

# NextvSeries

C E E & D A C H • 2 0 1 8

**NOVEMBER 29<sup>th</sup> & 30<sup>th</sup>**  
BRISTOL HOTEL, BERLIN

## TELEVISION & TELECOMMUNICATION TRENDS

#nextvcee

Organised by **Dataxis**



**Chris Dziadul**

Editorial Director & Chief East European Analyst

**Broadband TV News**

Pay TV is now by far the most common way of receiving TV services in Central and Eastern Europe (CEE) and DACH. Indeed, some markets, including Romania, have close to 100% Pay TV penetration, while the Czech Republic is one of the few in which FTA services still dominate. Overall, among the 96% of households in the region that owned a TV in 2018, no fewer than 72% subscribed to a Pay TV service.

Despite strong competition from other delivery methods, cable continues to hold its own as the most popular in the region. It had a 41% market share in 2018 and was followed by DTH, IPTV and linear OTT.

Pay TV is also a lucrative market, being worth some 12 billion euros in 2018 and projected to reach around 15 billion euros in 2023. Alongside this will come an increase in ARPU, worth 5 euros in CEE and 17.5 euros in DACH in 2018.

While consolidation is a fact of life in the Pay TV industry, the market remains highly fragmented despite having a few dominant players. In terms of subscriber numbers, Russia's Gazprom Media, the owner of Tricolor TV, occupies top spot in CEE and DACH. It is closely followed by the Russian incumbent telco Rostelecom, which currently accounts for the majority of new Pay TV subscribers in what is a market fast approaching saturation.

Liberty Global and Deutsche Telekom are also key players, though the former is in the process of selling its assets in Germany, the Czech Republic, Hungary and Romania to Vodafone.

Meanwhile, the broadband market across the region is going through far-reaching technological changes, with fibre and high-speed internet access (DOCSIS 3.x) rapidly replacing ADSL and standard cable. It is forecast that by 2023 more of 3/4 of the 120m broadband subscribers in CEE & DACH will be using FTTx than any other technology to access services.

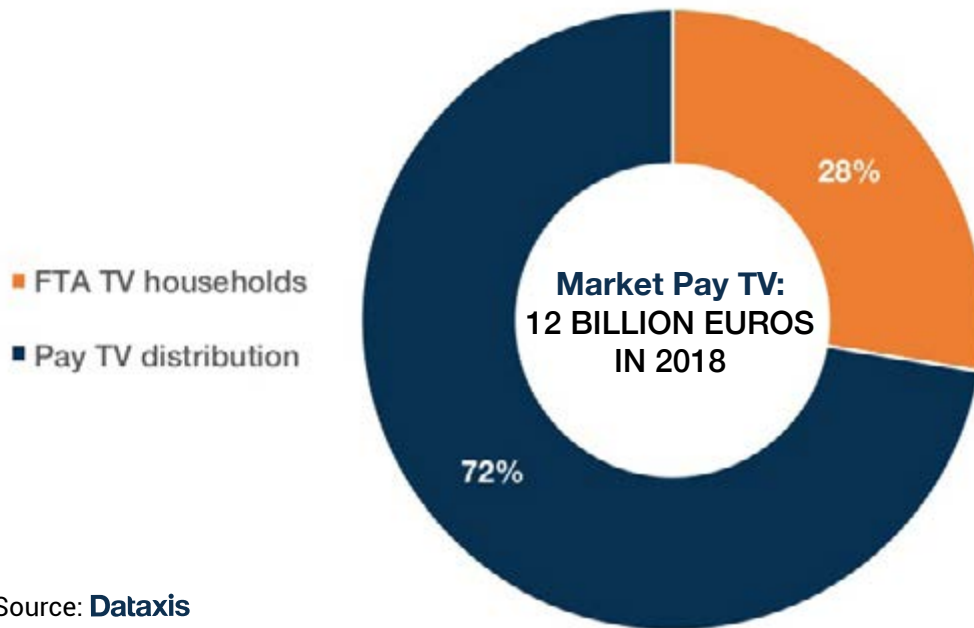
Alongside this will come growth in blended broadband ARPU, which was already worth 10 euros in 2018.

