Russia OTT and Pay TV Forecasts

Published in April 2022, this 22-page PDF report covers the converging pay TV and OTT TV episode and movie sectors. The report covers the following:

OTT TV & Video Insight: Commentary on the main players and developments

- Chart: OTT TV & video revenues by AVOD, TVOD, DTO and SVOD for 2021, 2022 and 2027
- Chart: Gross SVOD subscriptions versus SVOD subscribers for 2021, 2022 and 2027
- Chart: SVOD subscribers by operator for 2021, 2022 and 2027
- Forecasts: OTT TV & Video Forecasts for every year from 2020 to 2027
- SVOD Forecasts for Ivi, Megogo, Okko, Amediateka, Premier; Wink; Kion; Kinopoisk; Start
- AVOD forecasts for Ivi; Megogo; Okko; Premier; Wink; Kion; Kinopoisk; Start

Pay TV Insight: Commentary on the main players and developments

- Chart: Breakdown of TV households by platform (digital cable, analog cable, IPTV, pay satellite TV, free-to-air satellite TV, analog terrestrial, free-to-air DTT and pay DTT) for 2021, 2022 and 2027
- Chart: Pay TV revenues by platform (digital cable, analog cable, IPTV, pay satellite TV and pay DTT) for 2021, 2022 and 2027
- Chart: Pay TV subscribers by operator (digital cable, analog cable, IPTV, pay satellite TV and pay DTT) for 2021, 2022 and 2027
- Forecasts: Pay TV Forecasts for every year from 2020 to 2027
- Forecasts for Akado, ER Telecom, MTS, Rostelecom, Beeline/Veon, NTV Plus, Tricolor, Orion

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SAMPLE: Qatar OTT TV & video insight

OTT TV & video revenues are forecast to reach $99 million by 2027, double from $46 million in 2021. SVOD will contribute $81 million in 2027, up from $39 million in 2021. There will be 668,000 SVOD subscriptions by 2027 compared with 362,000 at end-2021. About 58% of the TV households will pay for at least one SVOD subscription by 2027.

Main assumptions behind the forecasts
• The OTT sector is competitive.
• Disney+ will start as a standalone platform in 2022
• Smartphone penetration is very high.
• Fixed broadband penetration is also high.
• High proportion of ex-pats means strong demand for foreign content.

Netflix ($7.99-14.99/month) launched in January 2016. We forecast 213,000 subscribers by 2027; up from 143,000 in 2021. Netflix is carried by Ooredoo.

Amazon Prime Video started operations in November 2016 as part of its global rollout. Subscriptions cost $5.99/month, with little original or local content. We forecast 62,000 Amazon subscribers by 2027.

Apple TV+ started in Qatar with its global rollout in November 2019, with 19,000 subscribers expected by 2027.

Disney+ will end its distribution deal with OSN in 2022 by starting as a standalone platform. We forecast 101,000 subscribers by 2027.

HBO Max and Paramount+ are not expected to start in the Arabic-speaking countries due to their deals with OSN.

OSN (briefly called Wavo. QAR35-79.50/month) launched in August 2017. As well as 27 linear channels, OSN exclusively carries Disney+ originals, Paramount+ and HBO content. We forecast 44,000 subscribers by 2027.

After a cost cutting drive, OSN now places more emphasis on its SVOD platform. OSN has exclusive deals with seven Hollywood studios. It will increase Arabic content to a quarter of the total.

Transmitting in English, Arabic and French, **StarzPlay** has 6,000 hours of Hollywood content as well as 2,000 hours of Arabic content. Discovery+ is on offer. We forecast 140,000 subscribers by 2027.

MBC's **Shahid VIP** provides linear channels as well as on-demand content. Ooredoo carries Shahid VIP. We forecast 65,000 subscribers by 2027.

beIN Connect provides access to 34 linear channels available on the satellite TV package as well as 2,000 on-demand TV episodes and 300 on-demand movies – free to satellite TV subs or $18/month to others.

Hong Kong's **Viu** started operations in Bahrain, Egypt, Jordan, Kuwait, Oman, Qatar, Saudi Arabia and UAE in February 2017. With 40,000 hours on offer, local content is included as well as international fare to appeal to ex-pats.

