Q2 2024
Analyst insights

Dataxis

TV and video market developments in Central Europe

What can local success stories teach us?





Presented by

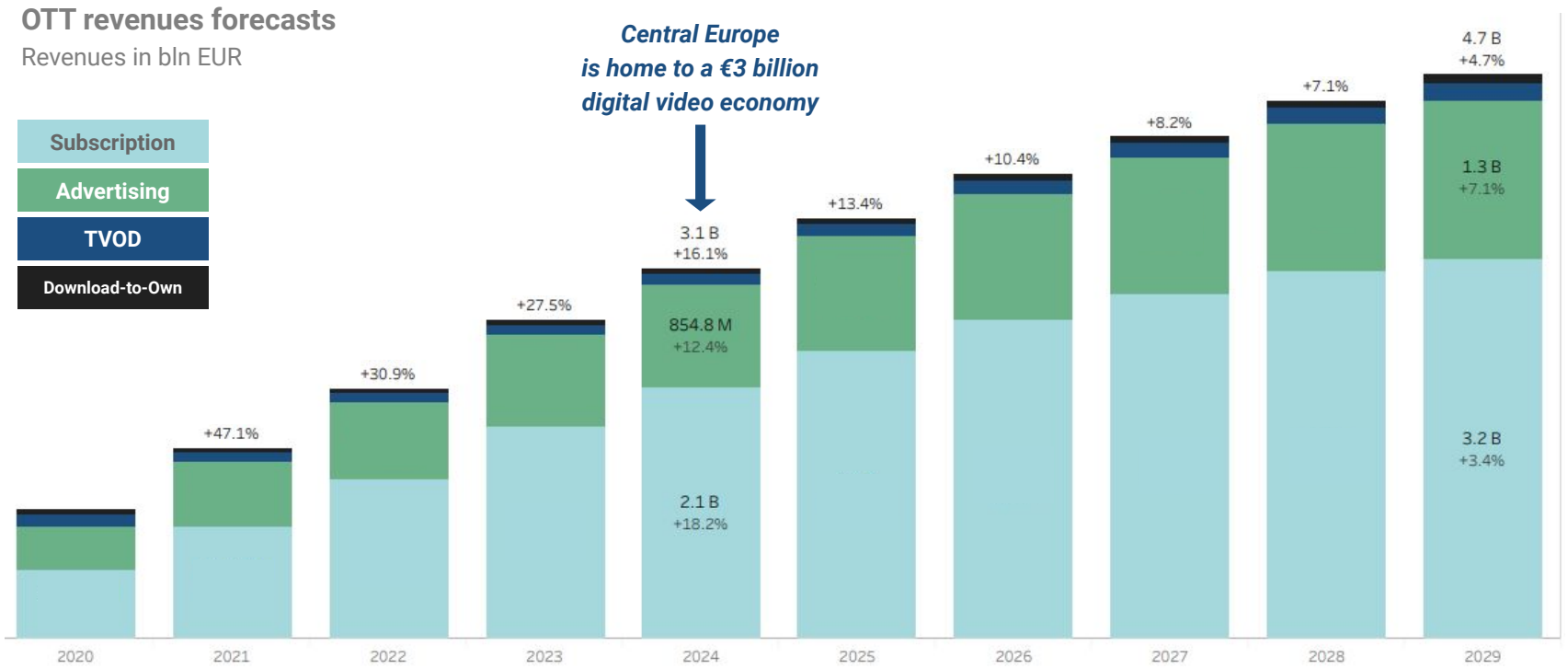
Ophélie Boucaud
Principal Analyst
Dataxis

AGENDA

- **Current status and forecasts** for the Central European TV & video industry
- **Local success stories** and business model analysis
- How are OTT services addressing Central European audiences' **appetite for local content**
- Upcoming launches and **market developments**

