digital TV research

October 2018

About us

Digital TV Research specialises in providing cutting-edge business intelligence for the television industry.

Our clients can purchase targeted, electronically-delivered products and rely on our extensive experience for tailored projects.

We publish more than 25 reports each year for more than 350 clients.

What makes us so different from other research providers?

- The full extent of our global coverage: 138 countries across 7 regions
- Annual detailed pay TV and OTT forecast updates of each country
- Experience (30+ years)
- Flexible, customised research: no need to buy everything in an annual subscription.
- Competitive and reasonable prices

Each country profile comes in three parts:

- Outlook: Subscriber forecasts via charts, graphs and bullet points in a PDF document;
- Detailed excel workbook covering each year from 2010 to 2023;
- Insight: Detailed analysis in a PDF document.

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Digital TV Research publication schedule for 2018			
	Title	***Publication***	**Price**
1	**Sub-Saharan Africa Pay TV Forecasts**	*January*	£1200/€1440/$1560
2	**Middle East & North Africa Pay TV Forecasts**	*January*	£1200/€1440/$1560
3	**Asia Pacific Pay TV Forecasts**	*April*	£1200/€1440/$1560
4	**Latin America Pay TV Forecasts**	*March*	£1200/€1440/$1560
5	**North America Pay TV Forecasts**	*March*	£500/€600/$650
6	**Eastern Europe Pay TV Forecasts**	*March*	£1200/€1440/$1560
7	**Western Europe Pay TV Forecasts**	*March*	£1200/€1440/$1560
8	**Global Pay TV Subscriber Forecasts**	*April*	£1500/€1800/$1950
9	**Global Pay TV Revenue Forecasts**	*April*	£1500/€1800/$1950
10	**Global Pay TV Operator Forecasts**	*April*	£1500/€1800/$1950
11	**Pay TV Subscriber Prospects**	*May*	£800/€960/$1040
12	**Pay TV Revenue Prospects**	*May*	£800/€960/$1040
13	**vMVPD and D2C TV Forecasts**	*May*	£900/€1,080/$1170
14	**Netflix Forecasts**	*May*	£700/€840/$910
15	**Sub-Saharan Africa OTT TV & Video Forecasts**	*June*	£1000/€1200/$1300
16	**Middle East & North Africa OTT TV & Video Forecasts**	*July*	£1000/€1200/$1300
17	**Asia Pacific OTT TV & Video Forecasts**	*July*	£1000/€1200/$1300
18	**Latin America OTT TV & Video Forecasts**	*August*	£1000/€1200/$1300
19	**North America OTT TV & Video Forecasts**	*August*	£500/€600/$650
20	**Eastern Europe OTT TV & Video Forecasts**	*September*	£1000/€1200/$1300
21	**Western Europe OTT TV & Video Forecasts**	*September*	£1000/€1200/$1300
22	**Global OTT TV & Video Forecasts**	*September*	£1800/€2160/$2340
23	**Global SVOD Forecasts**	*September*	£1500/€1800/$1950
24	**TV Forecasts**	*October*	£1500/€1800/$1950
25	**Western Europe TV Outlook**	*October*	£1200/€1440/$1560
26	**TV Databook**	*October*	£1000/€1200/$1300
27	**SVOD Outlook by Country**	*October*	£1000/€1200/$1300
28	**European TV Databook**	*November*	£750/€900/$975
29	**SVOD Databook**	*November*	£650/€780/$845

