

MEDIA LANDSCAPE REPORT:

AN ANALYSIS OF MIDDLE EAST & NORTH AFRICA (MENA) REGION

EXECUTIVE SUMMARY

You have downloaded a summary of Sportcal Media's MENA Media Landscape Report, including the full table of contents.

Find out more by contacting our Client Services team on +44 (0) 20 8944 8786 or clientservices@sportcal.com



Sportcal Media's Landscape series provides the industry with regular **territory or regional insight** and statistics on the **sports rights market** layered into detailed analysis of key sectors of the media.

With multi-billion-dollar broadcast rights deals common place around the world in 2018 it is crucial to **stay up-to-date** with the media landscape in key territories.

The **Middle East and North Africa (MENA)** is the first pan-regional analysis in our series of Landscape reports taking an in-depth look at the sports broadcast rights market and its health and influence across key sectors of the media; specifically, pay-TV and the telecoms sector.

Sportcal takes a close look at the **key trends** occurring in the market and discovers which organisations are competing and exploiting which sports rights; both domestic and international properties.

Geopolitical unrest in the region and declining oil prices **negatively impacted the MENA economy** in 2017, with growth shrinking by 2 per cent.

Dominant pan-regional pay-TV sports broadcaster **BeIN Sports**, based in Doha, is facing challenging conditions as a result, though the BeIN Media Group still has more than 50 per cent of all pay-TV subscribers.

- Sports rights are the domain of pay-TV, with **BeIN** holding the pan-regional rights to many of the highest-profile sports events, including the Olympics, FIFA World Cup and UEFA Champions League, plus the 'big five' European soccer leagues, in which it is **currently investing over \$450 million per season** in total.
- **OSN** and **Abu Dhabi Media** cannot compete with BeIN for key rights but do show plenty of sports coverage. OSN focuses on expat sports while soccer content is popular for Abu Dhabi Media, including the domestic UAE Pro League, for which it pays **Dh42.5 million per season** up to 2018-19.
- The pay-TV market in the region has suffered as a direct result of the **political unrest**, causing subscriptions to drop by 21 per cent in 2017 to **4.2 million**.
- In contrast to the constriction of the pay-TV market, subscriptions to OTT platforms **increased by 48 per cent** in 2017 as **1.38 million** homes now use an online video service.
- **Streaming** is still in its infancy due to the underdeveloped but **improving broadband infrastructure** and the e-commerce universe, with many people still unable to make purchases online because of the low penetration of banking and payment cards, particularly outside the Gulf States

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- Gain a comprehensive and up to date knowledge of **sports rights acquisitions** as well as the latest key statistics and challenges from the MENA media market
- Access the very latest information from **Sportcal Media's sports rights database**
- Understand the economic scale of the **market** and understand who the major players are, domestically and pan-regionally, including **subscriber numbers**
- **Tables and charts throughout the report** to accompany the numbers behind the commentary in a clear and easily understandable format
- Access **contact details and company summaries** of all major sports broadcasters in MENA



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