



# digital TV research

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**April 2024**

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## Digital TV Research report schedule for 2024

	Title	Publication	Price
1	<a href="#">Africa Pay TV Forecasts</a>	January	£1500/€1725/\$1875
2	<a href="#">Middle East &amp; North Africa Pay TV Forecasts</a>	January	£1500/€1725/\$1875
3	<a href="#">Africa OTT TV and Video Forecasts</a>	February	£1500/€1725/\$1875
4	<a href="#">MENA OTT TV and Video Forecasts</a>	February	£1500/€1725/\$1875
5	<a href="#">North America Pay TV Forecasts</a>	February	£775/€890/\$965
6	<a href="#">North America OTT TV and Video Forecasts</a>	February	£775/€890/\$965
7	<a href="#">Latin America Pay TV Forecasts</a>	March	£1500/€1725/\$1875
8	<a href="#">Latin America OTT TV and Video Forecasts</a>	March	£1500/€1725/\$1875
9	<a href="#">Western Europe Pay TV Forecasts</a>	March	£1500/€1725/\$1875
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12	<a href="#">Eastern Europe OTT TV and Video Forecasts</a>	March	£1500/€1725/\$1875
13	<a href="#">Asia Pacific Pay TV Forecasts</a>	April	£1500/€1725/\$1875
14	<a href="#">Asia Pacific OTT TV and Video Forecasts</a>	April	£1500/€1725/\$1875
15	<a href="#">Global OTT TV &amp; Video Forecasts</a>	April	£1600/€1840/\$1990
16	<a href="#">Global Pay TV Forecasts</a>	April	£2000/€2300/\$2500
17	<a href="#">Global AVOD Forecasts</a>	April	£1600/€1840/\$1990
18	<a href="#">Global SVOD Forecasts (based on Dec 2023 results)</a>	April	£1600/€1840/\$1990
19	<a href="#">Global FAST Forecasts</a>	May	£1500/€1725/\$1875
20	<a href="#">Global Hybrid AVOD-SVOD Forecasts</a>	May	£1500/€1725/\$1875
21	<a href="#">Africa OTT TV and Video Forecasts</a>	August	£1500/€1725/\$1875
22	<a href="#">MENA OTT TV and Video Forecasts</a>	August	£1500/€1725/\$1875
23	<a href="#">Latin America OTT TV and Video Forecasts</a>	August	£1500/€1725/\$1875
24	<a href="#">North America OTT TV and Video Forecasts</a>	August	£775/€890/\$965
25	<a href="#">Eastern Europe OTT TV and Video Forecasts</a>	September	£1500/€1725/\$1875
26	<a href="#">Asia Pacific OTT TV and Video Forecasts</a>	September	£1500/€1725/\$1875
27	<a href="#">Western Europe OTT TV and Video Forecasts</a>	September	£1500/€1725/\$1875
28	<a href="#">Global SVOD Forecasts (based on June 2024 results)</a>	September	£1600/€1840/\$1990
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31	<a href="#">Global FAST Forecasts</a>	October	£1600/€1840/\$1990
32	<a href="#">Global Hybrid AVOD-SVOD Forecasts</a>	October	£1600/€1840/\$1990
33	<a href="#">Global Pay TV Forecasts</a>	November	£2000/€2300/\$2500

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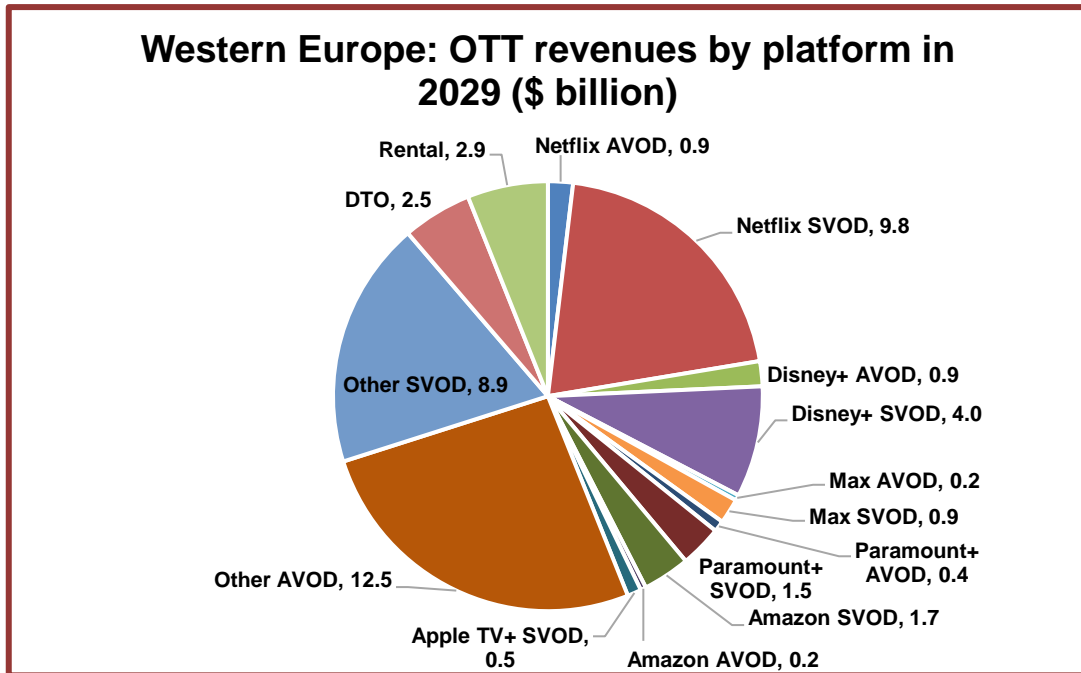
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**April 2024**