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3	**Middle East & North Africa Pay TV Forecasts**	*February*	£1000/€1200/$1300
4	**Middle East & North Africa OTT TV and Video Forecasts**	*February*	£1000/€1200/$1300
5	**Asia Pacific Pay TV Forecasts**	*March*	£1000/€1200/$1300
6	**Asia Pacific OTT TV and Video Forecasts**	*March*	£1000/€1200/$1300
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19	**Pay TV Subscriber Outlook by Country**	*September*	£1000/€1200/$1300
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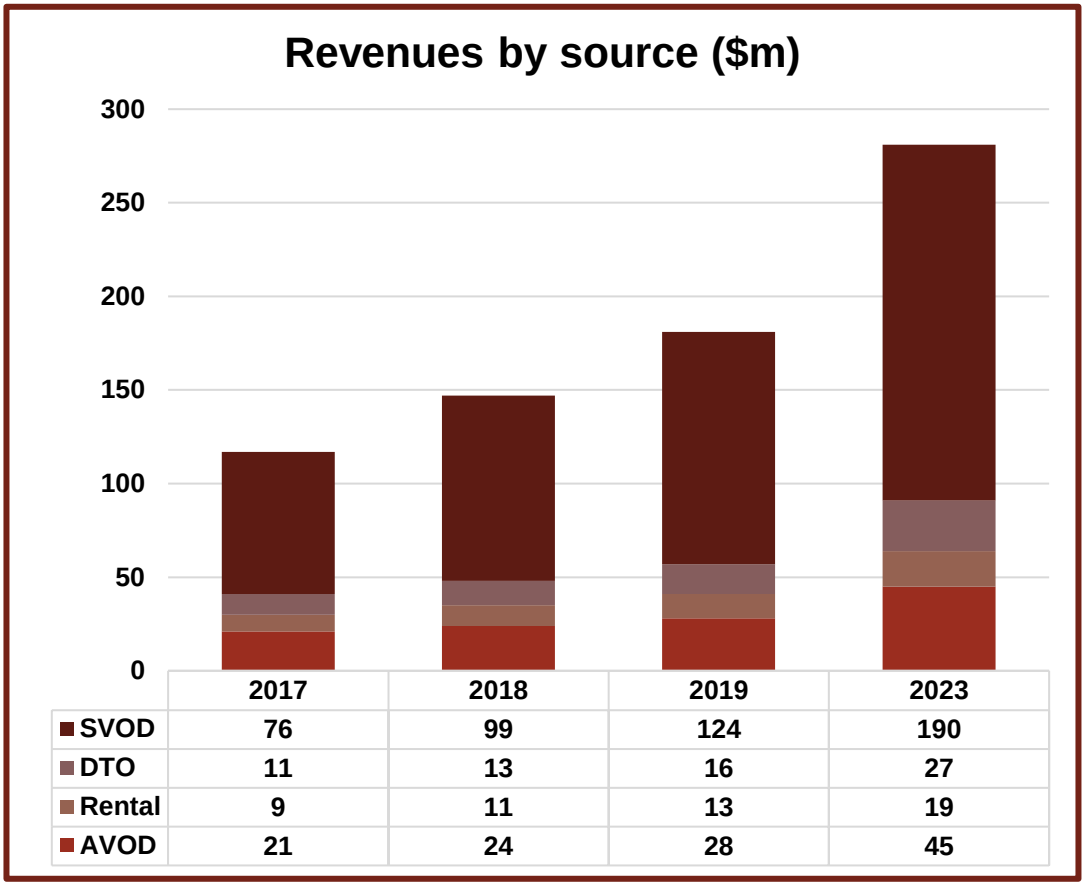
Outlook: Chile OTT TV & video forecasts



	2017	2018	2019	2023
SVOD	76	99	124	190
DTO	11	13	16	27
Rental	9	11	13	19
AVOD	21	24	28	45

- **OTT TV & video revenues will grow from $117 million in 2017 to $281 million by 2023.**
- **SVOD revenues will be $190 million by 2023 (two-thirds of the total), up from $76 million in 2017.**
- **Advertising on OTT sites will provide $45 million to the 2023 total, double the $21 million in 2017.**
- **The government is considering adding VAT to foreign digital platforms.**
- **The OTT sector is crowded and competitive**
- **Chile is one of the wealthiest and most stable countries in the region.**

