

Germany OTT and Pay TV Forecasts

Published in April 2021, 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 2019, 2020, 2021, 2022 and 2026
- Chart: Gross SVOD subscriptions versus SVOD subscribers for 2019, 2020, 2021, 2022 and 2026
- Chart: SVOD subscribers by operator for 2019, 2020, 2021, 2022 and 2026
- Forecasts: OTT TV & Video Forecasts for every year from 2019 to 2026
- Forecasts for Netflix, Amazon Prime Video, Disney+, Apple TV+, Sky Ticket, Magenta TV App, Giga TV, RTL+, Joyn

- **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 2019, 2020, 2021, 2022 and 2026
- Chart: Pay TV revenues by platform (digital cable, analog cable, IPTV, pay satellite TV and pay DTT) for 2019, 2020, 2021, 2022 and 2026
- Chart: Pay TV subscribers by operator (digital cable, analog cable, IPTV, pay satellite TV and pay DTT) for 2019, 2020, 2021, 2022 and 2026
- Forecasts: Pay TV Forecasts for every year from 2019 to 2026
- Forecasts for Vodafone, Telecolumbus, T-Home, Sky, HD+, Freenet TV

Price: £500/€550/\$650

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This is just one country. We can provide the same level of detail for a further 137 countries.

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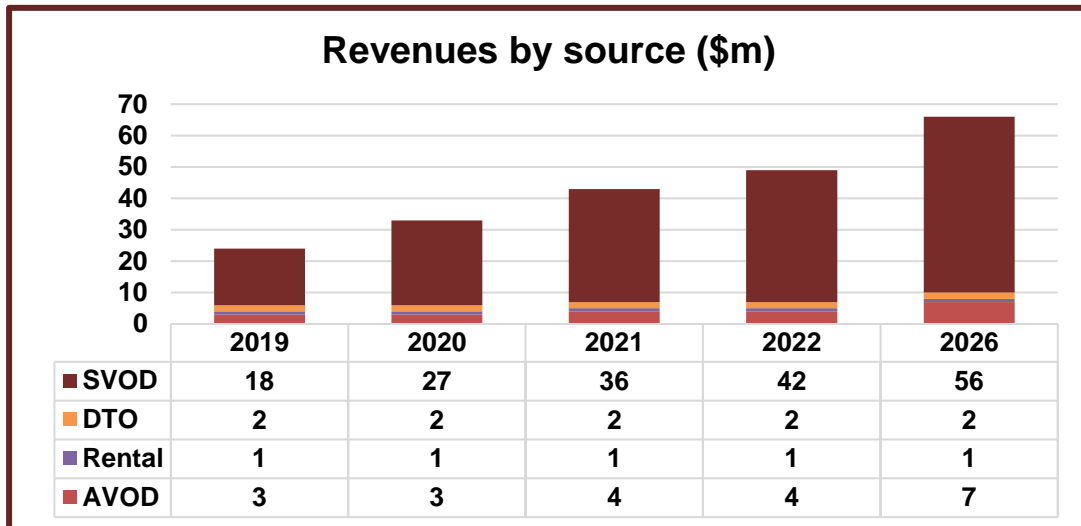
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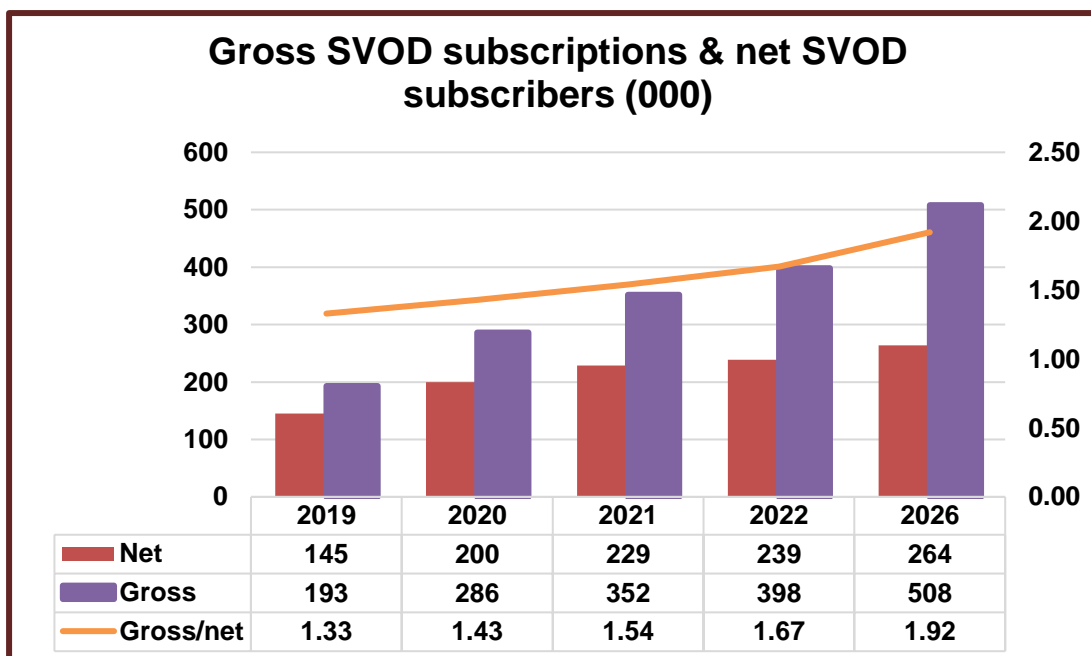
digital TV research