## Western Europe OTT revenues to climb by 55%

Western European OTT TV episode and movie revenues will reach \$48 billion in 2029; up from \$31 billion in 2023. The UK will contribute \$10 billion in 2029, Germany \$9 billion, Italy \$5 billion and France \$7 billion.



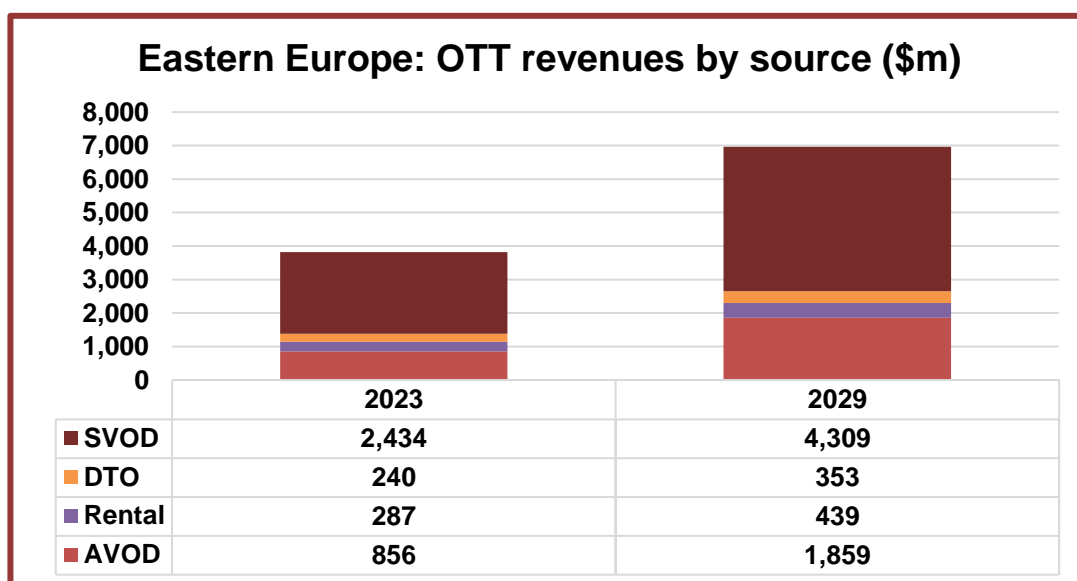
Simon Murray, Principal Analyst at Digital TV Research, said: “We expect that Netflix, Disney+, Max and Paramount+ together will generate AVOD revenues of \$2.4 billion by 2029 – with a further \$16.2 billion from SVOD.”

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

## Eastern Europe OTT revenues to climb by 82%

OTT TV episode and movie revenues for 22 Eastern European countries will reach \$6.96 billion in 2029; up from \$3.82 billion in 2023. From the \$3.1 billion additional revenues between 2023 and 2029, Russia will provide \$1 billion and Poland \$0.7 billion.

Simon Murray, Principal Analyst at Digital TV Research, said: “Together Poland and Russia will account for two-thirds of the region’s 2029 revenues. This means that the remaining 20 countries will share \$2.57 billion – or an average of only \$129 million each.”

