Pay TV in MENA: Changing the Channel

The Middle East pay TV market is going through a massive transition. What are the opportunities and how can they be captured?
This report was first published in the Pro50 publication from BroadcastPro Middle East released in collaboration with CPI Media Group at the 2016 CABSAT conference.
A New Market Is Evolving

The television sector is going through a massive transition in the Middle East and North Africa (MENA). In the past 12 months, major developments have shaken up the market. After direct broadcast satellite provider beIN Media Group added entertainment content to its lineup, OSN responded with three new entertainment channels and striking new content deals with their studio partners. Netflix has arrived in the region (earlier than people expected) to join Starz as the second major international over-the-top (OTT) content provider. These moves—and rumors of other major developments—could transform a market that has until now been relatively stable and dominated by free-to-air direct-to-home (DTH) broadcasting. A more prominent role for pay TV could be on the horizon.

These operators clearly see the market potential. Although the pay TV market is predicted to see rapid growth from today’s subscriber base of four million people to more than 12 million by 2020, this will still be less than 20 percent of all TV households (see figure 1). In comparison, pay TV penetration in many South and Southeast Asian countries is above 60 percent.

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**Figure 1**

The Middle Eastern and North African pay TV market is growing

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Note: UAE is United Arab Emirates.
Source: A.T. Kearney analysis
The sector could get a significant boost from beIN’s entry into entertainment. In the short run, this could result in intense competition with OSN as both platforms go all out to acquire content and consumers, and eventually, it will help grow the overall subscriber base.

At the same time, there have been several commercial moves in OTT by icflix, MBC, Telly, and others to drive up subscriber bases through distribution deals and product innovation. While the impact of the arrival of Netflix is still uncertain, it is spurring content providers to review and enhance their offering (see sidebar: Netflix Arrives in the Middle East and North Africa on page 3).

Overall, pay TV operators will have to navigate a more competitive and complex market with dynamic consumer behavior, evolving content trends, and disruptions to distribution and delivery channels (see figure 2).

Figure 2
The TV market is becoming more complex

The Competition Is Heating Up

The competitive landscape in pay TV is changing dramatically with new growth strategies by DTH operators, some Internet-protocol television (IPTV) companies changing their models, and an increase in the number of pure OTT providers.

One unknown is the future of DTH services. For OSN and beIN, low penetration levels combined with their unique ability to provide a regional footprint suggest growth potential. Recognized brand names, established sales and distribution networks, and long-term content

Note: OTT is over the top. IPTV is Internet-protocol television.
Sources: company information; A.T. Kearney analysis

<table>
<thead>
<tr>
<th>IPTV providers</th>
<th>IPTV providers</th>
</tr>
</thead>
<tbody>
<tr>
<td>OSN</td>
<td>Go by OSN OSN Play</td>
</tr>
<tr>
<td>beIN Media Group</td>
<td>beIN Connect</td>
</tr>
<tr>
<td>Aimajd Network</td>
<td>My-HD</td>
</tr>
<tr>
<td>Direct-to-home pay TV providers</td>
<td>Direct-to-home satellite operators</td>
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<td>OSN</td>
<td>Arabsat</td>
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<tr>
<td>beIN Media Group</td>
<td>Nilesat</td>
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<tr>
<td>Aimajd Network</td>
<td>Es’hailSat</td>
</tr>
<tr>
<td>My-HD</td>
<td>Eutelsat</td>
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<td>Pure OTT players</td>
<td>Yahsat</td>
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<td>MBC</td>
<td>Noorsat</td>
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<tr>
<td>Rotana</td>
<td>Netflix</td>
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<tr>
<td>Dubai Media Inc.</td>
<td>Starz</td>
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<td>Istikana</td>
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<td>Telly</td>
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<td>icflix</td>
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<td>Rotana</td>
<td>DMI</td>
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</table>

Studios
Aggregation
Distribution
Delivery

Content creation
Aggregation
Distribution
Delivery

Channels
TV platforms
OTT platforms
Infrastructure

Studios
Aggregation
Distribution
Delivery

Sources: company information; A.T. Kearney analysis
agreements could help the incumbents maintain their lead. A.T. Kearney research indicates DTH will continue to capture 60 to 70 percent of pay TV revenues in the region in the coming five years, albeit with variances across markets. Qatar, for instance, is likely to see more growth in IPTV as a result of Ooredoo’s TV expansion. However, competition for both subscribers and content rights will pose an ongoing threat to DTH operators’ margins and average revenue per user.