Next Generation Access broadband (NGA) is also being increasingly deployed and several markets in CEE & DACH already have higher levels of NGA penetration as a percentage of the population than the European average. They include Switzerland, Germany, Hungary, Belarus, Bulgaria and Lithuania.

NGA has acted as a catalyst for OTT streaming services, which as of Q2 2018 were already received in 20 million households in CEE & DACH. While Netflix accounts for just over half of the total and Amazon is a leading player, local services also feature strongly. This is especially true in Russia, where ivi.ru, Megogo and Amedia are three of the largest OTT platforms.

## TV MARKET CEE & DACH 2018

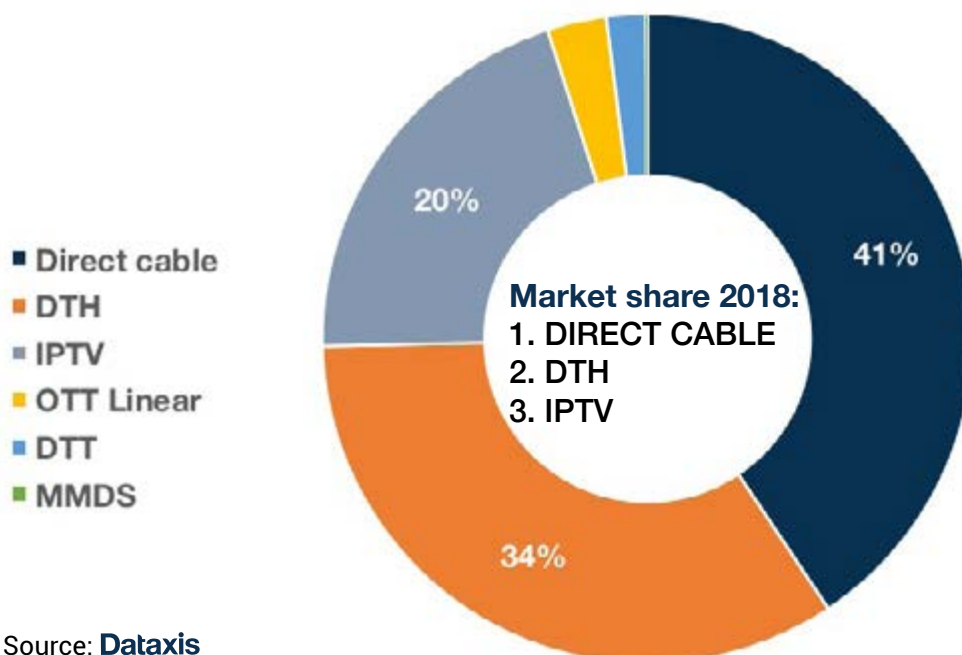
% of households



Source: **Dataxis**