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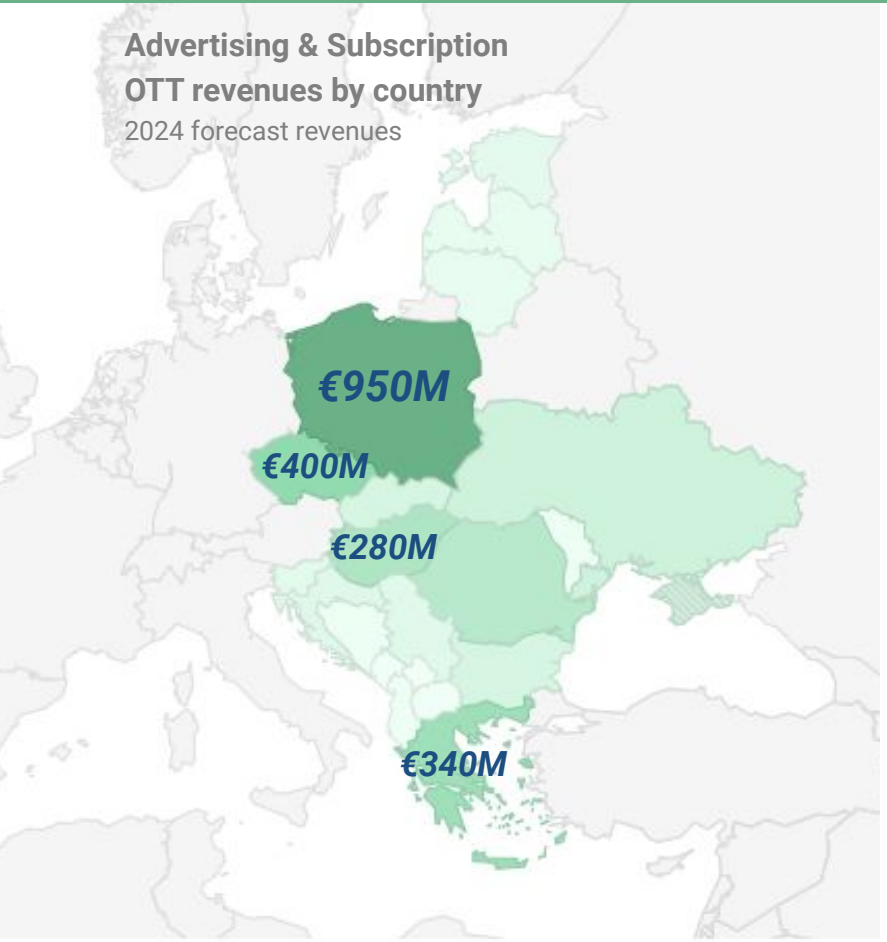
Central Europe: a fast-growing OTT market led by subscription services



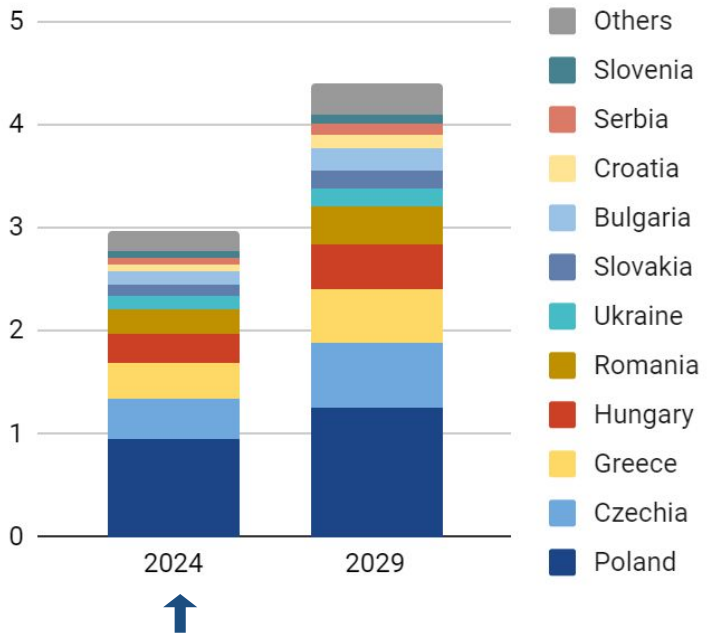
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4 markets account for half the region's OTT revenues

