

The streaming wars go global

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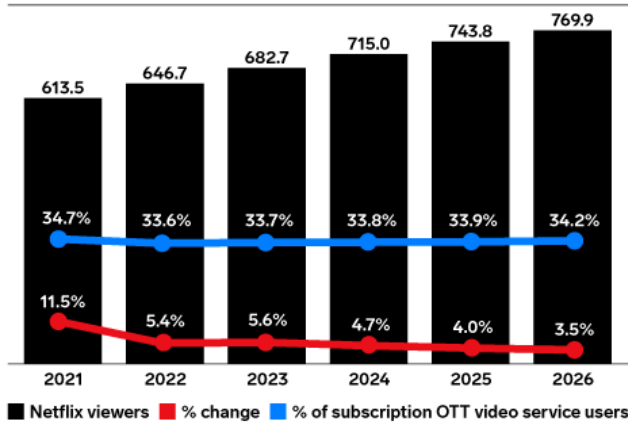
For now, Netflix's viewership is the only sub OTT audience we are able to estimate on a worldwide scale. However, we are slowly building out our projections for two of Netflix's primary international rivals—Disney+ and Amazon Prime Video—and we can now make some useful comparisons across various markets. We believe Netflix remains the most watched service in the world, but it is not alone at the peak.

Note that our projections are not akin to the various companies' self-reported subscriber numbers. Our figures try to account for all the viewers in a household—or wider population—who watch content on one of these services at least once per month via any given access

point. Once we account for large families, group viewing, and rampant password-sharing, viewership totals can end up nearly triple the number of formally paid subscriptions.

Our goal is to determine for marketers how many pairs of eyeballs are tuning in, regardless of who's paying and who isn't: By this measure, Netflix will have an impressive 682.7 million viewers next year. That's about a third of all the sub OTT users in the world, and almost 15% of all internet users.

Netflix Viewers Worldwide, 2021-2026
millions, % change, and % of subscription OTT users



Note: Netflix viewers are individuals of any age who watch Netflix via app or website at least once per month; subscription OTT users are individuals of any age who watch video via any app or website at least once per month that provides paid subscription access to streaming video content over the internet and bypasses traditional distribution; OTT video services are not mutually exclusive; there is overlap between groups
Source: eMarketer, Oct 2022

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On a country-by-country basis, the battle for consumer attention is shaping up to be fierce. We have Netflix viewer estimates for every region in the world, including breakouts for **more than a dozen countries**. We don't have this much detail for its competitors yet, but we do have forecasts for Amazon Prime Video in eight countries.

Comparing the two giants side by side shows that Amazon is more than holding its own. In India, Germany, and Japan, Prime Video will have more viewers than Netflix in 2023.

Netflix Viewers vs. Amazon Prime Video Viewers in Select Countries, 2023

millions

	Netflix	Amazon Prime Video
US	172.2	157.1
India	44.3	59.8
UK	32.4	22.1
Germany	28.1	30.8
France	26.7	13.1
Canada	18.9	13.9
Australia	10.3	4.4
Japan	9.7	15.6

Note: Netflix viewers are individuals of any age who watch Netflix via app or website at least once per month; Amazon Prime Video viewers are individuals of any age who watch Amazon Prime Video via app or website at least once per month; OTT video services are not mutually exclusive; there is overlap between groups

Source: eMarketer, Oct 2022

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Prime Video trails Netflix in the US, where stalwart Hulu also commands a huge audience. Hulu does not operate outside of the US, which changes the dynamics of the competition internationally. Disney+, the only other provider with more than 100 million viewers in the US, is emerging as the primary challenger to Netflix and Amazon globally.

In at least one important country, Disney+ is already the market leader—and that's India. Thanks to its acquisition of Hotstar, Disney+ in India (officially called Disney+ Hotstar as of 2020) will reach 56.5% of the country's sub OTT viewers in 2023. That's only 10.6% of the population, however, so there is plenty of room for growth.

Report by Ethan Cramer-Flood Dec 09, 2022

Worldwide Subscription OTT Users Forecast 2023



