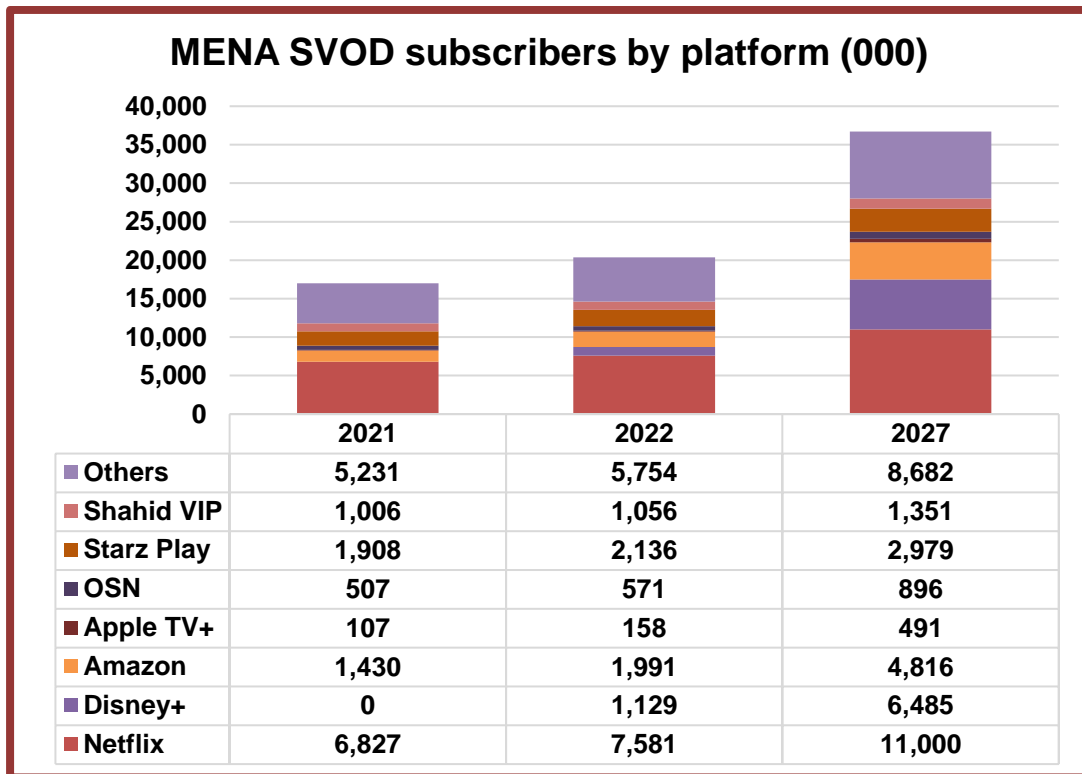


MENA SVOD revenues to reach \$4 billion

SVOD revenues for 20 countries in the MENA region will grow by \$2.3 billion between 2021 and 2027 to reach \$4 billion. Leader Turkey will triple its total to \$1.27 billion by 2027.

Simon Murray, Principal Analyst at Digital TV Research, said: “Netflix will generate half - \$1.90 billion - of MENA’s \$4 billion SVOD revenues by 2027. Second-placed Disney+ will be a long way behind with \$589 million.”



MENA will have 36.70 million SVOD subscriptions by 2027. Netflix will account for 30% of this total. Disney+ will start in the Arabic countries, Israel and Turkey in 2022 – quickly growing to 6.5 million subscribers by 2027. Regional player StarzPlay will have 2.98 million subscribers [excluding its operation in Pakistan] by 2027 – 1 million more than in 2021.

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

Middle East & North Africa OTT TV & Video Forecasts

Table of Contents

Published in February 2022, this 164-page PDF, PowerPoint and excel report comes in three parts:

- Insight: Detailed country-by-country analysis in a 62-page PDF document.
- Outlook: Regional overview and forecasts for 20 countries in a 47-page PowerPoint document full of charts, graphs and bullet points;
- A 55-page Excel workbook covering each year from 2010 to 2027 for 20 countries by household penetration, by SVOD subscribers and by OTT revenues for movies and TV episodes. As well as summary tables by country and by platform;

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



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Forecasts for the following 124 platforms across 20 countries:

