



# digital TV research

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## Why choose us?

- We cover 138 countries across seven regions
- Detailed bottom-up updates and forecasts by country for pay TV and OTT
- 35+ years of experience and connections: key for the validation of our data
- Flexible, customised research: choose from a single country profile to an annual subscription package.
- Competitive and reasonable prices
- Fast-turnaround on analyst feedback

## Each country report comes in two parts:

- **Insight:** Thorough scrutiny in a PDF document, giving market analysis of the key players.
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<b>Digital TV Research report schedule for 2023</b>			
	<b>Title</b>	<b>Publication</b>	<b>Price</b>
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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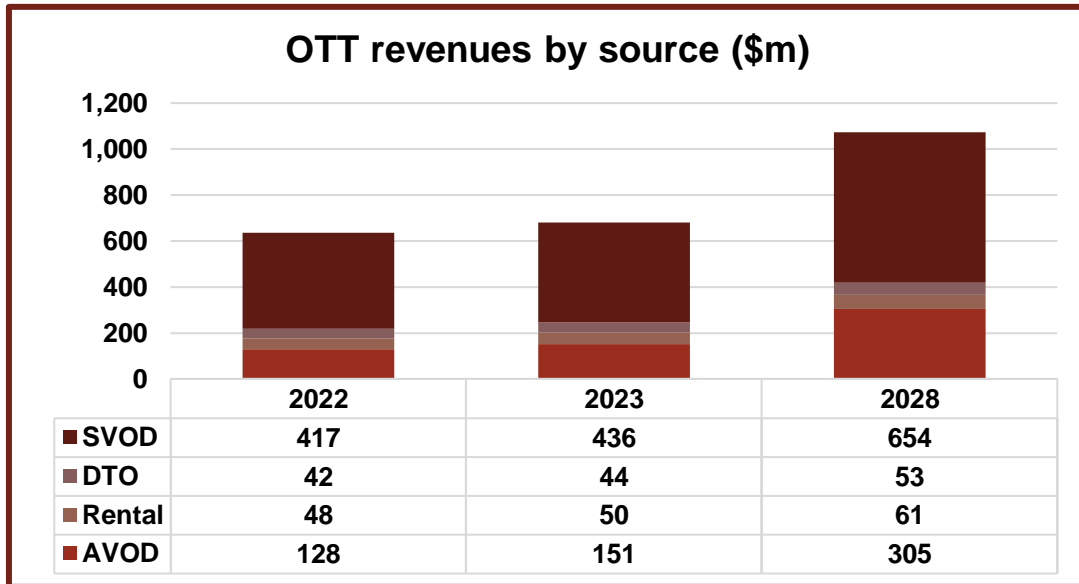