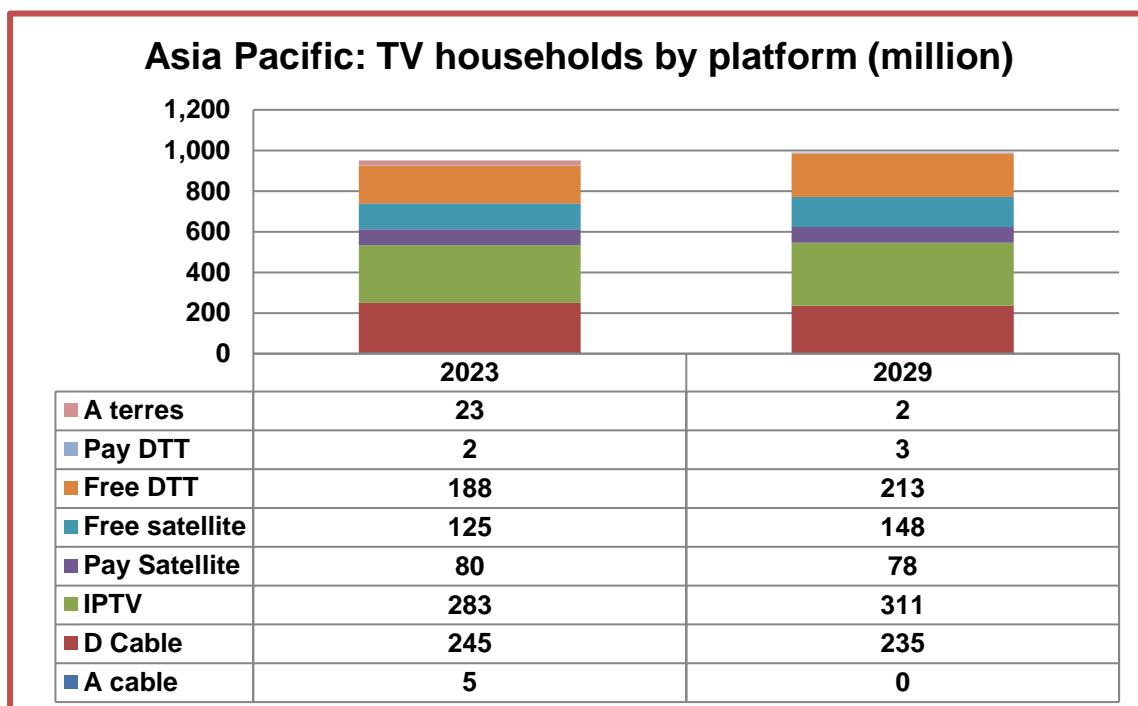


SVOD revenues will reach \$4.3 billion by 2029 – up from \$2.4 billion in 2023. Russia and Poland will be the only countries to generate SVOD revenues in excess of \$1 billion by 2029. AVOD will add \$1 billion to take its total to \$1.9 billion.

For more information [on the Eastern Europe OTT TV & Video Forecasts report](#), please contact: Simon Murray, [simon@digitaltvresearch.com](mailto:simon@digitaltvresearch.com),

## Asia Pacific to add 11 million pay TV subs

Asia Pacific will add 11 million pay TV subscribers by 2029. China and India together will account for 80% of the region’s 627 million pay TV subscribers by 2029 – or 503 million subscribers collectively. India will add “only” 10 million pay TV subscribers between 2023 and 2029, with China down by 3 million. Fifteen of the 22 countries will gain subscribers between 2023 and 2029.



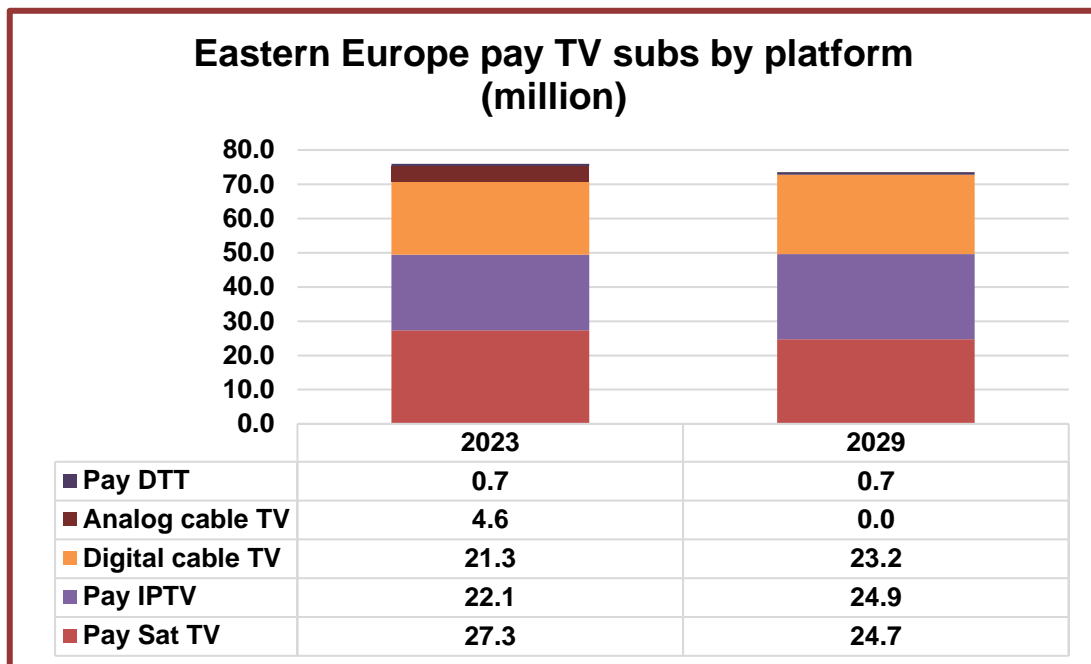
Simon Murray, Principal Analyst at Digital TV Research, said: “IPTV is the biggest pay TV winner – adding 28 million subscribers between 2023 and 2029 to total 311 million. Much of this growth will happen in China (up by 11 million) as cable subs convert to OTT or IPTV and in India (up by 13 million).”

IPTV subscribers overtook cable TV ones in 2022. Digital cable subscriptions will fall by 10 million between 2023 and 2029. China will lose 14 million digital cable subscribers, although Pakistan will add 3 million. Analog cable subscriptions will fall by 5 million to zero.

