

Turkey OTT and Pay TV Forecasts

Published in February 2023, this 15-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 2022, 2023 and 2028
- Chart: Gross SVOD subscriptions versus SVOD subscribers for 2022, 2023 and 2028
- Chart: SVOD subscribers by operator for 2022, 2023 and 2028
- Excel forecasts: Forecasts for every year from 2015 to 2028
- SVOD forecasts for Netflix, Amazon Prime Video, Disney+, HBO; Tivibu Go, Turkcell, beIN, blu and Vodafone' Paramount+
- AVOD forecasts for Netflix; Disney+; HBO; Paramount+; YouTube; Facebook; blu; Puhu; Exxen

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 2022, 2023 and 2028
- Chart: Pay TV revenues by platform (digital cable, analog cable, IPTV, pay satellite TV and pay DTT) for 2022, 2023 and 2028
- Chart: Pay TV subscribers by operator (digital cable, analog cable, IPTV, pay satellite TV and pay DTT) for 2022, 2023 and 2028
- Excel forecasts: Pay TV Forecasts for every year from 2015 to 2028
- Forecasts for D-Smart, Digiturk, TTNNet, Turkcell and Turksat

Price: £500/€550/\$600

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SAMPLE: Bahrain OTT TV & video insight

OTT TV & video revenues are forecast to reach \$72 million by 2028, up from \$40 million in 2022. AVOD revenues will reach \$15 million by 2028, triple from \$5 million in 2022.

SVOD will contribute \$50 million in 2028, up from \$31 million in 2022. There will be 513,000 gross SVOD subscriptions by 2028 compared with 308,000 at end-2022. About 63% of TV households will pay for at least one SVOD subscription by 2028.

SVOD will contribute \$47 million in 2027, up from \$25 million in 2021. There will be 483,000 gross SVOD subscriptions by 2027 compared with 261,000 at end-2021. About 62% of TV households will pay for at least one SVOD subscription by 2027.

Main assumptions behind the forecasts
Mobile dominates the broadband sector.
Broadband penetration is high
High disposable incomes.
Ex-pat community has a strong demand for foreign content.
Disney+ start as a standalone platform in June 2022
Piracy remains a significant problem

Netflix launched in January 2016. We forecast 156,000 subscribers by 2028; up from 124,000 at end-2022. English and Arabic content is available.

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 37,000 Amazon Prime Video subscribers by 2028.

Apple TV+ (\$7.99/month) started in Bahrain with its global rollout in November 2019. We expect 14,000 subscribers by 2028. Zain distributes Apple TV+.

Disney+ ended its distribution deal with OSN in June 2022 by starting as a standalone platform (\$8.99/month, \$88.99/year). We forecast 65,000 subs by 2028.

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

OSN launched its SVOD platform in August 2017. It costs BHD4-10/month. As well as 27 linear channels, OSN carries Paramount+ and HBO content. OSN signed a distribution agreement with Netflix in February 2018 and another with STC in June 2018. We forecast 45,000 subscribers by 2028.

After a cost-cutting drive, OSN now places more emphasis on its SVOD platform than its satellite TV one. 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 more than 6,000 hours of Hollywood content as well as 2,000 hours of Arabic content. Discovery+ is available as a branded content block. We forecast 81,000 subscribers in Bahrain by 2028, up from 56,000 at end-2022.

MBC's **Shahid VIP** provides 10 linear channels as well as on-demand content. Shahid has promised original content. Shahid also distributes Fox Plus. Shahid VIP is carried by mobile operators STC and Zain (BHD3/month). We expect 82,000 subscribers by 2028, up from 56,000 at end-2022. Shahid is its AVOD platform.

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 60.7 million monthly active users across 16 markets by mid-2022. Viu had 9.1 million paying subscribers by mid-2022. 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
Batelco	58	-	-	OSN+
beIN	18	-	-	-
OSN	18	-	-	-
STC	-	-	-	Shahid VIP; OSN+; STC TV; Spuul
Zain	-	-	1,000	Zee5; Apple TV+; Shahid VIP, Viu; OSN+

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. OSN has exclusive deals with seven Hollywood studios. It increased Arabic content to a quarter of the total. We estimate that the company had 18,000 satellite TV subscribers by end-2022.

