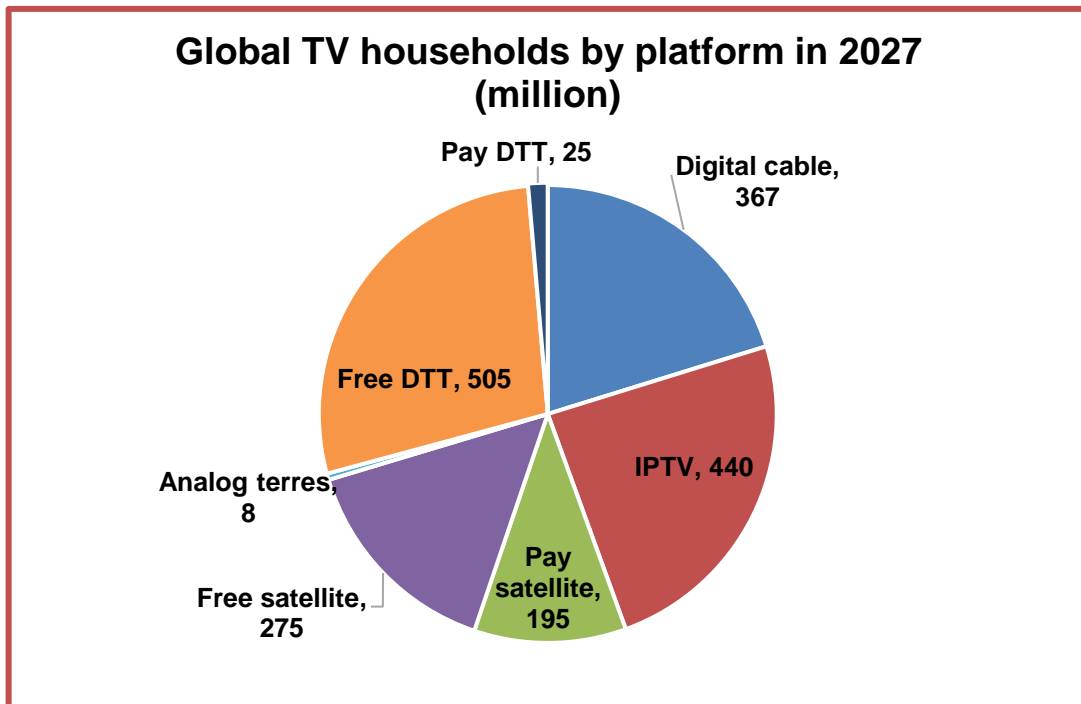
Murray continued: “SVOD revenues for Disney+ will reach \$15 billion by 2027. Despite lowering our forecasts by 67 million subscribers, SVOD revenues for Disney+ will be the same in 2027 as our previous forecast. SVOD ARPU and revenues will increase in key markets after the platform introduces the hybrid AVOD-SVOD tier and the more expensive SVOD-only tier.”

Netflix will remain the revenue winner, with \$30 billion expected by 2027 – similar to Disney+, HBO Max and Paramount+ combined. Global SVOD revenues will reach \$132 billion by 2027.

For more information the [SVOD Forecasts Update report](#), please contact: Simon Murray, [simon@digitaltvresearch.com](mailto:simon@digitaltvresearch.com), Tel: +44 20 8248 5051

## One billion pay TV subscribers

The number of pay TV subscribers across 138 countries will reach 1.03 billion by 2027; slightly up on 2021 as pay TV continues to grow in developing countries. This total represents 57% of TV households – down from the peak of 61% in 2018.



Simon Murray, Principal Analyst at Digital TV Research, said: “Given the increasing demand for fast broadband connections, IPTV will be the pay TV winner. IPTV will add 79 million subscribers between 2021 and 2027 to take its total to 440 million. IPTV will become the pay TV leader in 2022.”

