Mexico OTT and Pay TV Forecasts

Published in September 2022, this 16-page PDF and excel report covers the converging pay TV and OTT TV episode and movie sectors:

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
- Excel forecasts: OTT TV & Video Forecasts for every year from 2010 to 2027
- SVOD forecasts for Netflix, Amazon Prime Video, Disney+, Apple TV+, Blim, Claro Video, HBO
- AVOD forecasts for YouTube; Facebook, Televisa/Blim; Azteca/Claro; Pluto; Samsung TV Plus; Roku

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
- Excel forecasts: Pay TV Forecasts for every year from 2010 to 2027
- Forecasts for Megacable, Televisa cable, Sky, Dish, TotalPlay

Price: £500/€550/$600

For more information on other countries, please click here or contact lydia@digitaltvresearch.com Please select a country from the table below to find out more:

Australia	Brazil	Canada	China
France	Germany	India	Italy
Japan	Mexico	Poland	Russia
Saudi Arabia	South Africa	South Korea	Spain
Sweden	Turkey	UK	USA

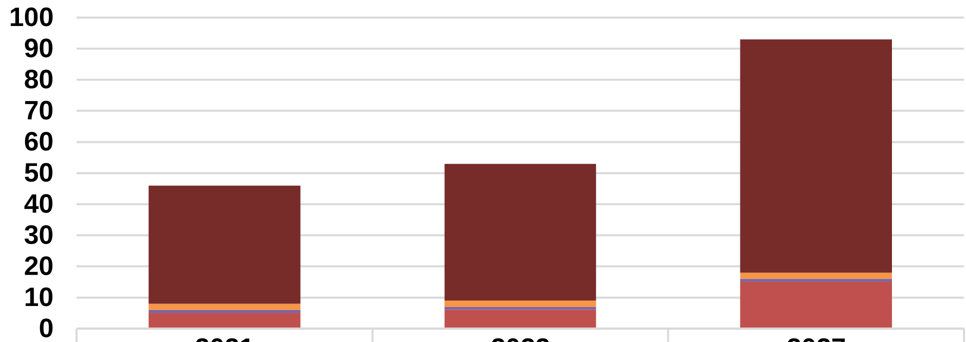
We can provide the same level of detail for a further 137 countries. Please contact us to request a different country. Discounts are available for multiple country purchases.

digital TV research

SAMPLE: Qatar OTT TV & video insight

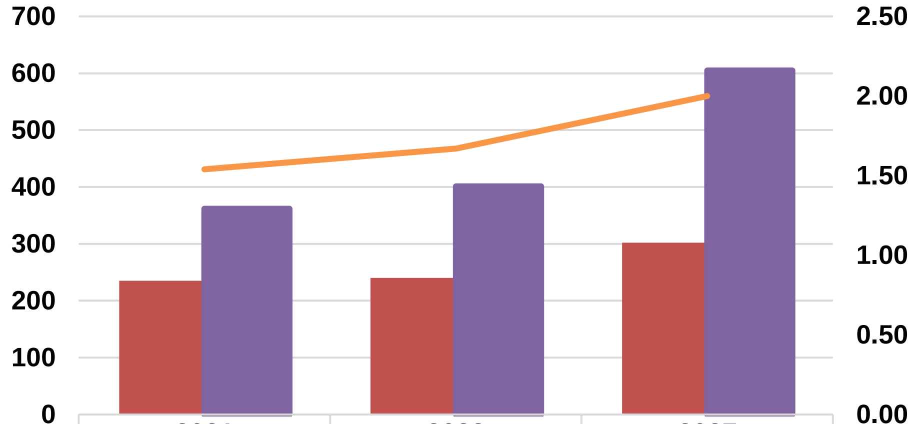
OTT TV & video revenues are forecast to reach $92 million by 2027, double from $45 million in 2021. SVOD will contribute $75 million in 2027, up from $38 million in 2021. There will be 605,000 SVOD subscriptions by 2027 compared with 362,000 at end-2021. About 54% of the TV households will pay for at least one SVOD subscription by 2027.

