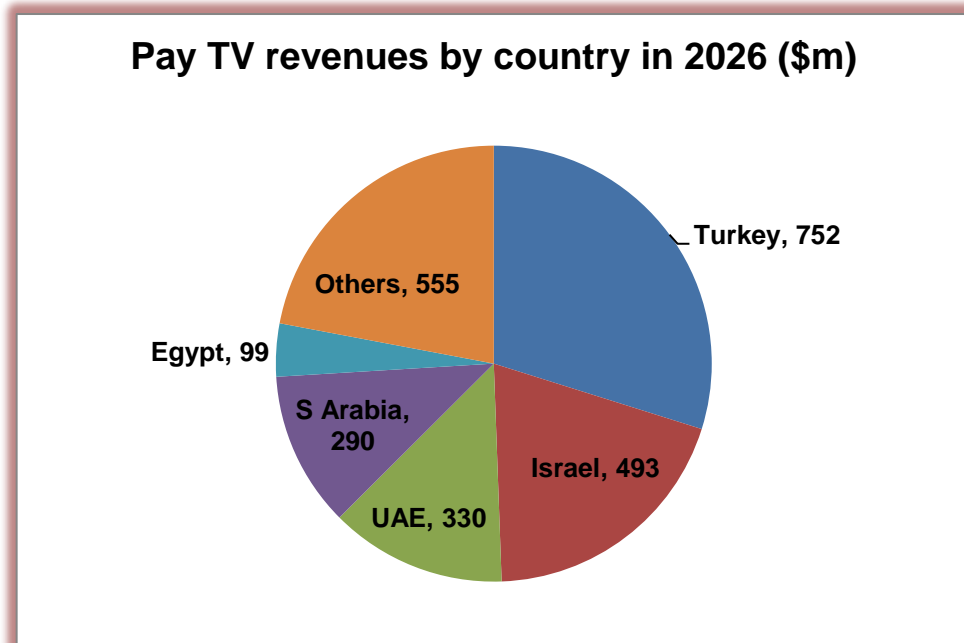


# MENA pay TV revenues continue to fall

Pay TV revenues for the 20 countries in the Middle East and North Africa region fell by 14% between 2016 and 2020 to \$2.74 billion. Revenues will continue to fall slowly - to \$2.52 billion in 2026. The 2026 revenues will be 23% lower than 2016.



*Source: Digital TV Research*

Simon Murray, Principal Analyst at Digital TV Research, said: “Five countries will contribute 78% of the region’s pay TV revenues in 2026. Turkey and Israel together will supply nearly half of the total. There are few winners. Eight of the 20 countries will lose revenues between 2020 and 2026.”

Turkish pay TV revenues will reach \$752 million in 2026; 17% lower than the peak year of 2016. However, the number of pay TV subscribers will grow from 7.27 million in 2020 to 7.64 million in 2026.

Israel is experiencing cord-cutting. It will lose 28% of its pay TV subs between 2020 to 2026. We forecast that Israel’s pay TV revenues will halve between 2016 and 2026. Beyond these figures, Israel’s OTT sector will grow significantly.

For the 13 Arabic-speaking countries, pay TV revenues will remain at about \$1 billion despite subscriber numbers increasing by 18% to 4 million.

# **Middle East & North Africa Pay TV Forecasts**

Published in January 2021, this 178-page PDF, PowerPoint and excel report is our tenth edition. The report comes in three parts:

- Insight: Detailed country-by-country analysis in a 56-page PDF document.
- Outlook: Forecasts for 20 countries in a 42-page PowerPoint document full of charts, graphs and bullet points;
- Excel workbook covering each year from 2010 to 2026 for 20 countries by household penetration, by pay TV subscribers, by pay TV revenues and by major operator. As well as summary tables by country and by platform;

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



**Forecasts for the following 20 countries and 49 platforms:**

<b>Country</b>	<b>No of ops</b>	<b>Platform forecasts</b>
<b>Algeria</b>	3	beIN; OSN; Algerie Telecom
<b>Armenia</b>	0	
<b>Azerbaijan</b>	0	
<b>Bahrain</b>	3	beIN; OSN; Batelco
<b>Egypt</b>	3	beIN; OSN; Telecom Egypt
<b>Georgia</b>	2	Magtisar; Sliknet
<b>Israel</b>	2	HOT; Yes
<b>Jordan</b>	3	beIN; OSN; Orange
<b>Kazakhstan</b>	2	Alma; KT
<b>Kuwait</b>	2	beIN; OSN
<b>Lebanon</b>	2	beIN; OSN
<b>Morocco</b>	3	beIN; OSN; Maroc Telecom
<b>Oman</b>	3	beIN; OSN; Omantel
<b>Qatar</b>	3	beIN; OSN; Ooredoo
<b>Saudi Arabia</b>	4	beIN; OSN; Invision; Mobily
<b>Syria</b>	1	beIN
<b>Tunisia</b>	2	beIN; OSN
<b>Turkey</b>	5	Turksat; Turkcell; TTNNet; Digiturk; D-Smart
<b>UAE</b>	4	beIN; OSN; Du; eLife
<b>Uzbekistan</b>	2	Uztelecom; Uzdigital

