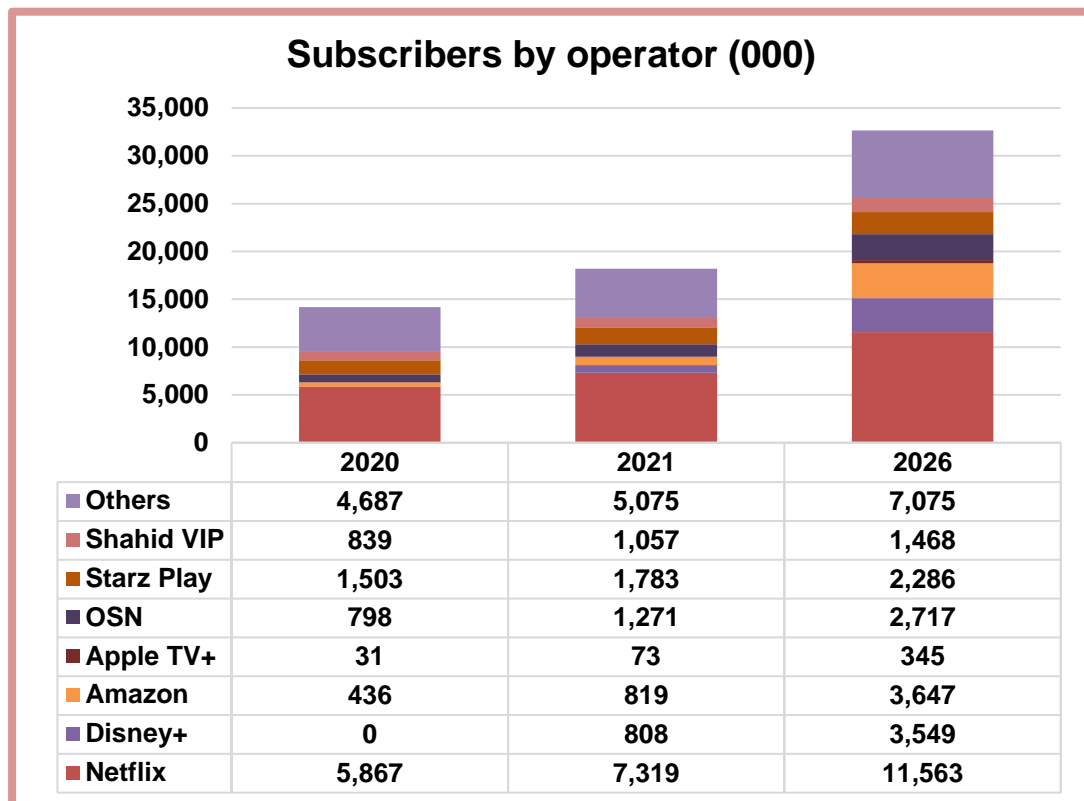


MENA to add 18 million SVOD subscriptions

The 20 countries in the Middle East and North Africa region will have 32.65 million SVOD subscriptions by 2026, up from the 14.16 million recorded at end-2020. Turkey will remain the market leader by a considerable distance, with nearly 14 million subscriptions by 2026.



Source: Digital TV Research

Simon Murray, Principal Analyst at Digital TV Research, said: “Netflix and Disney+ will account for about half of the region’s total by 2026, despite Disney+ only starting in 2022 in a limited number of countries. Due to exclusive deals with Disney+, HBO and Paramount+, OSN will quickly gain subscribers.”

Middle East & North Africa OTT TV & Video Forecasts

Table of Contents

Published in February 2021, this 171-page PDF, PowerPoint and excel report comes in three parts:

- Insight: Detailed country-by-country analysis in a 66-page PDF document.
- Outlook: Regional overview and forecasts for 20 countries in a 45-page PowerPoint document full of charts, graphs and bullet points;
- A 60-page Excel workbook covering each year from 2010 to 2026 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

