

Middle East and Africa TV: 5th Edition

© 2008 Informa UK Ltd.

All rights reserved.

The contents of this publication are protected by international copyright laws, database rights and other intellectual property rights. The owner of these rights is Informa UK Ltd, our affiliates or other third party licensors. All product and company names and logos contained within or appearing on this publication are the trade marks, service marks or trading names of their respective owners, including Informa UK Ltd. This publication may not be-

- (a) copied or reproduced; or
- (b) lent, resold, hired out or otherwise circulated in any way or form without the prior permission of Informa UK Ltd.

Whilst reasonable efforts have been made to ensure that the information and content of this publication was correct as at the date of first publication, neither Informa UK Ltd nor any person engaged or employed by Informa UK Ltd accepts any liability for any errors, omissions or other inaccuracies. Readers should independently verify any facts and figures as no liability can be accepted in this regard - readers assume full responsibility and risk accordingly for their use of such information and content.

Any views and/or opinions expressed in this publication by individual authors or contributors are their personal views and/or opinions and do not necessarily reflect the views and/or opinions of Informa UK Ltd.

AUTHORS

Adam Thomas, *Media Research Manager*
(adam.thomas@informa.com)

Simon Dyson, *Senior Research Analyst*
(simon.dyson@informa.com)

Ted Hall, *Senior Research Analyst*
(ted.hall@informa.com)

Thomas Miles, *Research Analyst*
(thomas.miles@informa.com)

REPORT STAFF

Simon Murray, *Principal Analyst*

Faiza Carter, *Production Manager*

Marta Almansa, *Production Editor*

HEAD OFFICE

Mortimer House
37-41 Mortimer Street
London W1T 3JH
Web site: www.informamedia.com

SALES & CUSTOMER SERVICE

UK/Europe

Phone: (44) 20 7017 5537

Fax: (44) 20 7017 4783

Email: media.enquiries@informa.com

North America

Phone: (1) 978 258 2500

Fax: (1) 20 978 258 2500

Email: colleen.barron@informa.com

ISBN: 978 1843 117 391

Published in May 2008

ABOUT THE AUTHORS

ADAM THOMAS, MEDIA RESEARCH MANAGER

Adam has held several senior roles within the media industry. He has worked as a journalist at CIA Medianetwork's Channel 11, authored media research analysis for the Corporate Intelligence Group and was senior media analyst at Market Tracking International. He also wrote for the PSI's prestigious *Cultural Trends* journal, before joining Informa Telecoms & Media in 2000 as Media Research Manager. Adam has written many of our best-selling reports on the film, TV, games and new media sectors. He graduated from Guildhall University in 1994, with a First Class Honours degree in Communications.

SIMON DYSON, SENIOR RESEARCH ANALYST

Simon is a music and broadcast analyst who joined Informa Telecoms & Media in 2000. Following a lengthy career in the music industry he returned to education and gained a BSc in Media Studies at South Bank University. He then worked for a research company specialising in music, including compilation of the *MBI World Report*, as well as music broadcasting and online developments.

TED HALL, SENIOR RESEARCH ANALYST

Ted graduated from the University of Reading with a first class honours degree in English Literature in 2005. Before moving into research, he took up analytical roles within the law and education industries. Work with a leading international law firm was followed by a brief role with a major UK examination board. Ted has been working for Informa Telecoms & Media since 2006, analysing all aspects of the TV industry.

THOMAS MILES, RESEARCH ANALYST

Thomas graduated from the University of Nottingham with a degree in History in 2002. After a period working in the financial industry, he spent several years working as a journalist in Spain for Madrid's foremost English-language magazine. He also taught English to professionals at many leading domestic and international companies. Following his return to the UK, Thomas joined Informa Telecoms & Media as a Media Research Analyst in 2007, specialising in TV.