Revenues by source ($m)



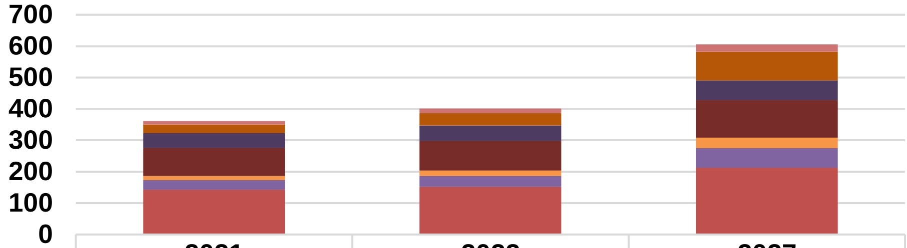
	2021	2022	2027
SVOD	38	44	75
DTO	2	2	2
Rental	1	1	1
AVOD	5	6	15

Gross SVOD subscriptions & net SVOD subscribers (000)



	2021	2022	2027
Net	235	240	302
Gross	362	401	605
Gross/net	1.54	1.67	2.00

Subscribers by operator (000)



	2021	2022	2027
Others	12	14	24
OSN	27	40	91
Shahid VIP	47	49	62
Starz Play	89	94	120
Apple TV+	14	17	34
Amazon	30	35	62
Netflix	143	152	213

Main assumptions behind the forecasts
The OTT sector is competitive.
Smartphone penetration is very high.
Fixed broadband penetration is also high.
Population forecasts are higher than the previous edition
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 34,000 subscribers expected by 2027.

HBO Max, Paramount+ and Disney+ are not expected to start in the Arabic-speaking countries due to 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 91,000 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 120,000 subscribers by 2027.

MBC's **Shahid VIP** provides linear channels as well as on-demand content. Ooredoo carries Shahid VIP. We forecast 62,000 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.

EXCEL SAMPLE: Qatar OTT TV & video forecasts

	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027
Population (000)																		
Total households (000)																		
TV households (000)																		
Fixed broadband holds (000)																		
Smartphone subs (000)																		
Tablet subscribers (000)																		
TV HH/Total HH																		
Fixed bband HH/Total HH																		
Smartphone subs/Pop																		
Tablet subs/Population																		
OTT TV & video viewers (000)																		
OTT TV & video viewers/pop																		
Online advertising (US$ mil.)																		
AVOD (US$ mil.)																		
Online rental revs (US$ mil.)																		
DTO video revs (US$ mil.)																		
SVOD revenues (US$ mil.)																		
OTT TV & video revs ($ mil.)																		
AVOD revenues/Pop $																		
SVOD revenues/Pop $																		
SVOD revs/SVOD subscrbr $																		
Net SVOD homes (000)																		
SVOD homes/TVHH																		
SVOD homes/Fixed band HH																		
SVOD subscrips/SVOD hh																		
Gross SVOD subscriptions (000)																		
SVOD subs/TVHH																		
SVOD subs/Fixed bband HH																		
SVOD subs/Sphone users																		
SVOD subscribers by operator (000)																		
Netflix																		
Amazon																		
Disney+																		
Apple TV+																		
StarzPlay																		
Shahid VIP																		
OSN																		
Others																		

EXCEL SAMPLE: Qatar OTT TV & video forecasts

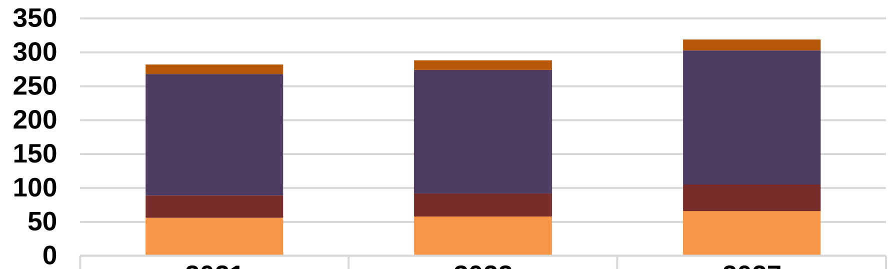
	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027
Share of SVOD subscribers by operator (%)																		
Netflix																		
Amazon																		
Disney+																		
Apple TV+																		
StarzPlay																		
Shahid VIP																		
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																		