We also expect IPTV to support overall market growth while at the same time providing a degree of competition to DTH. While IPTV platforms have been primarily content redistributors, recent moves show they may be keen to capture a greater share of value by expanding their video-on-demand library, starting their own linear channels, launching multiscreen offers, or creating strategic partnerships. Saturation in telecom subscriber growth will mean telecom operators look to broadband and triple- or quadruple-play services to drive growth. With an established business model and cash flow from their core telecom business, these operators could mount a challenge to DTH, although any such challenge will be concentrated in urban areas that have the required fiber infrastructure.

**Netflix Arrives in the Middle East and North Africa**

Netflix may be the world’s most talked about new arrival in TV in a long time. With a presence in 190 countries and expected investment of $6 billion in content in 2016, including 600 hours of original content, Netflix is making bold moves to transform the market.

Although this is an attractive offering, it is not yet enough to draw most MENA pay TV subscribers away from their regular packages and attract people used to free TV to pay for content. Short-term growth is likely to be constrained, and long-term success will depend on how Netflix addresses certain challenges.

To begin with, Netflix’s MENA content library is small. At the time of writing only about 20 percent of the total US catalog is available, and because of pre-existing licensing agreements with OSN, some in-house content such as *House of Cards* is not available. Building a large user base will require substantial investments in both developing local content, similar to what Netflix is doing in France, Spain, and other markets where English is not the main language, and in expanding existing rights deals. Another challenge is that OTT services such as Starz and icflix have been available for some time, and most have distribution partnerships and local content deals already in place. In addition, prevalent characteristics such as low willingness to pay for content, high mobile data costs, minimal credit card penetration, and high content piracy present a real challenge.

In reality, Netflix was in the region before its official launch in 2016 because many people subscribe to US or other versions through virtual private networks. (Estimates put the number in the UAE at more than 200,000 people.) This reduces the potential for subscriber growth on the MENA service, which has much less content.

Regardless, Netflix’s arrival is expected to give overall OTT video in MENA a boost by getting more consumers to consider such services and forcing existing providers to enhance their services. This will change the dynamics of the market as OTT video opens up new ways to compete for eyeballs. Operators can now gain an edge by focusing on factors such as customer experience, content curation, and big data-driven personalization. This growing market is evolving along two axes (see figure on page 4), which enables a wide range of models that vary based on market segment positioning and the primary “usage trigger” for consumers. The strategic positioning will affect the potential reach (global versus regional or even local), the monetization model (ad versus subscription or a hybrid), and the approach to managing content rights.

Today, local providers in the MENA region largely follow the mass aggregator model, while global social video centers are also popular. There is clearly room for more. With such a big appetite for short-form video

(continued on page 4)
Batelco’s new IPTV service in partnership with OSN, Ooredoo’s launch of its GO app, and Etisalat’s 4K set-top box supported by a dedicated 4K channel and enhanced video-on-demand library are indicative of this trend. More aggressive investments in acquiring content rights to protect and grow the broadband subscriber base, as IPTV operators are doing in some markets, might also be a possibility. UK telecom operator BT, for example, has spent about $1.5 billion for a share of the domestic English Premier League football rights over three seasons starting in 2016 (70 percent above the previous period). This is on top of another $1.5 billion that BT spent for exclusive UK rights to broadcast the Champions League and Europa League. BT’s target audience is their three million superfast broadband subscribers, who are most likely multi-screen video consumers.

However, any content-driven IPTV play will be limited by the economics of their fiber infrastructure and the broader issue of the MENA region being a single market for content rights (whereas telecom operators only have fixed-line infrastructure in select markets). Thus, the role of telecom operators is likely to remain largely focused on distribution and local partnerships.