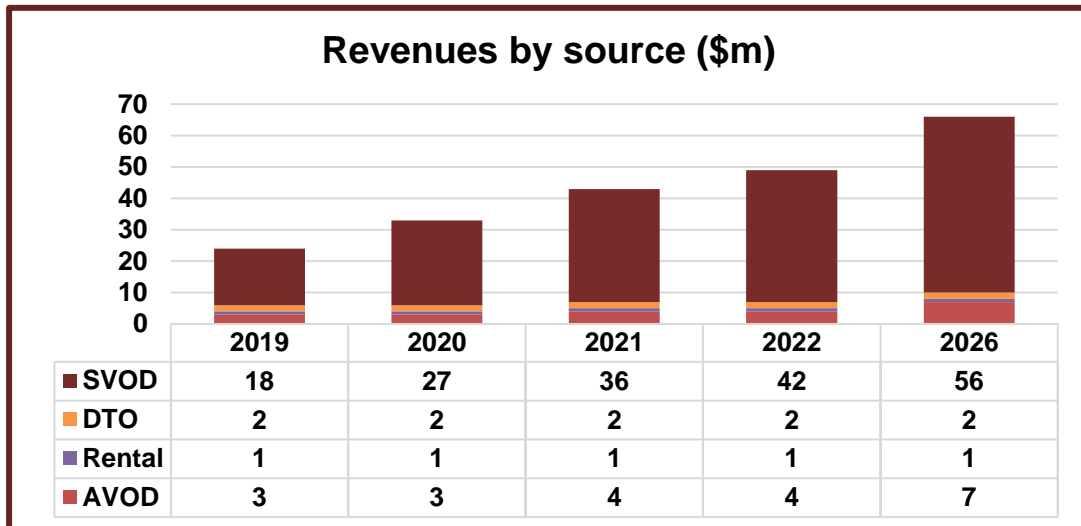


Forecasts for the following 113 platforms across 20 countries:

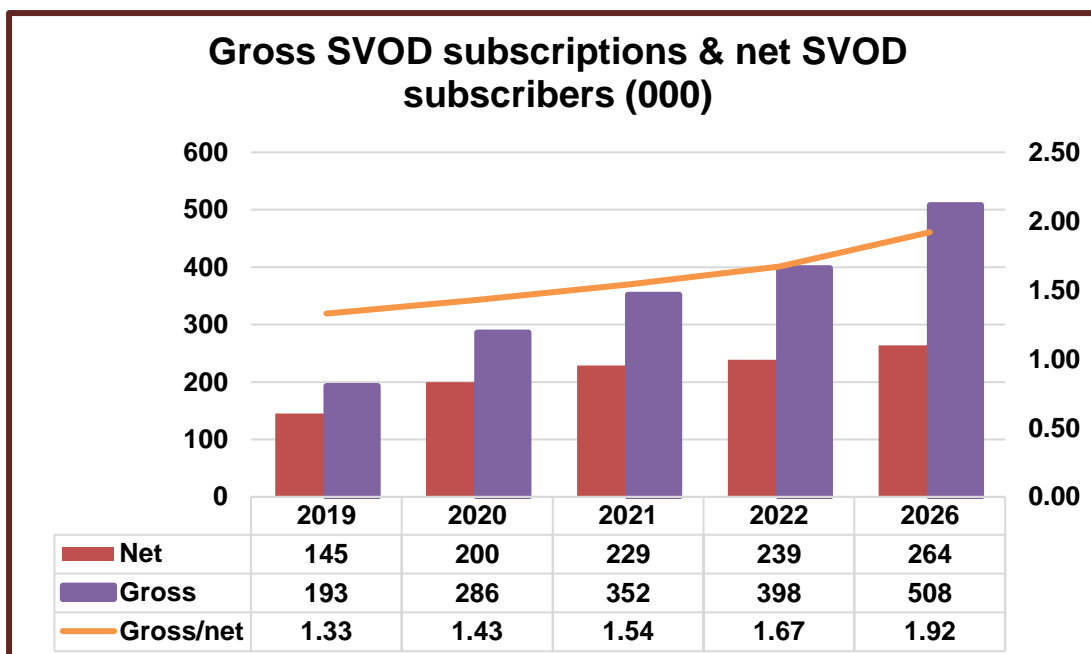
Country	SVOD ops	SVOD Platforms
Algeria	5	Netflix; Amazon Prime Video; StarzPlay; Shahid VIP; OSN
Armenia	4	Netflix; Amazon Prime Video; Disney+; Apple TV+
Azerbaijan	5	Netflix; Amazon Prime Video; Disney+; Apple TV+; Megogo
Bahrain	6	Netflix; Amazon Prime Video; Apple TV+; StarzPlay; Shahid VIP; OSN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

SAMPLE: Qatar OTT TV & video insight

- OTT TV & video revenues are forecast to reach \$66 million by 2026, double from \$33 million in 2020. SVOD will contribute \$56 million to the 2026 total, up from \$27 million in 2020.



- There will be 508,000 SVOD subscriptions by 2026 compared with 286,000 at end-2020. The average SVOD subscriber will pay for 1.92 SVOD subscriptions by 2026, up from 1.43 in 2020. Just over half of the TV households will pay for at least one SVOD subscription by 2026.