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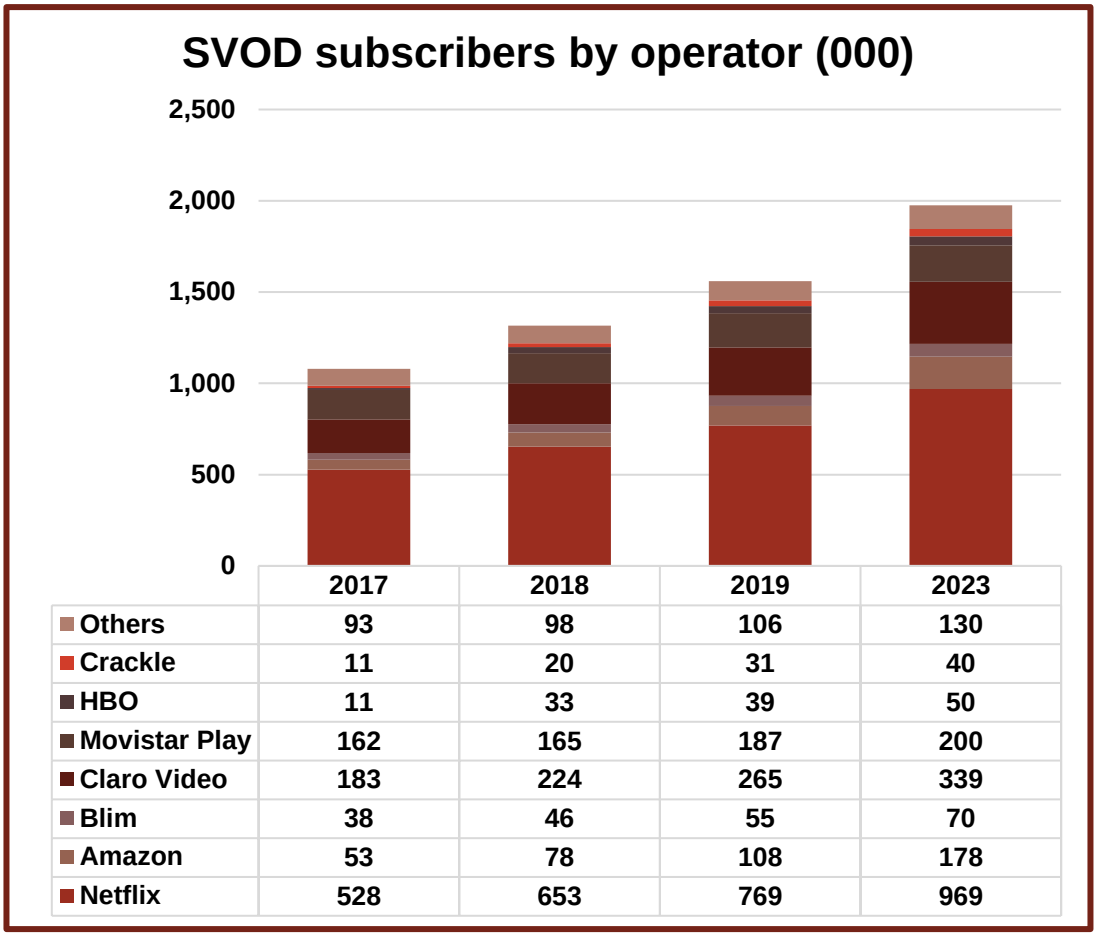
Outlook: Chile OTT TV & video forecasts



	2017	2018	2019	2023
Others	93	98	106	130
Crackle	11	20	31	40
HBO	11	33	39	50
Movistar Play	162	165	187	200
Claro Video	183	224	265	339
Blim	38	46	55	70
Amazon	53	78	108	178
Netflix	528	653	769	969

- **There were 1.08 million SVOD homes by end-2017, with this total growing to 2.00 million in 2023.**
- **SVOD penetration of TV households will climb from 20% in 2017 to 35% by 2023**
- **Netflix will account for about half the total SVOD subscribers. Netflix is offered by VTR**
- **Claro Video will remain in second place, followed by Movistar Play and Amazon Prime Video.**
- **HBO launched as a standalone SVOD platform in June 2017.**

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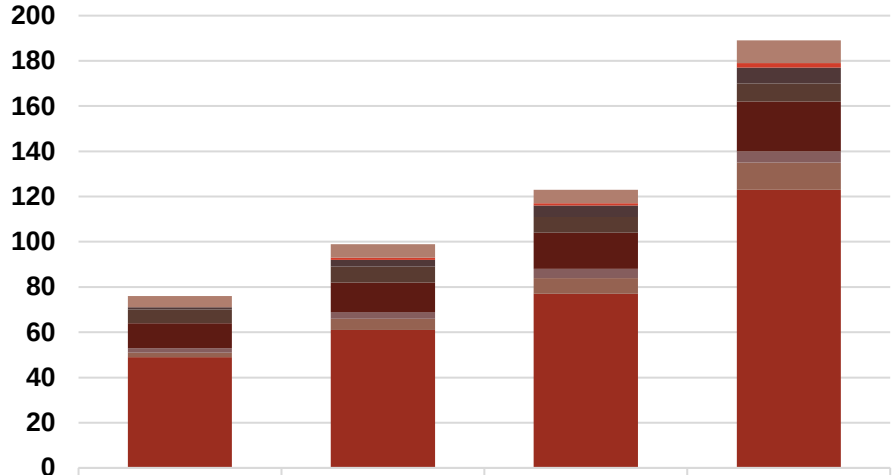
Outlook: Chile OTT TV & video forecasts