digital TV research

SAMPLE: Bahrain pay TV insight

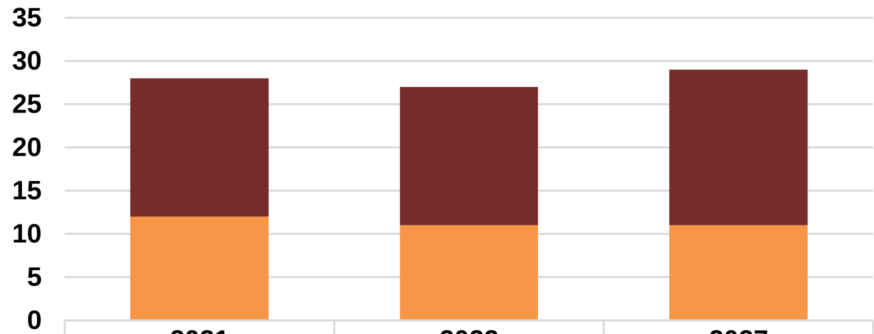
Pay TV penetration will not increase by much – reaching 33% by 2027. **Pay TV revenues** will be flat at $27-30 million as competition cuts ARPUs.

Homes by platform (000)



	2021	2022	2027
A terres	0	0	0
Pay DTT	0	0	0
Free DTT	14	14	16
Free satellite	179	182	198
Pay Satellite	33	34	39
IPTV	56	58	66
A Cable	0	0	0
D cable	0	0	0

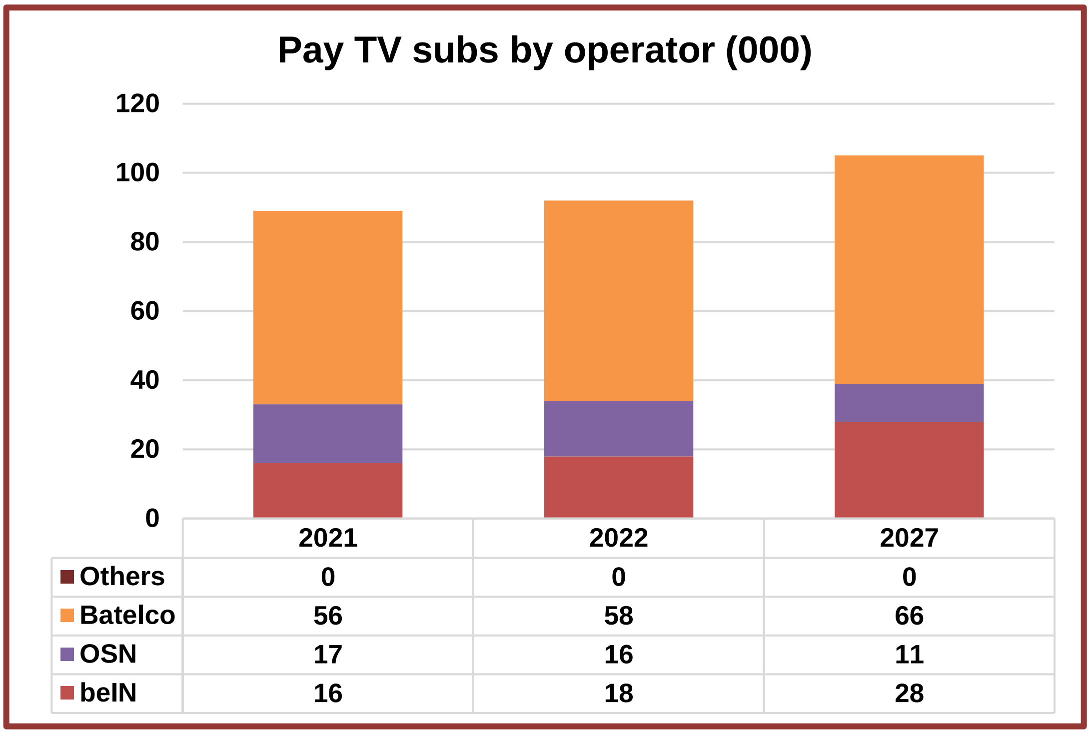
Revenues by platform ($m)