Advertising & Subscription
OTT revenues by country
2024 forecast revenues



Advertising & Subscription
OTT revenues by country
In billion EUR

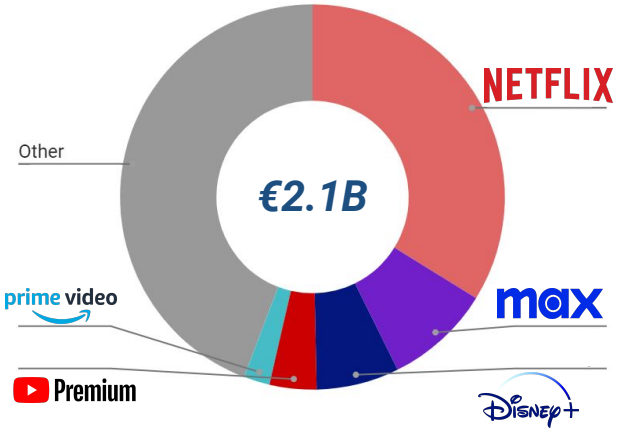


Central Europe is passing the bar of 30 million OTT subscriptions in 2024

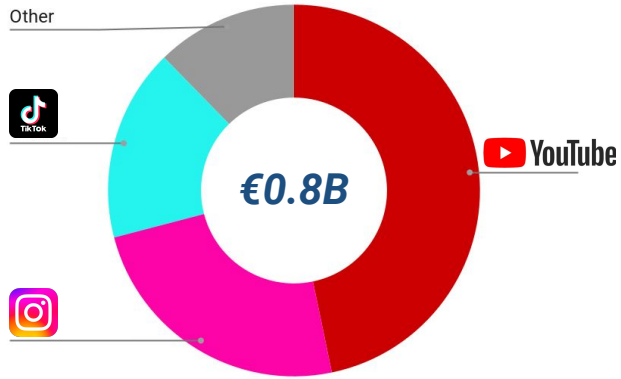
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Global platforms are generating two thirds of revenues across the Central European digital video landscape

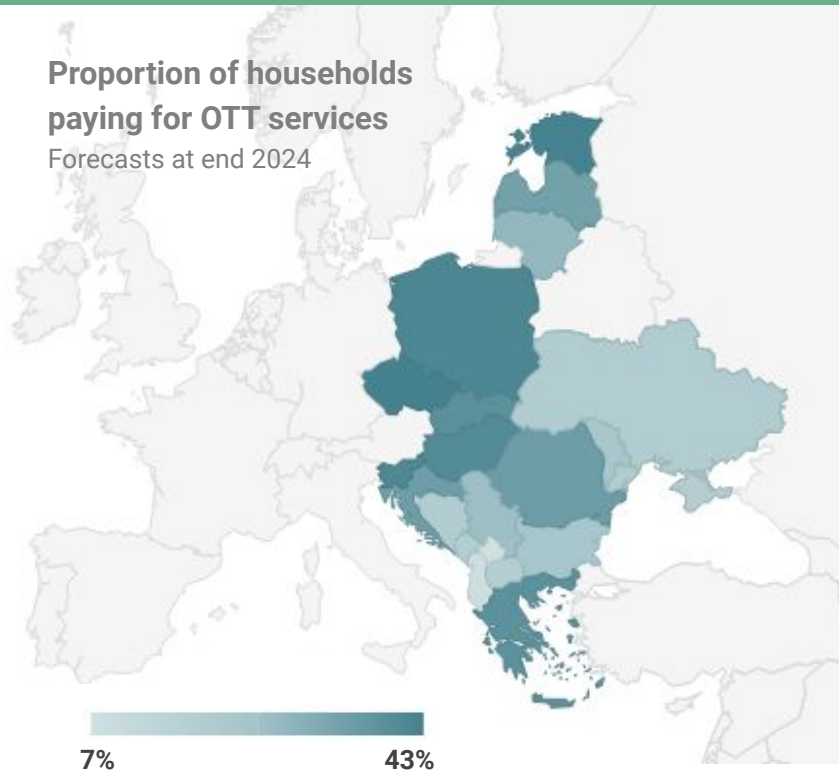
Subscription OTT revenues
Forecasts 2024