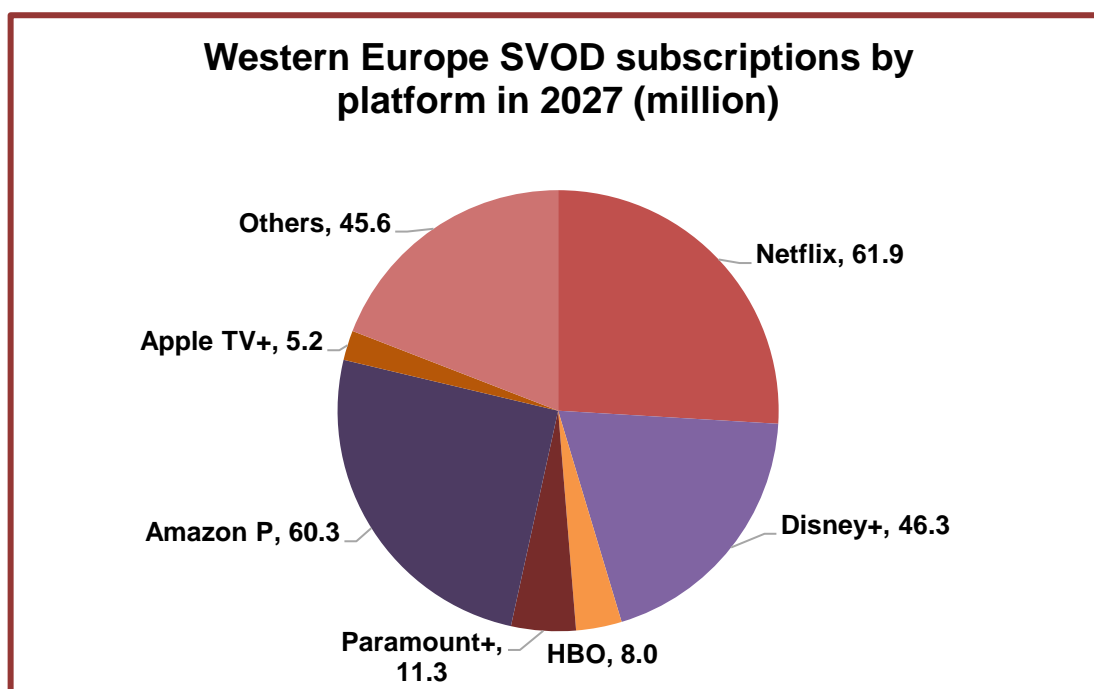
Pay satellite TV will lose 12 million subscribers between 2021 and 2027 as homes convert to platforms that offer high-speed broadband.

There will be 367 million cable TV subs by 2027, 56 million lower than the 422 million recorded in 2021. The 2021 total includes 22 million analog cable TV subscribers. This total will fall to zero by 2027.

For more information [on the Pay TV Forecasts Update report](#), please contact: Simon Murray, [simon@digitaltvresearch.com](mailto:simon@digitaltvresearch.com), Tel: +44 20 8248 5051

## Western Europe to add 73 million SVOD subs

Western Europe will have 238 million SVOD subscriptions by 2027, up from 165 million by end-2021. Six US-based platforms will account for 81% of all SVOD subscriptions by 2027.



Netflix will have 62 million subscribers by 2027 – 3 million more than 2021. Subscriptions are flat for 2022 due mainly to increased competition. Netflix's share of the total will fall from 36% in 2021 to 26% by 2027.

Disney+ will have 46 million subscribers by 2027 – 20 million more than 2021. Newcomer Paramount+/SkyShowtime will add 11 million subscribers and HBO Max will bring in an extra 5 million.

Western European SVOD revenues will total \$25 billion by 2027 – up from \$16 billion in 2021. The UK will remain the SVOD revenue leader.

Simon Murray, Principal Analyst at Digital TV Research, said: “Netflix will slowly lose SVOD revenues as we assume that it will convert its cheapest tier to a lower-priced hybrid AVOD-SVOD tier. Any SVOD revenue shortfall will be more than covered by its AVOD revenues. Netflix will remain the SVOD revenue winner, although its share of the total will fall from nearly half in 2021 to a third in 2027.”

Murray continued: “We do not expect many more price rises due to the intense competition. We assume that Disney+ will follow its US example by converting its present tier to a hybrid AVOD-SVOD one and charging more for an SVOD-only tier.”

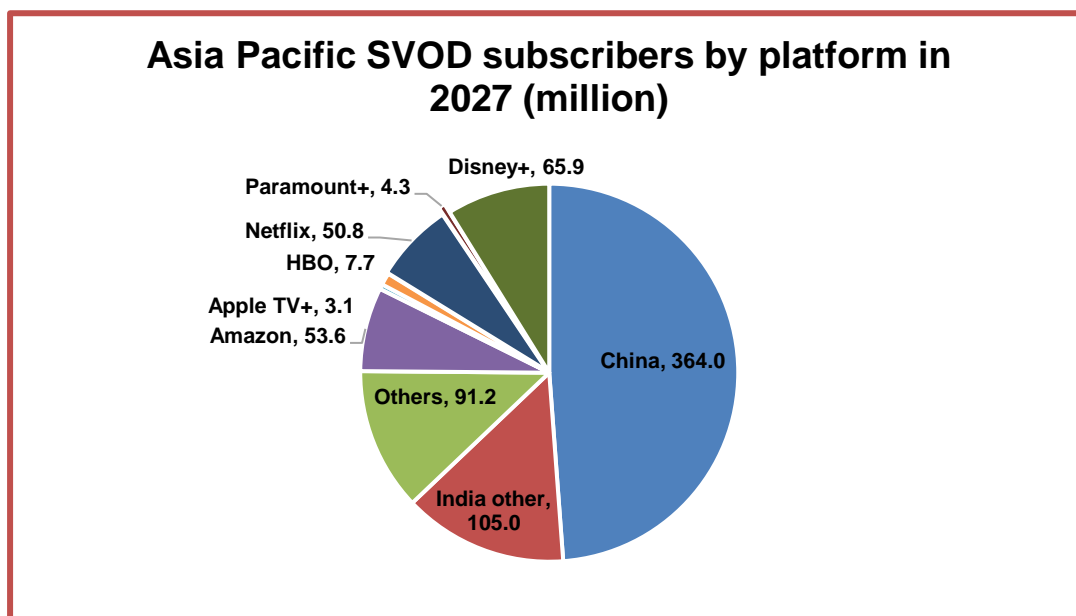


For more information [on the Western Europe SVOD Forecasts report](#), please contact: Simon Murray, [simon@digitaltvresearch.com](mailto:simon@digitaltvresearch.com), Tel: +44 20 8248 5051

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## Asia Pacific to add 205 million SVOD subs

Asia Pacific will have 746 million SVOD subscriptions by 2027, up from 541 million in 2021. China will have 364 million SVOD subscriptions in 2027 – or 49% of the region’s total. India will add 92 million to reach 176 million in 2027.



