

# Western Europe SVOD Forecasts

## Table of Contents

Published in December 2016, this 146-page PDF and excel report contains comprehensive coverage of the SVOD sector (TV episodes and movies) for 17 countries. The report comprises:

- Executive Summary.
- Major SVOD players, including subscriber estimates by country (2010 to 2021) for the major platforms.
- Country-by-country forecasts from 2010 to 2021
- Country profiles

### 17 countries and 60 platforms covered:

Country	No of ops	Operators
Austria	5	Netflix, Amazon, Sky, Maxdome, Myprime
Belgium	4	Netflix; Amazon; Videoland; Yelo
Denmark	4	Netflix; Amazon; HBO; Viaplay
Finland	4	Netflix; Amazon; HBO; Viaplay
France	3	Netflix; Amazon; Canal Play
Germany	5	Netflix, Amazon, Sky, Maxdome, Myprime
Iceland	1	Netflix
Ireland	2	Netflix; Amazon
Italy	5	Netflix; Amazon; Sky; TIMVision; Mediaset Infinity
Luxembourg	2	Netflix; Amazon
Netherlands	4	Netflix; Amazon; Videoland; Myprime
Norway	4	Netflix; Amazon; HBO; Viaplay
Portugal	3	Netflix; N Play; Videoclube
Spain	3	Netflix; Amazon; HBO
Sweden	4	Netflix; Amazon; HBO; Viaplay
Switzerland	4	Netflix; Amazon; Myprime; Teleclub Play
UK	3	Netflix; Amazon; Now TV

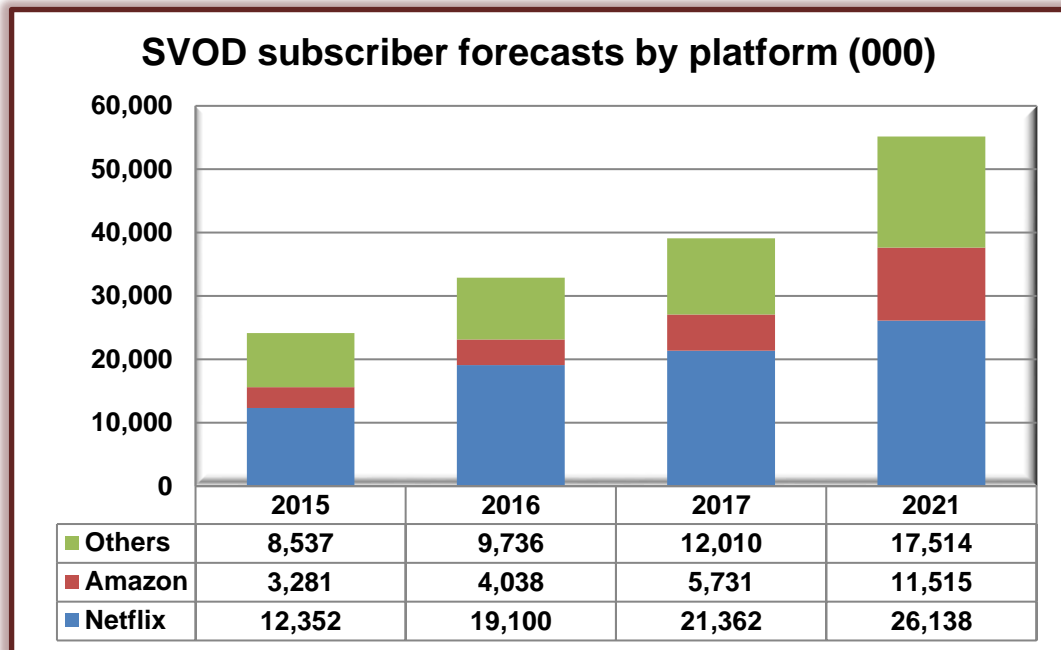


*Forecasts (for each year from 2010 to 2021) contain this detail for 17 countries (as well as subscriber and revenue market shares by operator)*

France SVOD forecasts												
	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
Population (000)												
Total households (000)												
TV households (000)												
Fixed broadband households (000)												
Smartphone subscribers (000)												
Tablet subscribers (000)												
TV HH/Total HH												
Fixed broadband HH/Total HH												
Smartphone subs/Population												
Tablet subs/Population												
SVOD total subscribers (000)												
SVOD homes/TVHH												
SVOD homes/Fixed broadband HH												
SVOD homes/smartphone subs												
SVOD subscribers by operator (000)												
Netflix												
Amazon												
Canal Play												
Others												
Share of SVOD subscribers by operator (%)												
Netflix												
Amazon												
Canal Play												
Others												
SVOD revenues (US\$ mil.)												
SVOD revenues by operator (US\$ mil.)												
Netflix												
Amazon												
Canal Play												
Others												
Share of SVOD revenues by operator (%)												
Netflix												
Amazon												
Canal Play												
Others												
SVOD ARPU by operator (\$)												
Netflix												
Amazon												
Canal Play												
Source: Digital TV Research												

## Netflix & Amazon drive Western European SVOD

Netflix will remain the dominant force in Western European SVOD for the next five years. However, Amazon Video will provide a stiff challenge as Digital TV Research estimates that 15 Western European countries will offer Amazon Prime Video by end-2017.