Batelco started offering IPTV services via its FTTH network (up to 500Mbps) in September 2011. Batelco had 58,000 IPTV subs at end-2022. Batelco offers OSN's SVOD platform (BHD4.20/month).

Principally a mobile operator, **STC (formerly called Viva)** carries OSN+ (BHD4/month), STC TV (BHD3/month for 100 linear channels and 20,000 on-demand titles), Shahid VIP (BHD3/month) and Hindi-language Spuul (BHD2/month). STC is owned by Saudi Telecommunications Company.

Zain carries Zee5 (BHD1.90/month), Apple TV+, Viu (BHD2/month), OSN+ (BHD4.20/month) and Shahid VIP (BHD3.49/month). With 1 million subscribers, Zain is 55.4% owned by the Zain Group.

SAMPLE: Bahrain OTT TV & video forecasts

	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028
Population (000)														
Total households (000)														
TV households (000)														
Fixed broadband hholds (000)														
Smartphone subscribers (000)														
Tablet subscribers (000)														
Online advertising total (\$ mil.)														
AVOD revenues (\$ mil.)														
Online rental revenues (\$ mil.)														
DTO revenues (\$ mil.)														
SVOD revenues (\$ mil.)														
OTT TV & video revs (\$ mil.)														
SVOD subscribers (000)														
SVOD subscribers/TVHH														
SVOD subscriptions (000)														
SVOD subscriptions/TVHH														
SVOD subscriptions/SVOD subscribers														
SVOD subscribers by operator (000)														
Netflix														
Amazon														
Disney+														
Apple TV+														
StarzPlay														
Shahid VIP														
OSN														
Others														
SVOD revenues by operator (\$ mil.)														
Netflix														
Amazon														
Disney+														
Apple TV+														
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OSN														
Others														

