



# digital TV research

September 2019

## About us

Digital TV Research specialises in providing cutting-edge business intelligence for the television industry.

Our clients can purchase targeted, electronically-delivered products and rely on our extensive experience for tailored projects.

We publish about 25 reports each year for more than 350 clients.

We offer annual subscriptions – or tailor-made subscriptions - with attractive discounts.

## What makes us so different from other research providers?

- The full extent of our global coverage: 138 countries across seven regions
- Annual detailed pay TV and OTT forecast updates of each country
- Experience (30+ years)
- Flexible, customised research: no need to buy everything in an annual subscription.
- Competitive and reasonable prices

## Each country profile comes in three parts:

- **Outlook:** Subscriber forecasts via charts, graphs and bullet points in a PDF document;
- Detailed **excel workbook** covering each year from 2010 to 2024;
- **Insight:** Detailed analysis in a PDF document.

### *Contact us:*

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<b>Digital TV Research publication schedule for 2019</b>			
<b>Title</b>	<b>Publication</b>	<b>Price</b>	
1 <a href="#">Sub-Saharan Africa Pay TV Forecasts</a>	January	£1000/€1200/\$1300	
2 <a href="#">Sub-Saharan Africa OTT TV and Video Forecasts</a>	January	£1000/€1200/\$1300	
3 <a href="#">Middle East &amp; North Africa Pay TV Forecasts</a>	January	£1000/€1200/\$1300	
4 <a href="#">Middle East &amp; North Africa OTT TV and Video Forecasts</a>	February	£1000/€1200/\$1300	
5 <a href="#">Asia Pacific Pay TV Forecasts</a>	March	£1000/€1200/\$1300	
6 <a href="#">Asia Pacific OTT TV and Video Forecasts</a>	March	£1000/€1200/\$1300	
7 <a href="#">Latin America Pay TV Forecasts</a>	April	£1000/€1200/\$1300	
8 <a href="#">Latin America OTT TV and Video Forecasts</a>	April	£1000/€1200/\$1300	
9 <a href="#">North America Pay TV Forecasts</a>	April	£500/€600/\$650	
10 <a href="#">North America OTT TV and Video Forecasts</a>	April	£500/€600/\$650	
11 <a href="#">Eastern Europe Pay TV Forecasts</a>	May	£1000/€1200/\$1300	
12 <a href="#">Eastern Europe OTT TV and Video Forecasts</a>	May	£1000/€1200/\$1300	
13 <a href="#">Western Europe Pay TV Forecasts</a>	June	£1000/€1200/\$1300	
14 <a href="#">Western Europe OTT TV and Video Forecasts</a>	June	£1000/€1200/\$1300	
15 <a href="#">Global OTT TV &amp; Video Forecasts</a>	June	£1800/€2160/\$2340	
16 <a href="#">Global SVOD Forecasts</a>	June	£1500/€1800/\$1950	
17 <a href="#">Global Pay TV Subscriber Forecasts</a>	June	£1500/€1800/\$1950	
18 <a href="#">Global Pay TV Revenue Forecasts</a>	June	£1500/€1800/\$1950	
19 <a href="#">Global Pay TV Operator Forecasts</a>	June	£1500/€1800/\$1950	
20 <a href="#">Global AVOD Forecasts</a>	June	£750/€900/\$975	
21 <a href="#">SVOD Forecasts Update</a>	September	£1000/€1200/\$1300	
22 <a href="#">OTT TV and Video Databook</a>	September	£750/€900/\$975	
23 <a href="#">SVOD Databook</a>	September	£750/€900/\$975	
24 <a href="#">Pay TV Databook</a>	September	£750/€900/\$975	
25 <a href="#">Pay TV Forecasts Update</a>	September	£1000/€1200/\$1300	

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Discounts are available for multiple report purchases and annual subscriptions.