Country	SVOD ops	SVOD Platforms
Algeria	6	Netflix; Amazon Prime Video; StarzPlay; Shahid VIP; OSN; Disney+
Armenia	3	Netflix; Amazon Prime Video; Apple TV+
Azerbaijan	6	Netflix; Amazon Prime Video; Apple TV+; Megogo; Ivi; Blu TV
Bahrain	7	Netflix; Amazon Prime Video; Apple TV+; StarzPlay; Shahid VIP; OSN; Disney+
Egypt	7	Netflix; Amazon Prime Video; Apple TV+; StarzPlay; Shahid VIP; OSN; Disney+
Georgia	3	Netflix; Amazon Prime Video; Megogo
Israel	9	Netflix; Amazon Prime Video; Disney+; Apple TV+; HBO; Yes+; Cellcom TV; Partner; Sting TV
Jordan	7	Netflix; Amazon Prime Video; Apple TV+; StarzPlay; Shahid VIP; OSN; Disney+
Kazakhstan	5	Netflix; Amazon Prime Video; Ivi; Megogo; Amediateka
Kuwait	6	Netflix; Amazon Prime Video; StarzPlay; Shahid VIP; OSN; Disney+
Lebanon	7	Netflix; Amazon Prime Video; Apple TV+; StarzPlay; Shahid VIP; OSN; Disney+
Morocco	6	Netflix; Amazon Prime Video; StarzPlay; Shahid VIP; OSN; Disney+
Oman	6	Netflix; Amazon Prime Video; Apple TV+; StarzPlay; Shahid VIP; OSN; Disney+
Qatar	7	Netflix; Amazon Prime Video; Apple TV+; StarzPlay; Shahid VIP; OSN Disney+
Saudi Arabia	8	Netflix; Amazon Prime Video; Apple TV+; StarzPlay; Shahid VIP; OSN; Jawwy; Disney+
Syria	4	Netflix; Amazon Prime Video; StarzPlay; Shahid VIP
Tunisia	6	Netflix; Amazon Prime Video; StarzPlay; Shahid VIP; OSN; Disney+
Turkey	9	Netflix; Amazon Prime Video; Disney+; HBO; Tivibu; Turkcell; beIN Connect; blu; Vodafone TV
UAE	7	Netflix; Amazon Prime Video; Apple TV+; StarzPlay; Shahid VIP; OSN; Disney+
Uzbekistan	4	Netflix; Amazon Prime Video; Ivi; Megogo

SAMPLE: Qatar OTT TV & video insight

OTT TV & video revenues are forecast to reach \$92 million by 2027, double from \$45 million in 2021. SVOD will contribute \$75 million in 2027, up from \$38 million in 2021. There will be 605,000 SVOD subscriptions by 2027 compared with 362,000 at end-2021. About 54% of the TV households will pay for at least one SVOD subscription by 2027.

Main assumptions behind the forecasts
• The OTT sector is competitive.
• Smartphone penetration is very high.
• Fixed broadband penetration is also high.
• Population forecasts are higher than the previous edition
• High proportion of ex-pats means strong demand for foreign content.

Netflix (\$7.99-14.99/month) launched in January 2016. We forecast 213,000 subscribers by 2027; up from 143,000 in 2021. Netflix is carried by Ooredoo.

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 62,000 Amazon subscribers by 2027.

Apple TV+ started in Qatar with its global rollout in November 2019, with 34,000 subscribers expected by 2027.

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

OSN (briefly called Wavo. QAR35-79.50/month) launched in August 2017. As well as 27 linear channels, OSN exclusively carries Disney+ originals, Paramount+ and HBO content. We forecast 91,000 subscribers by 2027.

After a cost cutting drive, OSN now 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. Discovery+ is on offer. We forecast 120,000 subscribers by 2027.

MBC's **Shahid VIP** provides linear channels as well as on-demand content. Ooredoo carries Shahid VIP. We forecast 62,000 subscribers by 2027.

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 49.4 million monthly active users across 16 markets by June 2021. Viu had 7.0 million paying subscribers by June 2021, up from 5.3 million paying subscribers by end-2020, 3.6 million in 2019 and 1.4 million in 2018. 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
beIN	54	-	-	beIN Connect
Ooredoo	156	-	2,660	Shahid VIP; OSN
OSN	42	-	-	OSN
Vodafone	-	5	1,800	-

The Ooredoo TV IPTV platform (up to 190 channels, including bundles from beIN, MBC and OSN) is part of a triple-play package (up to 1Gbps). We estimated 156,000 subscribers at end-2021. In October 2015, Ooredoo has distribution deals with SVOD platforms OSN and Shahid VIP.