## SAMPLE: Bahrain pay TV insight

- Bahrain achieved complete **digital TV penetration** in 2013. About 76% of the 288,000 TV households receive digital satellite signals. IPTV subs have overtaken satellite TV. Pay TV penetration will increase from 38.8% in 2020 to 39.5% in 2026. **Pay TV revenues** will be flat at \$32 million as competition cuts ARPUs.

Main assumptions behind the forecasts	
•	FTA satellite TV is the main TV reception platform – accounting for half the TV households.
•	As well as satellite TV, OSN packages are available on most of the other pay TV platforms.
•	beIN subscriber numbers have been hit by the Saudi-led ban.
•	Batelco will remain the main fixed pay TV platform.
•	Limited cable networks were phased out.
•	Analog terrestrial switch-off was achieved by end-2013.
<i>Source: Digital TV Research</i>	

- The dispute between Saudi Arabia and Qatar hit beIN's subscriber numbers across the region. Most governments followed the mid-2017 Saudi ban on beIN – although not all of them have enforced the ban that effectively.
- beIN** lost 12,000 subscribers in the four years to end-2020 to take its total to 22,000. We do not expect any growth. Sports is a major attraction for beIN.

Main operators by subscribers (000)				
Operator	Pay TV subs	Fixed bb subs	Mobile subs	SVOD platforms
Batelco	57	-	-	OSN
beIN	22	-	-	-
OSN	33	-	-	-
STC	-	-	-	Shahid VIP; OSN; Telly; Jawwy; Spuul
Zain	-	-	845	Netflix; Shahid VIP; Telly; Yupp
<i>Source: Digital TV Research</i>				

- Bahrain is a priority market for OSN. Traditionally appealing to expatriates, **OSN** is attracting more local subscribers, although it dropped a lot of its sports coverage. OSN is carried by STC – via fixed or mobile broadband – and Batelco. We estimate that the company had 33,000 satellite TV subscribers in Bahrain by end-2020 and will have 39,000 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.

- **Batelco** started offering IPTV services via its FTTH network (up to 500Mbps) in September 2011. Batelco had 57,000 IPTV subs at end-2020 and will have 66,000 by 2026. Batelco also offers OSN (BHD4/month).
- Principally a mobile operator, **STC (formerly called Viva)** carries OSN (BHD4/month), Jawwy TV (BHD3/month), Telly (BHD1.90/month), Shahid Plus (BHD2/month) and Hindi-language Spuul (BHD2/month). STC is owned by Saudi Telecommunications Company.
- Rival **Zain** carries Netflix, Telly (BHD1.90/month), Yupp TV (BHD2.90/month) and Shahid Plus (BHD2/month). Zain had 845,000 mobile subscribers in Bahrain by March 2017. Zain is 55.4% owned by the Zain Group.
- **Digital terrestrial switchover**, using the DVB-T2 standard, was completed in 2013, although its impact is limited because of the ready acceptance of other platforms.

## Bahrain pay TV forecasts

	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026
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)																	
Digital cable subs/TV HH																	
Analog cable subs/TV HH																	
Pay IPTV subs/TV HH																	
Pay Satellite TV/TV HH																	
Free-to-air Satellite TV/TV HH																	
Analog terrestrial/TVHH																	
Primary FTA DTT/TV HH																	
Primary pay DTT/TV HH																	
TVHH/Total HH																	
Digital/TV HH																	
Analog/TV HH																	
Pay TV Subs/TV HH																	
<i>Stand-alone dig cab subs (000)</i>																	
<i>Dual-play dig cable subs (000)</i>																	
<i>Triple-play dig cable subs (000)</i>																	
<i>Stand-alone IPTV subs (000)</i>																	
<i>Dual-play pay IPTV subs (000)</i>																	
<i>Triple-play pay IPTV subs (000)</i>																	