Advertising OTT revenues
Forecasts 2024



Proportion of households paying for OTT services
Forecasts at end 2024

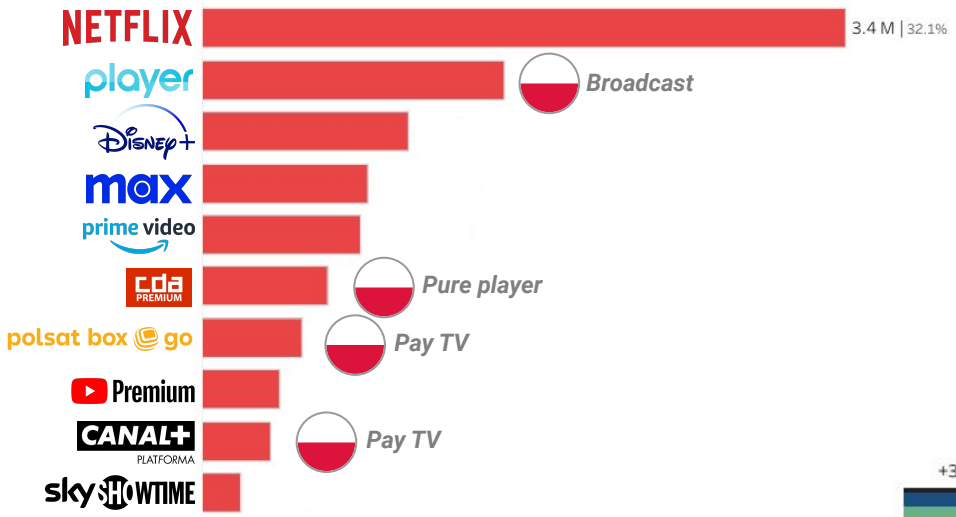


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Polish champions secure significant subscriber bases in a crowded market