SAMPLE: Qatar OTT TV & video insight

- OTT TV & video revenues are forecast to reach \$66 million by 2026, double from \$33 million in 2020. SVOD will contribute \$56 million to the 2026 total, up from \$27 million in 2020.



- There will be 508,000 SVOD subscriptions by 2026 compared with 286,000 at end-2020. The average SVOD subscriber will pay for 1.92 SVOD subscriptions by 2026, up from 1.43 in 2020. Just over half of the TV households will pay for at least one SVOD subscription by 2026.

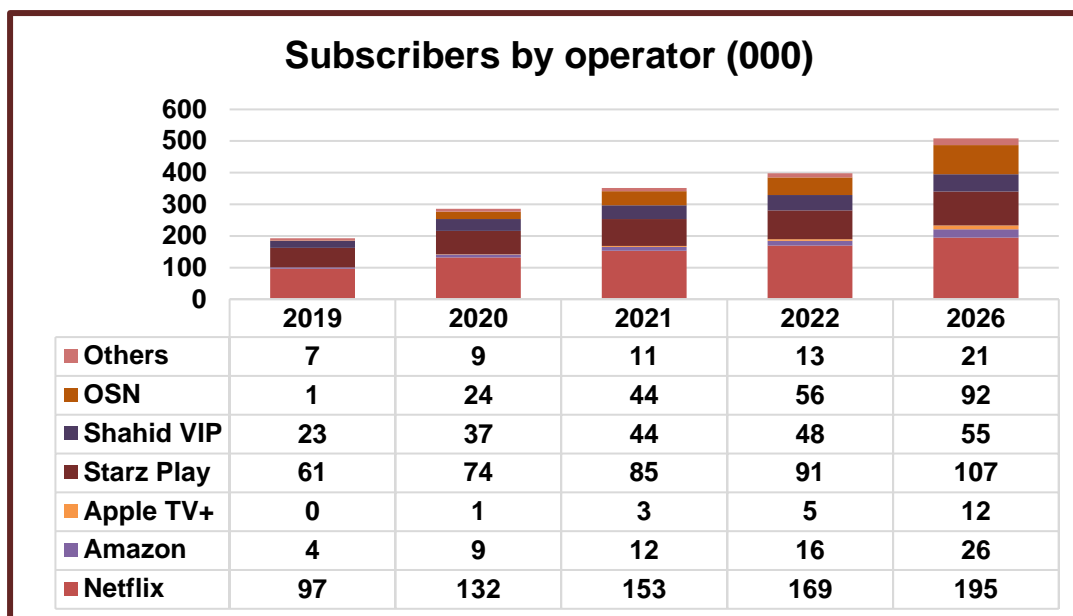


Main assumptions behind the forecasts

- The OTT sector is competitive.
- Smartphone penetration is very high.
- Fixed broadband penetration is also high.
- High proportion of ex-pats means strong demand for foreign content.