SVOD revenues by operator ($m)



	2017	2018	2019	2023
Others	5	6	6	10
Crackle	0	1	1	2
HBO	1	3	5	7
Movistar Play	6	7	7	8
Claro Video	11	13	16	22
Blim	2	3	4	5
Amazon	2	5	7	12
Netflix	49	61	77	123

- **SVOD revenues will be $190 million by 2023, up from $76 million in 2017.**
- **Netflix dominates SVOD revenues and will take two-thirds of the 2023 total.**
- **Claro Video, its nearest rival, will remain a long way behind.**

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Chile OTT TV & video forecasts

	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023
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														
OTT fixed bband hh (000)														
OTT TV & video HH/Fixed bb HH														
OTT TV & video HH/TV HH														
OTT TV & video smartph subs (000)														
OTT TV & video HH/smartph subs														
OTT TV & video total (000)														
SVOD subscribers (000)														
SVOD/TVHH														
SVOD/Fixed broadband														
SVOD/Smartphone														
TV rental transactions (000)														
Movie rental transactions (000)														
Total rental transactions (000)														
TV download-to-own trans (000)														
Movie download-to-own trans (000)														
Total download-to-own trans (000)														
Online advertising total (US$ mil.)														
Online advg for OTT sites (US$ mil.)														
Online TV rental revenues (US$ mil.)														
Online movie rental revs (US$ mil.)														
Online rental revenues (US$ mil.)														
Download-to-own TV revs (US$ mil.)														
DTO movie revs (US$ mil.)														
DTO video revs (US$ mil.)														
SVOD revenues (US$ mil.)														
OTT TV & video revenues (US$ mil.)														

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Chile OTT TV & video forecasts

	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023
SVOD subscribers by operator (000)														
Netflix														
Amazon Prime Video														
Blim														
Claro Video														
Movistar Play														
HBO														
Crackle														
Others														
Share of SVOD subscribers by operator (%)														
Netflix														
Amazon Prime Video														
Blim														
Claro Video														
Movistar Play														
HBO														
Crackle														
Others														
SVOD revenues by operator (US$ mil.)														
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Share of SVOD revenues by operator (%)														
Netflix														
Amazon Prime Video														
Blim														
Claro Video														
Movistar Play														
HBO														
Crackle														
Others														
Source: Digital TV Research														

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Chile OTT TV & video insight

- **OTT TV and video revenues** are forecast to grow from in $117 million in 2017 and to $281 million by 2023. Online advertising expenditure on OTT sites [AVOD] will reach $45 million in 2023, up from $21 million in 2017. The government is considering adding VAT to foreign digital platforms.

Main assumptions behind the forecasts
• The OTT sector is crowded and competitive.
• Chile is one of the wealthiest and most stable countries in the region.
Source: Digital TV Research

- **SVOD revenues** will double from $76 million in 2017 to $190 million in 2023. The number of SVOD subscribers will double from 1.08 million at end-2017 to 2.00 million in 2023.

- **Netflix** has operated in Chile since September 2011, with 528,000 subscribers by end-2017. Its subs total will reach 989,000 in 2023. Following a global deal with Liberty, Netflix is offered by VTR. There is plenty of competition.

- **Amazon Prime Video** started operations in November 2016 as part of its global rollout. Subscriptions are cheaper than Netflix at $5.99/month, but Amazon offers little original or local content. We forecast 178,000 Amazon subs by 2023.

- **HBO Go** started in September 2016 as a free service to its existing premium pay TV subscribers. HBO launched as a standalone SVOD platform (CLP7,700/month, $11.99 – expensive by local standards) in June 2017. We forecast 50,000 subs by 2023. HBO Go provides 2,500 titles and 10 linear channels. Local original titles include *Profugos*.

- Owned by Sony Pictures, **Crackle** started in Latin America as an AVOD platform in 2012. It considerably increased its SVOD activity in late 2016. To enhance the SVOD offer, Crackle has signed more than 100 distribution deals in the region, including Claro Video. We forecast 40,000 subscribers by 2023.