*Forecasts for 138 countries:*

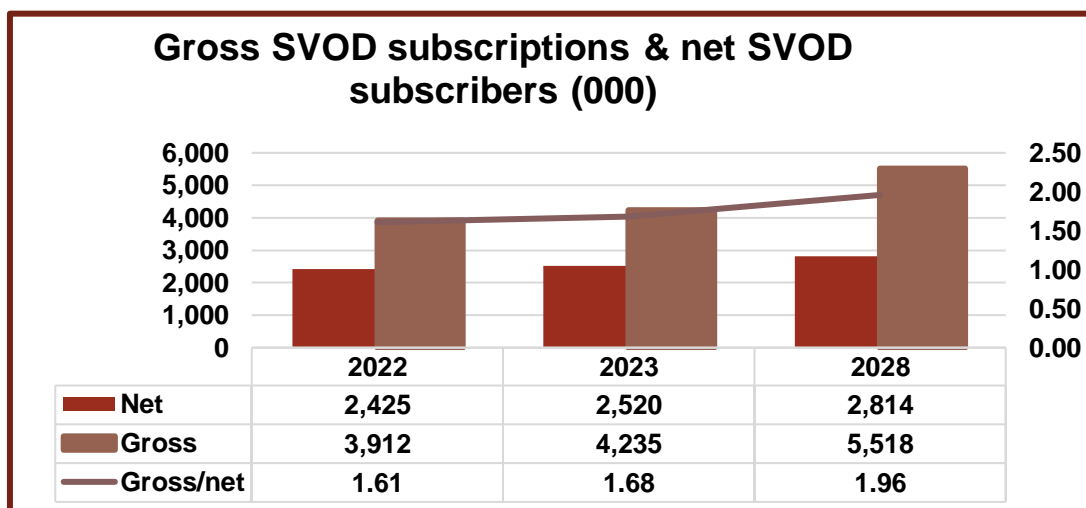
Albania	Algeria	Angola	Argentina
Armenia	Australia	Austria	Azerbaijan
Bahrain	Bangladesh	Belarus	Belgium
Benin	Bolivia	Bosnia	Botswana
Brazil	Bulgaria	Burkina Faso	Burundi
Cambodia	Cameroon	Canada	CAR
Chad	Chile	China	Colombia
DR Congo	Rep Congo	Costa Rica	Cote d'Ivoire
Croatia	Cyprus	Czech Rep.	Denmark
Dominican Rep.	Ecuador	Egypt	El Salvador
Eq Guinea	Estonia	Ethiopia	Finland
France	Gabon	Gambia	Georgia
Germany	Ghana	Greece	Guatemala
Guinea	Honduras	Hong Kong	Hungary
Iceland	India	Indonesia	Ireland
Israel	Italy	Japan	Jordan
Kazakhstan	Kenya	Kuwait	Laos
Latvia	Lebanon	Liberia	Lithuania
Luxembourg	Macedonia	Madagascar	Malawi
Mali	Malaysia	Malta	Mexico
Moldova	Mongolia	Montenegro	Morocco
Mozambique	Myanmar	Namibia	Nepal
Netherlands	New Zealand	Nicaragua	Niger
Nigeria	Norway	Oman	Pakistan
Panama	Paraguay	Peru	Philippines
Poland	Portugal	Puerto Rico	Qatar
Romania	Russia	Rwanda	Saudi Arabia
Senegal	Serbia	Sierra Leone	Singapore
Slovakia	Slovenia	South Africa	South Korea
Spain	Sri Lanka	Sweden	Switzerland
Syria	Taiwan	Tanzania	Thailand
Togo	Tunisia	Turkey	Uganda
Ukraine	UAE	UK	USA
Uruguay	Uzbekistan	Venezuela	Vietnam
Zambia	Zimbabwe		

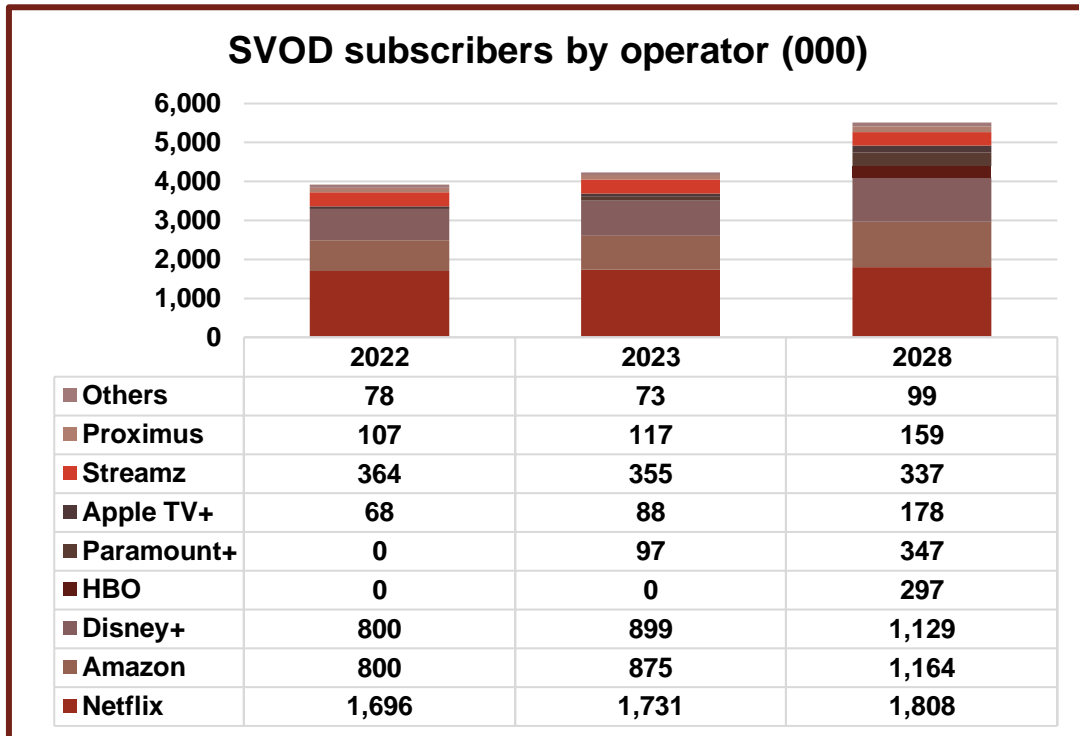
## SAMPLE: Belgium OTT TV & video insight

