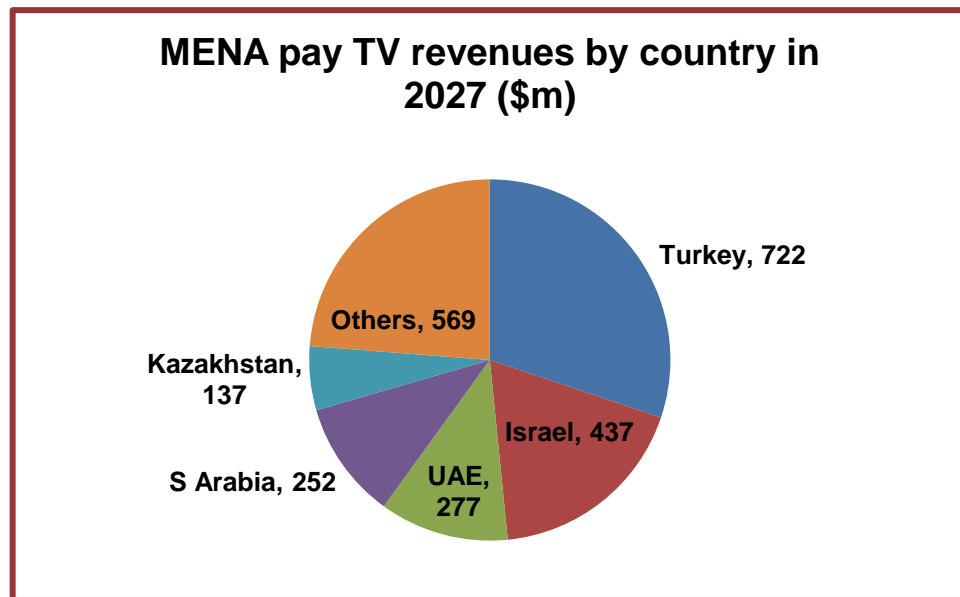


MENA pay TV revenues to fall by \$1.5 billion

Pay TV revenues for 20 countries in the Middle East and North Africa region will fall by 38% between peak year 2016 (\$3.84 billion) and 2027 (\$2.39 billion).

Simon Murray, Principal Analyst at Digital TV Research, said: "Pay TV has never had an easy ride the MENA region. First was the battle with widespread piracy. Next the Saudi government and others banned beIN for four years. Traditional pay TV subscribers are now converting to SVOD platforms."



Source: Digital TV Research

Pay TV revenues for the 13 Arabic-speaking countries will be \$915 million by 2027; down from \$1,571 million in 2016. Pay TV subscriber numbers will fall from 3.70 million to 3.14 million over the same period.

Turkish pay TV revenues will reach \$722 million in 2027; \$188 million lower than in 2016. However, the number of pay TV subscribers will grow from 5.92 million in 2016 to 8.25 million in 2027 – so subscribers are paying less.

Cord-cutting in Israel will see 46% of its pay TV subs lost between 2014 to 2027. Pay TV revenues will fall from \$1.15 billion to \$437 million over the same period.

For more information [on the Middle East and North Africa Pay TV Forecasts report](#), please contact: Simon Murray, simon@digitaltvresearch.com, Tel: +44 20 8248 5051

Middle East & North Africa Pay TV Forecasts

Published in January 2022, this 152-page PDF, PowerPoint and excel report is our tenth edition. The report comes in three parts:

- Insight: Detailed country-by-country analysis in a 52-page PDF document.
- Outlook: Forecasts for 20 countries in a 42-page PowerPoint document full of charts, graphs and bullet points;
- Excel workbook covering each year from 2010 to 2027 for 20 countries by household penetration, by pay TV subscribers, by pay TV revenues and by major operator. As well as summary tables by country and by platform;

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

Forecasts for the following 20 countries and 49 platforms:

Country	No of ops	Platform forecasts
Algeria	3	beIN; OSN; Algerie Telecom
Armenia	0	
Azerbaijan	0	
Bahrain	3	beIN; OSN; Batelco
Egypt	3	beIN; OSN; Telecom Egypt
Georgia	2	Magtisar; Sliknet
Israel	2	HOT; Yes
Jordan	3	beIN; OSN; Orange
Kazakhstan	2	Alma; KT
Kuwait	2	beIN; OSN
Lebanon	2	beIN; OSN
Morocco	3	beIN; OSN; Maroc Telecom
Oman	3	beIN; OSN; Omantel
Qatar	3	beIN; OSN; Ooredoo
Saudi Arabia	4	beIN; OSN; Jawwy IPTV ; Mobily
Syria	1	beIN
Tunisia	2	beIN; OSN
Turkey	5	Turksat; Turkcell; TTNNet; Digiturk; D-Smart
UAE	4	beIN; OSN; Du; eLife
Uzbekistan	2	Uztelecom; Uzdigital

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.

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.

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.

SAMPLE: Bahrain pay TV forecasts

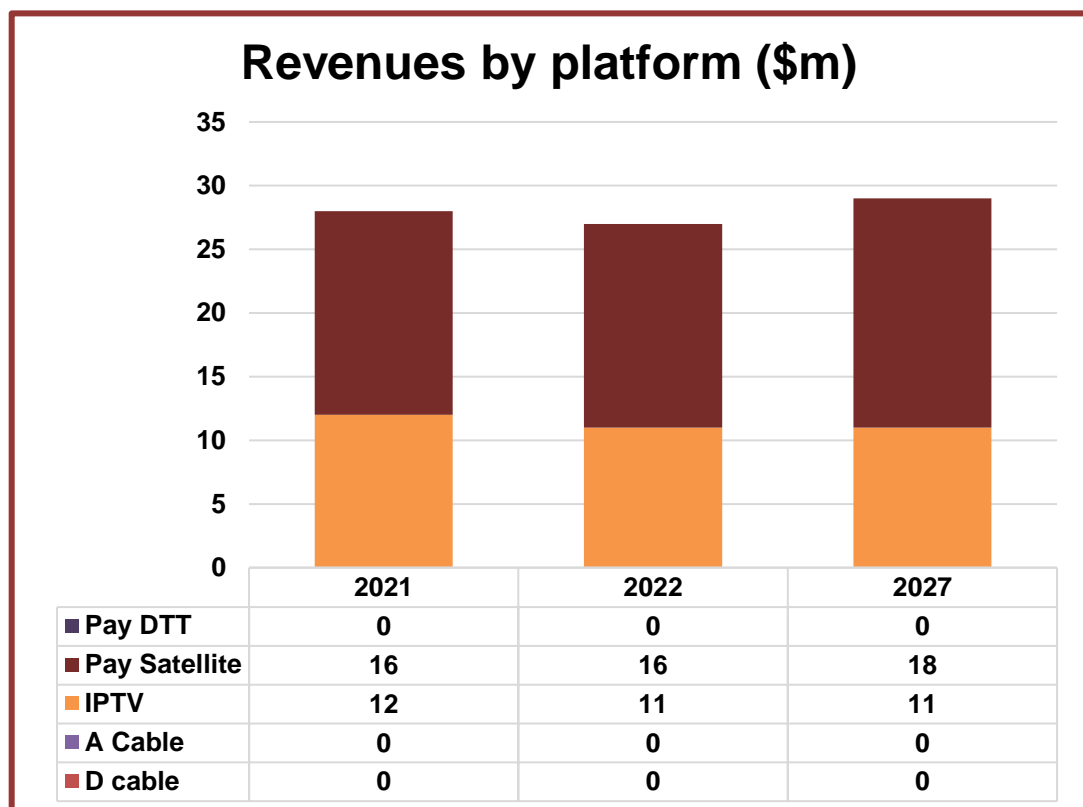