Contents

EXECUTIVE SUMMARY

| | |
|--|---|
| Advertising | 2 |
| <i>Gross TV ad spend by broadcast group in the GCC countries</i> | 3 |
| Piracy | 4 |

CHAPTER 1

FORECASTS

| | |
|--|----|
| <i>Pay TV subscribers (000)</i> | 6 |
| <i>Multichannel TV households (000)</i> | 7 |
| <i>Multichannel TV household penetration (%)</i> .. | 8 |
| <i>Net TV Advertising (US\$ million)</i> | 8 |
| <i>Population Forecasts (000)</i> | 9 |
| <i>Annual Population Growth (%)</i> | 10 |
| <i>TV Households (000)</i> | 11 |
| <i>Net TV Advertising (US\$ million)</i> | 12 |
| <i>Net TV Advertising per TV Household (US\$)</i> .. | 13 |
| <i>MMDS/Cable Households (000)</i> | 14 |
| <i>MMDS/Cable Households as % of TV Households (%)</i> | 15 |
| <i>Satellite Households (000)</i> | 16 |
| <i>Satellite Households as % of TV Households (%)</i> | 17 |
| <i>Multichannel Households (000)</i> | 18 |
| <i>Multichannel Households as % of TV Households (%)</i> | 19 |
| <i>Pay MMDS/Cable Households (000)</i> | 20 |
| <i>Pay DTH Households (000)</i> | 21 |
| <i>Pay DTH Households as % of Satellite Households (%)</i> | 22 |
| <i>Pay DTH Households as % of TV Households (%)</i> | 23 |
| <i>Pay TV Households (000)</i> | 24 |
| <i>Pay TV Households as % of TV Households (%)</i> | 25 |

CHAPTER 2

| | |
|--|----|
| ALGERIA | 27 |
| Market movements | 27 |
| Country overview | 27 |
| <i>Algeria: Financial indicators</i> | 28 |
| Television overview | 28 |
| Digital terrestrial TV | 29 |
| Terrestrial | 30 |
| ENTV | 30 |
| IPTV | 31 |

| | |
|---|----|
| <i>Eepad ADSL packages</i> | 32 |
| <i>Algerie Telecom EASY ADSL residential packages</i> | 32 |
| IPTV activity | 33 |
| Viewing/programming Advertising | 33 |
| <i>Top 10 TV Advertising Brands</i> | 34 |

CHAPTER 3

| | |
|--|----|
| BAHRAIN | 35 |
| Market movements | 35 |
| Country overview | 35 |
| <i>Bahrain: Financial indicators</i> | 36 |
| Television overview | 36 |
| <i>BRTC programming mix</i> | 38 |
| <i>Orbit packages in Bahrain (2008)</i> | 38 |
| <i>Bahrain: Programme rights holders</i> | 40 |
| IPTV | 40 |
| <i>Bahrain telecommunications indicators</i> | 41 |
| Batelco | 41 |
| <i>Batelco financial data (BHD million)</i> | 42 |
| <i>Batelco residential ADSL packages (2008)</i> .. | 42 |
| <i>Internet service providers (2008)</i> | 42 |
| Advertising | 43 |
| <i>Bahrain: Advertising revenues (US\$ million)</i> .. | 43 |
| <i>Top 10 TV Advertisers (2007)</i> | 43 |

CHAPTER 4

| | |
|--|----|
| CYPRUS | 45 |
| Market movements | 45 |
| Country overview | 45 |
| <i>Greek Cyprus: Financial indicators</i> | 45 |
| Television overview | 46 |
| Programmers | 46 |
| LTV/Alfa | 46 |
| Cable | 48 |
| <i>Cablenet triple-play packages (April 2008)</i> .. | 49 |
| <i>Cablenet subscriber growth</i> | 49 |
| IPTV | 49 |
| <i>Cyprus broadband data</i> | 49 |
| <i>Cyprus: IPTV subscriber growth</i> | 50 |
| MiVision | 50 |
| <i>CyTA pay TV and double-play packages (March 2008)</i> | 50 |
| PrimeTel | 51 |
| <i>PrimeTel multi-play packages (March 2008)</i> .. | 52 |