Please contact [lydia@digitaltvresearch.com](mailto:lydia@digitaltvresearch.com)

## *Forecasts for 138 countries:*

Albania	Algeria	Angola	Argentina
Armenia	Australia	Austria	Azerbaijan
Bahrain	Bangladesh	Belarus	Belgium
Benin	Bolivia	Bosnia	Botswana
Brazil	Bulgaria	Burkina Faso	Burundi
Cambodia	Cameroon	Canada	CAR
Chad	Chile	China	Colombia
DR Congo	Rep Congo	Costa Rica	Cote d'Ivoire
Croatia	Cyprus	Czech Rep.	Denmark
Dominican Rep.	Ecuador	Egypt	El Salvador
Eq Guinea	Estonia	Ethiopia	Finland
France	Gabon	Gambia	Georgia
Germany	Ghana	Greece	Guatemala
Guinea	Honduras	Hong Kong	Hungary
Iceland	India	Indonesia	Ireland
Israel	Italy	Japan	Jordan
Kazakhstan	Kenya	Kuwait	Laos
Latvia	Lebanon	Liberia	Lithuania
Luxembourg	Macedonia	Madagascar	Malawi
Mali	Malaysia	Malta	Mexico
Moldova	Mongolia	Montenegro	Morocco
Mozambique	Myanmar	Namibia	Nepal
Netherlands	New Zealand	Nicaragua	Niger
Nigeria	Norway	Oman	Pakistan
Panama	Paraguay	Peru	Philippines
Poland	Portugal	Puerto Rico	Qatar
Romania	Russia	Rwanda	Saudi Arabia
Senegal	Serbia	Sierra Leone	Singapore
Slovakia	Slovenia	South Africa	South Korea
Spain	Sri Lanka	Sweden	Switzerland
Syria	Taiwan	Tanzania	Thailand
Togo	Tunisia	Turkey	Uganda
Ukraine	UAE	UK	USA
Uruguay	Uzbekistan	Venezuela	Vietnam
Zambia	Zimbabwe		



## Country Profiles

As part of our commitment to provide research data in a range of different formats, we now offer individual country profiles which can be purchased separately. We have combined analysis for traditional pay TV with OTT/SVOD into one document. Each of the PDF reports cover the following:

- **SVOD Insights:** Commentary on the main players and developments
- Detailed Forecasts: SVOD Forecasts for every year from 2017 to 2024
- Chart: SVOD subscribers by operator for 2017, 2018, 2019, 2020 and 2024
- Chart: SVOD revenues by operator for 2017, 2018, 2019, 2020 and 2024
  
- **Pay TV Insights:** Commentary on the main players and developments
- Forecasts: Pay TV Forecasts for every year from 2017 to 2024
- 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 2017, 2018, 2019, 2020 and 2024
- Chart: Pay TV revenues by platform (digital cable, analog cable, IPTV, pay satellite TV and pay DTT) for 2017, 2018, 2019, 2020 and 2024
- Chart: Pay TV subscribers by operator (digital cable, analog cable, IPTV, pay satellite TV and pay DTT) for 2017, 2018, 2019, 2020 and 2024
- Chart: Pay TV revenues by operator (digital cable, analog cable, IPTV, pay satellite TV and pay DTT) for 2017, 2018, 2019, 2020 and 2024

**Price for each country profile: £375/€450/\$485**

For more information, [please click here](#) or contact [lydia@digitaltvresearch.com](mailto:lydia@digitaltvresearch.com)

Please click on the country that you are most interested in from the table below to find out more:

<a href="#">Australia</a>	<a href="#">Brazil</a>	<a href="#">Canada</a>	<a href="#">China</a>
<a href="#">France</a>	<a href="#">Germany</a>	<a href="#">India</a>	<a href="#">Italy</a>
<a href="#">Japan</a>	<a href="#">Mexico</a>	<a href="#">Poland</a>	<a href="#">Russia</a>
<a href="#">Saudi Arabia</a>	<a href="#">South Africa</a>	<a href="#">South Korea</a>	<a href="#">Spain</a>
<a href="#">Sweden</a>	<a href="#">Turkey</a>	<a href="#">UK</a>	<a href="#">USA</a>

We can provide this level of detail for 138 countries.

Please [contact us](#) to request a different country.

## REPORT SAMPLE: Qatar OTT TV & video insight

- OTT TV & video revenues are forecast to reach \$53 million by 2024, up from \$18 million in 2018. SVOD will contribute \$43 million to the 2024 total, up from \$14 million in 2018. There will be 398,000 SVOD subscriptions by 2024 (77% of TV households) compared with 180,000 at end-2018.