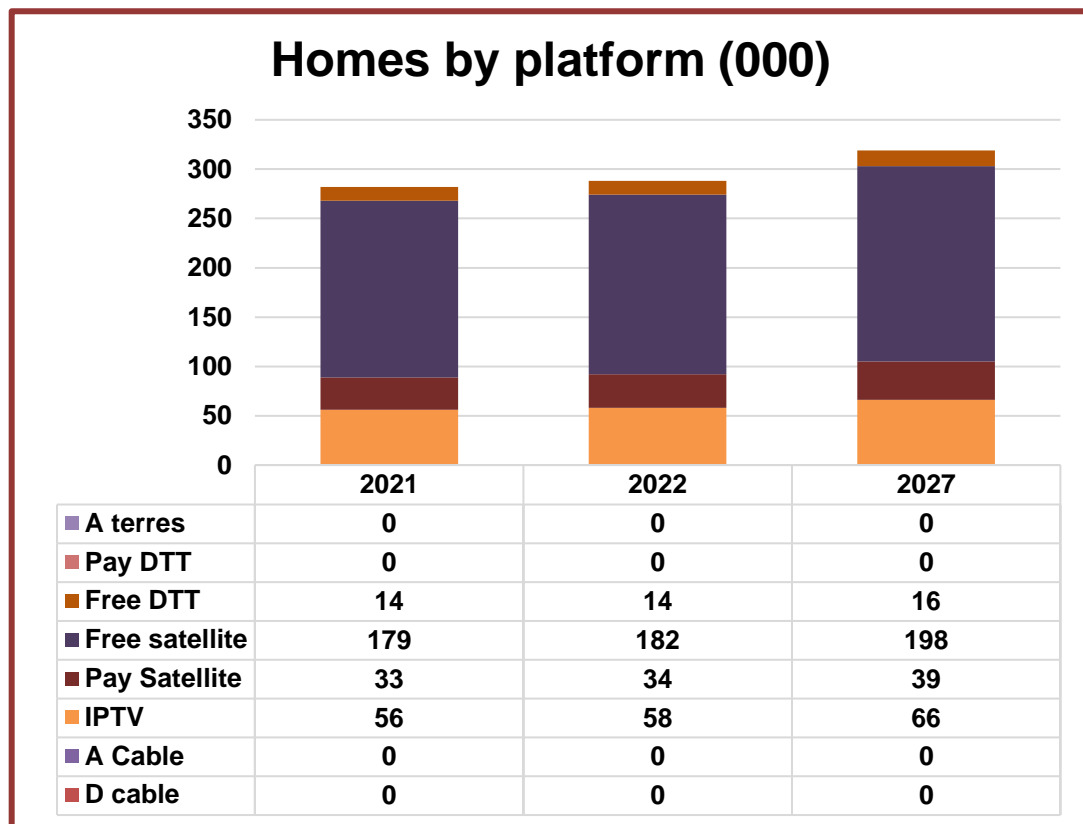
	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027
Total households (000)																		
TV households (000)																		
Digital cable subs (000)																		
Analog cable subs (000)																		
Pay IPTV subscribers (000)																		
Pay 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																		
Revenues (US\$ million)																		
Digital cable TV																		
Analog cable TV																		
IPTV																		
Satellite TV																		
DTT																		
Total revenues																		
Average Revenue Per User (ARPU - US\$)																		
Digital cable TV																		
Analog cable TV																		
IPTV																		
Satellite TV																		
DTT																		
Average monthly ARPU																		



