

Middle East & North Africa Pay TV Forecasts

Published in January 2024, 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 2029 for 20 countries by household penetration, by pay TV subscribers, by pay TV revenues and by major operator.

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 fall slightly to 30% by 2029. Pay TV revenues will be flat at \$26-27 million as competition cuts ARPU. About three-quarters of the 301,000 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 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.

Main operators by subscribers (000)

Operator	Pay TV subs	Fixed bb subs	Mobile subs	SVOD platforms
Batelco	61	-	-	Netflix, Shahid VIP
beIN	20	-	-	-
OSN	14	-	-	-
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 pay TV subscriber numbers back up.

Traditionally appealing to expatriates, **OSN** is attracting more local subscribers. It increased Arabic content to a quarter of the total. We estimate 14,000 satellite TV subscribers by end-2023.

Batelco started offering IPTV services via its FTTH network in September 2011. Batelco had 61,000 IPTV subs at end-2023. Batelco offers Netflix (BHD5.25/month) and Shahid VIP (BHD3.14/month).

Principally a mobile operator, **STC (formerly called Viva)** carries OSN+ (BHD4.20/month), STC TV (BHD3/month for 100 linear channels and 20,000 on-demand titles), Shahid VIP (BHD3.99/month) and Hindi-language Spuul (BHD2/month). STC is owned by Saudi Telecommunications Company.

Zain carries Zee5 (BHD1.90/month), Apple TV+ (\$7.99/month), Viu (BHD2/month), OSN+ (BHD2.20-3.20/month) and Shahid VIP (BHD3.99/month). 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	2029
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 2024

	Title	Publication	Price
1	Africa Pay TV Forecasts	January	£1500/€1725/\$1875
2	Middle East & North Africa Pay TV Forecasts	January	£1500/€1725/\$1875
3	Africa OTT TV and Video Forecasts	February	£1500/€1725/\$1875
4	MENA OTT TV and Video Forecasts	February	£1500/€1725/\$1875
5	North America Pay TV Forecasts	February	£775/€890/\$965
6	North America OTT TV and Video Forecasts	February	£775/€890/\$965
7	Latin America Pay TV Forecasts	March	£1500/€1725/\$1875
8	Latin America OTT TV and Video Forecasts	March	£1500/€1725/\$1875
9	Western Europe Pay TV Forecasts	March	£1500/€1725/\$1875
10	Western Europe OTT TV and Video Forecasts	March	£1500/€1725/\$1875
11	Eastern Europe Pay TV Forecasts	March	£1500/€1725/\$1875
12	Eastern Europe OTT TV and Video Forecasts	March	£1500/€1725/\$1875
13	Asia Pacific Pay TV Forecasts	April	£1500/€1725/\$1875
14	Asia Pacific OTT TV and Video Forecasts	April	£1500/€1725/\$1875
15	Global OTT TV & Video Forecasts	April	£1600/€1840/\$1990
16	Global Pay TV Forecasts	April	£2000/€2300/\$2500
17	Global AVOD Forecasts	April	£1600/€1840/\$1990
18	Global SVOD Forecasts (based on Dec 2023 results)	April	£1600/€1840/\$1990
19	Global FAST Forecasts	May	£1500/€1725/\$1875
20	Global Hybrid AVOD-SVOD Forecasts	May	£1500/€1725/\$1875
21	Africa OTT TV and Video Forecasts	August	£1500/€1725/\$1875
22	MENA OTT TV and Video Forecasts	August	£1500/€1725/\$1875
23	Latin America OTT TV and Video Forecasts	August	£1500/€1725/\$1875
24	North America OTT TV and Video Forecasts	August	£775/€890/\$965
25	Eastern Europe OTT TV and Video Forecasts	September	£1500/€1725/\$1875
26	Asia Pacific OTT TV and Video Forecasts	September	£1500/€1725/\$1875
27	Western Europe OTT TV and Video Forecasts	September	£1500/€1725/\$1875
28	Global SVOD Forecasts (based on June 2024 results)	September	£1600/€1840/\$1990
29	Global AVOD Forecasts	September	£1600/€1840/\$1990
30	Global OTT TV & Video Forecasts	September	£1600/€1840/\$1990
31	Global FAST Forecasts	October	£1600/€1840/\$1990
32	Global Hybrid AVOD-SVOD Forecasts	October	£1600/€1840/\$1990
33	Global Pay TV Forecasts	November	£2000/€2300/\$2500

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