| | | | |
|---|----|--|----|
| Satellite | 52 | Television overview | 72 |
| Nova Cyprus | 52 | Cable | 73 |
| <i>Multichoice: Cypriot subscriber numbers</i> | 53 | <i>HOT cable financials (US\$ million)</i> | 73 |
| Athina Sat | 53 | <i>HOT Cable main shareholders (January 2008)</i> | 74 |
| On-demand TV | 54 | IPTV | 74 |
| DTT | 54 | <i>Israel broadband subscriber details</i> | 74 |
| Terrestrial | 55 | Satellite | 75 |
| <i>Audience share (%)</i> | 55 | <i>Yes subscriber growth</i> | 76 |
| <i>Cyprus: Programme rights holders</i> | 55 | <i>Yes financials (ILS million)</i> | 76 |
| Cyprus Broadcasting Corporation | 55 | DTT | 77 |
| Sigma | 56 | Mobile TV | 78 |
| Sigma primetime programming sources | 56 | <i>Israel mobile subscribers by operator</i> | 78 |
| Other channels | 56 | <i>Israel mobile subscribers by technology</i> | 78 |
| Advertising | 57 | On-Demand TV | 79 |
| <i>Advertising expenditure by quarter (C£ million)</i> | 57 | HDTV | 79 |
| CHAPTER 5 | | Terrestrial | 80 |
| EGYPT | 59 | <i>Israel terrestrial broadcasters</i> | 80 |
| Market movements | 59 | Channel 2 | 80 |
| Country overview | 59 | Channel 10 | 81 |
| <i>Egypt: Financial indicators</i> | 59 | Channel 1 and Channel 33 | 82 |
| <i>Egypt: Estimated trade losses due to copyright piracy (US\$ million)</i> | 60 | Viewing/programming | 82 |
| Television overview | 61 | <i>Release windows (months after theatrical release)</i> | 83 |
| Multichannel TV | 63 | Advertising | 83 |
| Pay TV | 63 | <i>Advertising spending (US\$ million)</i> | 83 |
| ART | 63 | Forecasts | 84 |
| Showtime | 63 | <i>Israel forecasts</i> | 85 |
| Orbit | 64 | CHAPTER 7 | |
| CNE | 65 | JORDAN | 87 |
| Free-to-air | 65 | Market movements | 87 |
| Nilesat | 65 | Country overview | 87 |
| <i>NileSat ownership structure (%)</i> | 65 | <i>Jordan: Financial indicators</i> | 88 |
| Dream TV | 66 | Television overview | 89 |
| Al-Mehwar TV | 67 | Satellite | 89 |
| <i>Egypt: Programme rights holders</i> | 67 | IPTV | 90 |
| Aghapy TV | 68 | <i>Jordan broadband data</i> | 90 |
| IPTV | 68 | Mobile TV | 91 |
| <i>Egypt broadband data</i> | 68 | Terrestrial | 91 |
| <i>TE Data DSL packages</i> | 68 | JRTV | 91 |
| <i>LINKdotNET DSL packages (E£)</i> | 69 | <i>JRT company history highlights</i> | 92 |
| Advertising | 70 | ATV | 93 |
| <i>Egypt advertising by media (US\$)</i> | 70 | Cable | 94 |
| CHAPTER 6 | | Advertising | 94 |
| ISRAEL | 71 | <i>Total advertising expenditure (US\$ million)</i> | 95 |
| Market movements | 71 | CHAPTER 8 | |
| Country overview | 71 | KUWAIT | 97 |
| | | Market movements | 97 |
| | | Country overview | 97 |

| | |
|---|-----|
| <i>Kuwait: Financial indicators</i> | 98 |
| Television overview | 98 |
| Cable | 99 |
| <i>KCV: Financial summary</i> | 100 |
| <i>LuxSAT payment options 2007</i> | 100 |
| Satellite | 100 |
| <i>Showtime Arabia subscription packages in Kuwait (March 2008)</i> | 101 |
| <i>Orbit subscription packages in Kuwait (2007)</i> | 102 |
| <i>Kuwait: Programme rights holders</i> | 103 |
| Mobile TV | 104 |
| <i>Kuwait: Mobile telephony subscribers</i> | 104 |
| IPTV | 104 |
| <i>Wataniya Telecom Kuwait financials (KWD millions)</i> | 104 |
| <i>Qualitynet subscription fees (March 2008)</i> | 105 |
| <i>Fast Telecommunications broadband packages (March 2008)</i> | 105 |
| Advertising | 106 |
| <i>Kuwait advertising expenditure by media (US\$ millions)</i> | 106 |
| <i>Advertising expenditure (US\$ million)</i> | 106 |