Ooredoo is investing QAR1 billion on an **extensive fiber network**. Ooredoo is constructing the government-owned National Broadband Network (QNBN). Ooredoo had 2.66 million mobile subscribers by September 2021.

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 1.80 million mobile subscribers by September 2021.

SAMPLE: Qatar OTT TV & video forecasts

	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027
Population (000)																		
Total households (000)																		
TV households (000)																		
Fixed broadband households (000)																		
Smartphone subs (000)																		
Tablet subscribers (000)																		
TV HH/Total HH																		
Fixed bband HH/Total HH																		
Smartphone subs/Pop																		
Tablet subs/Population																		
OTT TV & video viewers (000)																		
OTT TV & video viewers/pop																		
Online advertising (US\$ mil.)																		
AVOD (US\$ mil.)																		
Online rental revs (US\$ mil.)																		
DTO video revs (US\$ mil.)																		
SVOD revenues (US\$ mil.)																		
Total OTT TV & video revenues (US\$ mil.)																		
AVOD revenues/Pop \$																		
SVOD revenues/Pop \$																		
SVOD revenues/SVOD subscriber \$																		
Net SVOD homes (000)																		
SVOD homes/TVHH																		
SVOD homes/Fixed band HH																		
SVOD subscriptions/SVOD homes																		
Gross SVOD subscriptions (000)																		
SVOD subs/TVHH																		
SVOD subs/Fixed bband HH																		
SVOD subs/Smphone users																		
SVOD subscribers by operator (000)																		
Netflix																		
Amazon																		
Disney+																		
Apple TV+																		
StarzPlay																		
Shahid VIP																		
OSN																		
Others																		

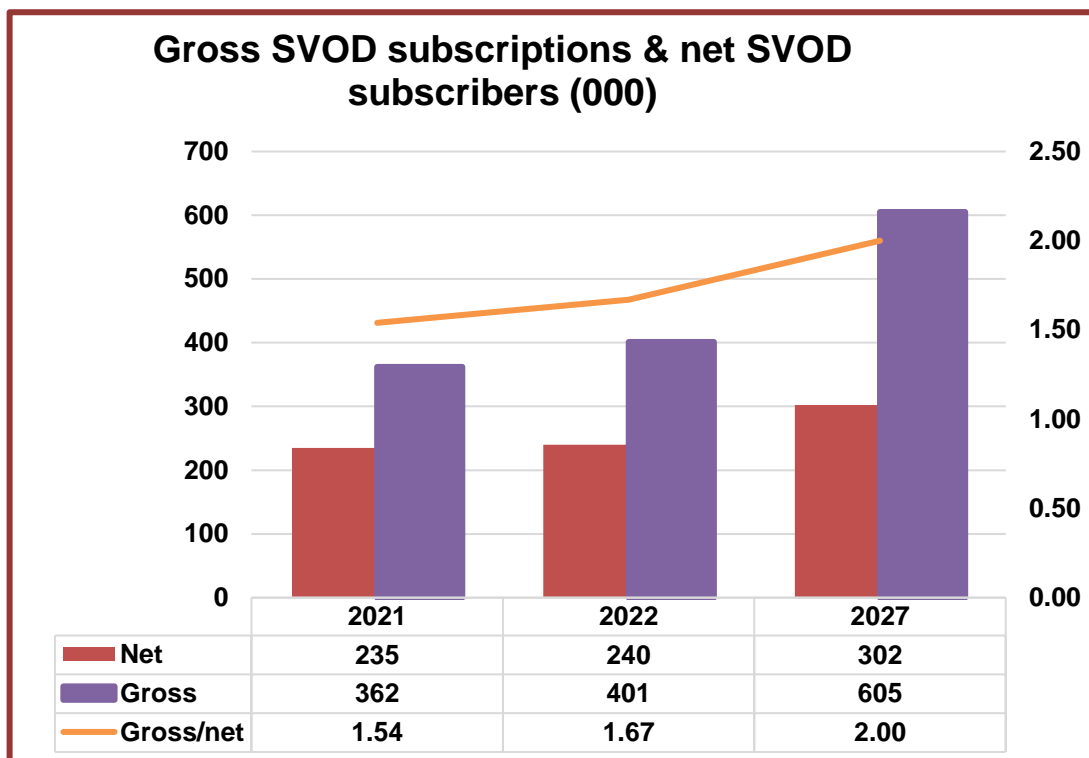
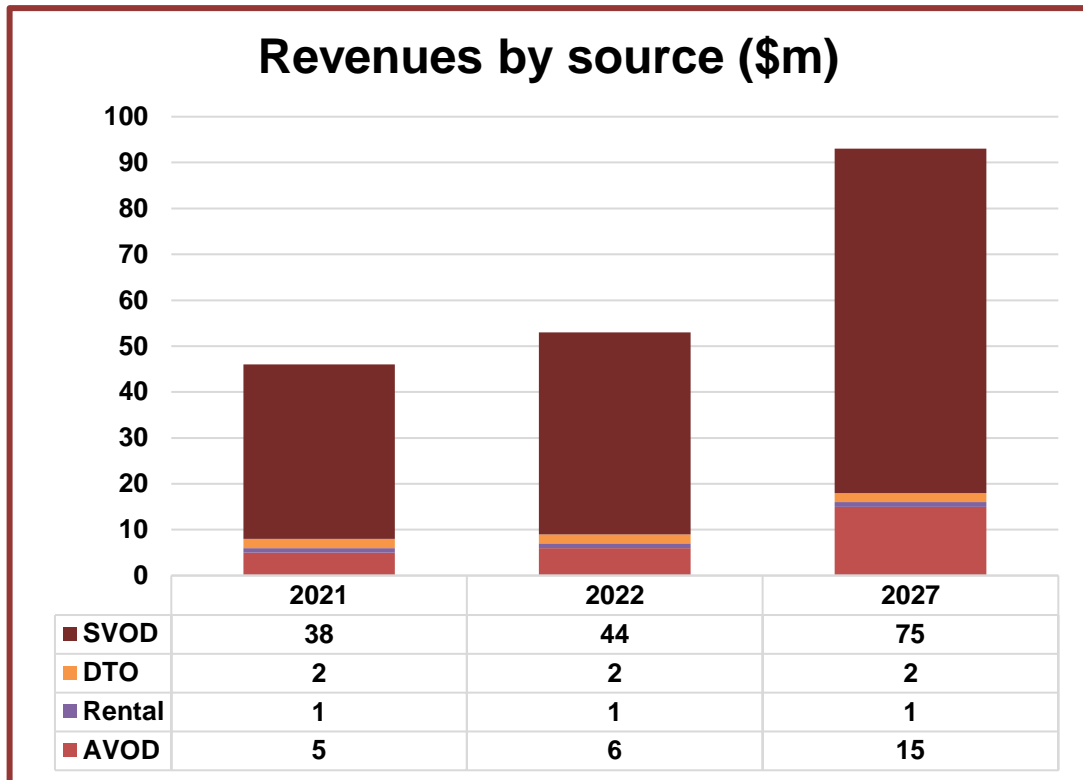