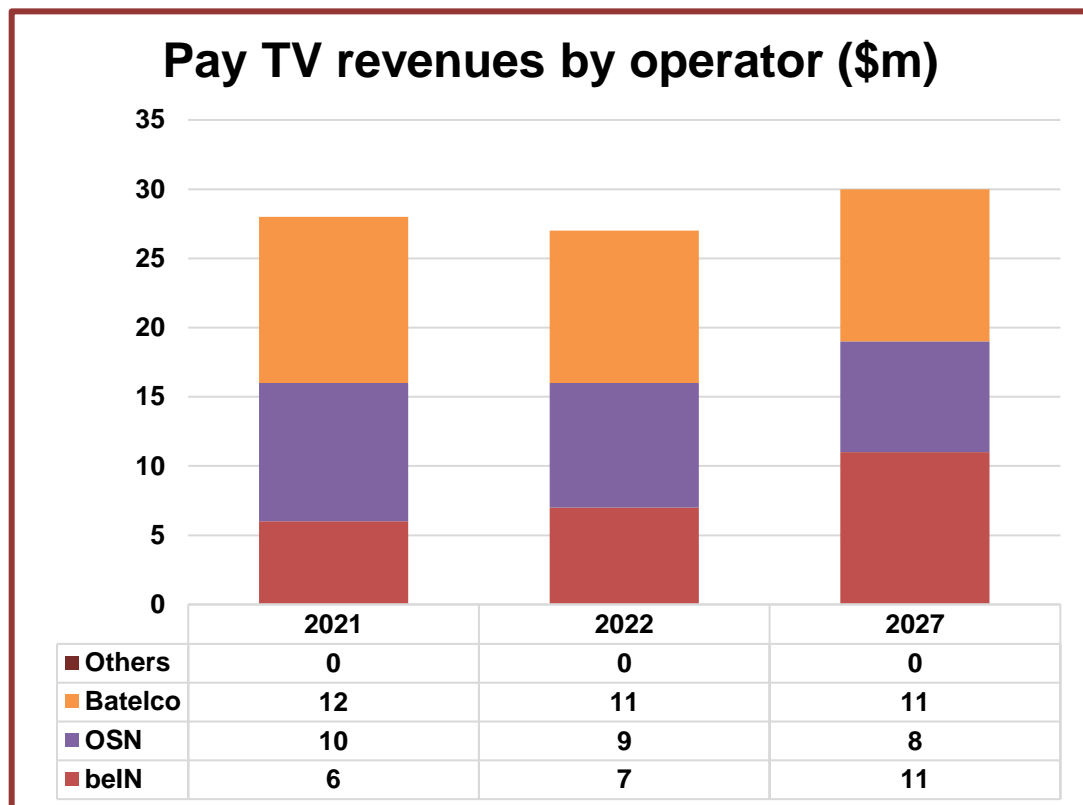
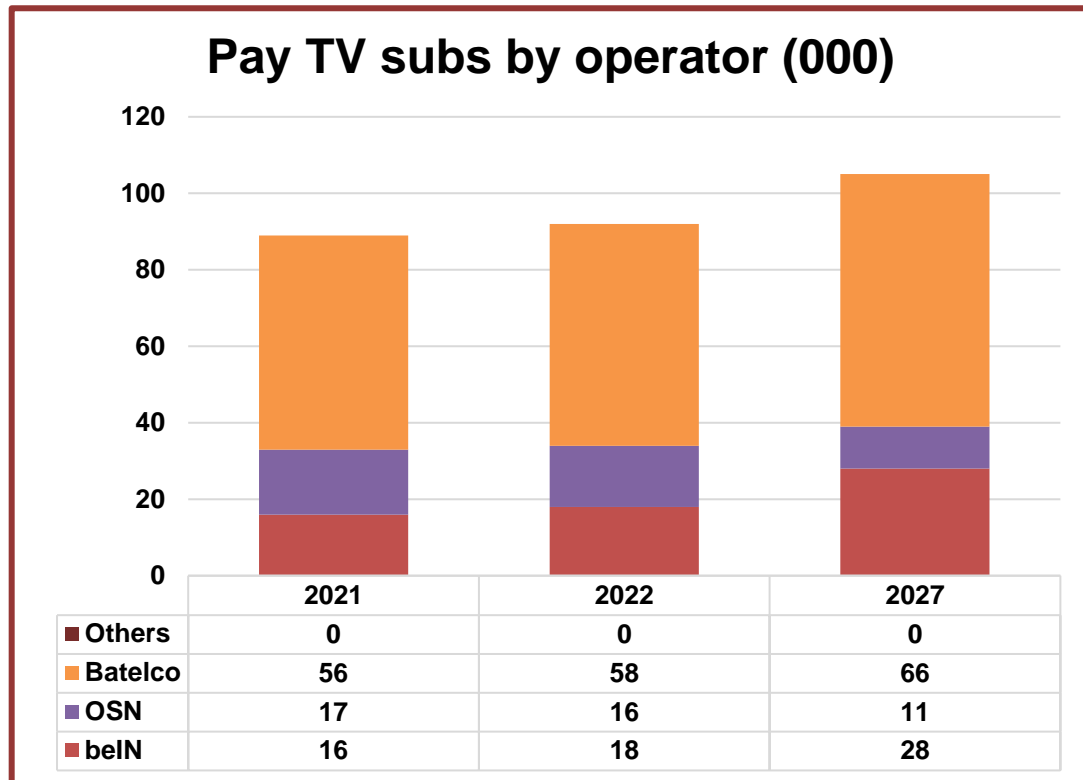
SAMPLE: Bahrain pay TV forecasts