## PAY TV MARKET CEE & DACH 2018

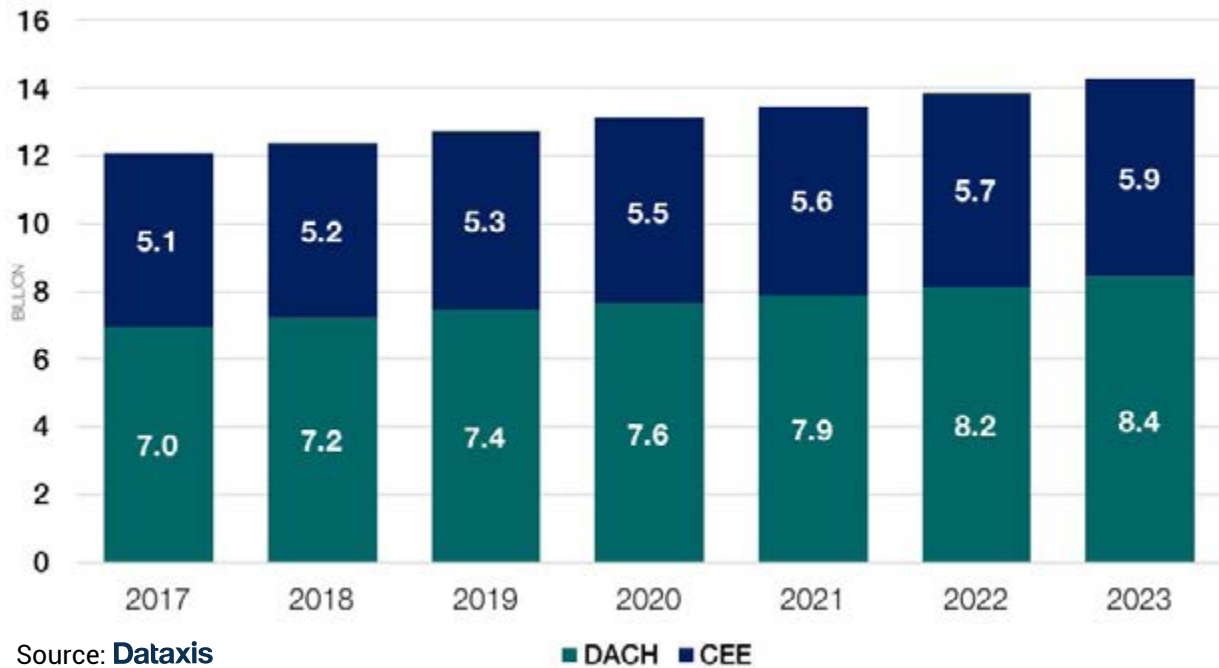
% of subscribers



Source: **Dataxis**

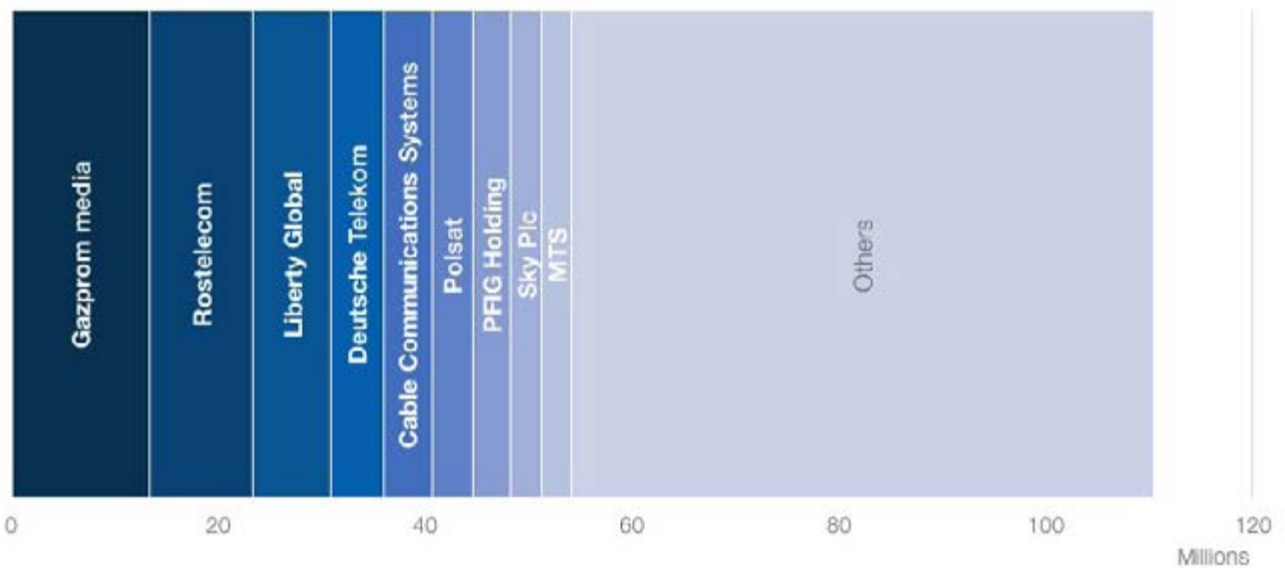
## PAY TV REVENUES CEE & DACH

euros



## MARKET SHARE BY GROUP CEE & DACH Q2 2018

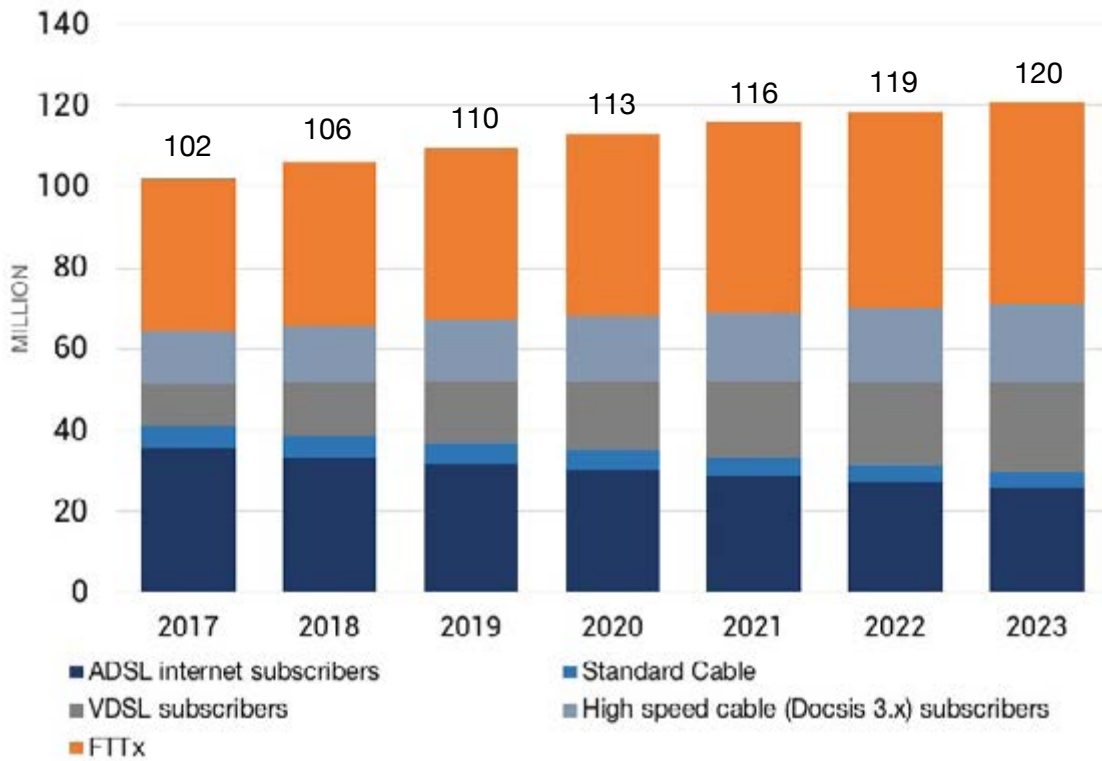