OTT subscriptions by actor

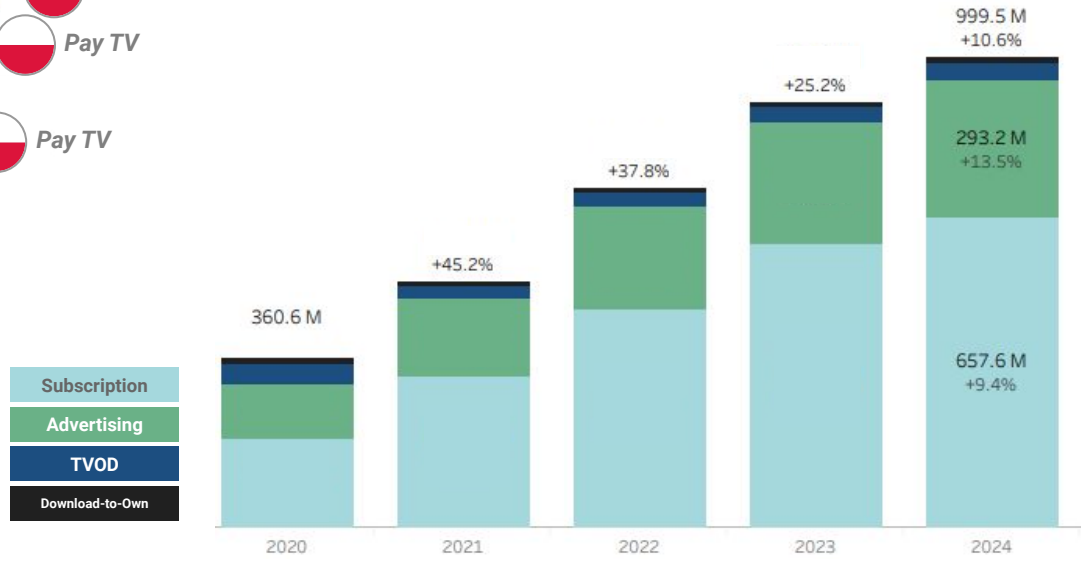
Top 10 Poland, Q2 2024





OTT revenues evolution

Poland, in EUR



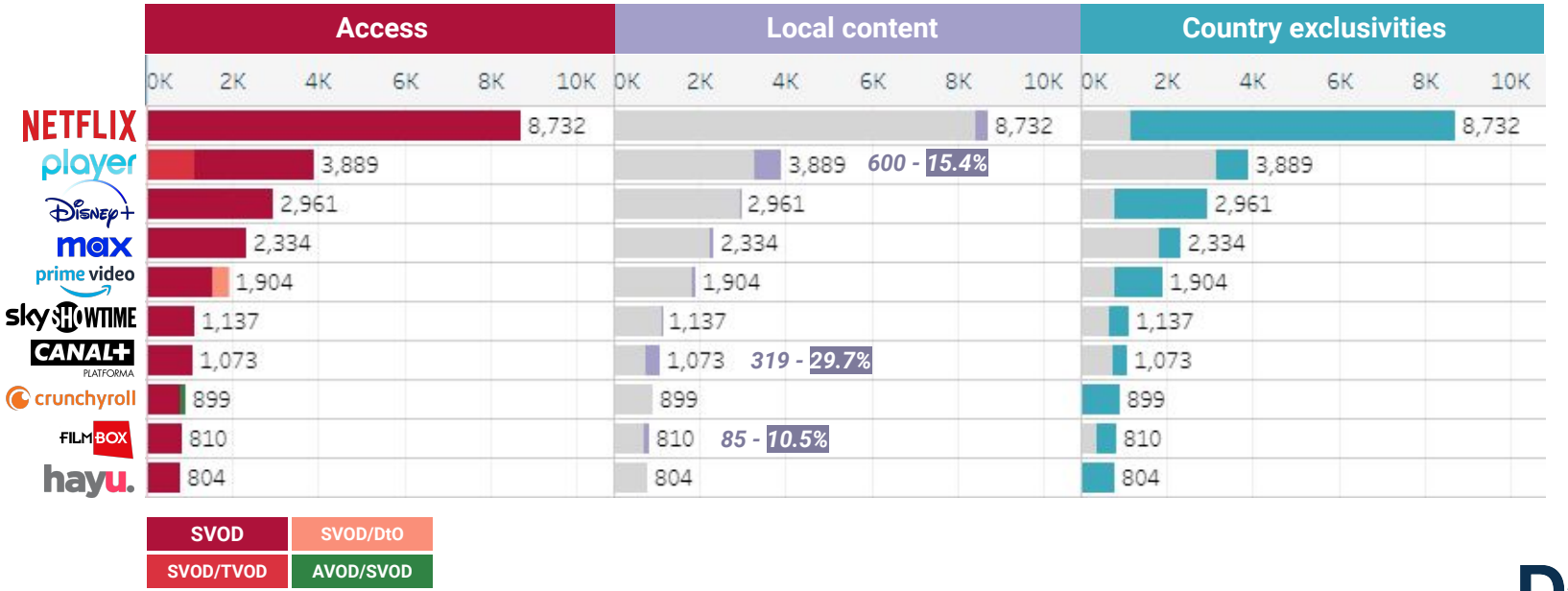
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Local champions can leverage a larger library of local content



Top 10 OTT libraries in Poland

Number of programs in June 2024
Excluding TVOD & DtO

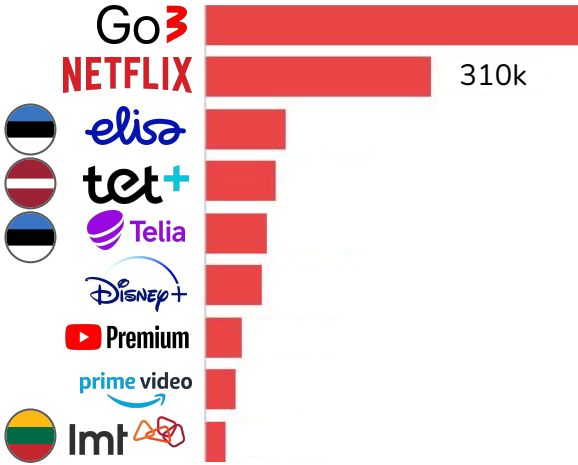


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Home-grown platform stands out as a leader in the Baltics, the only European market where Netflix isn't #1

