

Digital TV Middle East & Africa: Table of Contents

Published in March 2013, this 154-page electronically-delivered report comes in two parts:

- An 84-page PDF file providing punchy narrative and succinct analysis in the Executive Summary and a digital TV briefing for each of the 26 countries listed below.
- An excel workbook providing detailed forecasts from 2008 to 2018 for each of the 16 countries listed below as well as handy comparative tables for the region (*please see next page for line-by-line detail of what is included in the forecasts for each country*).

Executive summary	Summary forecasts
Afghanistan*	Algeria
Armenia*	Azerbaijan*
Bahrain	Cyprus
Egypt	Georgia*
Iran*	Iraq*
Israel	Jordan
Kazakhstan*	Kuwait
Kyrgyzstan*	Lebanon
Libya*	Morocco
Oman	Qatar
Saudi Arabia	Syria
Tunisia	Turkey
United Arab Emirates	Uzbekistan*

Note: No forecasts for the 10 countries with an asterisk

Apart from extending our forecasts to 2018 and fully updating the country profiles, this edition contains the following information for the first time:

- TV household forecasts (to 2018) for 31 countries;
- Seven new digital TV country profiles (Afghanistan, Iran, Iraq, Kazakhstan, Kyrgyzstan, Libya, Uzbekistan)

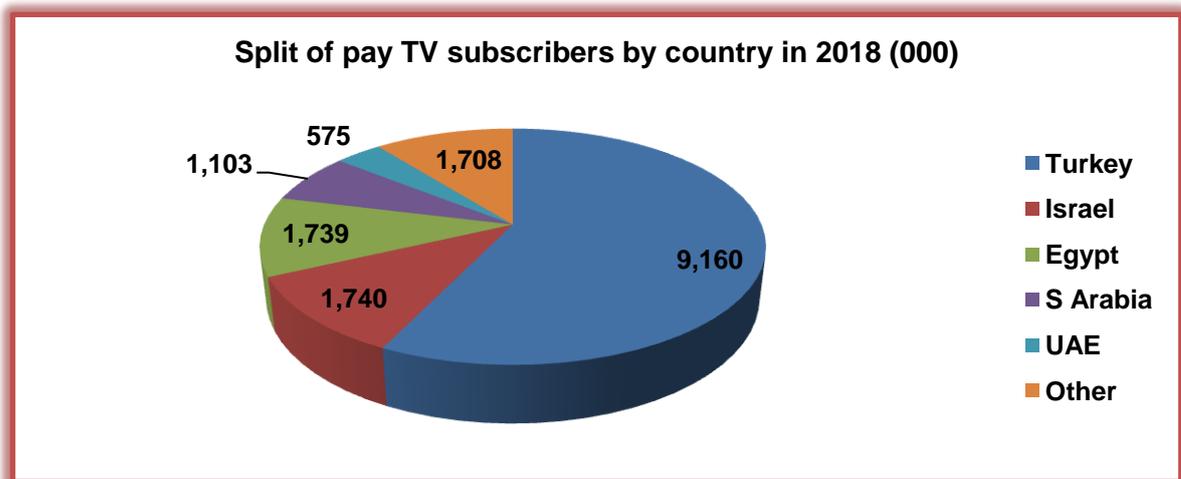
Forecasts (2008-2018) contain the following detail for each country:

TV households	Digital cable subs	Analog cable subs
Pay IPTV subscribers	Pay digital DTH subscribers	Digital free DTH households
Analog DTH Households	Analog terrestrial households	Primary FTA DTT households
Primary Pay DTT households	Digital homes	Analog homes
Pay TV subscribers		
Digital cable subs/TV HH %	Analog cable subs/TV HH %	Pay IPTV subs/TV HH %
Pay DTH/TV HH %	Digital free DTH/TV HH %	Analog DTH/TV HH %
Analog terrestrial/TVHH %	Primary FTA DTT/TV HH %	Primary pay DTT/TV HH %
Digital/TV HH %	Analog/TV HH %	Pay TV Subs/TV HH %
<i>Stand-alone digital cable subs</i>	<i>Dual-play digital cable subs</i>	<i>Triple-play digital cable subs</i>
<i>Stand-alone pay IPTV subs</i>	<i>Dual-play pay IPTV subs</i>	<i>Triple-play pay IPTV subs</i>
<i>Stand-alone digital cable revs</i>	<i>Dual-play digital cable TV revenues</i>	<i>Triple-play digital cable TV revenues</i>
Digital cable TV subs revenues	Digital cable TV on-demand revs	Digital cable TV revenues
Analog cable TV subs revs	Cable TV revenues	
<i>Stand-alone IPTV revenues</i>	<i>Dual-play IPTV revenues</i>	<i>Triple-play IPTV revenues</i>
IPTV subscription revenues	IPTV on-demand revenues	IPTV revenues
DTH subscription revenues	DTH on-demand revenues	DTH revenues
DTT subscription revs	DTT on-demand revenues	DTT revenues
Subscription revenues	On-demand revenues	Total revenues
Average Revenue Per User (US\$)		
<i>Stand-alone digital cable subs</i>	<i>Dual-play digital cable TV subs</i>	<i>Triple-play digital cable TV subs</i>
Average digital cable (subs & VOD)	Analog cable TV subs	
<i>Stand-alone IPARPU TV subs</i>	<i>Dual-play IPTV subs</i>	<i>Triple-play IPTV subs</i>
Average IPTV (subs and VOD)		
Pay DTH (subs)	Pay DTH (subs and PPV)	
Pay DTT (subs)	Pay DTT (subs and PPV)	
Average monthly ARPU		



Piracy clampdown boosts Middle East & North Africa pay TV revenues

The number of pay TV homes in the Middle East and North Africa will double between 2011 and 2018 to 16.0 million, according to a new report from Digital TV Research. The third edition of the **Digital TV Middle East and North Africa** report forecasts that fewer than 15% of TV households (analog and digital) legitimately paid for TV signals by end-2012. This proportion will climb to 21.6% by 2018.