OTT TV & video revenues will rocket from \$634 million in 2022 to \$944 million by 2028. AVOD is forecast to grow to \$305 million in 2028, up from \$128 million in 2022. Netflix, Disney+ and Paramount+ are all expected to start hybrid AVOD-SVOD tiers in 2023, with HBO following in 2024.



SVOD revenues will increase from \$417 million in 2022 to \$526 million by 2028. Gross SVOD subscriptions will reach 5.52 million by 2028, up from 3.91 million in 2022. About 57% of TV households will pay for at least one SVOD subscription by 2028. The average SVOD subscriber will pay for 1.96 SVOD subscriptions by 2028.





Main assumptions behind the forecasts
TV penetration is falling, but the number of households is still rising.
Belgium has been an Amazon Prime country since November 2017.
The SVOD sector is crowded.

**Netflix** (€8.99-17.99/month) launched in Belgium in September 2014. We forecast 1.81 million subscribers by 2028, up from 1.70 million at end-2022. Proximus carries the Netflix app on its decoder. Local productions include *Into the Night*. By 2028, 380,000 homes will subscribe to the hybrid AVOD-SVOD tier, generating \$24 million in ad revenues.

**Disney+** started in Belgium in September 2020. It costs €8.99/month or €89.90/year. The Star content block was added in February 2021. We expect 1.13 million subscribers by 2028, of which 960,000 will subscribe to the hybrid AVOD-SVOD tier.

Comcast's Sky and NBC Universal will partner with ViacomCBS to launch the **SkyShowtime** platform in 22 European countries (outside the five Sky countries and excluding Belgium, France and Switzerland) in 2022. We expect that Paramount+ will start in 2023, with 347,000 subscribers forecast by 2028.

**Amazon Premium** started in Belgium in February 2016, priced at €69.90/year from September 2022. Amazon Prime started in Flanders in November 2017. Based on trends from other countries, we expect 70% of Amazon Prime subs to watch videos. For these subs, we have dedicated 50% of their fee to Amazon Prime Video. Proximus carries Amazon Prime. We forecast 1.16 million Amazon Prime Video subs by 2028.

**Apple TV+** launched in more than 100 countries in November 2019. The ad-free platform will offer original content, with an annual production budget of \$2 billion. Subscriptions are only €4.99/month, although a year's free subscription is given to purchasers of Apple's top products. We forecast 178,000 paying subs by 2028.

**HBO Max** is expected to start in 2024 as part of a joint platform with sister companies Discovery+ and Eurosport. We forecast 297,000 HBO Max subscribers by 2028. HBO has a long-standing relationship with BeTV.

Premium channel provider **BeTV** launched its OTT platform in December 2014. BeTV is free to its premium pay TV subscribers, but costs €25/month (seven linear channels and 500 on-demand titles – including exclusive HBO and Canal Plus content) to others. Orange Belgium owns BeTV.