Main assumptions behind the forecasts
<ul style="list-style-type: none"><li>• We have substantially upgraded our SVOD forecasts for this edition due to the added activity over the last year.</li></ul>
<ul style="list-style-type: none"><li>• The OTT sector is competitive.</li></ul>
<ul style="list-style-type: none"><li>• Smartphone penetration is very high.</li></ul>
<ul style="list-style-type: none"><li>• Fixed broadband penetration is also high.</li></ul>
<ul style="list-style-type: none"><li>• Piracy is a problem.</li></ul>
<ul style="list-style-type: none"><li>• High proportion of ex-pats means strong demand for foreign content.</li></ul>
<i>Source: Digital TV Research</i>

- Similar to the rest of the region, **piracy** is a major problem. However, the Ministry of Justice instigated a widespread anti-piracy campaign in 2012.
- **Netflix** launched in January 2016. We forecast 136,000 subscribers by 2024; up by 60,000 on the end-2017 total. Netflix signed a distribution deal with OSN in February 2018.
- **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 subs by 2024.
- Transmitting in English, Arabic and French, **Starz Play** has 5,000 hours of Hollywood content as well as 1,200 hours of Arabic content. In October 2015, Ooredoo TV signed an exclusive distribution deal with Starz Play (QAR30/month, \$8.24). More Arabic content will lead to subscriber growth – 103,000 by 2024.
- MBC's **Shahid Plus** provides 10 linear channels as well as on-demand content. We forecast 60,000 subscribers by 2024.
- Started in 2012, **Icflix** is the longest established SVOD platform. We forecast 20,000 subscribers by 2024. With Arabic, English and French content, Icflix provides more than 20,000 hours of content.

- OSN launched SVOD platform **Wavo** in August 2017. Wavo carries OSN's movie archive and HBO content as well as 27 linear channels. OSN signed a distribution agreement with Netflix in February 2018. We expect 10,000 paying subscribers by 2024.
- **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. We forecast 6,000 paying subscribers by 2024.
- **Telly** is also available in Qatar (\$4.99/month). Telly is available in 14 countries across the region.
- Hong Kong's **Viu** started operations in Bahrain, Egypt, Jordan, Kuwait, Oman, Qatar, Saudi Arabia and UAE in February 2017. Local content is included as well as international fare to appeal to ex-pats. **Ooredoo Video Clips** started in April 2016, providing access to 1.7 million videos in 25 languages for QAR2/day (\$0.55) – in partnership with **Vuclip**.
- **The Ooredoo TV IPTV platform** is offered as part of a triple-play package (up to 1Gbps). In October 2015, Ooredoo signed an exclusive distribution deal with SVOD platform Starz Play (QAR30/month).
- Ooredoo is investing QAR1 billion on an **extensive fiber network** (up to 100Mbps). The company claimed 500,000 homes passed and 400,000 connected by November 2018. Ooredoo is responsible for constructing the government-owned National Broadband Network (QNBN). Ooredoo had 3.26 million mobile subs by September 2018.
- **Vodafone** won the license for the second fixed line service in April 2010. Vodafone sold its stake to a local consortium in late 2018. Pocket TV provides 70 linear channels for QAR30/month. Vodafone had 5,000 fixed broadband and 1.38 million mobile subscribers by September 2018.



Qatar OTT TV & video forecasts								
	2017	2018	2019	2020	2021	2022	2023	2024
Population (000)								
Total households (000)								
TV households (000)								
Fixed broadband households (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 fixed bb hh (000)								
OTT TV & video HH/Fixed bband HH								
OTT TV & video HH/TV HH								
OTT TV & video smartph subs (000)								
OTT TV & video HH/smartph subs								
Gross OTT TV & video total (000)								
Gross SVOD subscriptions (000)								
SVOD subs/TVHH								
SVOD subs/Fixed broadband HH								
SVOD subs/Smartphone users								
Net SVOD homes (000)								
SVOD homes/TVHH								
SVOD homes/Fixed broadband HH								
SVOD subscriptions/SVOD homes								
TV rental transactions (000)								
Movie rental transactions (000)								
Total rental transactions (000)								
TV download-to-own trans (000)								
Movie download-to-own trans (000)								
Total download-to-own trans (000)								