CHAPTER 9

| | |
|--|-----|
| LEBANON | 107 |
| Market movements | 107 |
| Country overview | 107 |
| <i>Lebanon: Financial indicators (February 2008)</i> | 108 |
| <i>Lebanese fiscal and monetary performance [LL Billion]</i> | 108 |
| Television overview | 108 |
| Cable | 110 |
| Free-to-air | 111 |
| Lebanese Broadcasting Corporation International (LBCI) | 111 |
| Future Television | 112 |
| Al-Manar | 113 |
| New TV | 115 |
| Tele Liban | 115 |
| National Broadcasting Network (NBN) | 115 |
| Tele Lumiere | 116 |
| Murr TV | 116 |
| Orange TV (OTV) | 116 |
| IPTV | 117 |
| Viewing/programming | 118 |
| Advertising | 118 |
| <i>Gross advertising expenditure (US\$ million)</i> | 119 |
| <i>Top 10 TV Advertising Brands (2007)</i> | 119 |

CHAPTER 10

| | |
|--|-----|
| MOROCCO | 121 |
| Market movements | 121 |
| Country overview | 121 |
| <i>Morocco: Financial indicators</i> | 121 |
| Television overview | 122 |
| Free-to-air | 122 |
| Digital terrestrial TV | 124 |
| <i>Composition of SNRT multiplex</i> | 124 |
| IPTV | 125 |
| <i>Maroc Telecom IPTV options (May 2008)</i> | 125 |
| Advertising | 126 |
| <i>Top 10 TV advertising brands (2007)</i> | 126 |

CHAPTER 11

| | |
|------------------------------------|-----|
| NIGERIA | 127 |
| Market movements | 127 |
| Country overview | 127 |
| Pay TV | 127 |
| Multichoice | 128 |
| HiTV | 128 |
| Other players | 129 |
| Mobile TV | 130 |
| Free-to-air | 130 |
| Forecasts | 131 |
| <i>Nigeria forecasts</i> | 132 |

CHAPTER 12

| | |
|--|-----|
| OMAN | 135 |
| Market movements | 135 |
| Country overview | 135 |
| <i>Oman: Financial indicators</i> | 136 |
| Television overview | 136 |
| Satellite | 137 |
| <i>Orbit DTH price plans in Oman</i> | 138 |
| <i>Showtime Arabia subscription packages in Oman</i> | 138 |
| <i>Oman: Programme rights holders</i> | 139 |
| IPTV | 139 |
| Advertising | 141 |
| <i>Oman: Advertising expenditure (US\$ millions)</i> | 141 |

CHAPTER 13

| | |
|--|-----|
| QATAR | 143 |
| Market movements | 143 |
| Country overview | 143 |
| <i>Qatar: Financial indicators</i> | 144 |

| | |
|---|-----|
| Television overview | 144 |
| Pay TV | 144 |
| <i>QCV: Subscriber numbers</i> | 145 |
| <i>Cablevision MVDS packages (2007)</i> | 145 |
| <i>Qatar: Programme rights holders</i> | 146 |
| Al Jazeera | 147 |
| IPTV | 150 |
| <i>Selected Mozaic TV+ channel packages</i> | 151 |
| Mobile TV | 151 |
| Advertising | 151 |
| <i>Qatar: Advertising expenditure (US\$ millions)</i> | 152 |

CHAPTER 14

| | |
|---|-----|
| SAUDI ARABIA | 153 |
| Market movements | 153 |
| Country overview | 153 |
| <i>Saudi Arabia: Financial indicators</i> | 154 |
| Television overview | 154 |
| Satellite | 156 |
| <i>Orbit DTH price plans in Saudi Arabia (end-2007)</i> | 157 |
| <i>Showtime Arabia subscription packages in Saudi Arabia (March 2008)</i> | 158 |
| Programming/viewing | 160 |
| <i>Saudi Arabia: Programme rights holders</i> | 160 |
| IPTV | 161 |
| Advertising | 162 |
| <i>Total advertising revenue by media (US\$ millions)</i> | 162 |