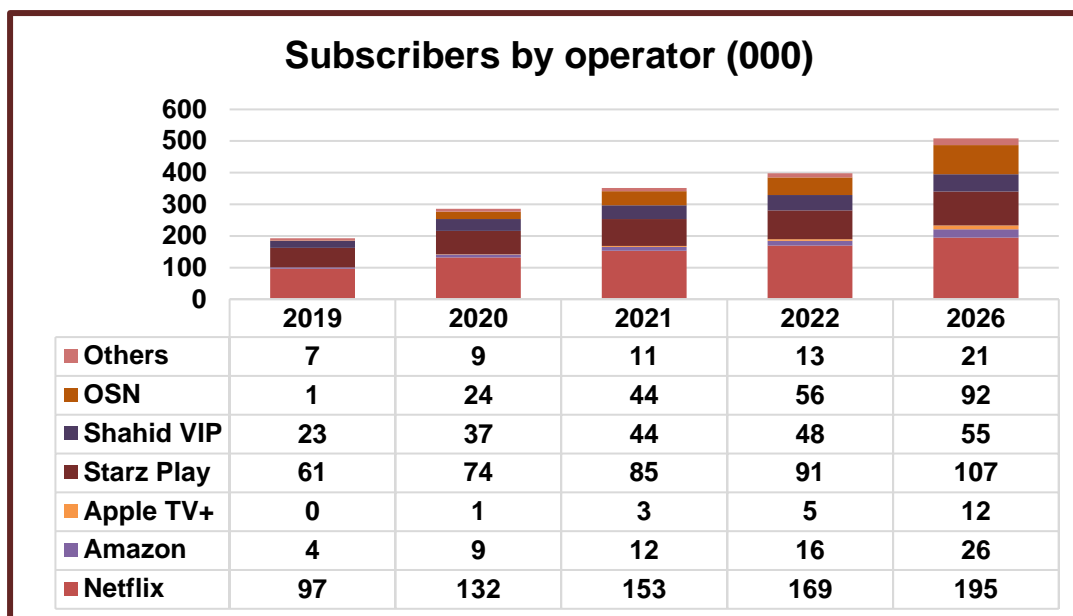


Main assumptions behind the forecasts

- The OTT sector is competitive.
- Smartphone penetration is very high.
- Fixed broadband penetration is also high.
- High proportion of ex-pats means strong demand for foreign content.

Source: Digital TV Research

- **Netflix** will remain the market leader by some distance. OSN will show strong growth based on its added content.



- **Netflix** launched in January 2016. We forecast 195,000 subscribers by 2026; up from 132,000 in 2020. Netflix is carried by Ooredoo.
- **Amazon Prime Video** started operations in November 2016 as part of its global rollout. Subscriptions are cheaper than Netflix at \$5.99/month, but Amazon offers less original or local content than Netflix. We forecast 26,000 Amazon subscribers by 2026.
- **Apple TV+** started in Qatar with its global rollout in November 2019, with 12,000 subscribers expected by 2026. **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/month)** launched its SVOD platform in August 2017. As well as 27 linear channels, OSN exclusively carries Disney+ originals and HBO content. We forecast 92,000 subscribers by 2026.
- After a cost cutting drive and in preparation for an IPO in 2021, OSN 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. In October 2015, Ooredoo TV signed an exclusive distribution deal with StarzPlay (QAR30/month). More Arabic content will lead to 107,000 subscribers by 2026.
- MBC's **Shahid VIP** provides linear channels as well as on-demand content. We forecast 55,000 subscribers by 2026.
- **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.

Main operators by subscribers (000)				
Operator	Pay TV subs	Fixed bb subs	Mobile subs	SVOD platforms
beIN	52	-	-	beIN Connect
Ooredoo	158	-	2,970	StarzPlay; OSN; beIN
OSN	57	-	-	OSN
Vodafone	-	5	1,678	-

Source: Digital TV Research

- **The Ooredoo TV IPTV platform** (up to 190 channels, including bundles from beIN, MBC and OSN) is offered as part of a triple-play package (up to 1Gbps). We estimated 158,000 subscribers at end-2020. In October 2015, Ooredoo has distribution deals with SVOD platforms OSN and StarzPlay (QAR30/month, 8,000 hours).
- Ooredoo is investing QAR1 billion on an **extensive fiber network** (up to 100Mbps). Ooredoo is responsible for constructing the government-owned National Broadband Network (QNBN). Ooredoo had 2.97 million mobile subscribers by September 2020.
- **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 1.68 million mobile subscribers by September 2020.