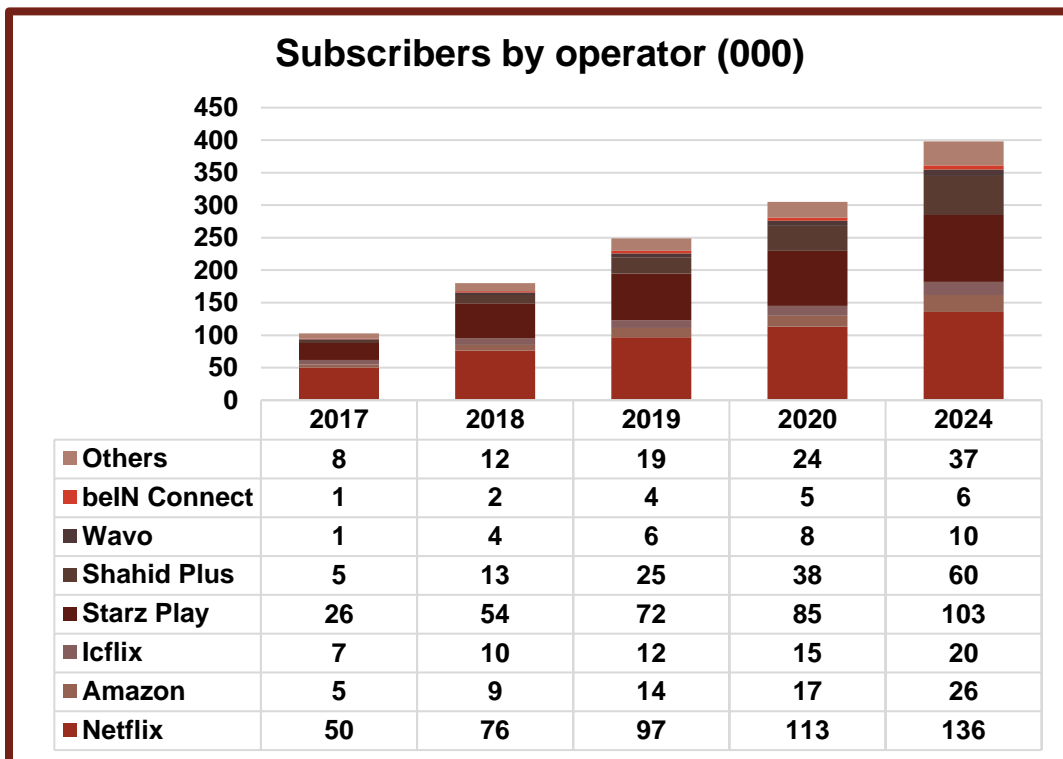
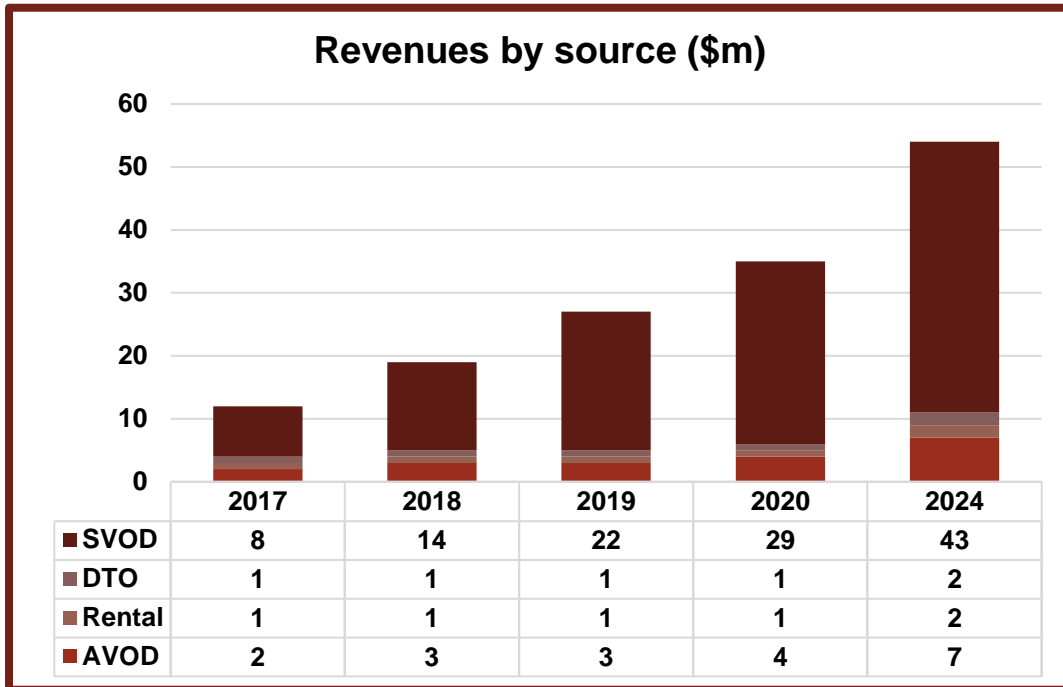