For more information [on the Asia Pacific Pay TV Forecasts report](#), please contact: Simon Murray, [simon@digitaltvresearch.com](mailto:simon@digitaltvresearch.com)

## Eastern Europe to add nine million digital pay TV subs

The number of pay TV subscribers in Eastern Europe will decline by 8 million from 81 million in the peak year of 2018 to 74 million in 2029. However, 2018 included 17 million analog cable subscribers, which will drop to zero by 2027. The number of digital pay TV subscribers will rise by 9 million over this period.



Pay TV subscriber numbers will fall in 20 of the 22 countries covered between 2023 and 2029, with the total down by 2.4 million. There will be 4.6 million fewer analog cable subs. Pay satellite TV will fall by 2.6 million. However, IPTV will gain 2.8 million and digital cable 1.9 million.

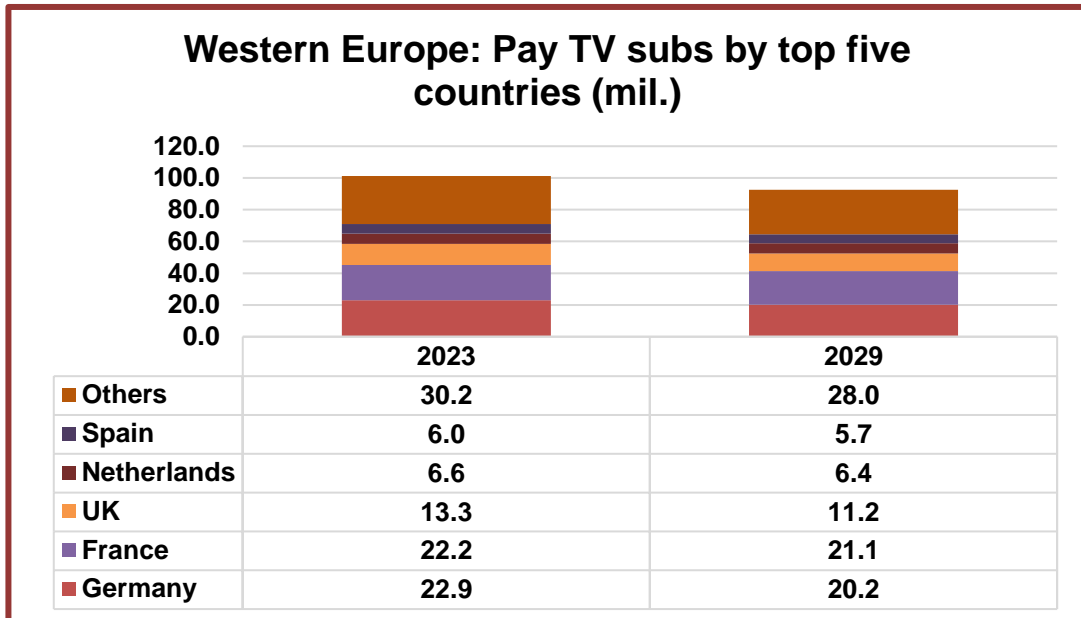
Russia will account for nearly half of the region's pay TV subscribers in 2029, despite losing 2.6 million pay TV subscribers between 2023 and 2029.

Simon Murray, Principal Analyst at Digital TV Research, said: "Tough times continue in Eastern Europe, with poor job prospects forcing many to seek work abroad. This migration married with low birth rates mean that populations will fall or stall in 17 of the 22 countries covered in this report between 2023 and 2029."

For more information [on the Eastern Europe Pay TV Forecasts report](#), please contact: Simon Murray, [simon@digitaltvresearch.com](mailto:simon@digitaltvresearch.com)

## Self-imposed cord-cutting to hit Western Europe pay TV

Western Europe will lose nearly 9 million pay TV subscribers between 2023 and 2029 to reach 93 million – down by 8%. This is nowhere near as bad as the US as pay TV penetration will still be 53% by 2029 – down from 58% in 2023.



Pay TV subscriber counts will fall for 14 of the 18 countries between 2023 and 2029. Germany will lose 2.7 million subs, with the UK down by 2.0 million, Italy 1.5 million and France by 1.1 million.