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**Figure**

**Content providers use different models to target viewers**

<table>
<thead>
<tr>
<th>Mainstream</th>
<th>Selection</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Social video center</strong></td>
<td><strong>Hybrid hub</strong></td>
</tr>
<tr>
<td>Facebook</td>
<td>Snapchat</td>
</tr>
<tr>
<td>YouTube</td>
<td>Vessel</td>
</tr>
<tr>
<td>Meerkat</td>
<td>AOL</td>
</tr>
<tr>
<td>Periscope</td>
<td>Vimeo</td>
</tr>
<tr>
<td><strong>Mass digital MCN</strong></td>
<td><strong>Semi-premium discovery</strong></td>
</tr>
<tr>
<td>Fullscreen</td>
<td>Feeln</td>
</tr>
<tr>
<td>Maker Studios</td>
<td>YipTV</td>
</tr>
<tr>
<td>Awesomeness TV</td>
<td>Curiosity Stream</td>
</tr>
<tr>
<td></td>
<td>Tribeca Shortlist</td>
</tr>
<tr>
<td><strong>Specialist community services</strong></td>
<td><strong>Thematic addict</strong></td>
</tr>
<tr>
<td>StyleHaul</td>
<td>Funny or Die</td>
</tr>
<tr>
<td>Machinima</td>
<td>Paula Deen Network</td>
</tr>
<tr>
<td>Kin Community</td>
<td>Shudder</td>
</tr>
<tr>
<td>Wonderly</td>
<td>Sarah Palin Channel</td>
</tr>
<tr>
<td><strong>Mass aggregators</strong></td>
<td><strong>Big media home</strong></td>
</tr>
<tr>
<td>Shomi</td>
<td>Vevo</td>
</tr>
<tr>
<td>Hulu</td>
<td>Warner Archive Instant</td>
</tr>
<tr>
<td>Amazon Instant Video</td>
<td>Ulive</td>
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<tr>
<td></td>
<td>Dplay</td>
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<tr>
<td><strong>Niche premium</strong></td>
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<td>WWE Network</td>
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<td>Red Bull TV</td>
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<td>MLB.TV</td>
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<tr>
<td>Sesame Street Go</td>
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</tbody>
</table>

Notes: Measured in number of views per year for the top 100 channels. MCN is multichannel network.
The future for pure OTT companies is also uncertain, especially with the entry of Netflix. Given the region’s high rate of technology adoption, OTT video penetration, although low, is likely to grow significantly. The MENA OTT market is crowded with both regional pure OTT providers such as icflix, Telly, Istikana, and Cinemoz competing with global companies Starz and Netflix. With few of these companies able to invest in original Arabic content, rival services from broadcasters’ and pay TV operators’ standalone OTT services, and stiffer competition for more expensive content rights, the market is unlikely to be able to sustain such a large number of pure OTT operators.

For DTH providers, OTT could result in some cannibalization as certain subscribers switch to a lower-cost OTT-only service. The impact will largely be felt at the low end of the pay TV market as higher-end subscribers will continue to pay for a premium service. The net result will be a continued bipolarization of the pay TV market in terms of price and the content and user experience that comes with that price.

**Consumer Landscape Shifting to OTT**

The MENA region is highly complex and diverse with a variety of ethnic groups, languages, and income levels across the area and within countries. This means that operators targeting the mass market need to address many factors, including content preferences, viewing platforms, and modes of payment.

The differences in content preferences even within countries highlight the importance of segmentation rather than following a pan-Arab or pan-MENA model. An overview of the top 10 TV shows during Ramadan in the United Arab Emirates (typically the period with the highest viewership for TV during the year) reveals considerable differences between local and expatriate Arabs (see figure 3). During Ramadan 2015, only two of the top 10 shows were common between

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**Figure 3**

Emiratis’ TV preferences differ from those of expatriate Arabs

**Top 10 Arabic shows in the United Arab Emirates during Ramadan 2015**

<table>
<thead>
<tr>
<th>Expatriate Arabs</th>
<th>Broadcaster</th>
<th>Emiratis</th>
<th>Broadcaster</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bab Al Hara</td>
<td>MBC</td>
<td>Shabeh Al Reeh</td>
<td>Al Emarat</td>
</tr>
<tr>
<td>Ramez Wakel Al Gaw</td>
<td>MBC</td>
<td>Shabayet Al Carton</td>
<td>Dubai Al Oula</td>
</tr>
<tr>
<td>Ostaz Wa Raes Qesm</td>
<td>MBC</td>
<td>Sawalef Tafash 3</td>
<td>Dubai Al Oula</td>
</tr>
<tr>
<td>Selfie</td>
<td>MBC</td>
<td>Ramez Wakel Al Gaw (9:30 p.m. slot)</td>
<td>MBC</td>
</tr>
<tr>
<td>Omna Rowayhet Alyana</td>
<td>MBC</td>
<td>Shabayet Al Carton</td>
<td>Sama Dubai</td>
</tr>
<tr>
<td>Alf Lelah We Lelah</td>
<td>MBC</td>
<td>Sawalef Tafash 2</td>
<td>Sama Dubai</td>
</tr>
<tr>
<td>Ramez Wakel Al Gaw (4:00 a.m. slot)</td>
<td>MBC</td>
<td>Law Enny Aaraf</td>
<td>AD Media</td>
</tr>
<tr>
<td>Horof Wa Olof</td>
<td>MBC</td>
<td>Al Rawy</td>
<td>Sama Dubai</td>
</tr>
<tr>
<td>Alo Fayez</td>
<td>MBC</td>
<td>Fi Aynayha Oghnia</td>
<td>Sama Dubai</td>
</tr>
<tr>
<td>Ramez Wakel Al Gaw (4:30 p.m. slot)</td>
<td>MBC</td>
<td>Selfie</td>
<td>MBC</td>
</tr>
</tbody>
</table>