Number of subscribers



# Broadband

## BROADBAND MARKET BY TECHNOLOGY CEE & DACH

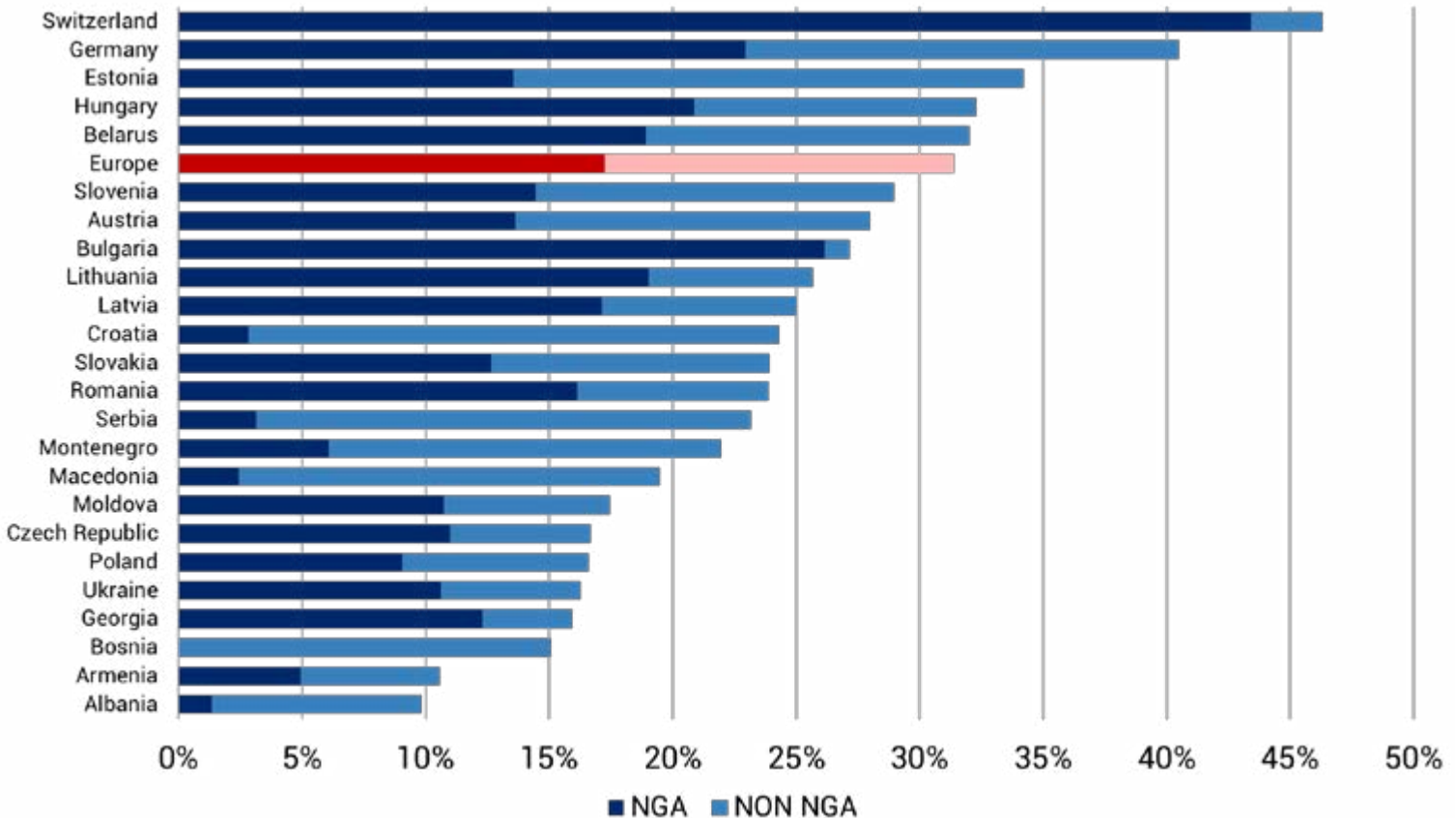
Number of subscribers



Source: **Dataxis**

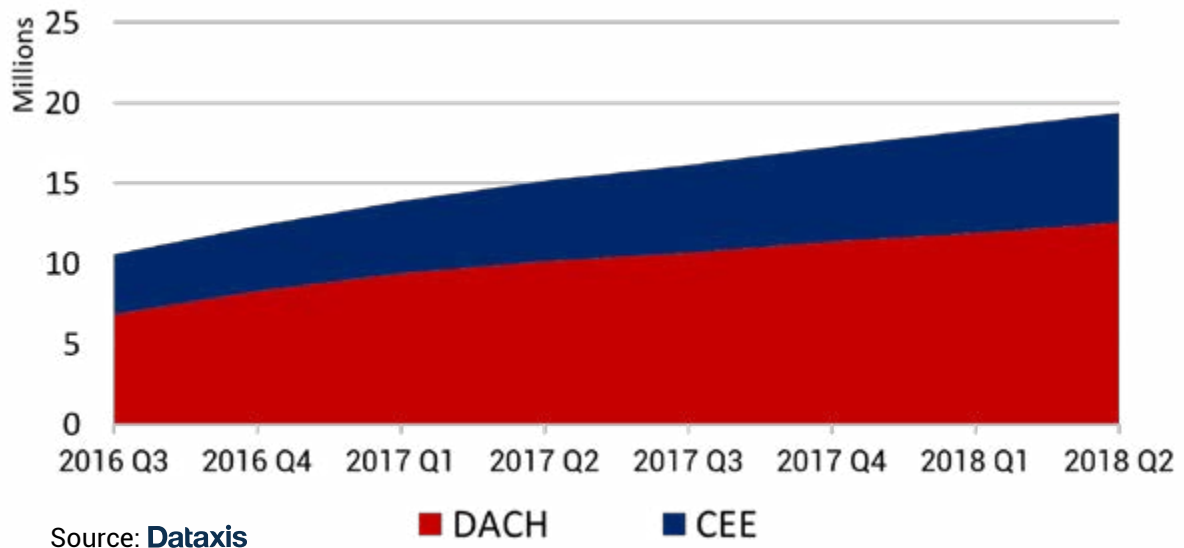
## FIXED BROADBAND PENETRATION CEE & DACH