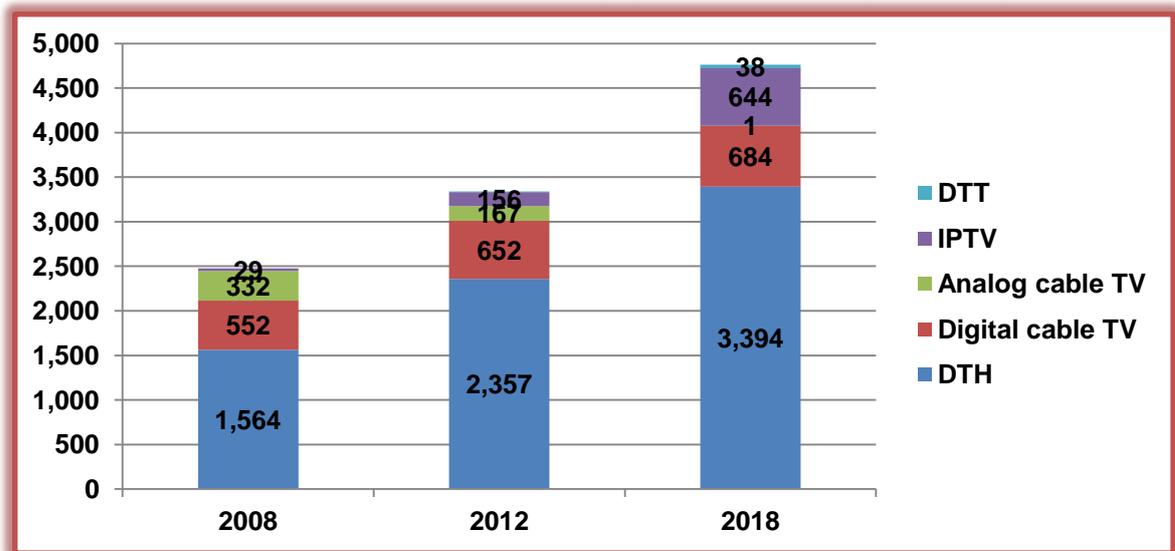
Source: Digital TV Research Ltd

Report author Simon Murray said: "Legitimate pay TV revenues [for the 16 countries covered in the report] will grow by more than 42% between 2012 and 2018 to \$4.76 billion. Turkey accounts for more than half of the total."

DTH will continue to dominate pay TV revenues, taking 71% of the 2018 total (similar to the 2012 proportion). DTH revenues will be \$3.39 billion in 2018, up by more than \$1 billion on 2012 and more than double the 2008 total. Turkey will account for \$1,952 million of the 2018 total (almost quadruple its 2008 total). Regional pay DTH penetration will gradually climb from 6.2% in 2008 to 13.7% in 2018, with subscriber numbers rocketing from 3.9 million to 10.1 million.

The number of homes paying for IPTV will overtake cable subs in 2016. Turkey and Egypt will be the leaders in terms of IPTV subscribers in 2018, although penetration will be higher in Cyprus (32%), Qatar (37%) and the UAE (46%). IPTV revenues will more than quadruple between 2012 and 2018 - to \$644 million.

Middle East and North Africa pay TV revenues (US\$ mil.)



Source: Digital TV Research Ltd

ATT penetration is falling – from 35.6% of the total in 2008 to 27.6% (18.5 million) by end-2012. Conversion will gather pace, though 9.6% of homes (7.1 million) will still receive ATT signals by 2018. Most of the ATT homes will be in Egypt (6.5 million) by 2018.

FTA DTT will be the main beneficiary of the converting homes; increasing from 1.75 million homes (2.6% TV household penetration) at end-2012 to 11.70 million (15.8%) by 2018.

Digital TV penetration for the 16 Middle East and North African countries forecast in this report will almost reach three-quarters of TV households by end-2013 (50.2 million) – up from two-thirds by end-2010 (43.4 million). Digital TV penetration will exceed 90% of TV households by 2018 (66.9 million). More than 54% of TV households watch free-to-air DTH signals.

The above forecasts are based on the 16 most advanced countries in the region, which collectively represent 67 million TV households. However, there are 104 million TV households across 31 countries in the whole region – a figure that will grow to 115 million by 2017. Major countries outside those that we have undertaken full forecasts for – that have longer term potential - include Iran (11 million TV households), Afghanistan (4.4 million TV households), Iraq (4.8 million TV households) and Uzbekistan (4.1 million TV households).