*Note: The month of Ramadan is typically when TV viewership is at its highest.*

Sources: tview; A.T. Kearney analysis
expatriate Arabs and Emiratis. Of course, non-Arab expatriates from other parts of the world, who also make up significant segments in the UAE market, have different viewing profiles.

Sourcing content to target such a diverse number of segments is a challenge for mass market operators and requires strategic thinking. MBC’s deal with global production house Anonymous Content is one way to complement its considerable in-house Arabic production capabilities with content that is already proven in other markets and can be localized (for example, an Arabic version of the TV series *True Detective*). This type of deal also helps MBC hedge against the risks stemming from the global trend of rising content costs.

Another approach is to innovate on content rights acquisition. In Indonesia, the Bakrie Group acquired, dubbed, and brought to Indonesia two Indian TV series, *Mahabharata* and *Mahadeva*. The idea was that the historical and cultural elements of these series would also appeal to the Indonesian market. Although the programming cost represented less than 5 percent of the broadcaster’s total budget, the shows captured audience shares of close to 20 percent, and the company went on to create spinoff reality shows riding on the popularity of some of the story lines and lead characters.

Shifts in viewing platform are also evident in the MENA region. Although TV consumption remains high, with daily viewership exceeding three hours in the biggest markets including Saudi Arabia and Egypt, this masks underlying shifts driven by the region’s demographics, where more than 50 percent of the population is younger than 30. These consumers have a strong affinity for on-demand content on mobile devices, which is enabled by smart device penetration (see figure 4). Saudi Arabia and the UAE are two of the top three countries in the

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**Figure 4**

*Many Middle East viewers lean toward on-demand content*

![Diagram showing YouTube views per capita and Pay TV penetration for different countries.](image)

Note: Measured in number of views per year for the top 100 channels
Sources: VidStatsX, Citi Research, comScore, Government of India Ministry of Information & Broadcasting, A.T. Kearney analysis
world for smartphone penetration. Tablets in particular are eating into traditional primetime TV viewership, and the UAE ranks number one worldwide in tablet use in the bedroom with 50 percent of consumers saying they do so regularly. What this translates into is expected high demand for short-form and nonlinear content for use on smartphones and tablets.

Another element to navigate in pay TV is the need to address payment preferences in a region with a strong bias toward cash. A 2014 A.T. Kearney study found that more than 75 percent of consumers in North Africa prefer to pay for pay TV with cash; many in the GCC also share this preference (see figure 5). Credit card penetration is low, and even those with credit cards are often reluctant to use them. Bank account penetration is also low, and direct debits are not permitted in many countries. These structural factors could limit growth in pay TV, both offline and online. The payment process needs to be simplified to help accelerate pay TV adoption, and again we are seeing OTT providers taking the lead with payment partnerships with telecom operators.

Figure 5
Many Middle Eastern viewers favor using cash for pay TV

Payment preferences for pay TV across income groups

Source: A.T. Kearney Middle East consumer study

Go-to-Market: Innovation Required

DTH growth in other markets proves that, beyond content, finding the right go-to-market model in terms of targeted product design, attractive and differentiated pricing, and strong distribution and customer service can go a long way in raising penetration levels. Of these factors, perhaps the most important for pay TV operators is finding the right model to balance high-end premium subscription services on one hand with low-end packages on the other, which will draw in consumers who only use free-to-air or cheap pirated services.
The Malaysian DTH company Astro is a good example of an innovative operator. Astro introduced a new low-end prepaid subscription product without cannibalizing its premium service. Launched in 2012, NJOI offers a basic package of 23 free-to-air channels with another 20 pay channels available à la carte. In 2015, NJOI contributed to 85 percent of Astro’s subscriber growth and accounted for 16 percent of the total pay TV base. Astro’s penetration of Malaysian TV households grew from 47 percent before NJOI’s launch to 63 percent today. Going forward, NJOI is expected to make a sizable contribution to subscriber growth as the company aims to reach 80 percent of Malaysia’s TV base by 2020. Notably, NJOI did not lead to overall decline in average revenue per user, as Astro simultaneously expanded its range of high-end services. This bipolarization is likely to become more common in pay TV markets.