% population



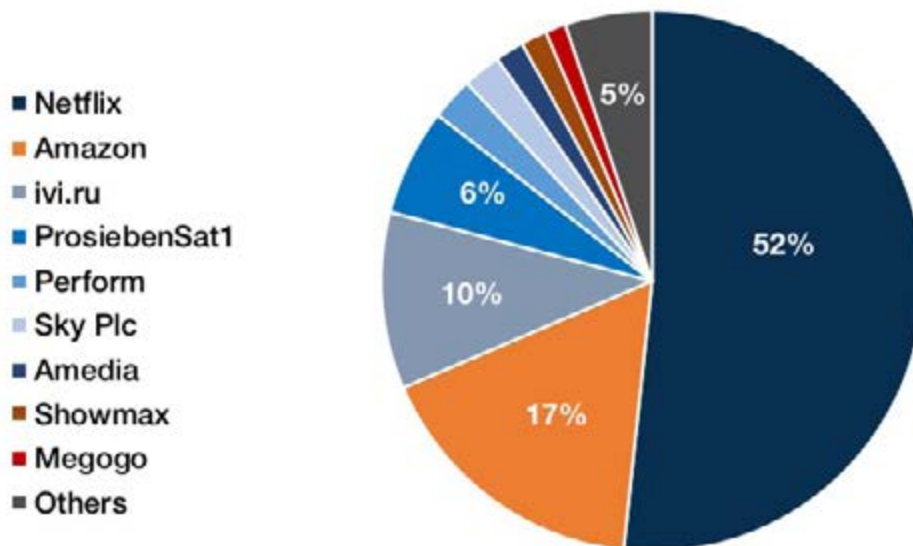
Source: **Dataxis**

## OTT STREAMING SERVICES CEE & DACH subscribers



## OTT STREAMING SERVICES MARKET SHARE CEE & DACH Q2 2018

Number of subscribers



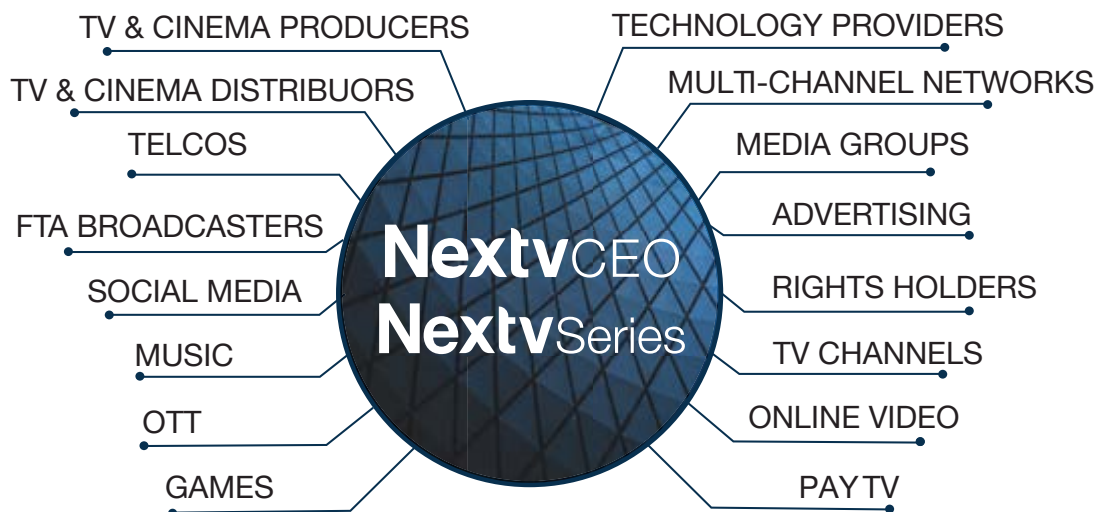
Countries included: Albania, Armenia, Austria, Belarus, Bosnia, Bulgaria, Croatia, Czech Republic, Estonia, Georgia, Germany, Hungary, Kosovo, Latvia, Lithuania, Macedonia, Moldova, Montenegro, Poland, Romania, Russia, Serbia, Slovakia, Slovenia, Switzerland, Ukraine

Source: **Dataxis**

NexTV Series Afrique Francophone	Abidjan	March 20th & 21st
NexTV CEO Africa	Cape Town	May 14th, 15th & 16th
NexTV Series South America	Buenos Aires	May 14th & 15th
NexTV Series Colombia & Andean	Bogota	June 27th
NexTV Series Mexico & Central America	Mexico City	October 8th & 9th
NexTV CEO Latin America	Miami	November 6th & 7th
NexTV Series Europe	Berlin	November 19th & 20th
NexTV Series CEE & DACH	Berlin	November 21st & 22nd
NexTV Series Brazil	São Paulo	November 20th