Qatar OTT TV & video forecasts

	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026
Population (000)																	
Total households (000)																	
TV households (000)																	
Fixed broadband households (000)																	
Smartphone subscribers (000)																	
Tablet subscribers (000)																	
<i>TV HH/Total HH</i>																	
<i>Fixed broadband HH/Total HH</i>																	
<i>Smartphone subs/Population</i>																	
<i>Tablet subs/Population</i>																	
OTT TV & video viewers (000)																	
OTT TV & video viewers/population																	
Online advertising total (US\$ mil.)																	
AVOD (US\$ mil.)																	
Online rental revenues (US\$ mil.)																	
Download-to-own video revenues (US\$ mil.)																	
SVOD revenues (US\$ mil.)																	
Total OTT TV & video revenues (US\$ mil.)																	
AVOD revenues/Population \$																	
SVOD revenues/Population \$																	
SVOD revenues/SVOD subscriber \$																	
Net SVOD homes (000)																	
SVOD homes/TVHH																	
SVOD homes/Fixed broadband HH																	
SVOD subscriptions/SVOD homes																	
Gross SVOD subscriptions (000)																	
SVOD subs/TVHH																	
SVOD subs/Fixed broadband HH																	
SVOD subs/Smartphone users																	



Qatar OTT TV & video forecasts

	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026
SVOD subscribers by operator (000)																	
Netflix																	
Amazon																	
Disney+																	
Apple TV+																	
StarzPlay																	
Shahid VIP																	
OSN																	
Others																	
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+																	
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OSN																	
Others																	
Share of SVOD revenues by operator (%)																	
Netflix																	
Amazon																	
Disney+																	
Apple TV+																	
StarzPlay																	
Shahid VIP																	
OSN																	
Others																	



Qatar OTT TV & video forecasts

	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026
SVOD ARPU by operator (\$)																	
Netflix																	
Amazon																	
Disney+																	
Apple TV+																	
StarzPlay																	
Shahid VIP																	
OSN																	
AVOD revenues by platform (\$ million)																	
YouTube																	
Facebook/Instagram																	
Other social media sites																	
FTA broadcasters																	
Pay TV broadcasters																	
AVOD platforms																	
Other																	
<i>Source: Digital TV Research. Revenues from professionally-made TV shows and movies - so not, for example, sports or UGC.</i>																	

Digital TV Research publication schedule for 2021

	Title	Publication	Price
1	Africa Pay TV Forecasts	January	£1200/€1320/\$1440
2	Africa OTT TV and Video Forecasts	January	£1200/€1320/\$1440
3	Middle East & North Africa Pay TV Forecasts	January	£1200/€1320/\$1440
4	Middle East & North Africa OTT TV and Video Forecasts	February	£1200/€1320/\$1440
5	SVOD Platform Forecasts Update	February	£800/€880/\$960
6	Asia Pacific Pay TV Forecasts	March	£1200/€1320/\$1440
7	Asia Pacific OTT TV and Video Forecasts	March	£1200/€1320/\$1440
8	Latin America Pay TV Forecasts	April	£1200/€1320/\$1440
9	Latin America OTT TV and Video Forecasts	April	£1200/€1320/\$1440
10	North America Pay TV Forecasts	April	£600/€660/\$720
11	North America OTT TV and Video Forecasts	April	£600/€660/\$720
12	Eastern Europe Pay TV Forecasts	May	£1200/€1320/\$1440
13	Eastern Europe OTT TV and Video Forecasts	May	£1200/€1320/\$1440
14	Western Europe Pay TV Forecasts	May	£1200/€1320/\$1440
15	Western Europe OTT TV and Video Forecasts	June	£1200/€1320/\$1440
16	Global OTT TV & Video Forecasts	June	£1800/€1980/\$2160
17	Global SVOD Forecasts	June	£1600/€1760/\$1920
18	Global Pay TV Subscriber Forecasts	June	£1600/€1760/\$1920
19	Global Pay TV Revenue Forecasts	June	£1600/€1760/\$1920
20	Global Pay TV Operator Forecasts	June	£1600/€1760/\$1920
21	Global AVOD Forecasts	June	£1600/€1760/\$1920
22	Africa SVOD Forecasts	August	£1000/€1200/\$1300
23	Middle East & North Africa SVOD Forecasts	August	£1000/€1200/\$1300
24	Asia Pacific SVOD Forecasts	August	£1000/€1200/\$1300
25	Latin America SVOD Forecasts	September	£1000/€1200/\$1300
26	North America SVOD Forecasts	September	£500/€600/\$650
27	Eastern Europe SVOD Forecasts	September	£1000/€1200/\$1300
28	Western Europe SVOD Forecasts	October	£1000/€1200/\$1300
29	SVOD Forecasts Update	October	£1600/€1760/\$1920
30	Pay TV Forecasts Update	November	£1600/€1760/\$1920
31	SVOD Platform Forecasts Update	December	£800/€880/\$960

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