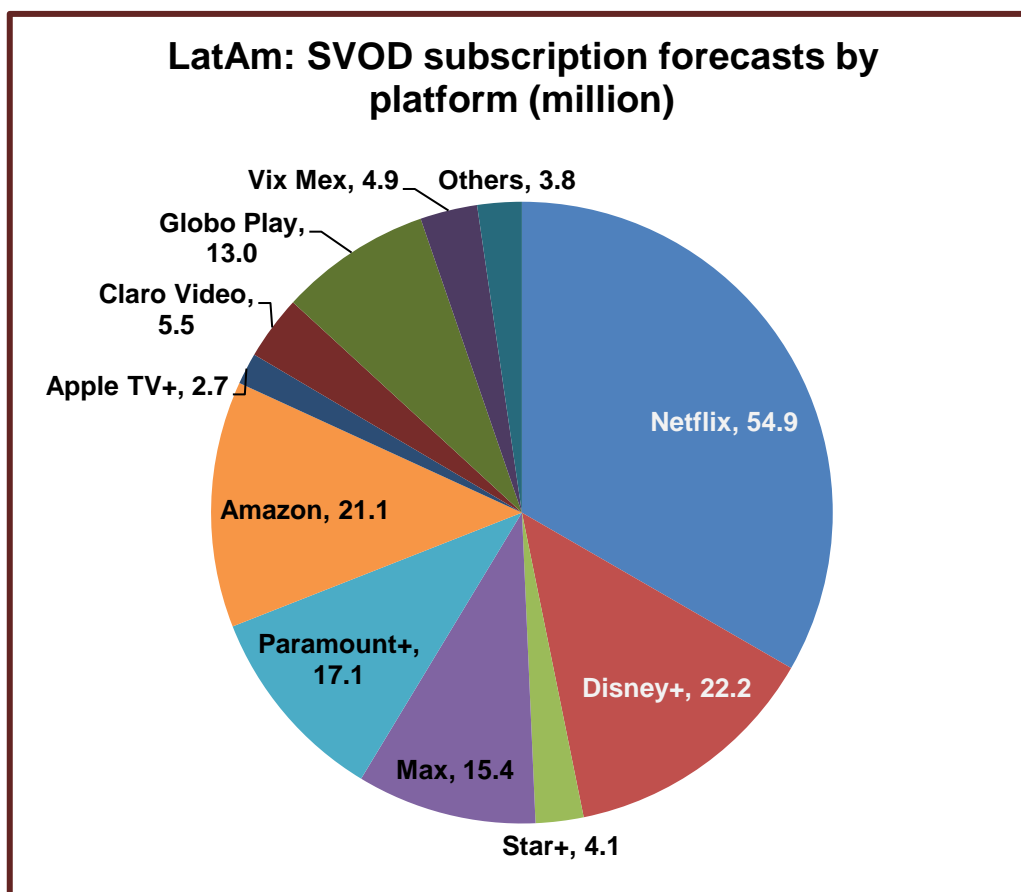
IPTV will gain 1 million subscribers between 2023 and 2029, with pay satellite TV down by 6.4 million, pay DTT down by 0.8 million and cable down by 2.4 million.

Simon Murray, Principal Analyst at Digital TV Research, said: “Pay satellite TV will be the biggest loser because most DTH platforms do not offer broadband access. This is not true of Sky, which wants to convert its satellite TV subscribers to its streaming platforms. Sky will lose 1.8 million satellite TV subs in both Germany and the UK as well as a further 1.3 million in Italy – or nearly 5 million in its five territories between 2023 and 2029.”

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

## Latin America to add 55m SVOD subscriptions

Latin America will have 165 million SVOD subscriptions by 2029; up from 110 million at end-2023. Brazil will provide 59 million SVOD subscriptions by 2029, with Mexico bringing in a further 43 million.



Seven US-based platforms (Netflix, Amazon Prime Video, Disney+, Star+, Paramount+, Apple TV+ and Max) will account for 83% of the region's paying SVOD subscriptions by end-2029. Netflix will add 9 million subscribers between 2023 and 2029, with Disney+ up by 8 million, Max by 10 million and Paramount+ increasing by 6 million. Globoplay, only available in Brazil, will take another 8% of the total.

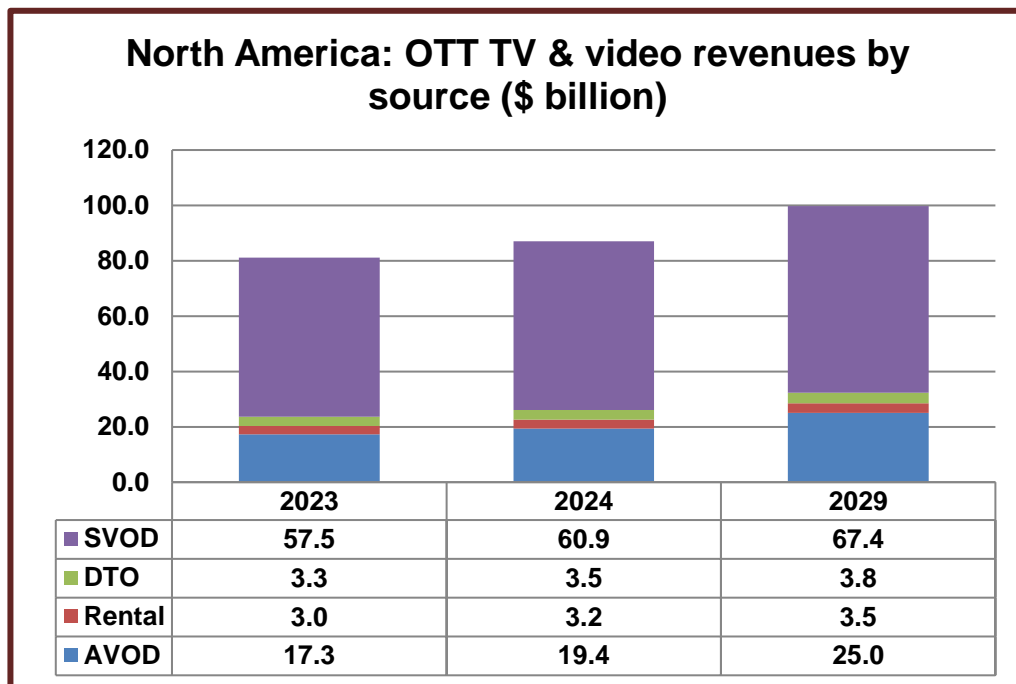
Simon Murray, Principal Analyst at Digital TV Research, said: "All of the major US platforms are very active in Latin America. Another dimension is added by local players such as Globo and Televisa [Vix]."