Main operators by subscribers (000)				
Operator	Pay TV subs	Fixed bb subs	Mobile subs	TV platforms
Orange	295	317	5,160	
Proximus	1,730	2,200	3,320	Pickx; Disney+; Netflix; BeTV
Telenet/BASE	1,730	1,490	2,940	Streamz
Telesat	207			
Voo	622			BeTV

In March 2016, mobile operator **Orange (formerly called Mobistar)** launched a fixed broadband and TV platform (70 channels) offer. TV is not available as a standalone platform. Orange reported 295,000 TV subscribers by end-2021. Orange had 5.16 million mobile and 371,000 residential fixed broadband subs by mid-2022.

Orange acquired 75% of Voo in November 2021. **Voo**, representing Nethys and Brutele (about 650,000 subs – not just in Brussels), enjoys a cable monopoly in Wallonia. Voo offers BeTV (€25/month).

**Proximus** had 2.20 million fixed broadband, 1.73 million TV and 3.32 million mobile subs by mid-2022. TV packs are not available as a standalone service. Proximus has an OTT platform called **Pickx** (€4.99-24.99/month). We forecast 153,000 SVOD subscribers by 2027. Pickx also offers Disney+, BeTV and Netflix.

**Telenet** is slowly losing TV subscribers, with 1.73 million recorded by June 2022. Telenet has a cable monopoly in Flanders. Streaming platform Flow TV provides 14 linear channels for €9.94/month.

The **Streamz** SVOD platform (€11.95-19.95/month including HBO content) had 370,400 subscribers by mid-2022; gradually falling). Play Sports (€19.95/month) brought in 210,500 subscribers at mid-2022.

DPG Media operates the Streamz SVOD platform with Telenet. In June 2014, Telenet bought a 50% stake in De Vijver Media, which controls FTA broadcasters Vier and Vijf. Liberty Global controls 58.28% of Telenet.

The company had 2.94 million mobile and 1.49 million residential broadband subscribers by mid-2022. Telenet has held a mobile license since 2006. In April 2015, Telenet acquired Base, the third largest mobile operator, from KPN. Telenet acquired Altice's Belgian and Luxembourg operations in December 2016 for €400 million.

**Satellite TV platforms** TV Vlaanderen (Flanders) and TeleSAT (Wallonia) have 207,000 subscribers combined. M7 Group controls both platforms. Canal Plus acquired M7 Group in late 2019. **TV Vlaanderen** started a pay DVB-T2 platform in November 2017. Comprising 15 channels for €9.95/month, Antenne TV offers most of the key FTA private networks.





Excel sample: Belgium 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 (US\$ mil.)														
AVOD (US\$ mil.)														
Online rental revs (US\$ mil.)														
DTO video revenues (US\$ mil.)														
SVOD revenues (US\$ mil.)														
OTT TV & video revs (\$ mil.)														
Net SVOD homes (000)														
SVOD homes/TVHH														
Gross SVOD subscriptions (000)														
SVOD subs/TVHH														
SVOD subscriptions/SVOD homes														
SVOD subscribers by operator (000)														
Netflix														
Amazon Prime Video														
Disney+														
HBO														
Paramount+														
Apple TV+														
Streamz														
Proximus Pickx														
Others														

