Russia OTT and Pay TV Forecasts

Published in March 2024, this 17-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 2023, 2024 and 2029
- Chart: Gross SVOD subscriptions versus SVOD subscribers for 2023, 2024 and 2029
- Chart: SVOD subscribers by operator for 2023, 2024 and 2029
- Excel forecasts: OTT TV & Video Forecasts for every year from 2015 to 2029
- 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 2023, 2024 and 2029
- Chart: Pay TV revenues by platform (digital cable, analog cable, IPTV, pay satellite TV and pay DTT) for 2023, 2024 and 2029
- Chart: Pay TV subscribers by operator (digital cable, analog cable, IPTV, pay satellite TV and pay DTT) for 2023, 2024 and 2029
- Forecasts for Akado, ER Telecom, MTS, Rostelecom, Beeline/Veon, NTV Plus, Tricolor, Orion

Price: £500/€550/$600

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SAMPLE: Bahrain OTT TV & video insight

OTT TV & video revenues are forecast to reach $65 million by 2029, up from $31 million in 2023. AVOD revenues will reach $16 million by 2029, triple from $5 million in 2023. SVOD will contribute $42 million in 2029, up from $22 million in 2023. There will be 554,000 SVOD subscriptions by 2029 compared with 313,000 at end-2023. The average subscriber will pay for 2.60 subscriptions by 2029. About 61% of TV households will pay for at least one SVOD subscription by 2029.

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 104,000 subscribers by 2029; up from 72,000 at end-2023. 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 49,000 Amazon Prime Video subscribers by 2029.

Apple TV+ ($7.99/month) started in Bahrain with its global rollout in November 2019. We expect 15,000 subscribers by 2029. 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 75,000 subs by 2029.

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. With 10,000 hours on offer, OSN+ carries Paramount+, NBCUniversal and HBO content. It costs BHD4-10/month. We forecast 39,000 subscribers by 2029. OSN signed a distribution agreement with Netflix in February 2018 and another with STC in June 2018. OSNtv Connect offers 43 linear channels and access to OSN+.

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 119,000 subscribers in Bahrain by 2029, up from 71,000 at end-2023.

MBC's **Shahid VIP** (BHD3.99/month) provides 10 linear channels as well as 20,000 hours of 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 136,000 subscribers by 2029, up from 90,000 at end-2023. Shahid is its AVOD platform.

Hong Kong's **Viu** (BHD2/month) 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. Zain distributes Viu.

PCCW's **Viu** recorded had 11.0 million paying subscribers (up 21% year-on-year) and 65.5 million MAUs in 16 countries across Southeast Asia and the Middle East by mid-2023. Most of these subscribers are in South East Asia. Canal Plus took a 26.1% stake in Viu in June 2023, with an option to extend it to 51%.

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.

Main operators by subscribers (000)

Operator	Pay TV subs	Fixed bb subs	Mobile subs	SVOD platforms
Batelco	61	-	-	Netflix, Shahid VIP
beIN	20	-	-	-
OSN	14	-	-	-
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 pay TV subscriber numbers back up.

Traditionally appealing to expatriates, **OSN** is attracting more local subscribers. It increased Arabic content to a quarter of the total. We estimate 14,000 satellite TV subscribers by end-2023.

Batelco started offering IPTV services via its FTTH network in September 2011. Batelco had 61,000 IPTV subs at end-2023. Batelco offers Netflix (BHD5.25/month) and Shahid VIP (BHD3.14/month).

Principally a mobile operator, **STC (formerly called Viva)** carries OSN+ (BHD4.20/month), STC TV (BHD3/month for 100 linear channels and 20,000 on-demand titles), Shahid VIP (BHD3.99/month) and Hindi-language Spuul (BHD2/month). STC is owned by Saudi Telecommunications Company.

Zain carries Zee5 (BHD1.90/month), Apple TV+ ($7.99/month), Viu (BHD2/month), OSN+ (BHD2.20-3.20/month) and Shahid VIP (BHD3.99/month). Zain is 55.4% owned by the Zain Group.

SAMPLE EXCEL: Bahrain OTT TV & video forecasts

	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029
Population (000)															
Total households (000)															
TV households (000)															
Fixed broadband households (000)															
Smartphone subscribers (000)															
Tablet subscribers (000)															
Online advertising total ($ mil.)															
AVOD revenues ($ mil.)															
of which FAST revenues ($ mil.)															
Online rental revenues ($ mil.)															
DTO revenues ($ mil.)															
SVOD revenues ($ mil.)															
OTT TV & video revenues ($ 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+															
StarzPlay															
Shahid VIP															
OSN															
Others															

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	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029
SVOD ARPU by operator ($)															
Netflix															
Amazon															
Disney+															
Apple TV+															
StarzPlay															
Shahid VIP															
OSN															
Hybrid AVOD-SVOD subscribers by operator (000)															
Netflix															
Disney+															
HBO Max															
Paramount+															
Hybrid SVOD revenues by operator ($ mil.)															
Netflix															
Disney+															
HBO Max															
Paramount+															
AVOD revenues by platform ($ million)															
Netflix															
Disney+															
HBO Max															
Paramount+															
YouTube															
Facebook/Instagram															
OSN															
Shahid															
StarzPlay															
Other															

SAMPLE: Bahrain pay TV insight

Pay TV penetration will fall slightly to 30% by 2029. Pay TV revenues will be flat at $26-27 million as competition cuts ARPUs. About three-quarters of the 301,000 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 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.

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	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029
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)															
beIN (satellite)															
OSN (satellite)															
Batelco (IPTV)															
Other															
Pay TV revenues by operator ($ million)															
beIN (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															