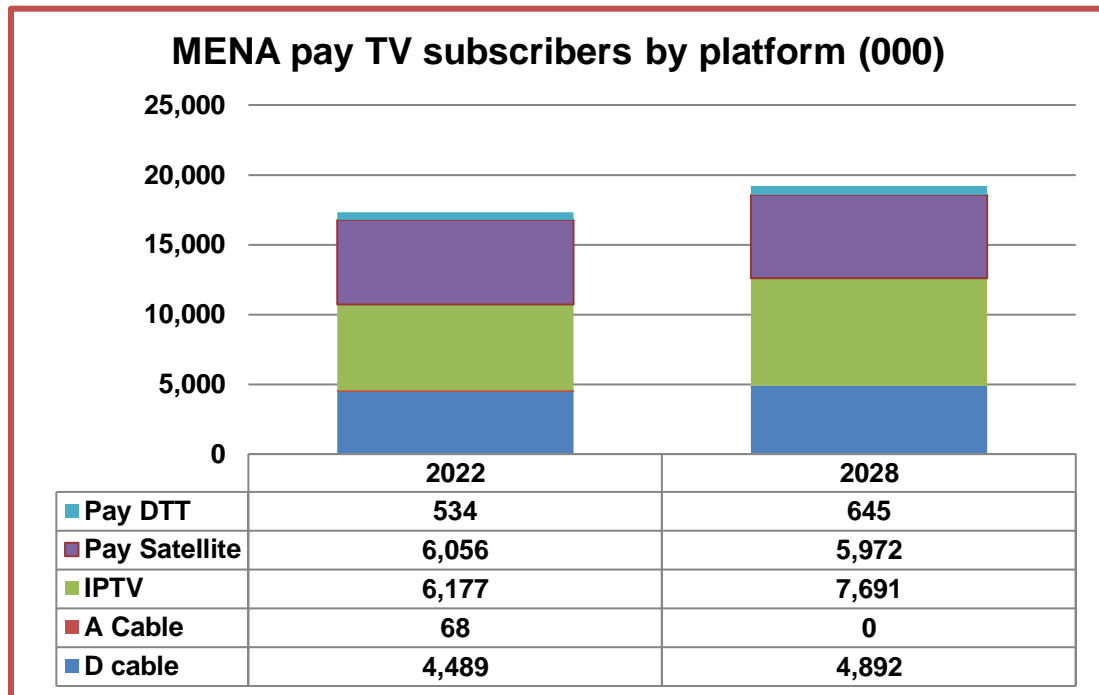


MENA to add 2 million pay TV subs

The number of pay TV subscribers in 20 MENA countries will increase from 17.32 million in 2022 to 19.20 million in 2028. Legitimate pay TV penetration will remain at only 19%. IPTV subscribers overtook pay satellite TV in 2022.



About 62% of the region's TV households will receive free-to-air satellite TV signals by 2028. FTA satellite penetration is highest in the Arabic-speaking countries. Another fifth of the region's TV households will take FTA DTT.

Pay TV revenues will fall by 36% between peak year 2016 (\$3.84 billion) and 2028 (\$2.47 billion). This comes despite the number of pay TV subscribers growing – which means that ARPUs are falling.

Simon Murray, Principal Analyst at Digital TV Research, said: "Legitimate pay TV penetration will remain low in the MENA region. First was the battle against widespread piracy. Traditional pay TV subscribers are now converting to SVOD platforms."

[Middle East & North Africa Pay TV Forecasts](#)

Published in January 2023, this 96-page PDF and excel report is our tenth edition. The report comes in two parts:

- Insight: Detailed country-by-country analysis in a 48-page PDF document.
- Excel workbook covering each year from 2015 to 2028 for 20 countries by household penetration, by pay TV subscribers, by pay TV revenues and by major operator. NEW FOR 2023: Filter worksheet – every row on one spreadsheet, allowing for easy comparisons.