Source: Digital TV Research

- **Netflix** will remain the market leader by some distance. OSN will show strong growth based on its added content.



- **Netflix** launched in January 2016. We forecast 195,000 subscribers by 2026; up from 132,000 in 2020. Netflix is carried by Ooredoo.
- **Amazon Prime Video** started operations in November 2016 as part of its global rollout. Subscriptions are cheaper than Netflix at \$5.99/month, but Amazon offers less original or local content than Netflix. We forecast 26,000 Amazon subscribers by 2026.
- **Apple TV+** started in Qatar with its global rollout in November 2019, with 12,000 subscribers expected by 2026. **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/month)** launched its SVOD platform in August 2017. As well as 27 linear channels, OSN exclusively carries Disney+ originals and HBO content. We forecast 92,000 subscribers by 2026.
- After a cost cutting drive and in preparation for an IPO in 2021, OSN 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. In October 2015, Ooredoo TV signed an exclusive distribution deal with StarzPlay (QAR30/month). More Arabic content will lead to 107,000 subscribers by 2026.
- MBC's **Shahid VIP** provides linear channels as well as on-demand content. We forecast 55,000 subscribers by 2026.
- **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.

| Main operators by subscribers (000) | | | | |
|-------------------------------------|-------------|---------------|-------------|----------------------|
| Operator | Pay TV subs | Fixed bb subs | Mobile subs | SVOD platforms |
| beIN | 52 | - | - | beIN Connect |
| Ooredoo | 158 | - | 2,970 | StarzPlay; OSN; beIN |
| OSN | 57 | - | - | OSN |
| Vodafone | - | 5 | 1,678 | - |

Source: Digital TV Research

- **The Ooredoo TV IPTV platform** (up to 190 channels, including bundles from beIN, MBC and OSN) is offered as part of a triple-play package (up to 1Gbps). We estimated 158,000 subscribers at end-2020. In October 2015, Ooredoo has distribution deals with SVOD platforms OSN and StarzPlay (QAR30/month, 8,000 hours).
- Ooredoo is investing QAR1 billion on an **extensive fiber network** (up to 100Mbps). Ooredoo is responsible for constructing the government-owned National Broadband Network (QNBN). Ooredoo had 2.97 million mobile subscribers by September 2020.
- **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 1.68 million mobile subscribers by September 2020.

Qatar OTT TV & video forecasts

| | 2019 | 2020 | 2021 | 2022 | 2023 | 2024 | 2025 | 2026 |
|--|------|------|------|------|------|------|------|------|
| Population (000) | | | | | | | | |
| Total households (000) | | | | | | | | |
| TV households (000) | | | | | | | | |
| Fixed broadband households (000) | | | | | | | | |
| Smartphone subscribers (000) | | | | | | | | |
| Tablet subscribers (000) | | | | | | | | |
| | | | | | | | | |
| <i>TV HH/Total HH</i> | | | | | | | | |
| <i>Fixed broadband HH/Total HH</i> | | | | | | | | |
| <i>Smartphone subs/Population</i> | | | | | | | | |
| <i>Tablet subs/Population</i> | | | | | | | | |
| | | | | | | | | |
| OTT TV & video viewers (000) | | | | | | | | |
| OTT TV & video viewers/population | | | | | | | | |
| | | | | | | | | |
| Online advertising total (US\$ mil.) | | | | | | | | |
| | | | | | | | | |
| AVOD (US\$ mil.) | | | | | | | | |
| Online rental revenues (US\$ mil.) | | | | | | | | |
| Download-to-own video revenues (US\$ mil.) | | | | | | | | |
| SVOD revenues (US\$ mil.) | | | | | | | | |
| Total OTT TV & video revenues (US\$ mil.) | | | | | | | | |
| | | | | | | | | |
| AVOD revenues/Population \$ | | | | | | | | |
| SVOD revenues/Population \$ | | | | | | | | |
| SVOD revenues/SVOD subscriber \$ | | | | | | | | |
| | | | | | | | | |
| Net SVOD homes (000) | | | | | | | | |
| <i>SVOD homes/TVHH</i> | | | | | | | | |
| <i>SVOD homes/Fixed broadband HH</i> | | | | | | | | |
| <i>SVOD subscriptions/SVOD homes</i> | | | | | | | | |
| | | | | | | | | |
| Gross SVOD subscriptions (000) | | | | | | | | |
| <i>SVOD subs/TVHH</i> | | | | | | | | |
| <i>SVOD subs/Fixed broadband HH</i> | | | | | | | | |
| <i>SVOD subs/Smartphone users</i> | | | | | | | | |
| | | | | | | | | |
| SVOD subscribers by operator (000) | | | | | | | | |
| Netflix | | | | | | | | |
| Amazon | | | | | | | | |
| Disney+ | | | | | | | | |
| Apple TV+ | | | | | | | | |
| StarzPlay | | | | | | | | |
| Shahid VIP | | | | | | | | |
| OSN | | | | | | | | |
| Others | | | | | | | | |



