

Video-on-Demand Market Assessment, By Component [Software, Services], By Device Type [Mobile Devices, Personnel Computers, Smart TV, Streaming Devices and Gaming Console], By Revenue Model [Subscription Video on Demand, Transactional Video on Demand, Advertisement-Based Video on Demand, Free Ad-Supported Streaming TV, Hybrid Video on Demand, Broadcaster Video on Demand], By Content [Movies, TV Shows, Documentaries, Others], By Region, Opportunities and Forecast, 2017-2031F

Market Report | 2025-01-09 | 234 pages | Market Xcel - Markets and Data

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Report description:

Global video-on-demand market is projected to witness a CAGR of 12.82% during the forecast period 2024-2031, growing from USD 142.01 billion in 2023 to USD 372.66 billion in 2031. Internet penetration stands out as the most critical driver in the growth of the video-on-demand market. As per the data provided by Forbes in 2024, around 5.35 billion or 66% of the world's population has internet access. Moreover, with a high increase in internet penetration mainly in emerging markets, such as in the Middle East and Africa, internet penetration for Egypt rose to 72.2%, up from 1.6% in 2022, which opens significant opportunities for subscription video-on-demand services. Growing the number of affordable smartphones and increasing high-speed broadband penetration ensures that content reaches more people and creates opportunities for on-demand, personalized entertainment. This increased accessibility has created an increase in competition between video providers on demand, compelling providers to diversify their content and employ competitive pricing models. Furthermore, mobile connections have grown to 105.1 million in Egypt. Hence, the growing number of mobile phones and internet connections propels the growth in the forecasted period. For instance, in July 2024, Tubi, Fox Corporation's ad-supported streaming service, launched in the United Kingdom, offers over

20,000 movies and TV episodes, including exclusive Tubi Originals and content from major distributors.

Smartphone Proliferation Drives Growth in Video-on-Demand Market

Smartphone proliferation is significantly fueling the growth of the video-on-demand market. As of 2023, over 54% of the global population, or approximately 4.3 billion people, owns a smartphone, according to the GSMA's State of Mobile Internet Connectivity Report 2023 (SOMIC). Smartphones have emerged as the primary device for access to mobile internet services. According to the study, nearly 4 billion people use mobile internet through a smartphone or about 49% of the world's population. Widespread smartphone adoption enhances video-on-demand accessibility and prompts viewers to stream content anywhere, anytime. The flexibility and convenience attached to it propel higher engagement with video-on-demand services, leading to more subscriptions and usage. For instance, mobile technology continues improving along with streaming, further supporting the growing demand for on-the-go entertainment.

For example, in May 2024, Paramount Global and Charter Communications, Inc. renewed their partnership, including ad-supported Paramount+ Essential and BET+ Essential in Spectrum TV packages at no extra cost and offering these services to internet-only customers.

Global Expansion of Over-The-Top Platforms Fuel the Video-on-Demand Market

Over-the-top (OTT) platforms, along with their global reach, are one of the biggest factors influencing growth in the video-on-demand market. OTT platforms such as Netflix, Disney+, and Amazon Prime Video have expanded their reach to new geographies, thus enhancing video-on-demand service availability and accessibility at unprecedented levels. Different content libraries brought by this widespread reach respond to cultural preferences and languages in other markets. Disney+ was launched in more than 60 countries within a few years of the launch to grow customer and subscription numbers. The expansion has also amplified the competition for video-on-demand services and pursuits of innovation in content and even user experience. More importantly, as OTT companies step out into emerging markets where internet penetration and smartphone numbers go up at the same time, they reach a new audience and, therefore, expand the video-on-demand market further.

For example, in April 2023, Paramount Global expanded EyeQ globally, integrating its vast digital content portfolio into a unified advertising platform. EyeQ will leverage Pluto TV's international reach and new Paramount+ ad tiers in select markets.

Government Initiatives Act as a Catalyst

Governments develop revenue streams within the video-on-demand market through various measures, such as offering tax incentives and grants for content produced locally that will spur the production of richer and more diversified content to attract viewers or increase video-on-demand subscriptions. Governments have spent money developing digital infrastructure, such as high-speed broadband and 5G networks, to access video on demand. Such legislation ensures net neutrality and the constraint of the freedom of internet service providers discriminated against video-on-demand sites. Furthermore, governments promote digital literacy projects that increase greater consumer participation in the use of video-on-demand services. All these activities lead to growth within the video-on-demand market, whose outcome reflects increased revenue generation for both local as well as international video-on-demand service providers.

For example, in February 2023, the United States Department of Defense (DoD) and the National Telecommunications and Information Administration (NTIA) launched the 2023 5G Challenge to advance open 5G ecosystems by improving network efficiency and streaming capabilities.

Subscription Video on Demand (SVoD) Leads the Video-on-Demand Market

The subscription video-on-demand business continues to dominate the video-on-demand segment by offering consumers unlimited access to a wide range of content for a fixed monthly fee. The model is attractive to subscribers, as it creates predictable costs and extensive options in terms of content. As a result, it builds strong consumer engagement and loyalty. Netflix and Disney+, for example, leverage original programming and unique content with the aim of differentiation in the market.

Through the subscription stream, subscription video on demand enjoys stability in revenues and can continually invest in more content and technology, thereby fixing its leadership position in the market against video on demand.

North America Dominates Video-on-Demand Market Share

Further digitization infrastructure, coupled with high internet penetration rates, are some of the prominent factors for North America's dominant position in the video-on-demand segment. This region's huge consumer base and high disposable income attract significant demand for diversified, premium content. The North American region also plays a significant role in innovative

content creation and distribution technologies and continues to set trends that influence global video-on-demand markets. The competitive landscape of the numerous already established and emerging platforms accelerates the development of cutting-edge features and content offerings further, thus setting North America further as a leading video-on-demand market.

For instance, in August 2024, Roku, Inc. released a study indicating that 69% of Canadian TV streamers watch ad-supported content monthly. Additionally, 58% prefer a combination of on-demand and live programming, showcasing changing viewing habits.

Future Market Scenario (2024-2031F)

- Advanced AI will result in much more personalized content recommendations and will enable an experience that is far more engaging.
- The prevalence of 5G will spread efficiently and provide proper streaming quality and high-definition content delivery across remote locations.
- This will directly result in more investment in region-specific content at platforms to cater to diverse preferences for various cultures and expand one's reach across regions.
- More interactive features, including live polling and choose-your-own-adventure stories, will be observed, providing an interactive way of viewing.

Key Players Landscape and Outlook

The video-on-demand market is dynamic, with key players constantly innovating to capture market share. The competition within the video-on-demand market is based on content diversity, technology advancement, and partnerships. For instance, major players invest tremendously in original programming and other exclusive content to attract and retain subscribers. The long-term competitive landscape is likely to be determined by consolidation trends once the market matures. Prominent players would continue to buy out the smaller ones and expand further. Services would differentiate themselves further based on emphasis on personalization and interactivity. Wide internet penetration, mobile usage, and growing consumer preference for on-demand content drive sustained growth in the video-on-demand market.

In August 2024, Amazon.com, Inc. launched Xbox Game Pass Ultimate on Fire TV devices, allowing users to play top Xbox games via cloud gaming without a console. Compatible devices include Fire TV Stick 4K and Fire TV Cube.

In October 2023, Amazon.com, Inc. launched an AI-powered search for Fire TV devices, using Alexa to deliver personalized content recommendations and enhance user experience with natural language queries.

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*Companies mentioned above DO NOT hold any order as per market share and can be changed as per information available during research work.

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