SAMPLE: Qatar OTT TV & video forecasts

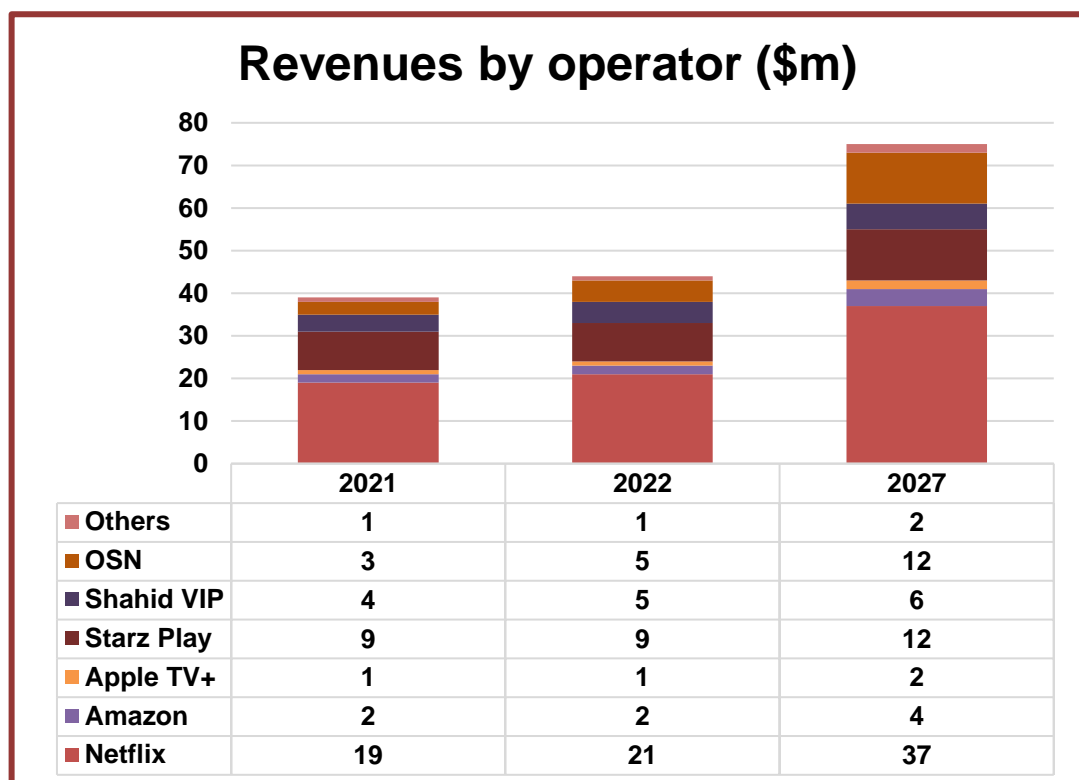
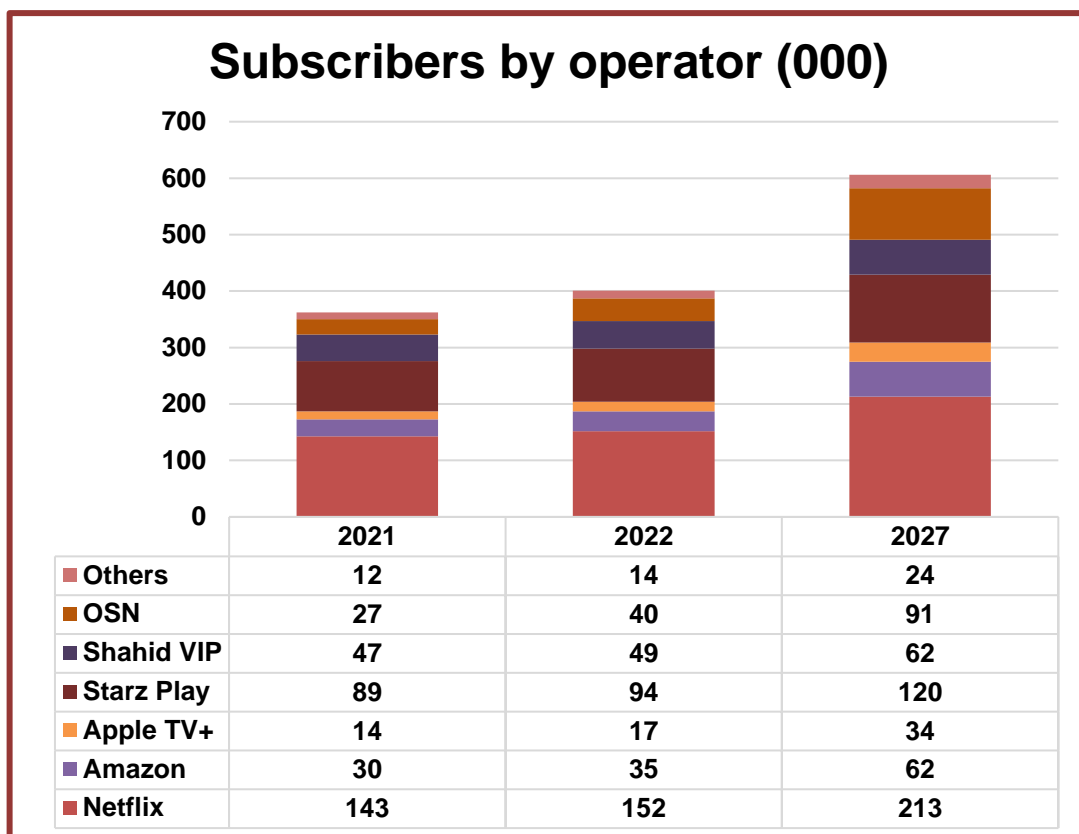
	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027
Share of SVOD subscribers by operator (%)																		
Netflix																		
Amazon																		
Disney+																		
Apple TV+																		
StarzPlay																		
Shahid VIP																		
OSN																		
Others																		
SVOD revenues by operator (US\$ mil.)																		
Netflix																		
Amazon																		
Disney+																		
Apple TV+																		
StarzPlay																		
Shahid VIP																		
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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																		



SAMPLE: Qatar OTT TV & video outlook



SAMPLE: Qatar OTT TV & video 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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