Qatar OTT TV & video forecasts								
	2017	2018	2019	2020	2021	2022	2023	2024
Online advertising total (US\$ mil.)								
AVOD (US\$ mil.)								
Online TV rental revenues (US\$ mil.)								
Online movie rental revs (US\$ mil.)								
Online rental revenues (US\$ mil.)								
Download-to-own TV revs (US\$ mil.)								
DTO movie revs (US\$ mil.)								
DTO video revenues (US\$ mil.)								
SVOD revenues (US\$ mil.)								
OTT TV & video revenues (US\$ mil.)								
SVOD subscribers by operator (000)								
Netflix								
Amazon								
Icflix								
Starz Play								
Shahid Plus								
Wavo								
beIN Connect								
Others								
Share of SVOD subscribers by operator (%)								
Netflix								
Amazon								
Icflix								
Starz Play								
Shahid Plus								
Wavo								
beIN Connect								
Others								
SVOD revenues by operator (US\$ mil.)								
Netflix								
Amazon								
Icflix								
Starz Play								
Shahid Plus								
Wavo								
beIN Connect								
Others								

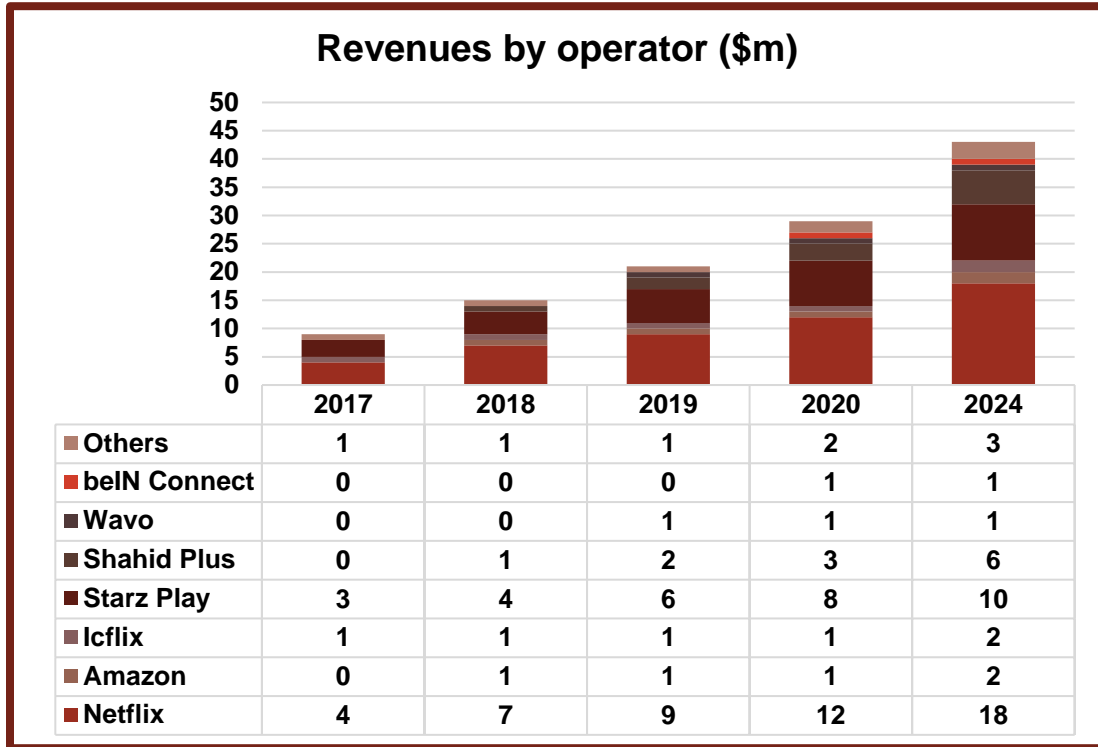


<b>Qatar OTT TV &amp; video forecasts</b>								
	2017	2018	2019	2020	2021	2022	2023	2024
<b>Share of SVOD revenues by operator (%)</b>								
<b>Netflix</b>								
<b>Amazon</b>								
<b>Icflix</b>								
<b>Starz Play</b>								
<b>Shahid Plus</b>								
<b>Wavo</b>								
<b>beIN Connect</b>								
<b>Others</b>								
<b>SVOD ARPU by operator (\$)</b>								
<b>Netflix</b>								
<b>Amazon</b>								
<b>Icflix</b>								
<b>Starz Play</b>								
<b>Shahid Plus</b>								
<b>Wavo</b>								
<b>beIN Connect</b>								
<b>Source: Digital TV Research</b>								

## Qatar OTT TV & video outlook



## Qatar OTT TV & video outlook



## REPORT SAMPLE: Qatar pay TV insight

- **Digital TV penetration** reached 100% in 2015. About 59% of the 506,000 TV households receive either free-to-air or pay satellite TV signals.

Main assumptions behind the forecasts	