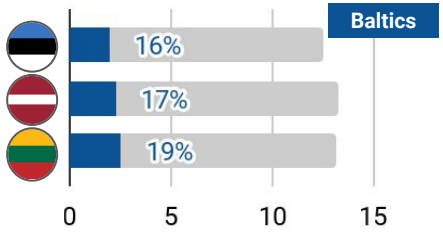
OTT subscriptions by actor

Top 10 Baltics,
Q2 2024, in thousand units



Go3 local content

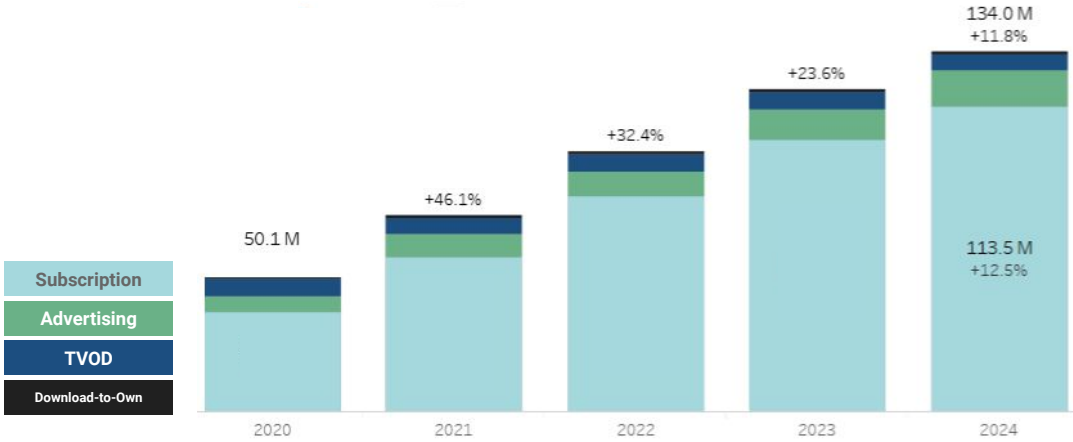
In mln hours of content, June 2024





OTT revenues evolution

Baltics, in EUR



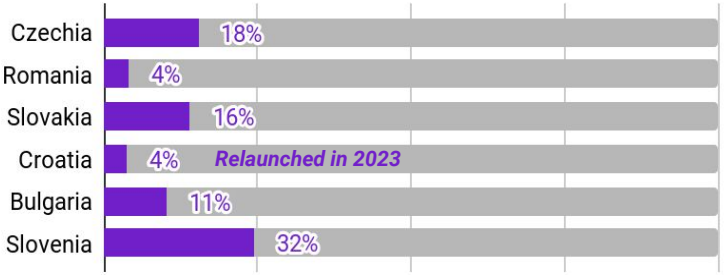
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Voyo's OTT ambitions aim at replicating CME's dominance over linear TV



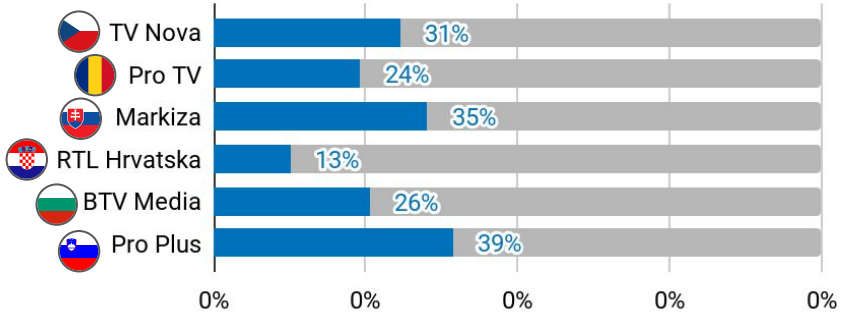
VOYO market share on OTT

Q2 2024 OTT market share in volume of subscriptions



CME Group market share on linear TV

2023 market share over TV networks revenues





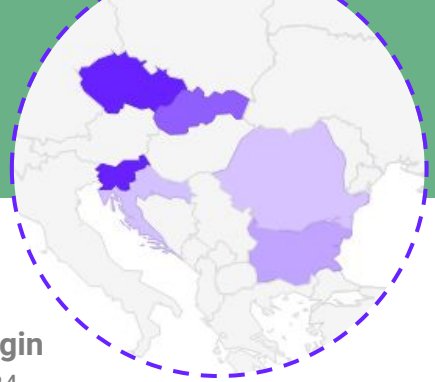
Daniel **Grunt**

H2 2023

- Significant investments in **premium content**
- Focus on a **paying service**
- Keep the offer **simple**

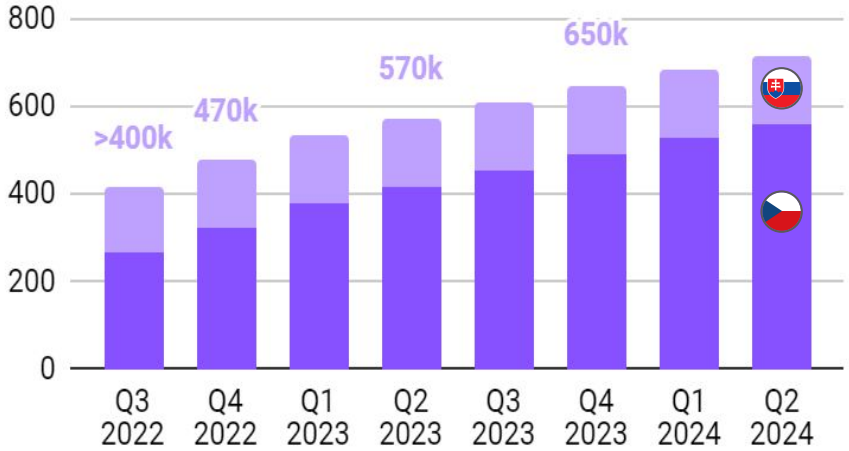
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Voyo's bet on local content is paying off in its top markets