- In February 2016, Televisa announced the launch of its **Blim** SVOD platform (across Spanish-speaking Latin America. Televisa has withdrawn its content from Netflix. The platform provides 21,000 hours of content and has more Latin American content (including 10 originals and 70 content partners) than Netflix. Televisa removed its content from Netflix in October 2016. We forecast 70,000 Blim subscribers in Chile by 2023.

- Having started in Argentina in 2009, **Qubit** expanded operations to eight markets (Argentina, Chile, Colombia, Ecuador, Guatemala, Paraguay, Peru and Uruguay). Costa Rica and Panama are likely to follow. The company claimed 100,000 subscribers by end-2016 (half of which were in Argentina).

- Launched in May 2017, Qubit wanted 100,000 users in Chile after its first year. Subscriptions cost CLP4,000/month ($6.23). Subscribers gain access to 3,000 titles, half of which are Hollywood and a quarter Latin American.

- Started in September 2013, **Claro Video** had 183,000 paying subscribers in Chile by end-2017, which is expected to grow to 339,000 by 2023. Claro Play is free to most higher paying postpaid mobile and broadband subscribers for a year.

- Providing 30,000 titles, the SVOD package costs CLP3,500/month ($5.45) to non-Claro mobile and broadband subs or titles can be rented for CLP1,200-1,700/each ($1.87-2.65). Crackle was added in March 2018.

- Subtel reported that America Movil-owned **Claro** had 393,390 (cable and satellite TV, but also including OTT) subs by March 2018. The company has been slowly losing subscribers since end-2013. Claro also had 6.99 million mobile subscribers by June 2018.

- Started in December 2013, **Movistar Play** offers more than 10,000 titles and 71 linear channels. It is free to top-paying residential broadband and mobile subs, but others have to pay for it. Blockbuster movies can be rented for CLP2,290-2,990/each ($3.57-4.66). Access to Netflix will be added in late 2018.

- Movistar Play had 100,000 paying subs by end-2015, 110,000 subscribers by early 2016 (half of which were not previously Telefonica clients). We forecast 200,000 paying subs by end-2023.

- **Telefonica/Movistar** had 679,000 pay TV accesses by mid-2018. Movistar offers subs triple-play bundles, with TV from the satellite TV operation and IPTV. Telefonica had 1.10 million fixed broadband and 8.78 million mobile subscribers by mid-2018.

- **VTR** had 1.07 million video subscribers at March 2018, of which 94% were digital. The operator has offered quad-play services since May 2012. VTR had 223,700 mobile subs by March 2018. More subs are taking double-play bundles at the expense of triple-play.

- Available only to VTR pay TV subscribers, **VTR Play** offers 8,000 on-demand titles, of which 5,000 are free to existing subscribers and the rest rented, and 64 linear channels. Go VTR provides linear channels to pay TV subscribers. VTR will include access to Netflix as part of Liberty Global's deal.

- **Entel** began offering IPTV and fiber services in October 2017. Entel reported 139,000 TV subs at end-2017. Netflix is also available. Entel is Chile's largest telco and mobile (9.27 million subs at March 2018) operator. Entel is constructing a national fiber optic network (up to 300Mbps).

- Subtel reported that Grupo GTD-owned **Telsur** had 105,585 IPTV subscribers by March 2018. Telesur provides access to eight SVOD platforms, including AXN Play, Fox Play and HBO Go.

Chile: Fixed broadband penetration		
Year	**Residential subs (000)**	**Total Subs(000)**
2010	1,584	1,820
2011	1,765	2,025
2012	1,895	2,186
2013	2,007	2,293
2014	2,182	2,501
2015	2,382	2,729
2016	2,577	2,912
2017	2,711	3,065
Source: Subtel		

Chile: Mobile subscriptions (000)				
Year	**Total**	**2G**	**3G**	**4G**
2010	19,852	3,810	1,446	
2011	22,315	4,803	3,155	
2012	23,941	3,989	4,984	
2013	23,661	3,445	6,366	
2014	23,681	1,744	8,610	545
2015	23,206	1,271	7,886	2,398
2016	23,303	730	6,924	6,291
2017	23,013	368	5,555	10,768
Source: Subtel				

Chile: Online advertising expenditure (CLP million)		
	Online	**Total**
2010	39,413	783,297
2011	49,657	862,067
2012	61,703	853,213
2013	78,795	877,406
2014	90,179	813,373
2015	111,756	818,129
2016	136,342	809,760
2017	157,444	800,083
Source: ACHAP		

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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		