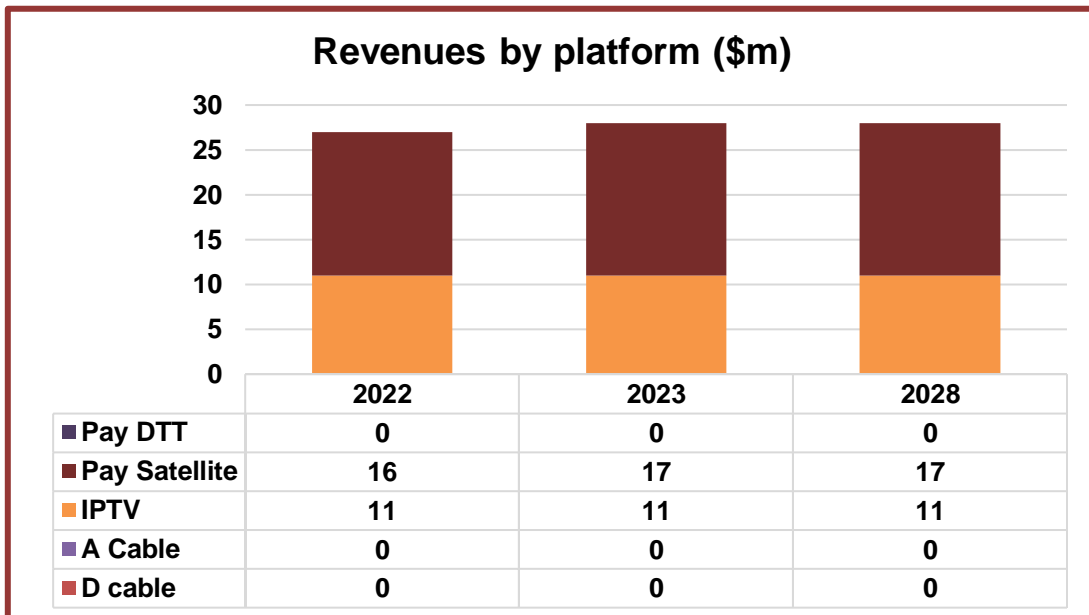
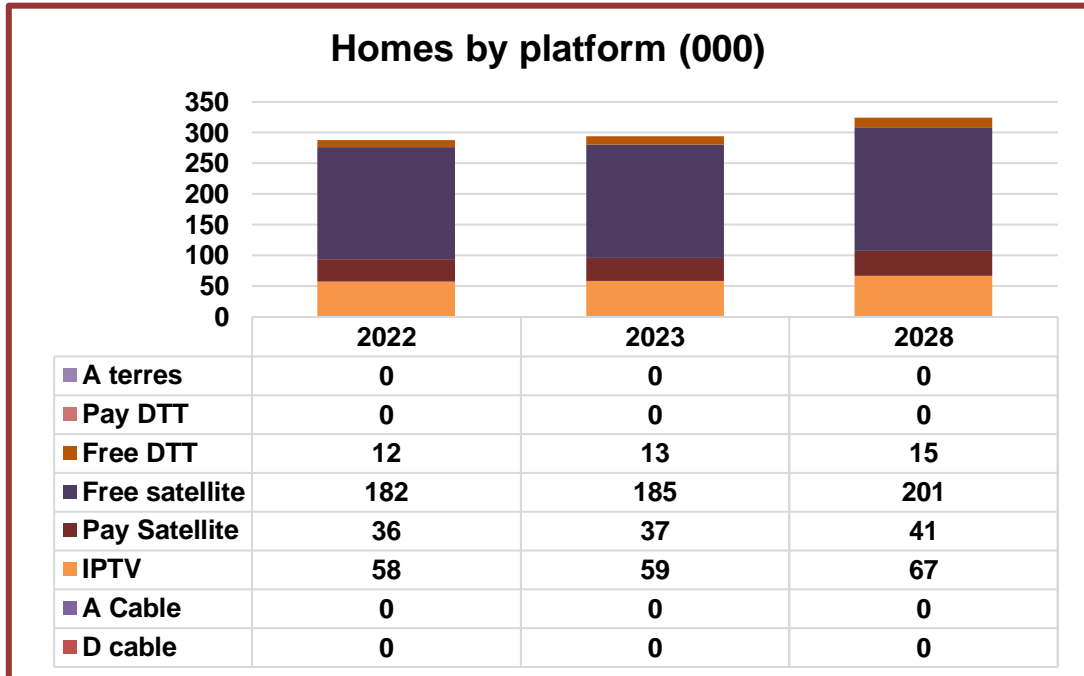
For more information, [please click here](#) or contact lydia@digitaltvresearch.com

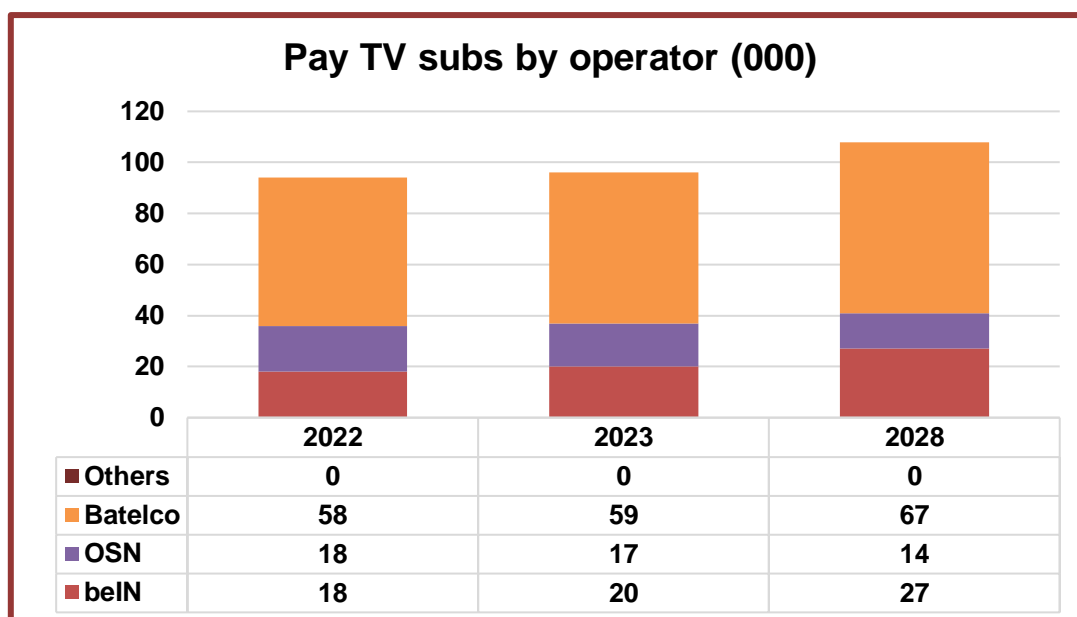
Forecasts for the following 20 countries and 49 platforms		
Country	No of ops	Platform forecasts
Algeria	3	beIN; OSN; Algeria Telecom
Armenia	0	
Azerbaijan	0	
Bahrain	3	beIN; OSN; Batelco
Egypt	3	beIN; OSN; Telecom Egypt
Georgia	2	Magtisar; Sliknet
Israel	2	HOT; Yes
Jordan	3	beIN; OSN; Orange
Kazakhstan	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; TNet; 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 2028. Pay TV revenues will be flat at \$28-29 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.	