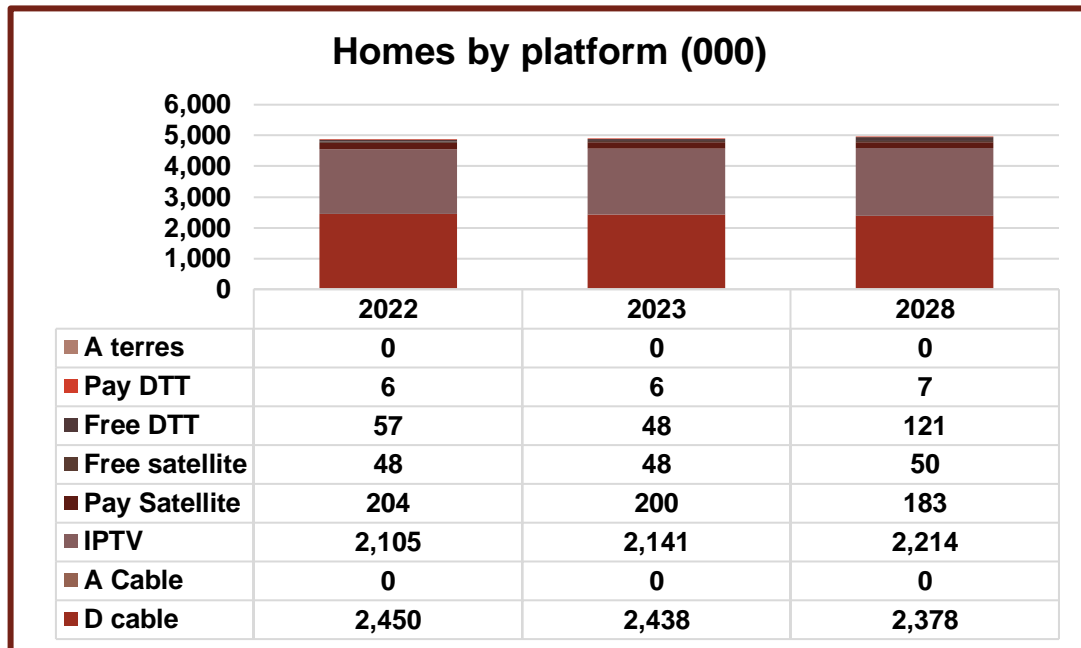


Excel sample: Belgium OTT TV & video forecasts

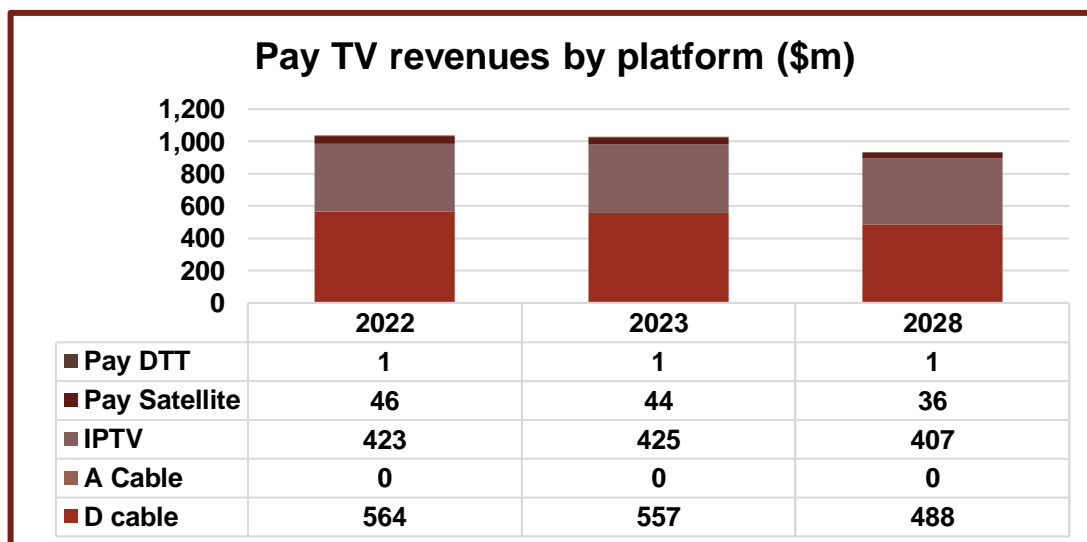
	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028
<b>SVOD revenues by operator (US\$ mil.)</b>														
Netflix														
Amazon Prime Video														
Disney+														
HBO														
Paramount+														
Apple TV+														
Streamz														
Proximus Pickx														
Others														
<b>SVOD ARPU by operator (\$)</b>														
Netflix														
Amazon Prime Video														
Disney+														
HBO														
Paramount+														
Apple TV+														
Streamz														
Proximus Pickx														
<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														
RTL Play														
VTM Go														
Other														