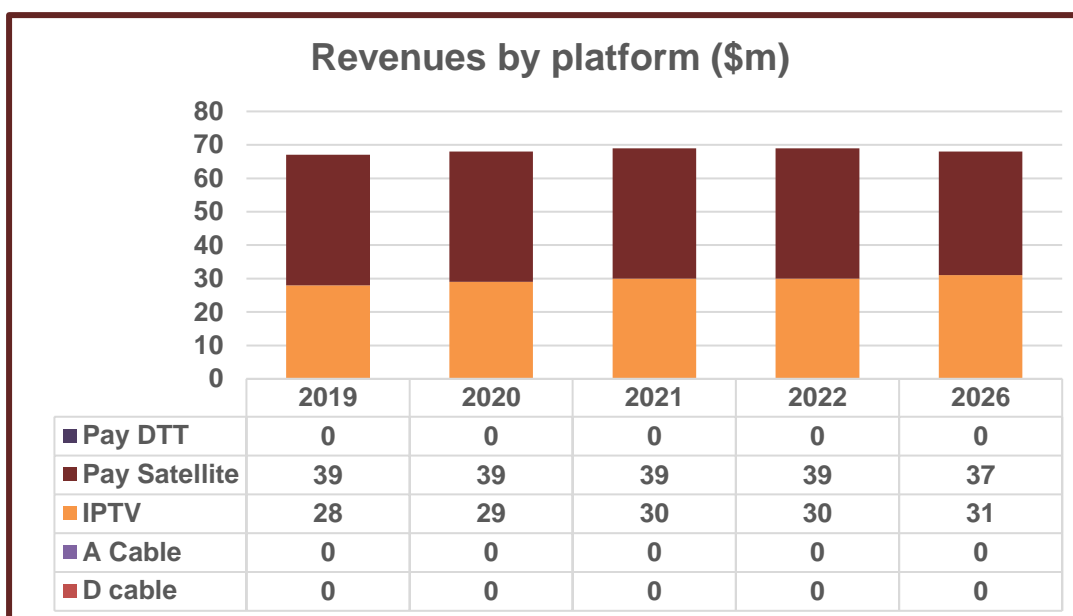
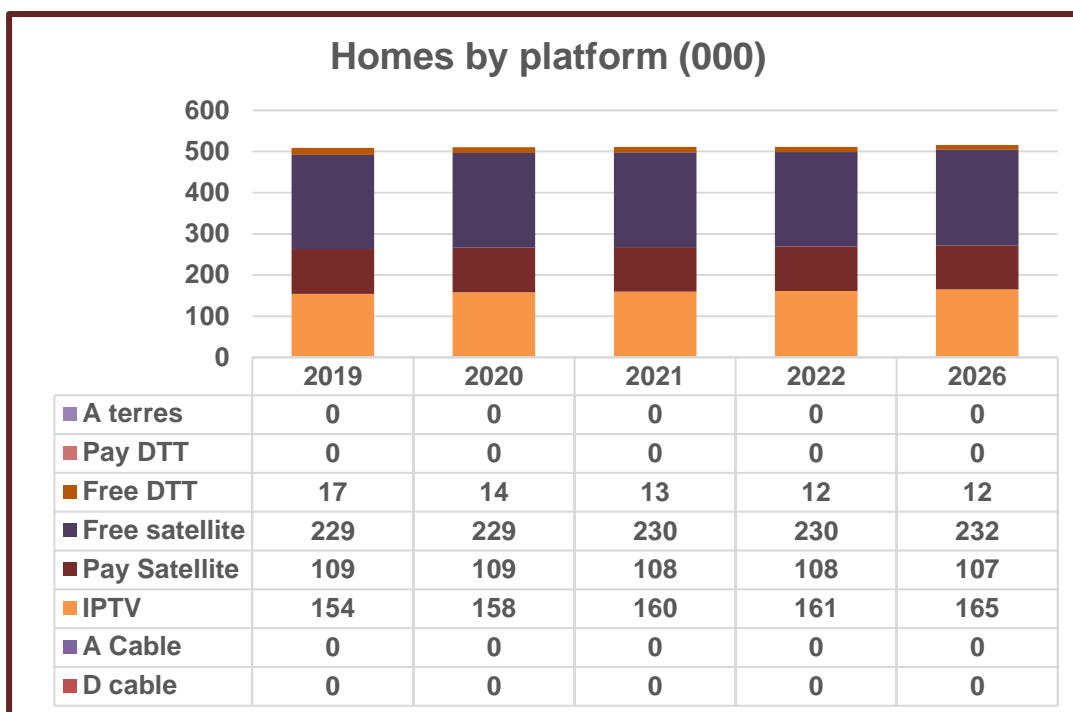
Qatar OTT TV & video forecasts