•	About 35% of homes receive FTA satellite TV signals and 24% pay to receive satellite TV signals.
•	IPTV penetration is also high – at 29.5% by end-2018.
•	Few homes rely on DTT signals.
<i>Source: Digital TV Research</i>	

- **Pay TV penetration** will climb from 53.5% in 2018 to 58.8% by 2024. This is mainly due to greater IPTV take-up (31.7% penetration by 2024). Pay TV revenues will reach \$80 million in 2024.
- The ongoing dispute between Saudi Arabia and Qatar has 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. However, we believe that it will be resolved in 2019; given the pressure on Saudi Arabia to drop the ban and to close pirate platform BeoutQ from many organizations, especially sports federations and other content owners.
- beIN is owned by Al Jazeera. Part of the disagreement involves the Saudi government not liking comments made on Al Jazeera about its regime. The same is true of the Egyptian government. Egypt and Saudi Arabia were key markets for beIN. Even when the ban on beIN is lifted and BeoutQ closed down, beIN is unlikely to regain all of its subscribers in those countries.

beIN monthly subscription fees (\$)		
Package	Channels	Price
Access	43	10
Top Sports	Access + 13 channels	25
Top Entertainment	Access +26 channels	25
Complete	Access + 43 channels	30
Elite	Complete + 5 channels	45
<i>Source: beIN</i>		

- With 61,000 subs in Qatar by end-2018, **beIN** provides up to 67 channels. We forecast that beIN will have 72,000 subs by 2024.

- Sports is a major attraction for beIN. As well as World Cup and Euros soccer, beIN holds the rights to European Champions League, La Liga, Bundesliga, Serie A, La Ligue and English Premier League (until 2022) football. Furthermore, it screens NBA, ATP tennis and three Opens, F1 and Tour de France action. beIN has 13 dedicated sports channels. beIN is broadening its appeal into the Entertainment sphere. beIN acquired the Miramax studio in March 2016.