About three-quarters of the 288,000 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 operators by subscribers (000)				
Operator	Pay TV subs	Fixed bb subs	Mobile subs	SVOD platforms
Batelco	58	-	-	OSN+
beIN	18	-	-	-
OSN	18	-	-	-
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 subscriber numbers back up. We forecast 27,000 subscribers by 2028.

Traditionally appealing to expatriates, **OSN** is attracting more local subscribers. OSN has exclusive deals with seven Hollywood studios. It increased Arabic content to a quarter of the total. We estimate that the company had 18,000 satellite TV subscribers by end-2022, falling to 14,000 in 2028 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 58,000 IPTV subs at end-2022. Batelco offers OSN's SVOD platform (BHD4.20/month).

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

Zain carries Zee5 (BHD1.90/month), Apple TV+, Viu (BHD2/month), OSN+ (BHD4.20/month) and Shahid VIP (BHD3.49/month). With 1 million subscribers, Zain is 55.4% owned by the Zain Group.

SAMPLE EXCEL: Bahrain pay TV forecasts

	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028
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														



Digital TV Research report schedule for 2023

	Title	Publication	Price
1	Africa Pay TV Forecasts	January	£1250/€1440/\$1500
2	Middle East & North Africa Pay TV Forecasts	January	£1250/€1440/\$1500
3	SVOD Forecasts Update (based on December 2022 results)	February	£1600/€1840/\$1900
4	Africa OTT TV and Video Forecasts	February	£1250/€1440/\$1500
5	MENA OTT TV and Video Forecasts	February	£1250/€1440/\$1500
6	North America Pay TV Forecasts	February	£700/€805/\$875
7	North America OTT TV and Video Forecasts	February	£700/€805/\$875
8	Latin America Pay TV Forecasts	March	£1250/€1440/\$1500
9	Latin America OTT TV and Video Forecasts	March	£1250/€1440/\$1500
10	Asia Pacific Pay TV Forecasts	March	£1250/€1440/\$1500
11	Asia Pacific OTT TV and Video Forecasts	March	£1250/€1440/\$1500
12	Western Europe Pay TV Forecasts	March	£1250/€1440/\$1500
13	Western Europe OTT TV and Video Forecasts	March	£1250/€1440/\$1500
14	Eastern Europe Pay TV Forecasts	April	£1250/€1440/\$1500
15	Eastern Europe OTT TV and Video Forecasts	April	£1250/€1440/\$1500
16	Global OTT TV & Video Forecasts	May	£1600/€1840/\$1900
17	Global Pay TV Forecasts	May	£2000/€2300/\$2400
18	Global AVOD Forecasts	May	£1600/€1840/\$1900
19	Global SVOD Forecasts (based on March 2023 results)	June	£1600/€1840/\$1900
20	Africa OTT & TV Update	August	£1250/€1440/\$1500
21	MENA OTT & TV Update	August	£1250/€1440/\$1500
22	Latin America OTT & TV Update	August	£1250/€1440/\$1500
23	North America OTT & TV Update	August	£700/€805/\$875
24	Eastern Europe OTT & TV Update	September	£1250/€1440/\$1500
25	Asia Pacific OTT & TV Update	September	£1250/€1440/\$1500
26	Western Europe OTT & TV Update	September	£1250/€1440/\$1500
27	SVOD Forecasts Update (based on June 2023 results)	September	£1600/€1840/\$1900
28	AVOD Forecasts Update	September	£1600/€1840/\$1900
29	OTT TV & Video Forecasts Update	September	£1600/€1840/\$1900
30	Pay TV Forecasts Update	October	£2000/€2300/\$2400
31	SVOD Forecasts Update (based on September 2023 results)	December	£1600/€1840/\$1900

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