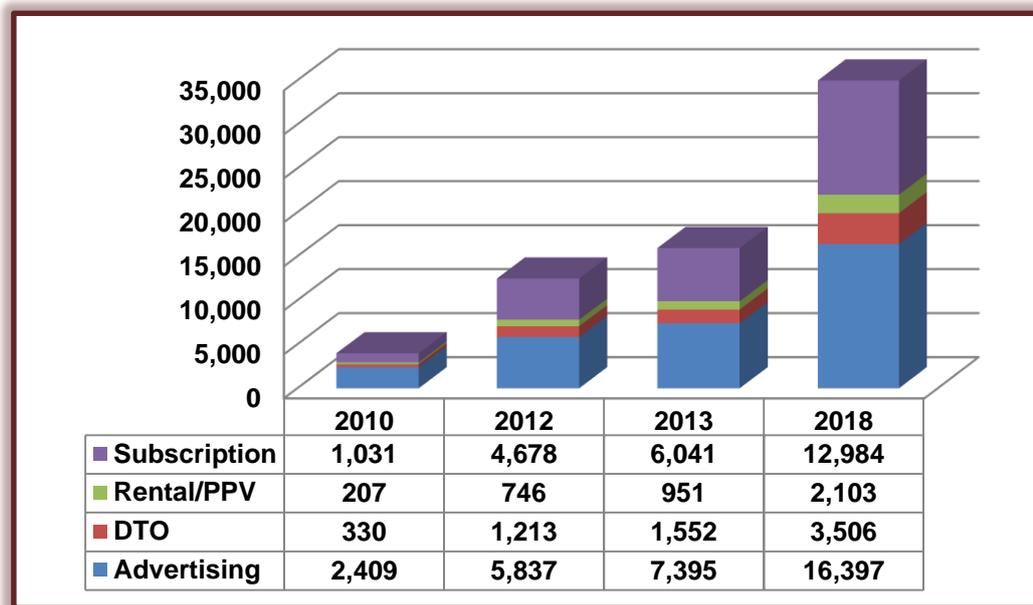


Online TV & video to generate \$35 billion by 2018

Global online TV and video revenues (over fixed broadband networks) will reach \$34.99 billion in 2018, a massive increase from the \$3.98 billion recorded in 2010 and the \$15.94 billion expected in 2013, according to the **Online TV and Video Forecasts** report from Digital TV Research. By 2018, 520 million homes in 40 countries will watch online television and video (both paid-for and ad-supported), up from 182 million in 2010.

The OTT [over-the-top] TV sector is on the brink of a huge take-off as the key players expand internationally, broadband penetration increases, technology advances and as new partnerships are announced on a daily basis.

Global online TV and video revenues by source (\$ million)



Source: Digital TV Research

Online TV and video advertising has been the key driver for the OTT sector, with revenues of \$7.4 billion expected in 2013, up from \$2.4 billion in 2010. Rapid advertising expenditure growth will continue, to reach a global total of \$16.4 billion in 2018. However, advertising's share of total OTT revenues will fall from 60.6% in 2010 to 46.9% in 2018.

The fastest growing paid-for OTT revenue stream will be subscription services. Although the likes of Netflix and Hulu Plus are already reasonably well established as streaming subscription services in North America, international markets have been relatively untouched - until now.

Online television and video subscription revenues (SVOD) will soar from \$1 billion in 2010 to \$6 billion in 2013 and onto \$13 billion in 2018. The number of homes paying a monthly fee to receive SVOD packages will climb from 21.9 million in 2010 to 67.8 million by end-2013 and onto 160.6 million in 2018.

The move towards subscription services will stifle the pay-per-view or rental market somewhat as they provide similar consumer propositions. However, online TV and video rental/pay-per-view revenues will still expand rapidly, climbing from \$207 million in 2010 to \$2,103 million in 2018.

The fast take-up of subscription services will also adversely affect download-to-own buying patterns. However, DTO revenues are forecast to be \$3,506 million in 2018, up from \$330 million in 2010.

Online TV and Video Forecasts:

Table of Contents

Published in October 2013, this 115-page PDF report comes in six parts:

- Executive Summary which discusses the burning OTT TV and video issues as well as giving top-line analysis of the forecasts.
- Succinct profiles of the main content providers and platforms, such as Apple, Amazon, Google, Hulu, Netflix, Lovefilm, YouTube, Facebook, Blockbuster, Xbox, PlayStation, Sony Entertainment Network, BBC iPlayer, YouView and Dailymotion.
- Country-by-country profiles.
- Global forecasts summary from 2010 to 2018
- Comparison forecast tables for 40 countries.
- Individual country forecasts for 40 territories.

40 countries covered:

Argentina	Australia	Austria	Belgium
Brazil	Canada	China	Czech Rep.
Denmark	Finland	France	Germany
Greece	Hong Kong	Hungary	India
Indonesia	Ireland	Israel	Italy
Japan	Malaysia	Mexico	Netherlands
New Zealand	Norway	Poland	Portugal
Romania	Russia	Singapore	South Africa
South Korea	Spain	Sweden	Switzerland
Taiwan	Turkey	UK	USA

Forecasts (for each year from 2010 to 2018) contain the following detail for each country:

Total households (000)
TV households (000)
Fixed broadband households (000)
Broadband households/Total households (%)
Online video households (000)
Online video households/Broadband households (%)
Online SVOD/subscription homes (000)
Online SVOD/subscription homes/TV households (%)
Online advertising total (US\$ mil.)
Online video advertising (US\$ mil.)
Download-to-own revenues (US\$ mil.)
Pay-per-view/rental revenues (US\$ mil.)
Online video subs/SVOD revenues (US\$ mil.)
Total online video revenues (US\$ mil.)
Online video advertising/Broadband households (US\$)
Download-to-own revenues/Broadband households (US\$)
Pay-per-view revenues/Broadband households (US\$)
Online video subs revenues/Broadband households (US\$)
Total online video revenues/Broadband households (US\$)
Online video advertising/online video households (US\$)
Download-to-own revenues/online video households (US\$)
Pay-per-view revenues/online video households (US\$)
Online video subs revenues/online video households (US\$)
Total online video revenues/online video households (US\$)