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



## North American OTT revenues to hit \$100 billion in 2029

North American OTT TV episode and movie revenues will reach \$100 billion in 2029; up from \$81 billion in 2023. The US will contribute \$16 billion from the \$19 billion additional revenues, with Canada supplying the rest. US revenues will be \$92 billion in 2029.



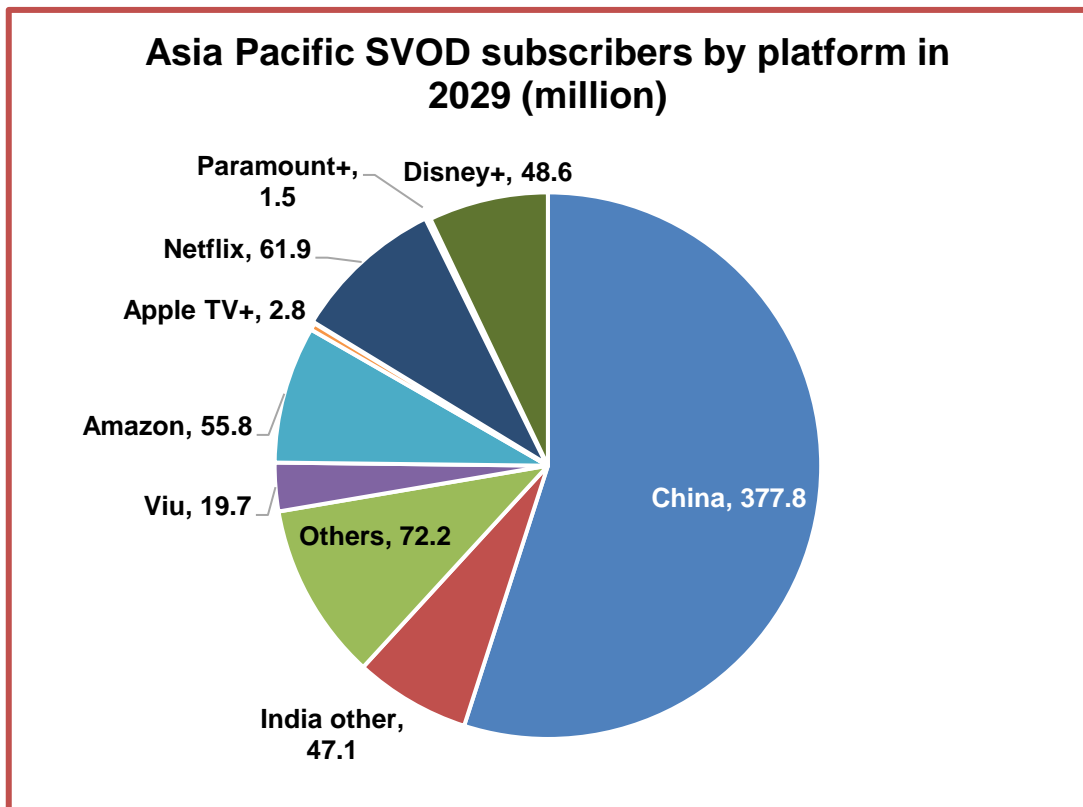
North American AVOD revenues will increase from \$17 billion in 2023 to \$25 billion in 2029. SVOD revenues will climb by \$10 billion between 2023 and 2029 to \$67 billion.

Simon Murray, Principal Analyst at Digital TV Research, said: “Despite being the most mature OTT market by some distance, the US OTT sector continues to grow as cord-cutting show few signs of abating. The US is unique, given the poor state of the pay TV market and the wide OTT choice.”

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

## Asia Pacific to add 93 million SVOD subscriptions

Asia Pacific will have 687 million SVOD subscriptions by 2029, up from 594 million in 2023. China will provide 378 million subscriptions in 2029. From the 93 million additions between 2023 and 2029, India will increase by 22 million, China 17 million, Japan 14 million, South Korea 9 million and Indonesia 8 million.