| | 2019 | 2020 | 2021 | 2022 | 2023 | 2024 | 2025 | 2026 |
|--|------|------|------|------|------|------|------|------|
| Share of SVOD subscribers by operator (%) | | | | | | | | |
| Netflix | | | | | | | | |
| Amazon | | | | | | | | |
| Disney+ | | | | | | | | |
| Apple TV+ | | | | | | | | |
| StarzPlay | | | | | | | | |
| Shahid VIP | | | | | | | | |
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| Others | | | | | | | | |
| SVOD revenues by operator (US\$ mil.) | | | | | | | | |
| Netflix | | | | | | | | |
| Amazon | | | | | | | | |
| Disney+ | | | | | | | | |
| Apple TV+ | | | | | | | | |
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| 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 social media sites | | | | | | | | |
| FTA broadcasters | | | | | | | | |
| Pay TV broadcasters | | | | | | | | |
| AVOD platforms | | | | | | | | |
| Other | | | | | | | | |
| <i>Revenues from professionally-made TV shows and movies - so not, for example, sports or UGC.</i> | | | | | | | | |



SAMPLE: Qatar pay TV insight

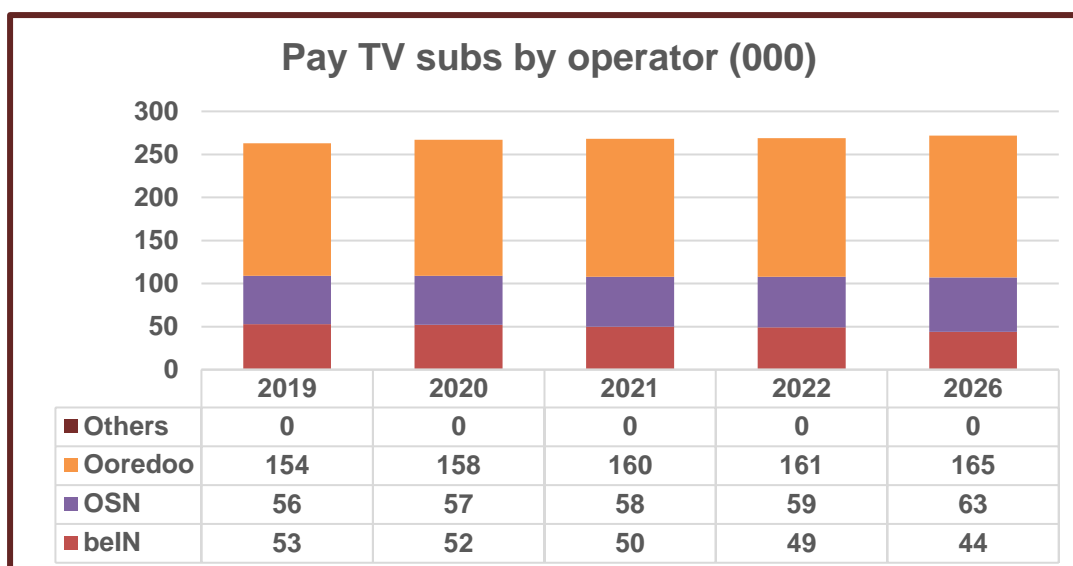
- **Digital TV penetration** reached 100% in 2015. About two-thirds of the 510,000 TV households receive either free-to-air or pay satellite TV signals.



Main assumptions behind the forecasts

- About 45% of homes receive FTA satellite TV signals and 21% pay to receive satellite TV signals.
- IPTV penetration is also high – at 30.9% by end-2020.
- Few homes rely on DTT signals.

Source: Digital TV Research



- **Pay TV penetration** will remain at 52% of TV households. Pay TV revenues will reach \$68 million in 2026.

| Main operators by subscribers (000) | | | | |
|--|-------------|---------------|-------------|----------------------|
| Operator | Pay TV subs | Fixed bb subs | Mobile subs | SVOD platforms |
| beIN | 52 | - | - | beIN Connect |
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| OSN | 57 | - | - | OSN |
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Source: Digital TV Research

- The ongoing 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 have followed the Saudi ban on beIN – although not all of them have enforced the ban that effectively. The ban started in mid-2017