OSN monthly subscription fees (QAR)		
Package	Channels	Price
El Farq	69	149
Platinum	93	500

*Source: OSN*

- KIPCO severely reduced its estimates for **OSN** satellite TV subscribers in Qatar – from 173,000 by end-2015 to 52,000 in March 2016. We forecast that OSN will have 68,000 subscribers by 2024.
- **The Ooredoo TV IPTV platform** (up to 200 channels, including bundles from beIN, MBC and OSN) is offered as part of a triple-play package (up to 1Gbps). We estimated 149,000 subscribers at end-2018; climbing to 164,000 by 2024. In October 2015, Ooredoo signed an exclusive distribution deal with SVOD platform Starz Play (QAR30/month, 7,000 hours).
- Ooredoo is investing QAR1 billion on an **extensive fiber network** (up to 100Mbps). The company claimed 500,000 homes passed and 400,000 connected by November 2018. Ooredoo is responsible for constructing the government-owned National Broadband Network (QNBN). Ooredoo had 3.26 million mobile subs by September 2018.
- **Vodafone** won the license for the second fixed line service in April 2010. Vodafone sold its stake to a local consortium in late 2018. Pocket TV provides 70 linear channels for QAR30/month. Vodafone had 5,000 fixed broadband and 1.38 million mobile subscribers by September 2018.
- 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.

- Oil and gas-rich Qatar is one of the wealthiest countries in the world, boasting a **GDP per capita** of \$67,818 in 2018. The International Monetary Fund expects average GDP growth over the next five years; better than the last edition. With a population of 2.77 million, Qatar has more foreign residents than locals. Low population growth is expected. Doha has a population of 753,000.
- Emir Hamad bin Khalifa has introduced some reforms since he took power in 1995. He handed over power to his son Tamim bin Hamad al-Thani in June 2013. Saudi Arabia led a boycott against Qatar in mid-2017, claiming that Qatar supported terrorism.



Qatar pay TV forecasts								
	2017	2018	2019	2020	2021	2022	2023	2024
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)								
Total DTT homes (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								
Total DTT/TVHH								
<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>								



