

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

Published in February 2024, this 132-page PDF and excel report comes in two parts:

- Insight: Detailed country-by-country analysis in a 64-page PDF document.
- A 70-page Excel workbook covering each year from 2015 to 2029 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

Forecasts for the following 123 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	8	Netflix; Amazon Prime Video; Disney+; Apple TV+; 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	7	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; STC TV; Disney+
Syria	4	Netflix; Amazon Prime Video; StarzPlay; Shahid VIP
Tunisia	6	Netflix; Amazon Prime Video; StarzPlay; Shahid VIP; OSN; Disney+
Turkey	8	Netflix; Amazon ; Prime Video; Disney+; 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: Bahrain OTT TV & video insight

OTT TV & video revenues are forecast to reach \$65 million by 2029, up from \$31 million in 2023. AVOD revenues will reach \$16 million by 2029, triple from \$5 million in 2023. SVOD will contribute \$42 million in 2029, up from \$22 million in 2023. There will be 554,000 SVOD subscriptions by 2029 compared with 313,000 at end-2023. The average subscriber will pay for 2.60 subscriptions by 2029. About 61% of TV households will pay for at least one SVOD subscription by 2029.

Main assumptions behind the forecasts
Mobile dominates the broadband sector.
Broadband penetration is high
High disposable incomes.
Ex-pat community has a strong demand for foreign content.
Disney+ start as a standalone platform in June 2022
Piracy remains a significant problem

Netflix launched in January 2016. We forecast 104,000 subscribers by 2029; up from 72,000 at end-2023. English and Arabic content is available.

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 49,000 Amazon Prime Video subscribers by 2029.

Apple TV+ (\$7.99/month) started in Bahrain with its global rollout in November 2019. We expect 15,000 subscribers by 2029. Zain distributes Apple TV+.

Disney+ ended its distribution deal with OSN in June 2022 by starting as a standalone platform (\$8.99/month, \$88.99/year). We forecast 75,000 subs by 2029.

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

OSN+ launched its SVOD platform in August 2017. With 10,000 hours on offer, OSN+ carries Paramount+, NBCUniversal and HBO content. It costs BHD4-10/month. We forecast 39,000 subscribers by 2029. OSN signed a distribution agreement with Netflix in February 2018 and another with STC in June 2018. OSNtv Connect offers 43 linear channels and access to OSN+.

Transmitting in English, Arabic and French, **StarzPlay** has more than 6,000 hours of Hollywood content as well as 2,000 hours of Arabic content. Discovery+ is available as a branded content block. We forecast 119,000 subscribers in Bahrain by 2029, up from 71,000 at end-2023.

MBC's **Shahid VIP** (BHD3.99/month) provides 10 linear channels as well as 20,000 hours of on-demand content. Shahid has promised original content. Shahid also distributes Fox Plus. Shahid VIP is carried by mobile operators STC and Zain (BHD3/month). We expect 136,000 subscribers by 2029, up from 90,000 at end-2023. Shahid is its AVOD platform.

Hong Kong's **Viu** (BHD2/month) 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. Zain distributes Viu.

PCCW's **Viu** recorded had 11.0 million paying subscribers (up 21% year-on-year) and 65.5 million MAUs in 16 countries across Southeast Asia and the Middle East by mid-2023. Most of these subscribers are in South East Asia. Canal Plus took a 26.1% stake in Viu in June 2023, with an option to extend it to 51%.

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.

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 OTT TV & video forecasts

	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029
Population (000)															
Total households (000)															
TV households (000)															
Fixed broadband households (000)															
Smartphone subscribers (000)															
Tablet subscribers (000)															
Online advertising total (\$ mil.)															
AVOD revenues (\$ mil.)															
of which FAST revenues (\$ mil.)															
Online rental revenues (\$ mil.)															
DTO revenues (\$ mil.)															
SVOD revenues (\$ mil.)															
OTT TV & video revenues (\$ mil.)															
SVOD subscribers (000)															
SVOD subscribers/TVHH															
SVOD subscriptions (000)															
SVOD subscriptions/TVHH															
SVOD subscriptions/SVOD subscribers															
SVOD subscribers by operator (000)															
Netflix															
Amazon															
Disney+															
Apple TV+															
StarzPlay															
Shahid VIP															
OSN															
Others															
SVOD revenues by operator (\$ mil.)															
Netflix															
Amazon															
Disney+															
Apple TV+															
StarzPlay															
Shahid VIP															
OSN															
Others															

SAMPLE EXCEL: Bahrain OTT TV & video forecasts

	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029
SVOD ARPU by operator (\$)															
Netflix															
Amazon															
Disney+															
Apple TV+															
StarzPlay															
Shahid VIP															
OSN															
Hybrid AVOD-SVOD subscribers by operator (000)															
Netflix															
Disney+															
HBO Max															
Paramount+															
Hybrid SVOD revenues by operator (\$ mil.)															
Netflix															
Disney+															
HBO Max															
Paramount+															
AVOD revenues by platform (\$ million)															
Netflix															
Disney+															
HBO Max															
Paramount+															
YouTube															
Facebook/Instagram															
OSN															
Shahid															
StarzPlay															
Other															

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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