	2021	2022	2027
Pay DTT	0	0	0
Pay Satellite	16	16	18
IPTV	12	11	11
A Cable	0	0	0
D cable	0	0	0

Main assumptions behind the forecasts
FTA satellite TV is the main TV reception platform – accounting for 63% of the TV households.
As well as satellite TV, OSN packages are available on most of the other pay TV platforms.
Batelco will remain the main pay TV platform.
Limited cable networks were phased out.
Analog terrestrial switch-off was achieved by end-2013.

digital TV research



Bahrain achieved complete **digital TV penetration** in 2013. About three-quarters of the 282,000 TV households receive digital satellite signals. IPTV subs have overtaken satellite TV.

Main operators by subscribers (000)				
Operator	**Pay TV subs**	**Fixed bb subs**	**Mobile subs**	**SVOD platforms**
Batelco	56	-	-	OSN
beIN	16	-	-	-
OSN	17	-	-	-
STC	-	-	-	Shahid VIP; OSN; Telly; Jawwy; Spuul
Zain	-	-	845	Netflix; Shahid VIP; Telly; Yupp

The dispute between Saudi Arabia and Qatar hit beIN's subscriber numbers across the region. Most governments followed the mid-2017 Saudi ban on beIN – although not all of them have enforced the ban that effectively. The ban was officially lifted in late 2021. **beIN** renewed several key sports rights, which will help to push its subscriber numbers back up.

Traditionally appealing to expatriates, **OSN** is attracting more local subscribers, although it dropped much of its sports coverage. OSN has exclusive deals with seven Hollywood studios. It will increase Arabic content to a quarter of the total.

OSN provides 41-47 channels for BHD16-35/month ($42.11-92.11). We estimate that the company had 17,000 satellite TV subscribers by end-2021, falling to 11,000 in 2027 as OSN places more emphasis on its SVOD platform.

Batelco started offering IPTV services via its FTTH network (up to 500Mbps) in September 2011. Batelco had 56,000 IPTV subs at end-2021 and will have 66,000 by 2027. Batelco also offers OSN's SVOD platform (BHD4/month).

Principally a mobile operator, **STC (formerly called Viva)** carries OSN (BHD4/month), Jawwy TV (BHD3/month), Shahid VIP (BHD3/month) and Hindi-language Spuul (BHD2/month). STC is owned by Saudi Telecommunications Company.

Rival **Zain** carries Zee5 (BHD1.90/month), Apple TV+, Viu (BHD3/month) and Shahid VIP (BHD3/month). Zain is 55.4% owned by the Zain Group.

Digital terrestrial switchover, using the DVB-T2 standard, was completed in 2013, although its impact is limited because of the ready acceptance of other platforms.

EXCEL SAMPLE: Bahrain pay TV forecasts

	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027
Total households (000)																		
TV households (000)																		
Digital cable subs (000)																		
Analog cable subs (000)																		
Pay IPTV subs (000)																		
Pay Satellite TV subs (000)																		
Free-to-air Sat TV HH (000)																		
Analog terrestrial households (000)																		
Primary FTA DTT households (000)																		
Primary Pay DTT hh (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																		

EXCEL SAMPLE: Bahrain pay TV forecasts

	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027
Average Revenue Per User (ARPU - US$)																		
Digital cable TV																		
Analog cable TV																		
IPTV																		
Satellite TV																		
DTT																		
Average monthly ARPU																		
Pay TV subscribers by operator (000)																		
beIN (satellite)																		
OSN (satellite)																		
Batelco (IPTV)																		
Other																		
Share of pay TV subs by operator %																		
beIN (satellite)																		
OSN (satellite)																		
Batelco (IPTV)																		
Other																		
Pay TV revenues by operator ($ million)																		
beIN (satellite)																		
OSN (satellite)																		
Batelco (IPTV)																		
Other																		
Share of pay TV revenues by operator %																		
beIN (satellite)																		
OSN (satellite)																		
Batelco (IPTV)																		
Other																		

digital TV research