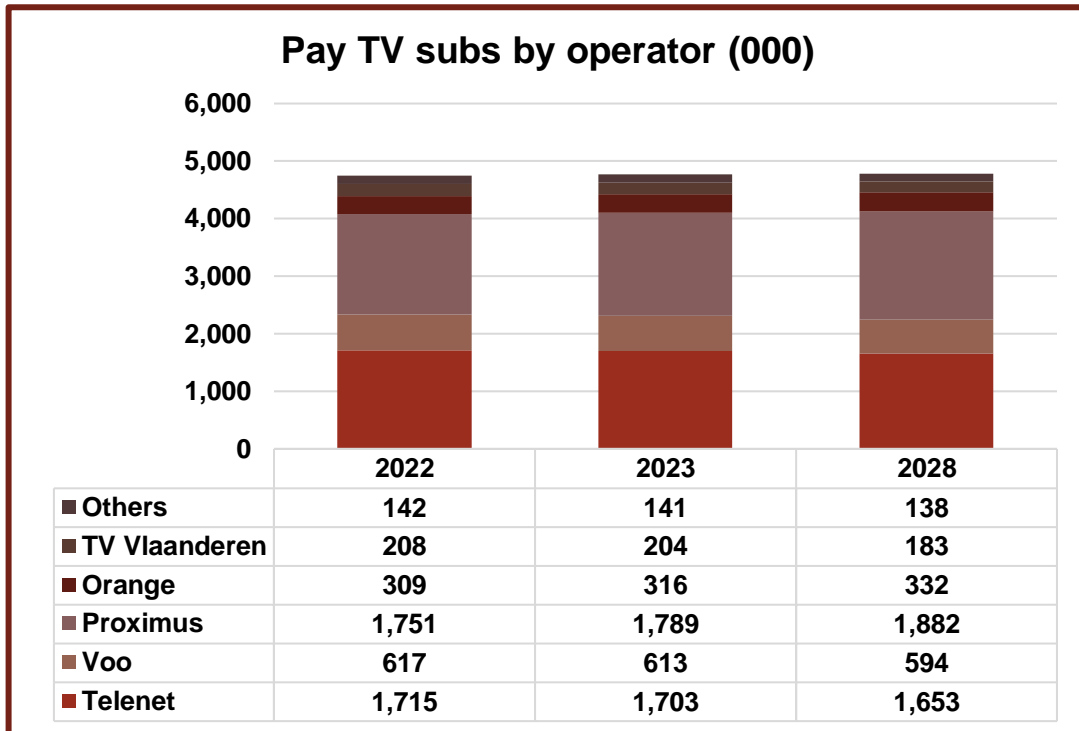
## SAMPLE: Belgium pay TV insight

Pay TV penetration will fall from a high of 98.5% in 2018 to 96.5% in 2028. Due to the rising population, the number of subscribers will stay at 4.7 million.



**Pay TV revenues** peaked in 2018 at \$1.09 billion, falling slowly as more homes convert to bundles to \$0.93 billion by 2028. Competition between cable operators and IPTV ones will force down TV ARPUs.





<b>Main assumptions behind the forecasts</b>	
TV penetration is falling, but the number of households is still rising as the population increases.	
Pay TV penetration is very high, but it will fall slightly.	
IPTV will gain subscribers, especially from some defecting analog cable homes.	
Orange acquired Voo	
ARPU's will fall as competition intensifies.	

From the 4.85 million TV households; 60% are in Flemish-speaking Flanders, 30% in French-speaking Wallonia and 10% in Brussels. Cable TV subscriber numbers will continue to decline slowly. Cable was historically considered a utility, with low subscription fees and ARPU.