*Source: Digital TV Research*

Netflix's share of Western European SVOD subscribers will fall from 51% in 2015 to 47% by 2021. However, Amazon's share will grow from 14% in 2015 to 21% by 2021\*. So, these two companies control two-thirds of the region's SVOD subs.

[The Western Europe SVOD Forecasts report](#) expects 55.17 million paying SVOD subscribers across 17 countries by 2021, up from 24.17 million in 2015 and an expected 32.87 million by end-2016. More than 8 million subscribers will be added in 2016 alone.

Simon Murray, Principal Analyst at Digital TV Research, said: "The UK will remain market leader, but Germany will close the gap. The UK accounted for a third of SVOD subscribers in 2015, but this proportion will fall to a quarter by 2021."

He continued: "SVOD growth will be more modest in France, Italy and Spain. In fact, the Netherlands and Sweden will have more SVOD subs than Spain in 2021, despite having much smaller populations."

About 31.5% of the region's TV households will subscribe to a SVOD platform by 2021; up from 14.1% recorded by end-2015. Penetration will remain notably higher in the Nordic countries and the UK. However, four of the five largest countries (France, Germany, Italy and Spain) will be below the Western European average. In fact, Spain will only record 14.0% penetration by 2021.

Western European SVOD revenues will total \$5.87 billion by 2021 – up from \$2.15 billion in 2015. The UK (up by \$800 million between 2015 and 2021 to \$1,534 million) will remain the SVOD revenue leader – generating more than Germany and France combined in 2021. This comes despite German and French revenues more than tripling over the same period.

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

*\* Amazon does not directly charge Prime subscribers to receive video content. However, Digital TV Research believes that Amazon is too big to ignore in the SVOD environment. Therefore, Digital TV Research has assumed that 60% of Prime subscribers watch video, so half the Prime subscription fee for these subs has been allocated to video.*

## Digital TV Research publication schedule for 2016

	Title	Publication Date	Price
1	<a href="#">Digital TV Sub-Saharan Africa Forecasts</a>	January	£900/\$1350/€1125
2	<a href="#">Digital TV Middle East &amp; North Africa Forecasts</a>	January	£900/\$1350/€1125
3	<a href="#">Digital TV Asia Pacific Forecasts</a>	March	£900/\$1350/€1125
4	<a href="#">Digital TV Latin America Forecasts</a>	March	£900/\$1350/€1125
5	<a href="#">Digital TV North America Forecasts</a>	March	£500/\$750/€625
6	<a href="#">Digital TV Eastern Europe Forecasts</a>	April	£900/\$1350/€1125
7	<a href="#">Digital TV Western Europe Forecasts</a>	April	£900/\$1350/€1125
8	<a href="#">Digital TV World Household Forecasts</a>	April	£1300/\$1950/€1625
9	<a href="#">Digital TV World Revenue Forecasts</a>	May	£1300/\$1950/€1625
10	<a href="#">Digital TV World Databook</a>	May	£800/\$1200/€1000
11	<a href="#">Middle East &amp; Africa OTT TV &amp; Video Forecasts</a>	May	£900/\$1350/€1125
12	<a href="#">Asia Pacific OTT TV &amp; Video Forecasts</a>	June	£900/\$1350/€1125
13	<a href="#">Latin America OTT TV &amp; Video Forecasts</a>	June	£900/\$1350/€1125
14	<a href="#">North America OTT TV &amp; Video Forecasts</a>	June	£500/\$750/€625
15	<a href="#">Eastern Europe OTT TV &amp; Video Forecasts</a>	July	£900/\$1350/€1125
16	<a href="#">Western Europe OTT TV &amp; Video Forecasts</a>	July	£900/\$1350/€1125
17	<a href="#">Global OTT TV &amp; Video Forecasts</a>	July	£1500/\$2250/€1875
18	<a href="#">Asia Pacific Pay TV Operator Forecasts</a>	August	£900/\$1350/€1125
19	<a href="#">Middle East &amp; Africa Pay TV Operator Forecasts</a>	August	£900/\$1350/€1125
20	<a href="#">Latin America Pay TV Operator Forecasts</a>	August	£900/\$1350/€1125
21	<a href="#">North America Pay TV Operator Forecasts</a>	September	£500/\$750/€625
22	<a href="#">Eastern Europe Pay TV Operator Forecasts</a>	September	£900/\$1350/€1125
23	<a href="#">Western Europe Pay TV Operator Forecasts</a>	September	£900/\$1350/€1125
24	<a href="#">Global Pay TV Operator Forecasts</a>	October	£1500/\$2250/€1875
25	<a href="#">Middle East &amp; Africa SVOD Forecasts</a>	October	£900/\$1350/€1125
26	<a href="#">Asia Pacific SVOD Forecasts</a>	October	£900/\$1350/€1125
27	<a href="#">Latin America SVOD Forecasts</a>	November	£900/\$1350/€1125
28	<a href="#">North America SVOD Forecasts</a>	November	£500/\$750/€625
29	<a href="#">Eastern Europe SVOD Forecasts</a>	November	£900/\$1350/€1125
30	<a href="#">Western Europe SVOD Forecasts</a>	December	£900/\$1350/€1125
31	<a href="#">Global SVOD Forecasts</a>	December	£1500/\$2250/€1875

[PLEASE CLICK HERE FOR MORE INFORMATION ON OUR LATEST PUBLICATIONS](#)

[PLEASE CLICK HERE TO ACCESS OUR CORPORATE BROCHURE](#)



digital TV research