## THE EVENT & MEDIA PARTNER TO PUSH YOUR NEW TV, OTT & BROADBAND BUSINESS

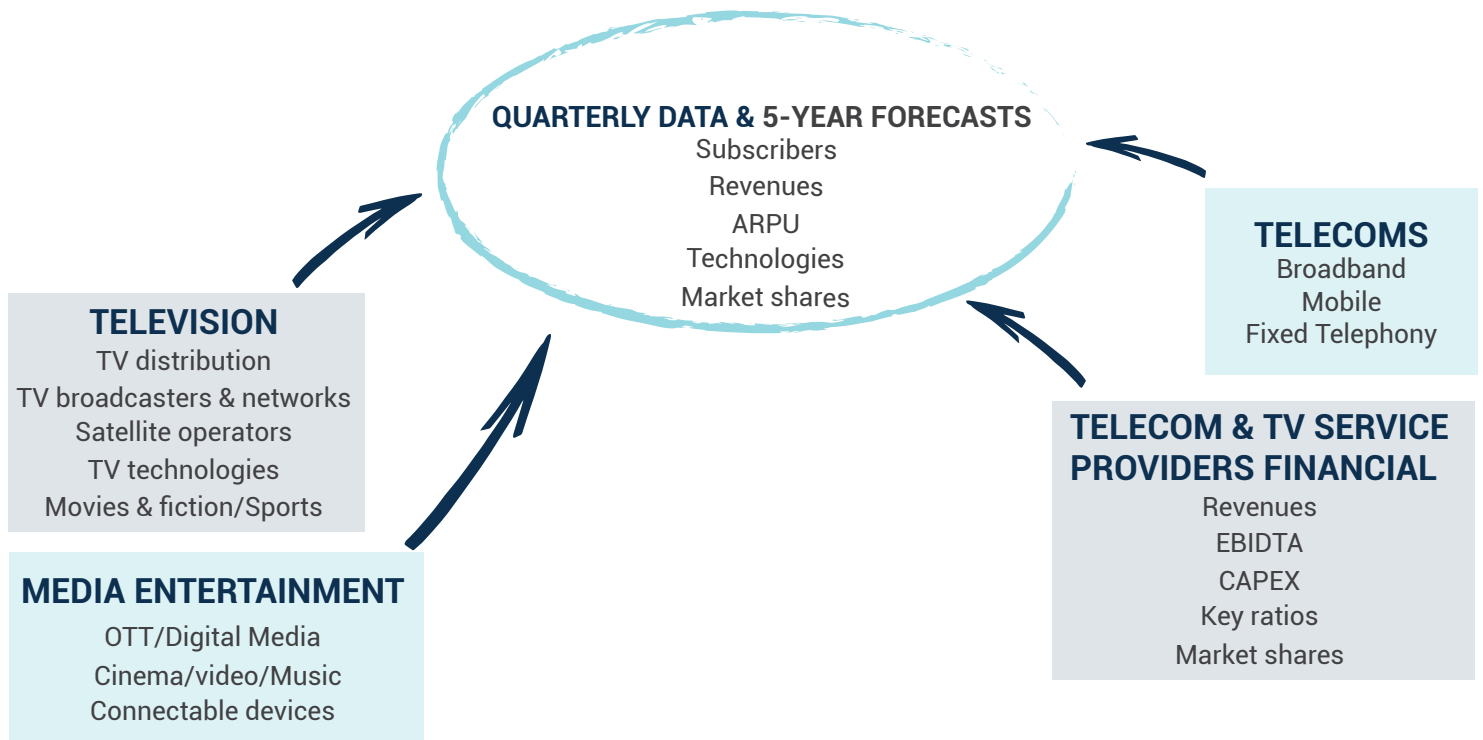
THOUGHT LEADERSHIP	 <b>8+</b> Events in Africa, Europe & Latin America
EXHIBIT, MEET, NETWORK & GENERATE LEADS	 <b>2,000+</b> Attendees
ADVERTISE YOUR BRAND	 <b>300+</b> Leading industry speakers
FIND YOUR REAL TARGETS	 High level networking activities: cocktails, lunches...
	 <b>+80%</b> Senior Executives
	 All TV, Video, Advertising, Media & Entertainment
	 C-level attendees: CEOs, COOs, CTOs, CCOs, CPOs



# Dataxis

I N T E L L I G E N C E

**50+ countries** covered in **CEE & DACH**



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## MORE INFORMATION

**Sa Eva Nébié**, Senior Market Analyst, | Email: [saeva.nebie@dataxis.com](mailto:saeva.nebie@dataxis.com)

### ABOUT DATAXIS

Dataxis is a global firm specializing in the delivery of detailed market research, high quality events, and powerful media covering the TV and Telecom industries in more than 200 countries. Dataxis has offices in Europe, Latin America and Africa. Dataxis Intelligence launched its quarterly online service in 2003 and quickly became recognized as a leading source of information for major operators, technology suppliers, content providers and governmental bodies around the globe. The online intelligence service and market reports provide key indicators, statistics, forecasts and analysis of all TV and Telecom operators worldwide. Please visit [www.dataxis.com](http://www.dataxis.com)