Viu recorded 49.4 million monthly active users across 16 markets by June 2021. Viu had 7.0 million paying subscribers by June 2021, up from 5.3 million paying subscribers by end-2020, 3.6 million in 2019 and 1.4 million in 2018. Most of these subscribers are in South East Asia.

Main operators by subscribers (000)				
Operator	**Pay TV subs**	**Fixed bb subs**	**Mobile subs**	**SVOD platforms**
beIN	54	-	-	beIN Connect
Ooredoo	156		2,660	Shahid VIP; OSN
OSN	42	-	-	OSN
Vodafone	-	5	1,800	-

The Ooredoo TV IPTV platform (up to 190 channels, including bundles from beIN, MBC and OSN) is part of a triple-play package (up to 1Gbps). We estimated 156,000 subscribers at end-2021. In October 2015, Ooredoo has distribution deals with SVOD platforms OSN and Shahid VIP.

Ooredoo is investing QAR1 billion on an **extensive fiber network**. Ooredoo is constructing the government-owned National Broadband Network (QNBN). Ooredoo had 2.66 million mobile subscribers by September 2021.

Vodafone won the license for the second fixed line service in April 2010. Vodafone sold its stake to a local consortium in late 2018. Vodafone started its Giga TV OTT platform in late 2019. Vodafone had 5,000 fixed broadband and 1.80 million mobile subscribers by September 2021.

SAMPLE: Qatar OTT TV & video forecasts								
1US$ = QAR3.64	2020	2021	2022	2023	2024	2025	2026	2027
Population (000)								
Total households (000)								
TV households (000)								
Fixed broadband hholds (000)								
Smartphone subscribers (000)								
Tablet subscribers (000)								
TV HH/Total HH								
Fixed broadband HH/Total HH								
Smartphone subs/Population								
Tablet subs/Population								
OTT TV & video viewers (000)								
OTT TV & video viewers/pop								
Online advertising total (US$ mil.)								
AVOD (US$ mil.)								
Online rental revs (US$ mil.)								
DTO video revs (US$ mil.)								
SVOD revenues (US$ mil.)								
OTT TV & video revs (US$ mil.)								
AVOD revenues/Population $								
SVOD revenues/Population $								
SVOD revs/SVOD subscriber $								
Net SVOD homes (000)								
SVOD homes/TVHH								
SVOD homes/Fixed bband HH								
SVOD subscriptions/SVOD homes								
Gross SVOD subscriptions (000)								
SVOD subs/TVHH								
SVOD subs/Fixed bband HH								
SVOD subs/Smartphone users								
SVOD subscribers by operator (000)								
Netflix								
Amazon								
Disney+								
Apple TV+								
StarzPlay								
Shahid VIP								
OSN								
Others								

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SAMPLE: Qatar OTT TV & video forecasts								
1US$ = QAR3.64	2020	2021	2022	2023	2024	2025	2026	2027
Share of SVOD subscribers by operator (%)								
Netflix								
Amazon								
Disney+								
Apple TV+								
StarzPlay								
Shahid VIP								
OSN								
Others								
SVOD revenues by operator (US$ mil.)								
Netflix								
Amazon								
Disney+								
Apple TV+								
StarzPlay								
Shahid VIP								
OSN								
Others								
Share of SVOD revenues by operator (%)								
Netflix								
Amazon								
Disney+								
Apple TV+								
StarzPlay								
Shahid VIP								
OSN								
Others								
SVOD ARPU by operator ($)								
Netflix								
Amazon								
Disney+								
Apple TV+								
StarzPlay								
Shahid VIP								
OSN								
AVOD revenues by platform ($ million)								
YouTube								
Facebook/Instagram								
Other								
Source: Digital TV Research. Revenues from professionally-made TV shows and movies - so not, for example, sports or UGC. Others includes beIN Connect; Viu								

SAMPLE: Qatar pay TV insight

Pay TV penetration will fall from 51% of TV households at end-2021 to 47% by 2027. Pay TV revenues will reach $78 million in 2027.

Main assumptions behind the forecasts
• About 45% of homes receive FTA satellite TV signals and 19% pay to receive satellite TV signals.
• IPTV penetration is also high – at 31% by end-2021.
• Few homes rely on DTT signals.