<b>Main operators by subscribers (000)</b>				
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**Proximus** had 2.20 million fixed broadband, 1.73 million TV and 3.32 million mobile subs by mid-2022. TV packs are not available as a standalone service. We forecast 1.88 million pay TV subscribers by 2028. Proximus has an OTT platform called **Pickx** (€4.99-24.99/month). Pickx also offers Disney+, BeTV and Netflix.

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**Analog terrestrial transmissions** ended in Flanders in November 2008, with Wallonia following in March 2010. High cable penetration and other platform launches limits DTT's universe. VRT operated the sole multiplex in Flanders until December 2018.



Excel sample: Belgium pay TV forecasts														
	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028
Households (000)														
TV households (000)														
Digital cable subs (000)														
Analog cable subs (000)														
Pay IPTV subscribers (000)														
Pay satellite TV subs (000)														
Free-to-air Satellite TV HH (000)														
Analog terrestrial hholds (000)														
Primary FTA DTT hholds (000)														
Primary Pay DTT hholds (000)														
Digital homes (000)														
Analog homes (000)														
Pay TV subscribers (000)														
TVHH/Total HH														
Digital/TV HH														
Analog/TV HH														
Pay TV Subs/TV HH														
Revenues (US\$ million)														
Digital cable TV														
Analog cable TV														
IPTV														
Satellite TV														
DTT														
Total revenues														
Pay TV subscribers by operator (000)														
Telenet (digital cable)														
Telenet (analog cable)														
Telenet (total)														
Voo (digital cable)														
Voo (analog cable)														
Voo (total)														
Proximus (IPTV)														
Orange (IPTV)														
Telesat/TV Vlaanderen (satellite)														
Others														



Excel sample: Belgium pay TV forecasts														
	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028
Pay TV revenues (\$ million)														
Telenet (digital cable)														
Telenet (analog cable)														
Telenet (total)														
Voo (digital cable)														
Voo (analog cable)														
Voo (total)														
Proximus (IPTV)														
Orange (IPTV)														
Telesat/TV Vlaanderen (satellite)														
Others														
Average Revenue Per User (ARPU - US\$)														
Digital cable TV														
Analog cable TV														
IPTV														
Satellite TV														
DTT														
Average monthly ARPU														

## Country Profiles

Our individual country profiles combine analysis for traditional pay TV with OTT into one document. Each PDF report covers the following:

**OTT TV & Video Insight:** Analysis of the main players and developments

- Chart: OTT TV & video revenues by AVOD, TVOD, DTO and SVOD for 2022, 2023 and 2028
- Chart: Gross SVOD subscriptions versus SVOD subscribers for 2022, 2023 and 2028
- Chart: SVOD subscribers by operator for 2022, 2023 and 2028
- Forecasts: OTT TV & Video Forecasts for every year from 2020 to 2028
- Forecasts for subscribers and revenues by major platforms

**Pay TV Insight:** Analysis of the main players and developments

- Chart: Breakdown of TV households by platform (digital cable, analog cable, IPTV, pay satellite TV, free-to-air satellite TV, analog terrestrial, free-to-air DTT and pay DTT) for 2022, 2023 and 2028
- Chart: Pay TV revenues by platform (digital cable, analog cable, IPTV, pay satellite TV and pay DTT) for 2022, 2023 and 2028
- Chart: Pay TV subscribers by operator (digital cable, analog cable, IPTV, pay satellite TV and pay DTT) for 2022, 2023 and 2028
- Forecasts: Pay TV Forecasts for every year from 2020 to 2028
- Forecasts for subscribers and revenues by major operators

***Price: £500/€550/\$600***

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<a href="#">Japan</a>	<a href="#">Mexico</a>	<a href="#">Poland</a>	<a href="#">Russia</a>
<a href="#">Saudi Arabia</a>	<a href="#">South Africa</a>	<a href="#">South Korea</a>	<a href="#">Spain</a>
<a href="#">Sweden</a>	<a href="#">Turkey</a>	<a href="#">UK</a>	<a href="#">USA</a>

We can provide this level of detail for 138 countries.

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