## Bahrain pay TV forecasts

	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026
Revenues (US\$ million)																	
<i>Stand-alone digital cable revs</i>																	
<i>Dual-play digital cable TV revs</i>																	
<i>Triple-play digital cable TV revs</i>																	
Digital cable TV subs revenues																	
Dig 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																	
Satellite TV subscription revs																	
Satellite TV on-demand revs																	
Satellite TV revenues																	
DTT subscription revs																	
DTT on-demand revenues																	
DTT revenues																	
Subscription revenues																	
On-demand revenues																	
Total revenues																	
Average Revenue Per User (ARPU - US\$)																	
<i>Stand-alone digital cable subs</i>																	
<i>Dual-play digital cable TV subs</i>																	
<i>Triple-play digital cable TV subs</i>																	
Ave digital cable (subs & VOD)																	
Analog cable TV subs																	
<i>Stand-alone IPTV subs</i>																	
<i>Dual-play IPTV subs</i>																	
<i>Triple-play IPTV subs</i>																	
Average IPTV (subs and VOD)																	
Pay Satellite TV (subs)																	
Pay Satellite TV (subs and PPV)																	
Pay DTT (subs)																	
Pay DTT (subs and PPV)																	
Average monthly ARPU																	



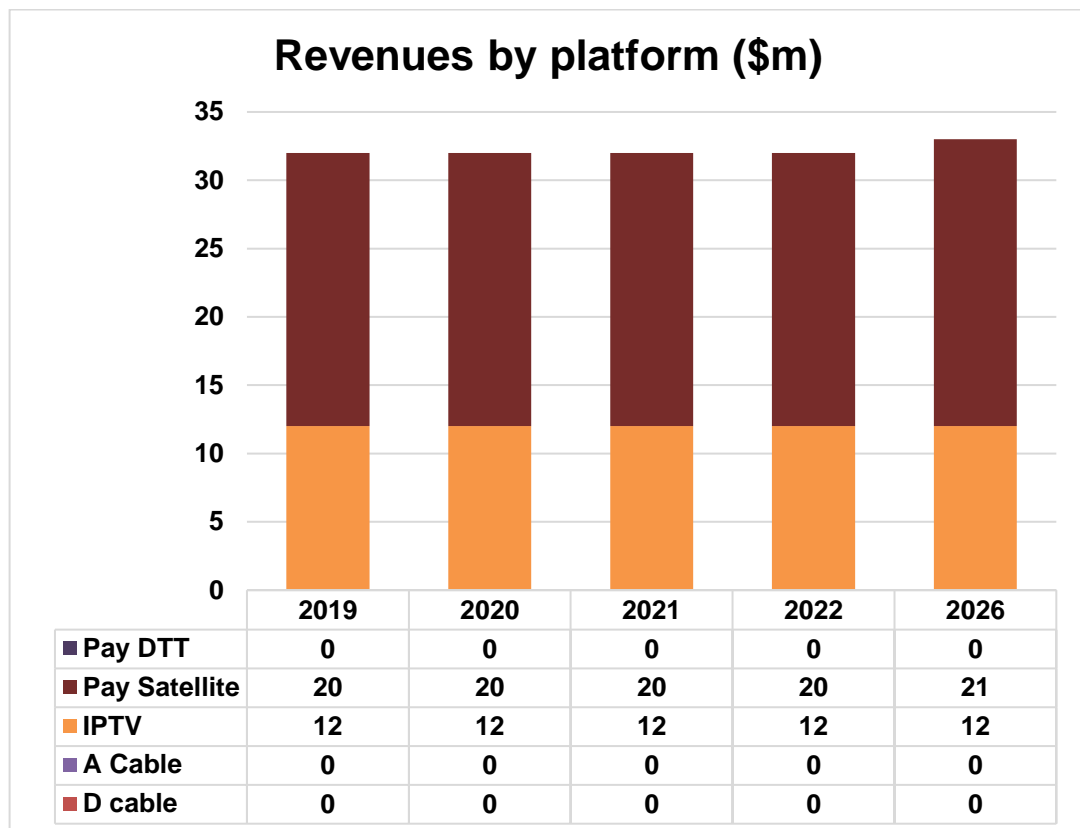
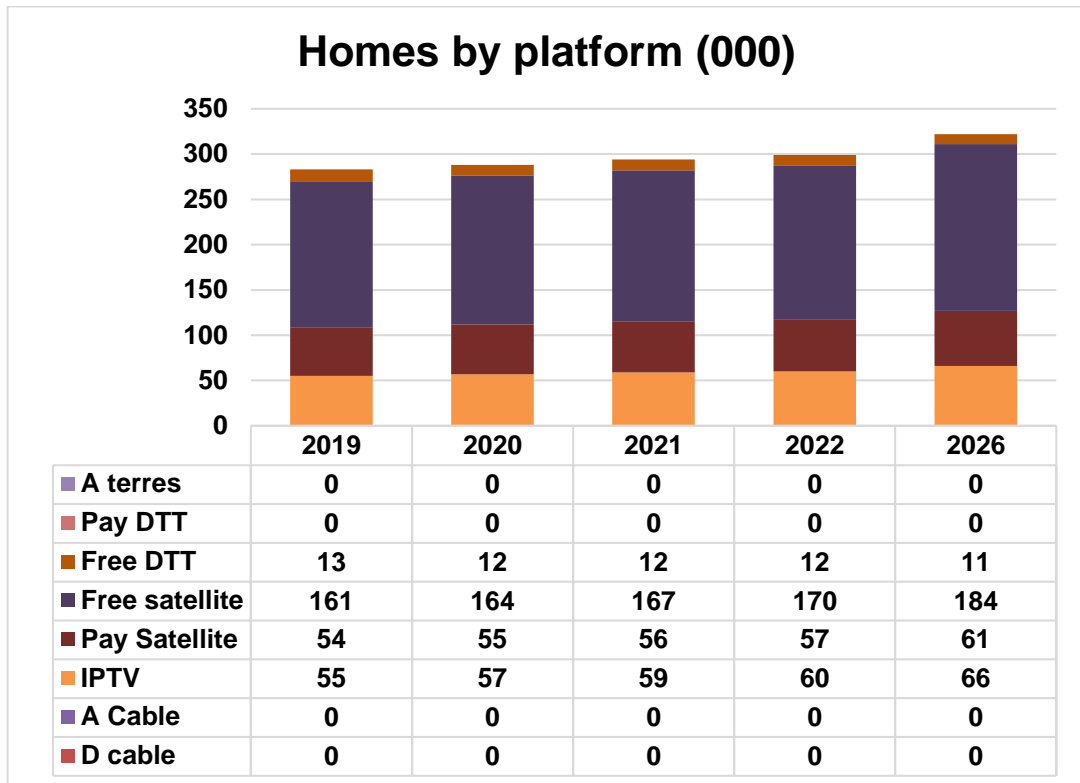
## Bahrain pay TV forecasts