VOYO OTT milestones in Czechia & Slovakia

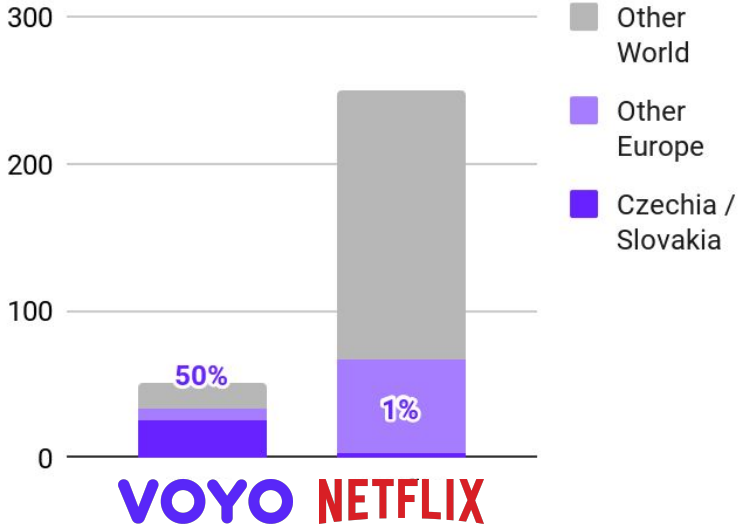
In thousand subscriptions



OTT library production origin

in Czechia & Slovakia, June 2024

In million of hours of content

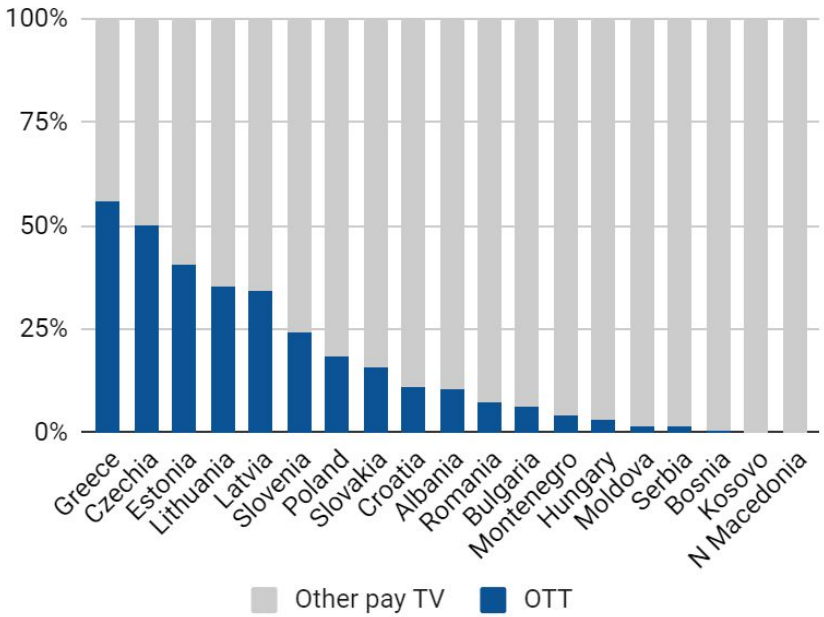


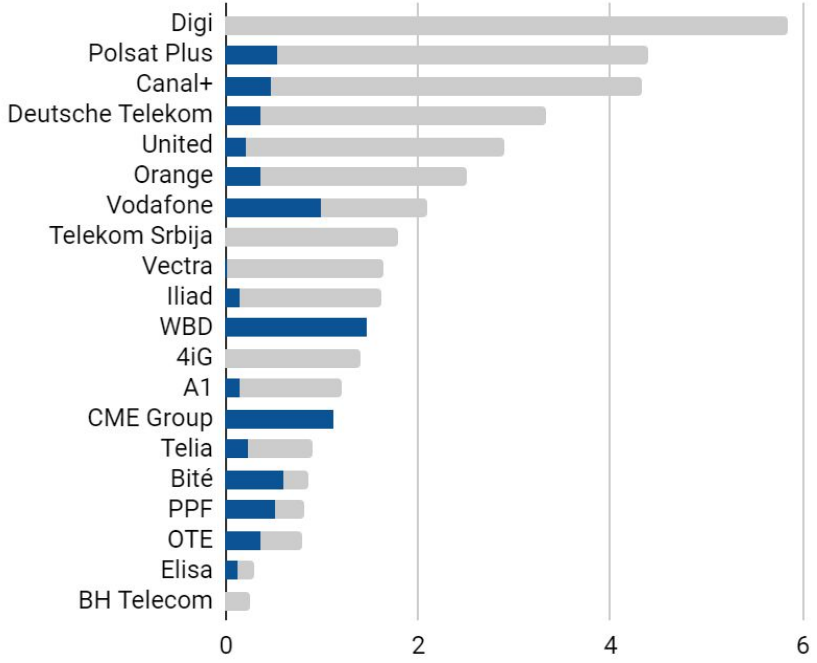
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The Central European pay TV market is increasingly driven by OTT