**Partnerships can play a role** in retaining a degree of control over value-added services.

Determining which value-added services to offer in high- versus low-end packages is an important decision. One common misconception is that such services belong only in the high end of the market. However, research in the MENA region suggests that lower-income consumers place the same level of importance on services such as content on demand, multiscreen viewing facilities, personal recording, interactivity, and catch-up (see figure 6). Making these services widely available will become more important, especially to traditional pay TV operators facing the risk of losing the lower end of the market to OTT substitutes that often have stronger capabilities in digital value-added services and can compete on experience without relying on expensive premium content. Again, partnerships can play a role in retaining a degree of control over these services without needing to invest in new technology and capabilities.

**Figure 6**
*Regardless of income, consumers prefer added TV features*

*Consumer preferences for digital and value-add services by income*

<table>
<thead>
<tr>
<th></th>
<th>Multiscreen: tablet or smartphone</th>
<th>Content on demand</th>
<th>Personal recording features</th>
<th>Interactive features</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Total market</strong></td>
<td>67%</td>
<td>86%</td>
<td>78%</td>
<td>65%</td>
</tr>
<tr>
<td><strong>High income</strong></td>
<td>62%</td>
<td>86%</td>
<td>77%</td>
<td>66%</td>
</tr>
<tr>
<td><strong>Low income</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Note: Higher income is monthly household income of more than $1,000; lower income is less than $1,000 a month.
Source: A.T. Kearney Middle East consumer study
Distribution and Delivery: Partnerships Will Be Essential

To thrive in this new environment, platforms and broadcasters alike must keep pace with the technological changes dictated by shifting consumer preferences and ensure that their distribution strategies maximize their market reach. This increases the importance of partnerships where companies can use one another's capabilities to build an efficient go-to-market approach and expand their reach.

DTH, for example, can provide excellent pan-regional reach and content but has a limited ability to provide triple-play services. Similarly, IPTV and telecom operators have vast amounts of consumer data and are accustomed to handling large payment volumes on a daily basis, but they do not have core skills in content acquisition and management. OTT platforms have significant consumer analytics skills, which is the basis of the design of their entire customer experience, but they do not have physical distribution outlets, large customer bases, or (in most cases) significant financial resources. Broadcasters have highly capable teams managing their content rights and advertising, but as traditionally business-to-business companies, they do not have commercial capabilities in consumer sales and service.

Satellite operators are also core partners in the ecosystem and will be keen to ensure the continued dominance of DTH delivery as the market changes.

Perhaps the most obvious area of partnerships we see emerging is between telecom operators and OTT providers. When Netflix expanded beyond the United States, the company partnered with broadband providers, including Vodafone in Germany, Orange in Spain, and SingTel in Singapore. In cash markets with low credit card penetration, partnering with telecom providers can bring other benefits, especially giving OTT subscribers simple payment options such as direct carrier billing. With more broadcasters launching OTT services, partnerships such as those between Viva and MBC and between du and Starz Play will become ubiquitous, especially as micro-packages with daily or even hourly validity could be introduced to satisfy consumer demand for snacking content with a pay-per-view model.

Another notable partnership trend is the emergence of hardware companies integrating OTT services such as Humax set-top boxes launched with icflix bundles. Hardware partnerships with further potential are those similar to LG providing prepaid Netflix subscriptions along with a bundle of streaming channels such as BuzzFeed, Wired, and Vogue preloaded on new TVs.

Satellite operators are also core partners in the ecosystem and will be keen to ensure the continued dominance of DTH delivery as the market changes. The three main MENA satellite operators—Arabsat, Nilesat, and Yahsat—will continue to reinforce their partnerships with the leading pay TV operators and broadcasters to ensure that their hotspots have the most watched content. On a global level, the SAT–IP alliance between Eutelsat, SES, and Hispasat aims to accelerate the adoption of SAT–IP in the satellite industry and push this technology to consumers, with the promise of transmitting live content simultaneously across devices in the home with...
superior picture quality. This will help DTH offset certain advantages that IPTV offers, such as signal quality and native interactive and on-demand capabilities.