CHAPTER 15

| | |
|--|-----|
| SOUTH AFRICA | 163 |
| Market movements | 163 |
| Country overview | 163 |
| Pay TV | 164 |
| Multichoice | 166 |
| <i>Naspers financial highlights</i> | 167 |
| <i>Multichoice subscriber details</i> | 167 |
| IPTV | 169 |
| <i>South Africa broadband data</i> | 169 |
| Mobile TV | 170 |
| <i>South African mobile subscriber details</i> | 170 |
| HDTV | 171 |
| DTT | 171 |
| Free-to-air | 172 |
| SABC | 172 |
| <i>SABC channel profiles</i> | 173 |
| <i>SABC financial highlights (ZAR 000)</i> | 173 |

| | |
|---|-----|
| <i>SABC1 top 10 programmes 2007 (ages 16+)</i> | 174 |
| <i>SABC2 top 10 programmes 2007 (ages 16+)</i> | 174 |
| <i>SABC3 top 10 programmes 2007 (ages 16+)</i> | 174 |
| e.tv | 175 |
| Free2View | 175 |
| Advertising | 176 |
| <i>Gross advertising expenditure (US\$ million)</i> | 176 |
| Forecasts | 176 |
| <i>South Africa forecasts</i> | 177 |

CHAPTER 16

| | |
|---|-----|
| SUB-SAHARAN AFRICA | 179 |
| Overview | 179 |
| Pay TV | 179 |
| Gateway TV | 179 |
| Multichoice | 180 |
| Other players | 181 |
| Francophone territories | 182 |
| Kenya | 183 |
| Pay TV | 183 |
| Mobile TV | 184 |
| Free-to-air | 185 |
| A24 | 186 |
| Uganda | 187 |
| Pay TV | 187 |
| Free-to-air | 188 |
| Angola | 189 |
| Pay TV | 190 |
| Free-to-air | 190 |
| Botswana | 190 |
| Pay TV | 191 |
| Free-to-air | 191 |
| Burkina Faso | 192 |
| Pay TV | 192 |
| Free-to-air | 192 |
| Burundi | 193 |
| Pay TV | 193 |
| Free-to-air | 193 |
| Cameroon | 194 |
| Pay TV | 194 |
| Free-to-air | 194 |
| Chad | 195 |
| Pay TV | 195 |
| Free-to-air | 196 |
| Democratic Republic Of Congo | 196 |
| Pay TV | 196 |
| Free-to-air | 196 |
| Republic of Congo | 197 |

| | |
|--------------------|-----|
| Pay TV | 197 |
| Free-to-air | 197 |
| Eritrea | 198 |
| Pay TV | 198 |
| Free-to-air | 198 |
| Ethiopia | 198 |
| Pay TV | 199 |
| Free-to-air | 199 |
| The Gambia | 199 |
| Pay TV | 199 |
| Free-to-air | 200 |
| Ghana | 200 |
| Pay TV | 200 |
| Free-to-air | 201 |
| Ivory Coast | 201 |
| Free-to-air | 202 |
| Rwanda | 202 |
| Pay TV | 202 |
| Free-to-air | 202 |
| Senegal | 203 |
| Pay TV | 203 |
| Free-to-air | 204 |
| Tanzania | 204 |
| Pay TV | 205 |
| Free-to-air | 205 |
| Zambia | 206 |
| Pay TV | 207 |
| Free-to-air | 207 |
| Zimbabwe | 208 |
| Pay TV | 208 |
| Free-to-air | 208 |

CHAPTER 17

| | |
|------------------------------------|-----|
| SYRIA | 211 |
| Market movements | 211 |
| Country overview | 211 |
| <i>Syria: Financial indicators</i> | 212 |
| Television overview | 212 |
| IPTV | 215 |