	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027
Pay TV subscribers by operator (000)																		
belN (satellite)																		
OSN (satellite)																		
Batelco (IPTV)																		
Other																		
Share of pay TV subs by operator %																		
belN (satellite)																		
OSN (satellite)																		
Batelco (IPTV)																		
Other																		
Pay TV revenues by operator (\$ million)																		
belN (satellite)																		
OSN (satellite)																		
Batelco (IPTV)																		
Other																		
Share of pay TV revenues by operator %																		
belN (satellite)																		
OSN (satellite)																		
Batelco (IPTV)																		
Other																		

SAMPLE: Bahrain pay TV outlook



SAMPLE: Bahrain pay TV outlook



Digital TV Research report schedule for 2022

Title	Publication	Price
1 Africa Pay TV Forecasts	January	£1400/€1600/\$1875
2 Middle East & North Africa Pay TV Forecasts	January	£1400/€1600/\$1875
3 SVOD Forecasts Update (based on December 2021 results)	February	£1800/€2050/\$2400
4 Africa OTT TV and Video Forecasts	February	£1400/€1600/\$1875
5 Middle East & North Africa OTT TV and Video Forecasts	February	£1400/€1600/\$1875
6 North America Pay TV Forecasts	February	£700/€800/\$940
7 North America OTT TV and Video Forecasts	February	£700/€800/\$940
8 Latin America Pay TV Forecasts	March	£1400/€1600/\$1875
9 Latin America OTT TV and Video Forecasts	March	£1400/€1600/\$1875
10 Asia Pacific Pay TV Forecasts	March	£1400/€1600/\$1875
11 Asia Pacific OTT TV and Video Forecasts	March	£1400/€1600/\$1875
12 Eastern Europe Pay TV Forecasts	April	£1400/€1600/\$1875
13 Eastern Europe OTT TV and Video Forecasts	April	£1400/€1600/\$1875
14 Western Europe Pay TV Forecasts	May	£1400/€1600/\$1875
15 Western Europe OTT TV and Video Forecasts	May	£1400/€1600/\$1875
16 Global OTT TV & Video Forecasts	May	£2000/€2300/\$2600
17 Global SVOD Forecasts (based on March 2022 results)	May	£1800/€2050/\$2400
18 Global Pay TV Subscriber Forecasts	June	£1800/€2050/\$2400
19 Global Pay TV Revenue Forecasts	June	£1800/€2050/\$2400
20 Global Pay TV Operator Forecasts	June	£1800/€2050/\$2400
21 Global AVOD Forecasts	June	£1800/€2050/\$2400
22 SVOD Forecasts Update (based on June 2022 results)	August	£1800/€2050/\$2400
23 Africa SVOD Forecasts	August	£1200/€1380/\$1600
24 Middle East & North Africa SVOD Forecasts	August	£1200/€1380/\$1600
25 Asia Pacific SVOD Forecasts	August	£1200/€1380/\$1600
26 Latin America SVOD Forecasts	September	£1200/€1380/\$1600
27 North America SVOD Forecasts	September	£600/€690/\$800
28 Eastern Europe SVOD Forecasts	September	£1200/€1380/\$1600
29 Western Europe SVOD Forecasts	October	£1200/€1380/\$1600
30 SVOD Forecasts Update (based on September 2022 results)	November	£1800/€2050/\$2400
31 Pay TV Forecasts Update	November	£2000/€2300/\$2700

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