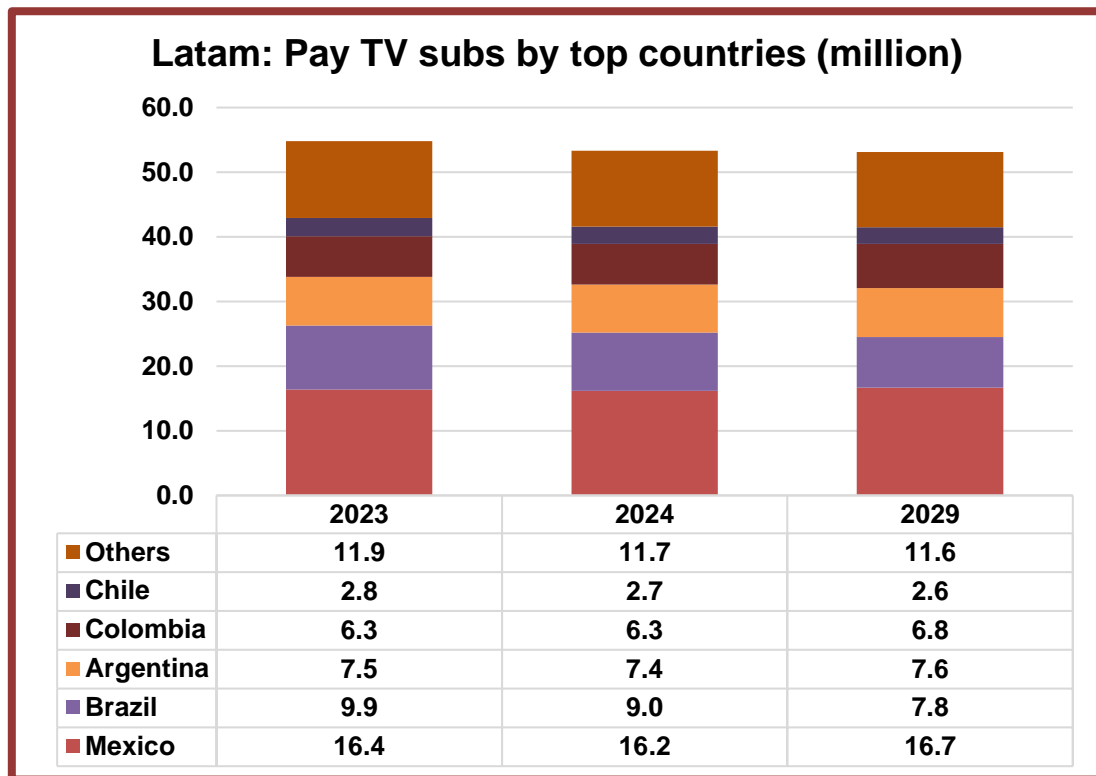


Simon Murray, Principal Analyst at Digital TV Research, said: “Five major US-based platforms will only control a quarter of Asia Pacific’s SVOD subscriptions by 2029 – lower than any other region in the world. These platforms will never gain standalone access to China, the region’s largest market.”

For more information [on the Asia Pacific OTT TV and Video Forecasts report](#), please contact: Simon Murray, [simon@digitaltvresearch.com](mailto:simon@digitaltvresearch.com),