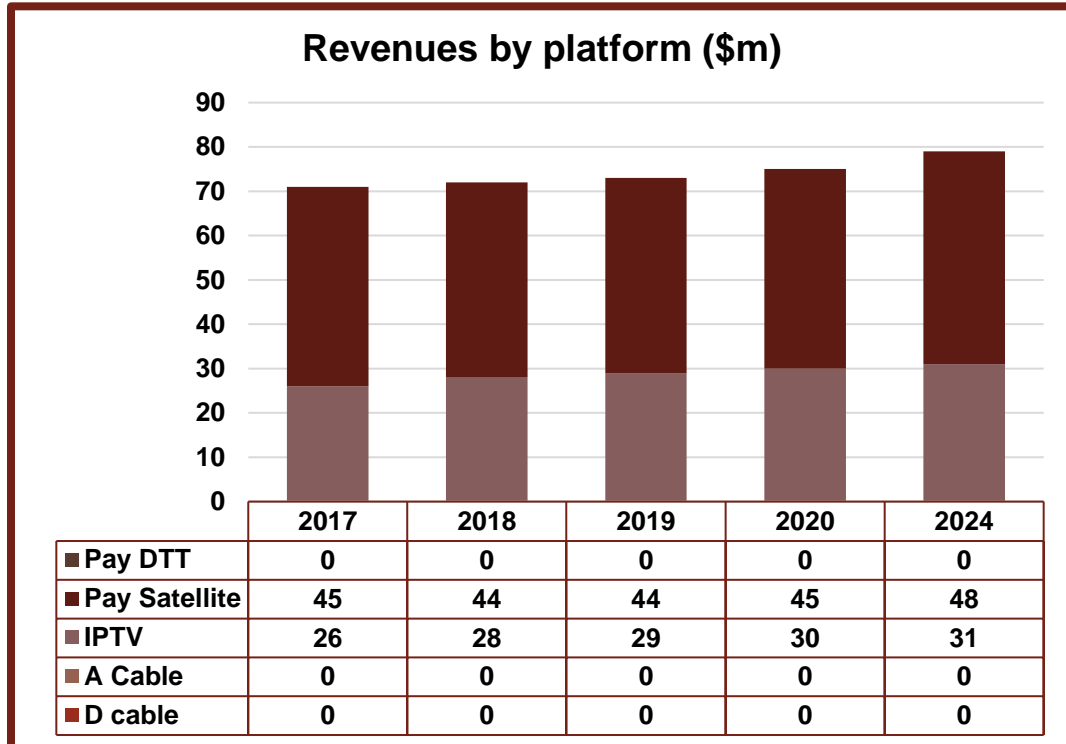
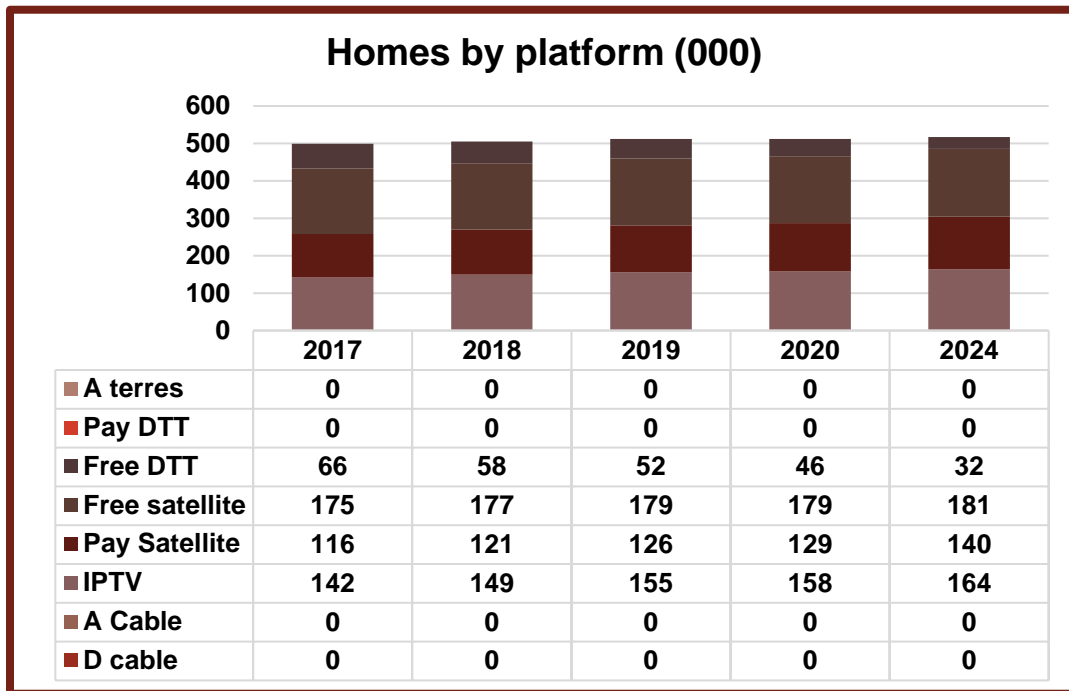
Qatar pay TV forecasts								
	2017	2018	2019	2020	2021	2022	2023	2024
Revenues (US\$ million)								
<i>Stand-alone digital cable revs</i>								
<i>Dual-play digital cable TV revenues</i>								
<i>Triple-play digital cable TV revs</i>								
Digital cable TV subs revenues								
Digital cable TV on-demand revs								
Digital cable TV revenues								
Analog cable TV subs revs								
Cable TV revenues								
<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								





Qatar pay TV forecasts								
	2017	2018	2019	2020	2021	2022	2023	2024
<b>Pay TV subs by operator (000)</b>								
beIN (satellite)								
OSN (satellite)								
Ooredoo (IPTV)								
Others								
<b>Share of pay TV subs by operator %</b>								
beIN (satellite)								
OSN (satellite)								
Ooredoo (IPTV)								
Others								
<b>Subscription &amp; VOD revenues (US\$ million)</b>								
beIN (satellite)								
OSN (satellite)								
Ooredoo (IPTV)								
Others								
<b>Share of pay TV revenues by operator %</b>								
beIN (satellite)								
OSN (satellite)								
Ooredoo (IPTV)								
Others								
<b>Average Revenue Per User (ARPU - US\$)</b>								
beIN (satellite)								
OSN (satellite)								
Ooredoo (IPTV)								
Source: digital TV research Ltd.								

## Qatar pay TV outlook



## Qatar pay TV outlook