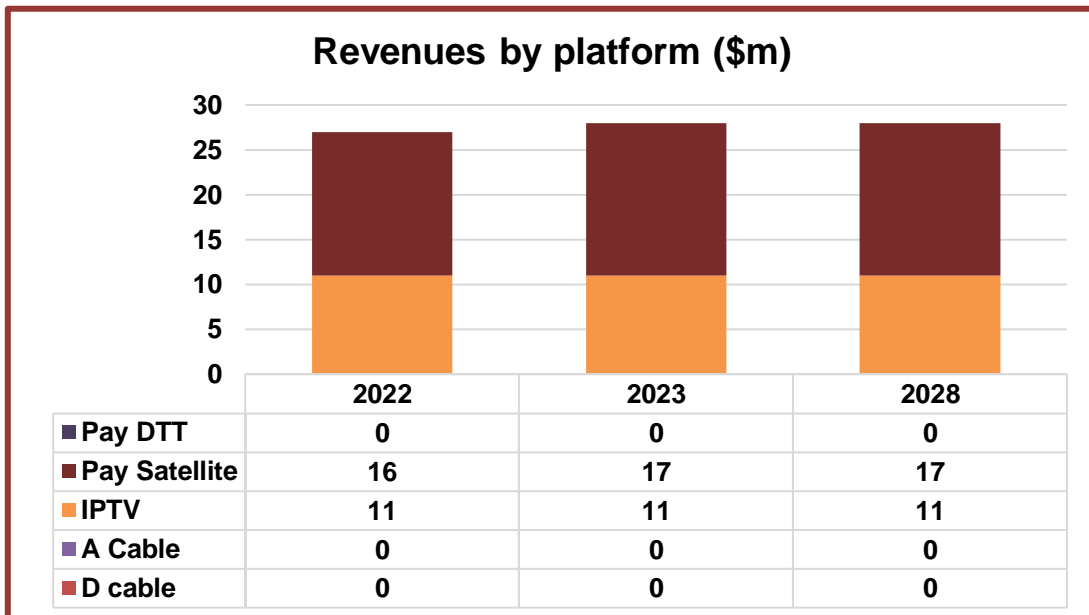
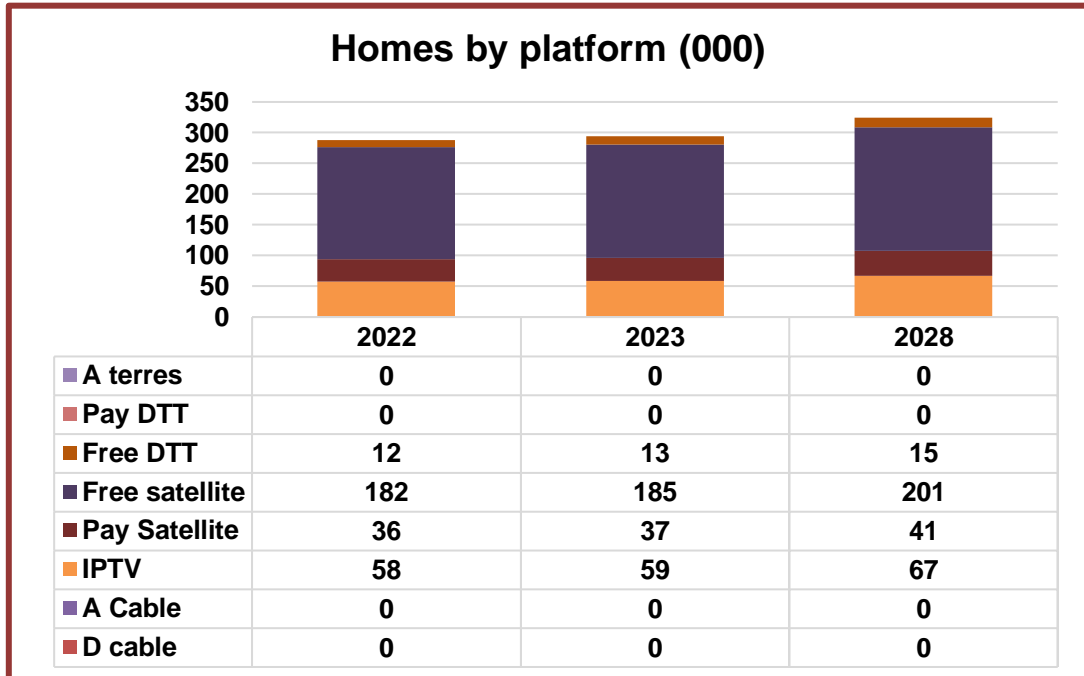


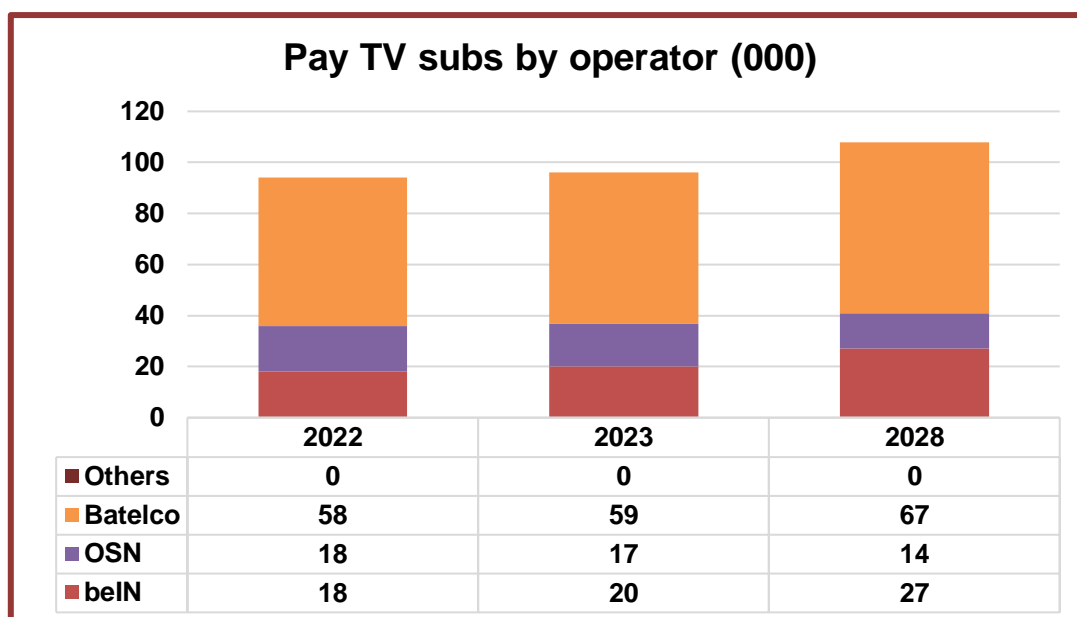
SAMPLE: Bahrain OTT TV & video forecasts