- With 52,000 subs in Qatar by end-2020, **beIN** provides up to 67 channels. We forecast that beIN will have 44,000 subscribers by 2026 - falling as fewer sports rights are expected.
- We estimate 57,000 **OSN** subscribers by end-2020, with 63,000 by 2026. After a cost cutting drive and in preparation for an IPO in 2021, OSN is placing more emphasis on its SVOD platform. OSN has exclusive deals with seven Hollywood studios, but wants to increase 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 offered as part of a triple-play package (up to 1Gbps). We estimated 158,000 subscribers at end-2020; climbing to 165,000 by 2026. In October 2015, Ooredoo has distribution deals with SVOD platforms OSN and StarzPlay (QAR30/month, 8,000 hours).

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- **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 1.68 million mobile subscribers by September 2020.
- 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.

Qatar pay TV forecasts

| | 2019 | 2020 | 2021 | 2022 | 2023 | 2024 | 2025 | 2026 |
|--|------|------|------|------|------|------|------|------|
| 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 | | | | | | | | |
| | | | | | | | | |
| <i>Stand-alone digital cable subs (000)</i> | | | | | | | | |
| <i>Dual-play digital cable subs (000)</i> | | | | | | | | |
| <i>Triple-play digital cable subs (000)</i> | | | | | | | | |
| | | | | | | | | |
| <i>Stand-alone pay IPTV subs (000)</i> | | | | | | | | |
| <i>Dual-play pay IPTV subs (000)</i> | | | | | | | | |
| <i>Triple-play pay IPTV subs (000)</i> | | | | | | | | |
| | | | | | | | | |
| Revenues (US\$ million) | | | | | | | | |
| <i>Stand-alone digital cable revs</i> | | | | | | | | |
| <i>Dual-play digital cable TV revenues</i> | | | | | | | | |
| <i>Triple-play digital cable TV revenues</i> | | | | | | | | |
| Digital cable TV subs revenues | | | | | | | | |
| Digital cable TV on-demand revs | | | | | | | | |
| Digital cable TV revenues | | | | | | | | |
| Analog cable TV subs revs | | | | | | | | |
| Cable TV revenues | | | | | | | | |
| | | | | | | | | |