Digital TV penetration reached 100% in 2015. About two-thirds of the 498,000 TV households receive either free-to-air or pay satellite TV signals.

Main operators by subscribers (000)

Operator	Pay TV subs	Fixed bb subs	Mobile subs	SVOD platforms
beIN	54	-	-	beIN Connect
Ooredoo	156		2,660	StarzPlay; OSN
OSN	42	-	-	OSN
Vodafone	-	5	1,800	-

The dispute between Saudi Arabia and Qatar hit beIN's subscriber numbers across the region. beIN is reliant on subscriptions outside Qatar to thrive. Most governments followed the Saudi ban. The ban started in mid-2017 and ended in late 2021.

With 54,000 subs in Qatar by end-2021, **beIN** provides up to 67 channels. We forecast that beIN will have 60,000 subscribers by 2027. Several key sports rights have been renewed.

We estimate 42,000 **OSN** subscribers (QAR159-349/month, $43.68-95.88) by end-2021, falling to 25,000 by 2027. OSN now places more emphasis on its SVOD platform. OSN has exclusive deals with seven Hollywood studios, but is increasing Arabic content to at least a quarter of the total.

The Ooredoo TV IPTV platform (up to 190 channels, including bundles from beIN, MBC and OSN) is part of a triple-play package (up to 1Gbps). We estimated 156,000 subscribers at end-2021; climbing to 179,000 by 2027. In October 2015, Ooredoo has distribution deals with SVOD platforms OSN and Shahid VIP.

Ooredoo is investing QAR1 billion on an **extensive fiber network**. Ooredoo is constructing the government-owned National Broadband Network (QNBN). Ooredoo had 2.66 million mobile subscribers by September 2021.

Vodafone won the license for the second fixed line service in April 2010. Vodafone sold its stake to a local consortium in late 2018. Vodafone started its Giga TV OTT platform in late 2019. Vodafone had 5,000 fixed broadband and 1.80 million mobile subscribers by September 2021.

State-owned **Qatar Media Corporation,** owner of Al Jazeera and FTA channel Qatar TV, had upgraded the terrestrial network to DVB-T2 by December 2013. Full conversion took place in 2014.

SAMPLE: Qatar pay TV forecasts

1US$ = QAR3.64	2020	2021	2022	2023	2024	2025	2026	2027
Total households (000)								
TV households (000)								
Digital cable subs (000)								
Analog cable subs (000)								
Pay IPTV subscribers (000)								
Pay digital Satellite TV subs (000)								
Free-to-air Satellite TV HH (000)								
Analog terrestrial households (000)								
Primary FTA DTT households (000)								
Primary Pay DTT households (000)								
Digital homes (000)								
Analog homes (000)								
Pay TV subscribers (000)								
Digital cable subs/TV HH								
Analog cable subs/TV HH								
Pay IPTV subs/TV HH								
Pay Satellite TV/TV HH								
Free-to-air Satellite TV/TV HH								
Analog terrestrial/TVHH								
Primary FTA DTT/TV HH								
Primary pay DTT/TV HH								
TVHH/Total HH								
Digital/TV HH								
Analog/TV HH								
Pay TV Subs/TV HH								
Revenues (US$ million)								
Digital cable TV								
Analog cable TV								
IPTV								
Satellite TV								
DTT								
Total revenues								
Average Revenue Per User (ARPU - US$)								
Digital cable TV								
Analog cable TV								
IPTV								
Satellite TV								
DTT								
Average monthly ARPU								

SAMPLE: Qatar pay TV forecasts								
1US$ = QAR3.64	2020	2021	2022	2023	2024	2025	2026	2027
Pay TV subscribers by operator (000)								
beIN (satellite)								
OSN (satellite)								
Ooredoo (IPTV)								
Others								
Share of pay TV subs by operator %								
beIN (satellite)								
OSN (satellite)								
Ooredoo (IPTV)								
Others								
Pay TV revenues by operator ($ million)								
beIN (satellite)								
OSN (satellite)								
Ooredoo (IPTV)								
Others								
Share of pay TV revenues by operator %								
beIN (satellite)								
OSN (satellite)								
Ooredoo (IPTV)								
Others								
Source: digital TV research Ltd.								

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