	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026
<b>Pay TV subscribers by operator (000)</b>																	
beIN (satellite)																	
OSN (satellite)																	
Batelco (IPTV)																	
Other																	
<b>Share of pay TV subs by operator %</b>																	
beIN (satellite)																	
OSN (satellite)																	
Batelco (IPTV)																	
Other																	
<b>Subscription &amp; VOD revenues (US\$ million)</b>																	
beIN (satellite)																	
OSN (satellite)																	
Batelco (IPTV)																	
Other																	
<b>Share of pay TV revenues by operator %</b>																	
beIN (satellite)																	
OSN (satellite)																	
Batelco (IPTV)																	
Other																	
<b>Average Revenue Per User (ARPU - US\$)</b>																	
beIN (satellite)																	
OSN (satellite)																	
Batelco (IPTV)																	

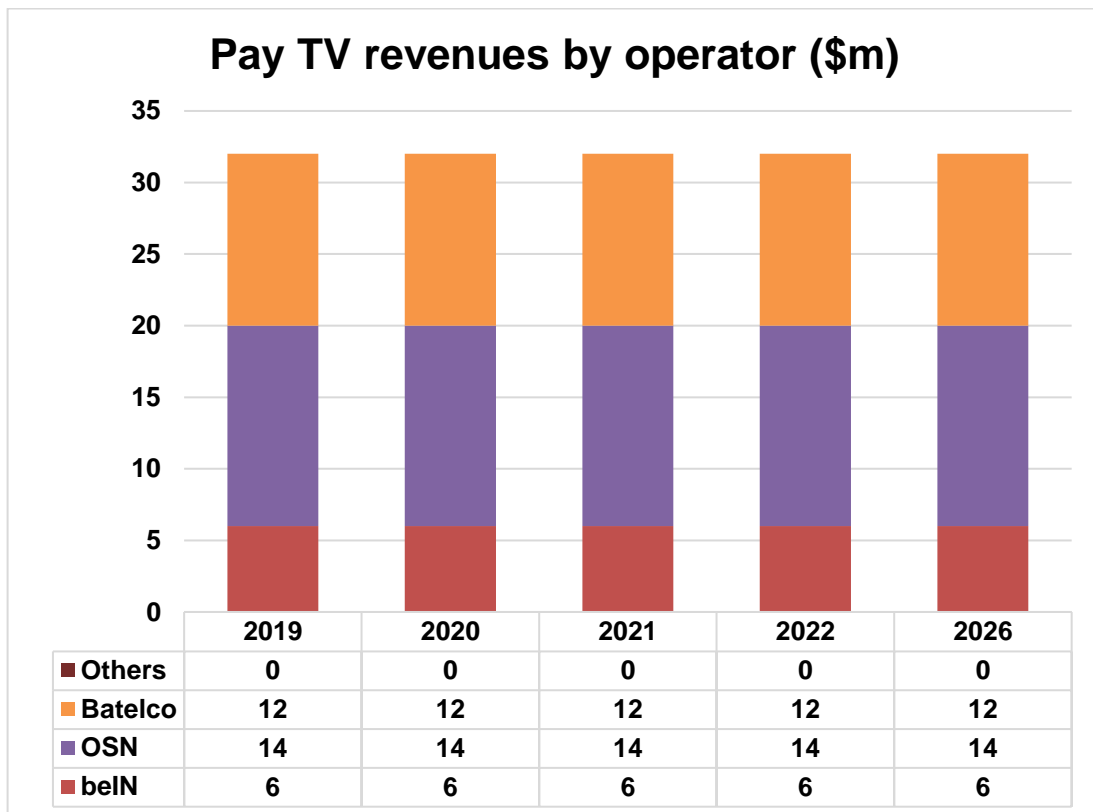
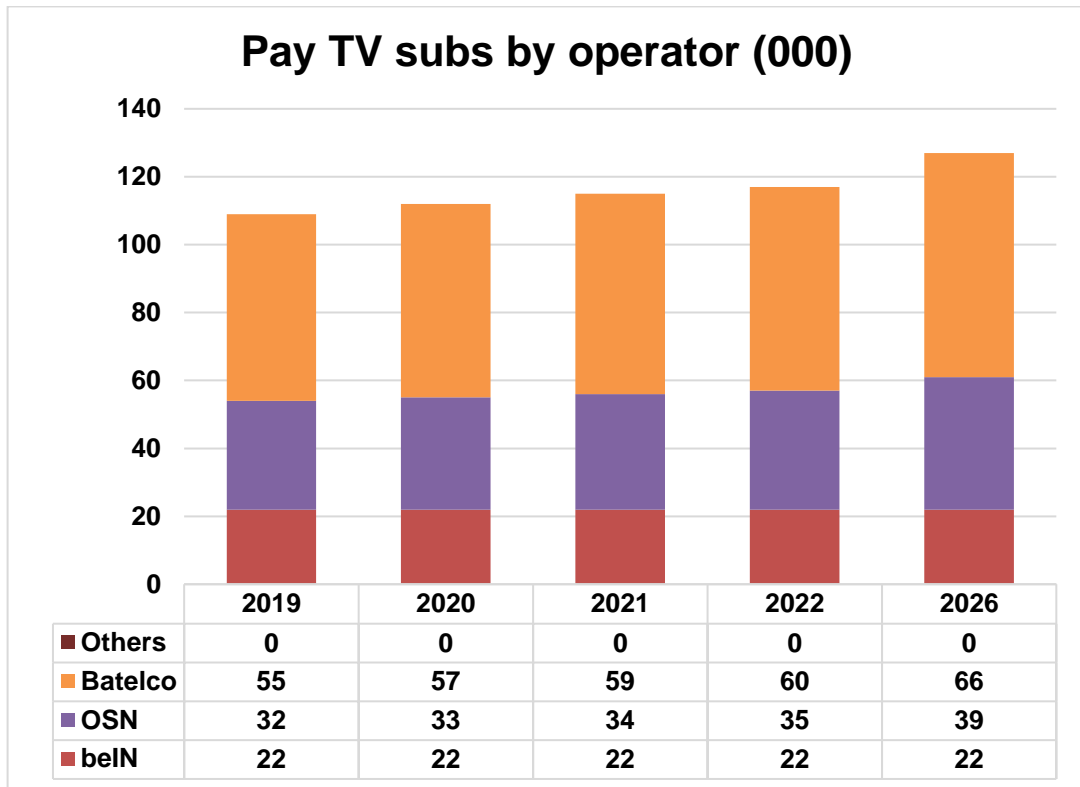




# Bahrain pay TV outlook



# Bahrain pay TV outlook



## Digital TV Research publication schedule for 2021

	<b>Title</b>	<b>Publication</b>	<b>Price</b>
1	Sub-Saharan Africa Pay TV Forecasts	January	£1200/€1320/\$1440
2	Sub-Saharan 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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