	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028
SVOD ARPU by operator (\$)														
Netflix														
Amazon														
Disney+														
Apple TV+														
StarzPlay														
Shahid VIP														
OSN														
Hybrid AVOD-SVOD subscribers by operator (000)														
Netflix														
Disney+														
HBO Max														
Paramount+														
AVOD revenues by platform (\$ million)														
Netflix														
Disney+														
HBO Max														
Paramount+														
YouTube														
Facebook/Instagram														
Other														

SAMPLE: Bahrain pay TV insight

Pay TV penetration will not increase by much – reaching 33% by 2028. Pay TV revenues will be flat at \$28-29 million as competition cuts ARPUs.





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.

About three-quarters of the 288,000 TV households receive digital satellite signals. IPTV subs have overtaken satellite TV. Digital terrestrial switchover, using DVB-T2, was completed in 2013, although its impact is limited because of the ready acceptance of other platforms.

Main operators by subscribers (000)

Operator	Pay TV subs	Fixed bb subs	Mobile subs	SVOD platforms
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OSN	18	-	-	-
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Zain	-	-	1,000	Zee5; Apple TV+; Shahid VIP; Viu; OSN+

beIN renewed several key sports rights, which will help to push its subscriber numbers back up. We forecast 27,000 subscribers by 2028.

Traditionally appealing to expatriates, **OSN** is attracting more local subscribers. OSN has exclusive deals with seven Hollywood studios. It increased Arabic content to a quarter of the total. We estimate that the company had 18,000 satellite TV subscribers by end-2022, falling to 14,000 in 2028 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 58,000 IPTV subs at end-2022. Batelco offers OSN's SVOD platform (BHD4.20/month).

Principally a mobile operator, **STC (formerly called Viva)** carries OSN+ (BHD4/month), STC TV (BHD3/month for 100 linear channels and 20,000 on-demand titles), Shahid VIP (BHD3/month) and Hindi-language Spuul (BHD2/month). STC is owned by Saudi Telecommunications Company.

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SAMPLE EXCEL: Bahrain pay TV forecasts

	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028
Total households (000)														
TV households (000)														
Digital cable subs (000)														
Analog cable subs (000)														
Pay IPTV subscribers (000)														
Pay Satellite TV subs (000)														
Free-to-air Satellite TV HH (000)														
Analog terrestrial hholds (000)														
Primary FTA DTT hholds (000)														
Primary Pay DTT hholds (000)														
Digital homes (000)														
Analog homes (000)														
Pay TV subscribers (000)														
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														
Pay TV subscribers by operator (000)														
belN (satellite)														
OSN (satellite)														
Batelco (IPTV)														
Other														
Pay TV revenues by operator (\$ million)														
belN (satellite)														
OSN (satellite)														
Batelco (IPTV)														
Other														
Average Revenue Per User (ARPU - US\$)														
Digital cable TV														
Analog cable TV														
IPTV														
Satellite TV														
DTT														
Average monthly ARPU														