Share of OTT over total Pay TV subscriptions

Forecasts at end 2024





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OTT platforms enable regional operators to build convergent content and service offers across their markets

EON active markets



A1 Xplore TV active markets





Elena **Petrova**

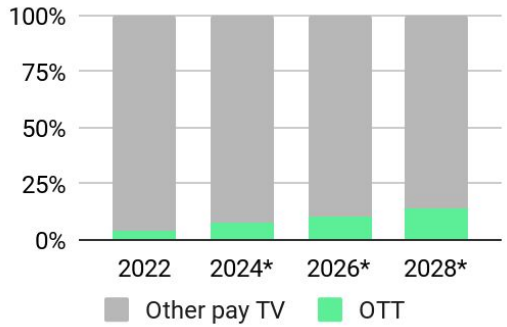
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H1 2024

- **Super aggregation**
- **Emphasis on content** offering: exclusivity, variety, localisation, strong marketing

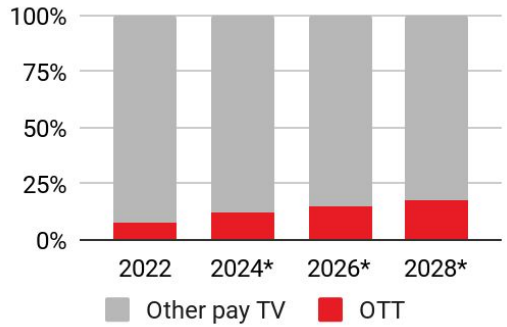
United Group OTT & TV forecasts

In million of subscriptions



A1 Group OTT & TV forecasts

In million of subscriptions



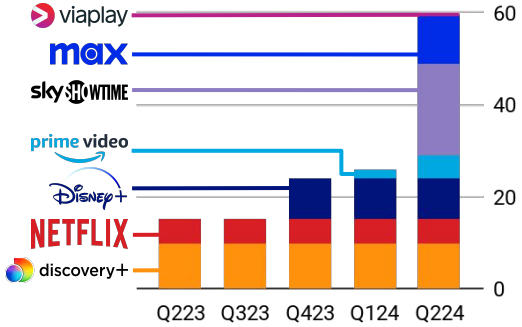
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Can upcoming ad-tier launches boost digital ad revenues and generate a new influx of subscription in CEE?

Pay ad-tier OTT offers in Europe at mid 2024

Chart: Number of markets with launched ad-tier for main OTT platforms

Map: Projected ad-tier presence by end 2024





Jamie **Cooke**

Nextv SERIES | EUROPE

H1 2024

- Different stages of market development in the region
- **Audiences' response to ads**?



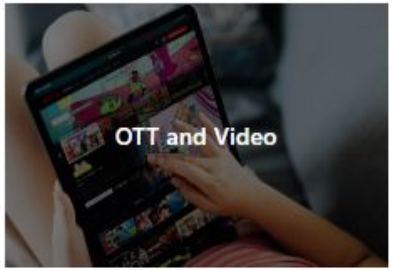
In conclusion

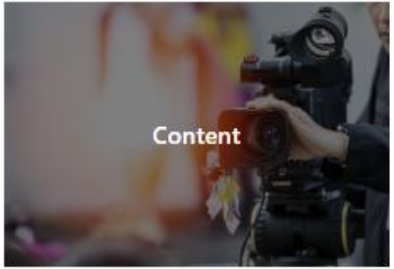
- Rapidly expanding market
  with **double-digit growth** in coming years
- **Promising perspectives** on subscription services
- **Local successes will drive mainstream adoption**
  of OTT services, from BVOD to pay TV
- Ad-supported services opportunities are conditioned
  by the **development of a mature digital ad industry**

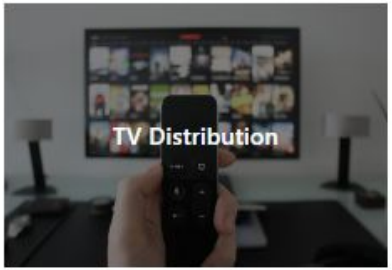
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