For telecom operators that offer IPTV, perhaps the biggest challenge they face is managing the growth in traffic. In the Middle East and Africa, Internet traffic is expected to increase sevenfold by 2020 to 14 petabytes per month, the fastest growth rate in the world (see figure 7). This will be driven by video, which will account for more than 80 percent of global Internet traffic by 2020. Working in partnership with content delivery networks to deliver this unmanaged traffic while preserving the quality of their own managed IPTV services will be essential.

Figure 7
Internet traffic is expected to skyrocket

Internet traffic by region
(petabytes per month)

<table>
<thead>
<tr>
<th>Region</th>
<th>2015e</th>
<th>2016f</th>
<th>2017f</th>
<th>2018f</th>
<th>2019f</th>
<th>2020f</th>
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</thead>
<tbody>
<tr>
<td>Middle East and Africa</td>
<td>14</td>
<td>16</td>
<td>22</td>
<td>30</td>
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<tr>
<td>Latin America</td>
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<td>10</td>
<td>13</td>
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<td>50</td>
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<tr>
<td>Central Europe</td>
<td>1</td>
<td>2</td>
<td>9</td>
<td>13</td>
<td>25</td>
<td>9</td>
</tr>
<tr>
<td>Western Europe</td>
<td>3</td>
<td>10</td>
<td>17</td>
<td>30</td>
<td>60</td>
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<tr>
<td>North America</td>
<td>5</td>
<td>28</td>
<td>34</td>
<td>50</td>
<td>60</td>
<td>207</td>
</tr>
<tr>
<td>Asia Pacific</td>
<td>2</td>
<td>8</td>
<td>16</td>
<td>20</td>
<td>34</td>
<td>106</td>
</tr>
</tbody>
</table>
| Sources: Cisco VNI; A.T. Kearney analysis

Forming a Game Plan

The MENA pay TV market is going through a transitional period that has great potential but an uncertain outlook. Will there be one clear winner? When asked in 2014 which companies were in the best position to win in the Middle East OTT video market, nearly 38 percent of executives cited dedicated OTT service providers. However, when we asked the same question a year later in 2015, telecom operators seemed to have the leading edge (see figure 8 on page 11).

This new operating environment does not need to be a game with both winners and losers. In fact, there are good prospects for all, including consumers, who can expect more choices and better quality content.

Although there is no single winning game plan for pay TV providers, five moves will be essential:

• Innovate on packaging while considering the underlying trend of market bipolarization.

1 SAT-IP is a method of distributing content from satellite dishes to TVs and other devices using an existing wired or wireless home network instead of coaxial cables.
Think broadly about what content is, what can be appealing, and where it can be sourced from, keeping in mind the vast linguistic, ethnic, social, and economic differences between consumer segments in the region.

Consider the user experience as a differentiator rather than relying only on content.

Use partnerships to strengthen position and to fill skill and resource gaps.

Build a strong internal operating model to use agility, efficiency, and data management capabilities as a competitive advantage.

Navigating this complex and competitive new market will require operators to keep an eye on shifting patterns in consumer behaviors, content trends, and distribution and delivery channels. Those that can adapt quickly and focus on the future are likely to play a prominent role.

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- **Hong Kong**
- **Jakarta**
- **Kuala Lumpur**
- **Melbourne**
- **Mumbai**
- **New Delhi**
- **Seoul**
- **Shanghai**
- **Singapore**
- **Sydney**
- **Taipei**
- **Tokyo**

### Europe
- **Amsterdam**
- **Berlin**
- **Brussels**
- **Bucharest**
- **Budapest**
- **Copenhagen**
- **Düsseldorf**
- **Frankfurt**
- **Helsinki**
- **Istanbul**
- **Kiev**
- **Lisbon**
- **Ljubljana**
- **London**
- **Madrid**
- **Milan**
- **Moscow**
- **Munich**
- **Oslo**
- **Paris**
- **Prague**
- **Rome**
- **Stockholm**
- **Stuttgart**
- **Vienna**
- **Warsaw**
- **Zurich**

### Middle East and Africa
- **Abu Dhabi**
- **Doha**
- **Dubai**
- **Johannesburg**
- **Manama**
- **Riyadh**

For more information, permission to reprint or translate this work, and all other correspondence, please email: insight@atkearney.com.

The signature of our namesake and founder, Andrew Thomas Kearney, on the cover of this document represents our pledge to live the values he instilled in our firm and uphold his commitment to ensuring “essential rightness” in all that we do.