CHAPTER 18

| | |
|--|-----|
| TUNISIA | 217 |
| Market movements | 217 |
| Country overview | 217 |
| <i>Tunisia: Financial indicators</i> | 218 |
| Television overview | 219 |
| <i>TV audience share</i> | 220 |
| DTH | 220 |
| <i>Tunisia: Programme rights holders</i> | 222 |

| | |
|--|-----|
| IPTV | 222 |
| <i>Distribution of Internet users (%)</i> | 223 |
| <i>Tunisie Telecoms ADSL packages (2008)</i> | 224 |

CHAPTER 19

| | |
|--|-----|
| TURKEY | 225 |
| Market movements | 225 |
| Country overview | 225 |
| Cable | 227 |
| Broadband | 227 |
| <i>Turkey broadband subscribers</i> | 228 |
| DTH | 228 |
| <i>Total homes receiving satellite signals (000)</i> | 228 |
| <i>D-Smart subscriber growth forecasts (000)</i> | 229 |
| <i>D-Smart financial forecasts</i> | 229 |
| DTT | 230 |
| Mobile TV | 231 |
| <i>Turkey mobile subscriber details</i> | 231 |
| Terrestrial | 232 |
| <i>TRT channels</i> | 233 |
| Viewing/Programming | 234 |
| <i>Prime time viewing (%)</i> | 234 |
| <i>All day channel viewing (%)</i> | 234 |
| <i>Release windows (Months after theatrical release)</i> | 235 |
| Advertising | 235 |
| <i>Advertising spending by media (TRY million)</i> | 235 |
| Forecasts | 235 |
| <i>Turkey forecasts</i> | 237 |

CHAPTER 20

| | |
|---|-----|
| UAE | 239 |
| Market movements | 239 |
| Country overview | 239 |
| <i>UAE: Financial indicators</i> | 240 |
| Television overview | 240 |
| Mobile TV | 242 |
| Multichannel TV | 242 |
| <i>E-Vision pay-TV subscription packages (March 2008)</i> | 243 |
| <i>UAE: Pay TV subscriber progress</i> | 244 |
| IPTV | 244 |
| <i>UAE Internet subscribers (Thousands)</i> | 244 |
| <i>Al Shamil broadband packages</i> | 245 |
| Advertising | 246 |
| <i>UAE advertising spend (US\$ million)</i> | 246 |
| <i>Top 5 TV advertising spenders (2007)</i> | 247 |

CHAPTER 21

| | |
|---|-----|
| COMPANY PROFILES | 249 |
| <i>Pan Arab advertising expenditure</i> <i>(US\$ million)</i> | 249 |
| Arab Digital Distribution | 250 |
| <i>ADD: Market reach</i> | 250 |
| <i>Programme packages</i> | 250 |
| Arab Radio & Television (ART) | 251 |
| <i>ART daily viewership by age</i> | 252 |
| <i>ART primetime viewing share by entertainment</i> <i>genre</i> | 252 |
| Arabsat | 252 |
| <i>Arabsat: Ownership structure</i> | 254 |
| Multichoice | 254 |
| <i>Naspers financial summary (2005-2007)</i> .. | 256 |
| <i>Multichoice subscriber details</i> | 256 |
| Nilesat | 258 |
| <i>Nilesat: Ownership structure</i> | 258 |
| Noorsat | 259 |
| Orbit Satellite Television and Radio Network | 259 |
| <i>Orbit Satellite Packages (February 2008)</i> .. | 260 |
| <i>Middle East: growth in channels available</i> .. | 261 |
| <i>Middle East net revenue breakdown for</i> <i>channels</i> | 261 |
| Showtime | 262 |
| Star Select | 265 |
| <i>Star Select channels (May 2008)</i> | 265 |
| Free-to-air satellite channels | 265 |
| Middle East Broadcasting Centre (MBC) | 265 |
| Lebanese Broadcasting Corporation International (LBCI) | 267 |
| Future TV | 267 |
| Nile TV | 268 |
| Dubai One (One TV) | 268 |
| Abu Dhabi TV | 269 |
| Rotana | 269 |