Qatar pay TV forecasts

| | 2019 | 2020 | 2021 | 2022 | 2023 | 2024 | 2025 | 2026 |
|---|------|------|------|------|------|------|------|------|
| <i>Stand-alone IPTV revenues</i> | | | | | | | | |
| <i>Dual-play IPTV revenues</i> | | | | | | | | |
| <i>Triple-play IPTV revenues</i> | | | | | | | | |
| IPTV subscription revenues | | | | | | | | |
| IPTV on-demand revenues | | | | | | | | |
| IPTV revenues | | | | | | | | |
| | | | | | | | | |
| Satellite TV subscription revenues | | | | | | | | |
| Satellite TV on-demand revenues | | | | | | | | |
| Satellite TV revenues | | | | | | | | |
| | | | | | | | | |
| DTT subscription revs | | | | | | | | |
| DTT on-demand revenues | | | | | | | | |
| DTT revenues | | | | | | | | |
| | | | | | | | | |
| Subscription revenues | | | | | | | | |
| On-demand revenues | | | | | | | | |
| Total revenues | | | | | | | | |
| | | | | | | | | |
| Average Revenue Per User (ARPU - US\$) | | | | | | | | |
| <i>Stand-alone digital cable subs</i> | | | | | | | | |
| <i>Dual-play digital cable TV subs</i> | | | | | | | | |
| <i>Triple-play digital cable TV subs</i> | | | | | | | | |
| Average digital cable (subs & VOD) | | | | | | | | |
| Analog cable TV subs | | | | | | | | |
| <i>Stand-alone IPTV subs</i> | | | | | | | | |
| <i>Dual-play IPTV subs</i> | | | | | | | | |
| <i>Triple-play IPTV subs</i> | | | | | | | | |
| Average IPTV (subs and VOD) | | | | | | | | |
| Pay Satellite TV (subs) | | | | | | | | |
| Pay Satellite TV (subs and PPV) | | | | | | | | |
| Pay DTT (subs) | | | | | | | | |
| Pay DTT (subs and PPV) | | | | | | | | |
| Average monthly ARPU | | | | | | | | |
| | | | | | | | | |
| Pay TV subscribers by operator (000) | | | | | | | | |
| <i>beIN (satellite)</i> | | | | | | | | |
| <i>OSN (satellite)</i> | | | | | | | | |
| <i>Ooredoo (IPTV)</i> | | | | | | | | |
| <i>Others</i> | | | | | | | | |
| | | | | | | | | |
| Share of pay TV subs by operator % | | | | | | | | |
| <i>beIN (satellite)</i> | | | | | | | | |
| <i>OSN (satellite)</i> | | | | | | | | |
| <i>Ooredoo (IPTV)</i> | | | | | | | | |
| <i>Others</i> | | | | | | | | |
| | | | | | | | | |



Qatar pay TV forecasts

| | 2019 | 2020 | 2021 | 2022 | 2023 | 2024 | 2025 | 2026 |
|---|------|------|------|------|------|------|------|------|
| Subscription & VOD revenues (US\$ million) | | | | | | | | |
| <i>beIN (satellite)</i> | | | | | | | | |
| <i>OSN (satellite)</i> | | | | | | | | |
| <i>Ooredoo (IPTV)</i> | | | | | | | | |
| <i>Others</i> | | | | | | | | |
| Share of pay TV revenues by operator % | | | | | | | | |
| <i>beIN (satellite)</i> | | | | | | | | |
| <i>OSN (satellite)</i> | | | | | | | | |
| <i>Ooredoo (IPTV)</i> | | | | | | | | |
| <i>Others</i> | | | | | | | | |
| Average Revenue Per User (ARPU - US\$) | | | | | | | | |
| <i>beIN (satellite)</i> | | | | | | | | |
| <i>OSN (satellite)</i> | | | | | | | | |
| <i>Ooredoo (IPTV)</i> | | | | | | | | |