## Latin American pay TV flattens

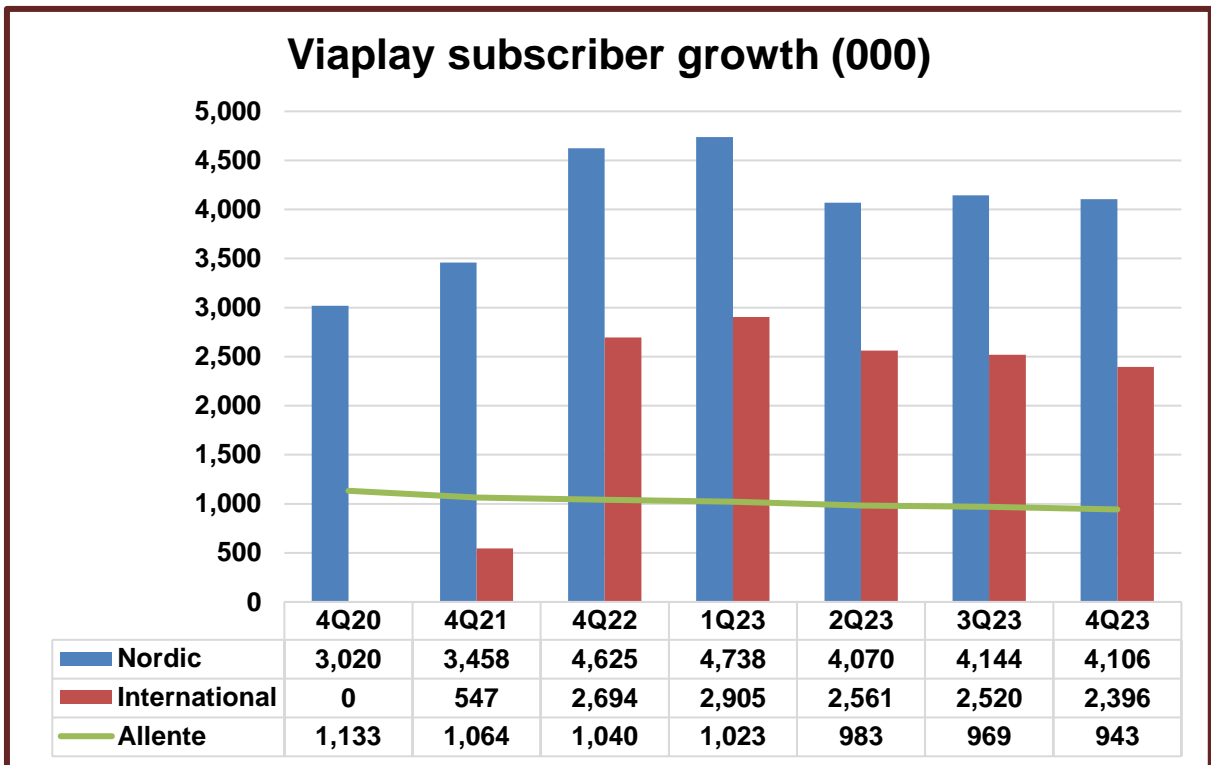
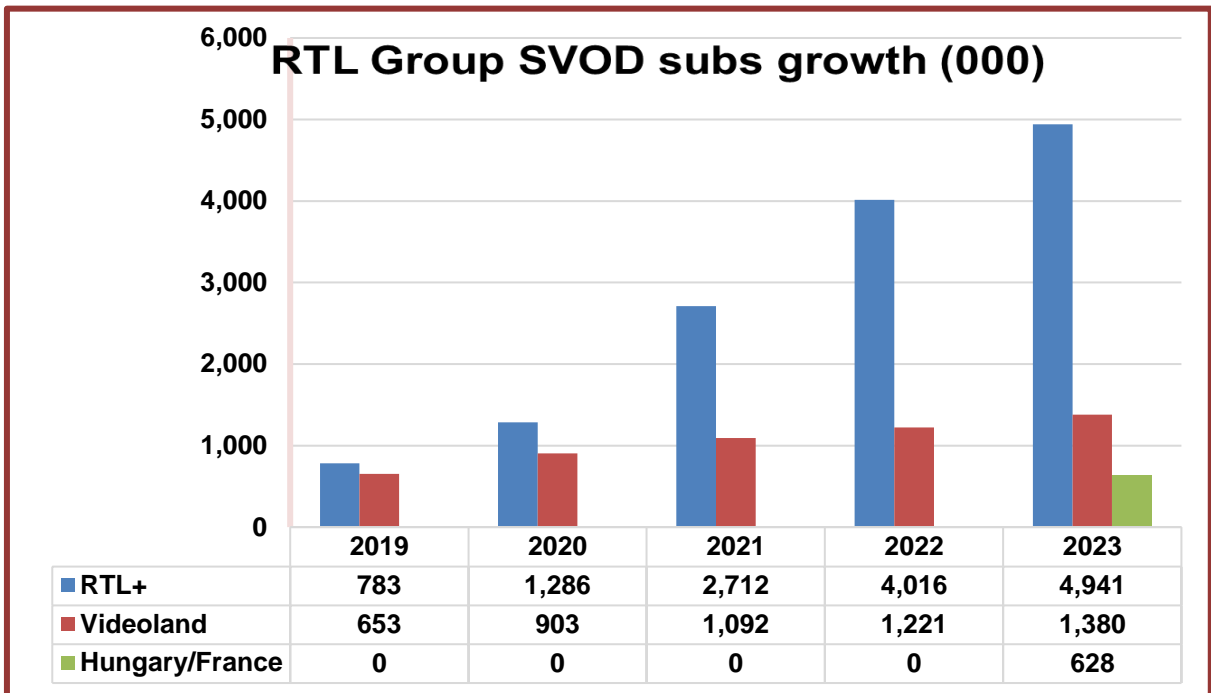
The number of pay TV subscribers in Latin America will stay at 53-54 million. This is down from the peak of 73 million in 2017. Brazil lost 9 million subscribers between 2015 and 2023, but will “only” lose 2 million between 2023 and 2029 to total 7.8 million.



Mexico has more pay TV subscribers than Brazil despite having many fewer TV households. Mexico has lost subscribers since its peak year of 2016 (21 million), but will now settle at around 16 million.

Simon Murray, Principal Analyst at Digital TV Research, said: “Most Latin American countries – not all - are coming out of economic recessions and periods of social unrest, which adversely affected the pay TV sector. Pay TV also has to battle against the well-served SVOD sector, with the major US-based platforms all operational in Latin America.”

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



<b>Canal Plus Group subscribers (000s)</b>						
	2018	2019	2020	2021	2022	2023
<b>France individual</b>	7,826					
<i>Of which retail</i>	4,697	4,548	4,719	5,049	5,252	
<i>Of which wholesale</i>	3,405	3,355	3,436	3,491	3,732	
<i>Of which collective</i>	509	513	523	511	524	
<b>France total</b>	8,611	8,416	8,678	9,051	9,508	9,798
<b>International individual</b>	8,577	11,875	13,448	14,655	14,314	16,561
<i>Of which Europe</i>	2,744	4,899	5,430	5,658	6,335	6,533
<i>Of which Overseas</i>	664	657	809	835	824	768
<i>Of which Africa</i>	4,173	4,899	5,991	6,847	7,597	8,091
<i>Of which Asia Pac</i>	996	1,267	1,218	1,315	1,230	1,169
<b>Total</b>	<b>17,188</b>	<b>20,291</b>	<b>22,126</b>	<b>23,706</b>	<b>25,494</b>	<b>26,359</b>