Simon Murray, Principal Analyst at Digital TV Research, said: “The six major US-based platforms [Netflix, Disney+, Paramount+, HBO Max, Amazon Prime Video and Apple TV+] will only control a quarter of Asia Pacific’s SVOD subscriptions by 2027 – much lower than in any other region in the world. These platforms will never gain access to China and India has plenty of local players.”

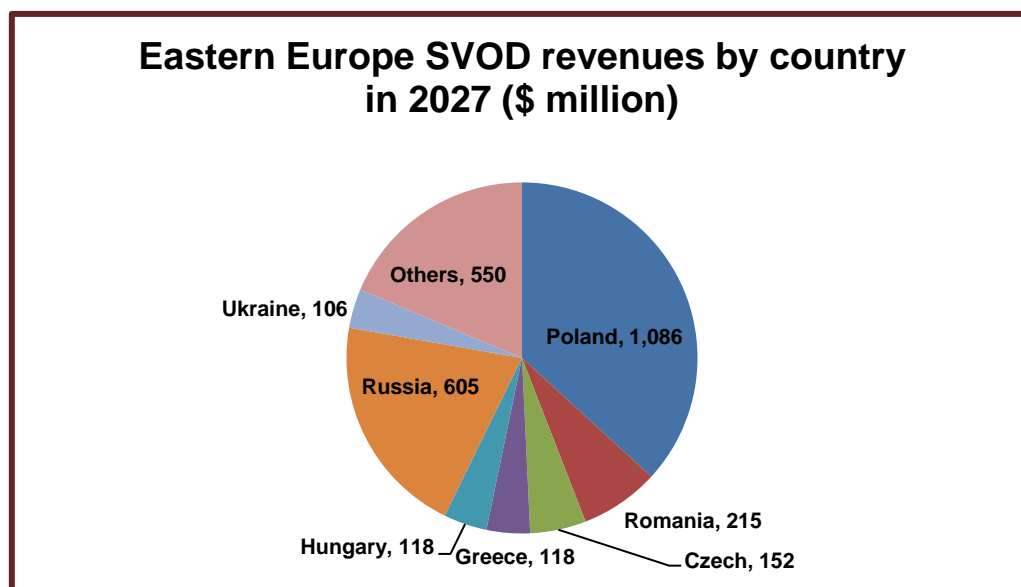
Disney+ overtook Netflix in subscriber terms in 2020 – almost entirely due to its success in India. Disney+ Hotstar reshaped the SVOD landscape in India, mainly by controlling the rights to India Premier League cricket. Disney+ Hotstar did not retain the IPL rights from 2023. The platform will lose 4.5 million subscribers in 2022 and 10 million in 2023 before plateauing.

Assuming that Disney+ retained the IPL rights in India, the previous forecasts estimated 127 million Disney+ subscribers across the region by 2027. Our revised forecasts predict 66 million by 2027 – 61 million less.

For more information [on the Asia Pacific SVOD Forecasts report](#), please contact: Simon Murray, [simon@digitaltvresearch.com](mailto:simon@digitaltvresearch.com), Tel: +44 20 8248 5051

## Poland drives Eastern European SVOD

Eastern European SVOD revenues will reach \$2.95 billion by 2027 – up from \$1.60 billion in 2021. Poland will be the only country to generate more than \$1 billion by 2027.



Simon Murray, Principal Analyst at Digital TV Research, said: “Excluding Russia and Ukraine – no mean feat considering that together they provide 57% of the region’s TV households - revenues will grow from \$0.93 billion in 2021 to \$2.24 billion in 2027. This was prompted by 2022 launches from Disney+, SkyShowtime and HBO Max.”

We forecast 38 million SVOD subscriptions in Eastern Europe by 2027; up from 22 million at end-2021. Excluding Russia and Ukraine, subscriptions for 20 countries will triple from 9 million in 2021 to 24 million in 2027.

There will still be plenty of room for growth beyond the forecast period as only 16% of the region’s TV households will subscribe to at least one SVOD platform by 2027. Excluding Russia and Ukraine, this proportion will double from 11% in 2021 to 24% in 2027. Penetration in Poland will reach 44% by 2027.

For more information [on the Eastern Europe SVOD Forecasts report](#), please contact: Simon Murray, [simon@digitaltvresearch.com](mailto:simon@digitaltvresearch.com), Tel: +44 20 8248 5051