2019 OTT & CONTENT STREAMING

25 November, 2019

Egypt Saudi Arabia United Arab Emirates



PREMIUM CONTENT **DELIVERED VIA** OTT PLATFORMS **CONTINUES TO BE** DISRUPTIVE IN MENA AS THE OTT SUBSCRIPTION **VIDEO MARKET CONTINUES TO GROW** IMPRESSIVELY.





THE MARKET IS WELL
DOMINATED BY REGIONAL
PLAYERS, MAJORLY DUE TO
THEIR LOCALIZED ARABIC
CONTENT, BUT TIMES ARE
CHANGING....

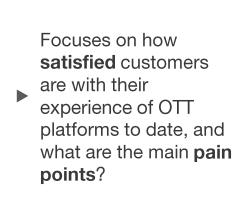
.. WITH THE GLOBAL LEADERS MAKING BIG STRATEGICAL MOVES IN THE MENA MARKET!



IPSOS' OTT AND STREAMING CONTENT **SYNDICATED STUDY ANSWERS MANY IMPORTANT BUSINESS QUESTIONS** REGARDING THE **CONSUMPTION OF SVOD AND PAY TV SERVICES**

The results tackle into the white spaces and opportunities of this industry by market segment?

How does the market look in terms of **customer churn**? And what is the behavior of consumers on such platforms is like?



Covers other areas such as how music streaming is performing and what is the market potential with the entry of new players?



THEREFORE, THE SURVEY OF THE STUDY COVERS NUMEROUS AREAS...

1. Online Activities

The usage of paid vs free contnet and overall online consumption

2. Device Ownership

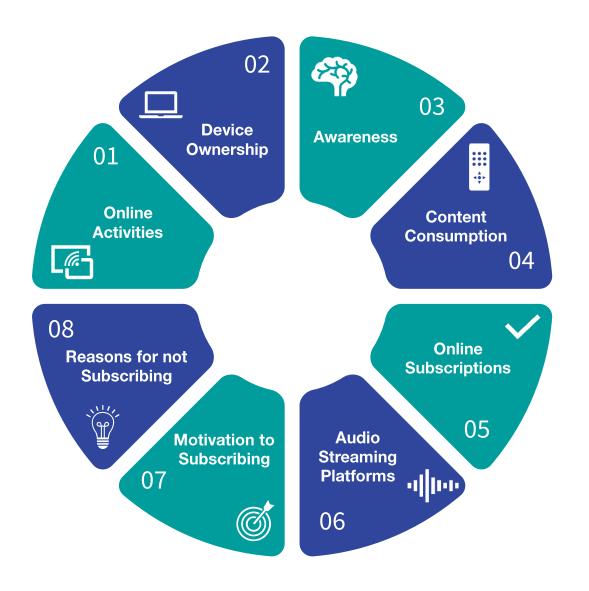
The devices owned and connected homes.

3. Awareness

Awareness of online platform services

4. Content Consumption

Music / games / TV / movies and sports content consumption and binge-watching habits



5. Online Subscriptions

Online and Pay-TV type of subcriptions and intentions to keep subscrbiging

6. Audio Streaming Platforms

Awareness of music and podcasts platforms

7. Motivation to Subscribing

Motivations for subscribing to online video platforms and payment amount made for OTT and Pay TV planforms

8. Reasons for not Subscribing

Reasons for not paying online content and reasons for not subscribing to online platforms



SOME KEY TRENDS IN OTT AND ONLINE CONTENT CONSUMPTION THIS YEAR

46% of viewers discover new channels and content to watch through recommendations from friends and family.

56%

Use the free versions of video on demand platforms averagely when consuming online content, especially to get content that cannot be accessed in their countries.



35%

of viewers, on average, state that football is the top type of content that they are willing to pay for, followed by western movies.





22%

is the average of those who stream online content DAILY through subscription-based video on **demand** platforms in the three countries combined

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IPSOS HAS BEEN TRACKING THE GROWTH & AWARENESS OF OTT SINCE DECEMBER 2015 IN MENA..

Sample of the 40+ OTT platforms tracked

ALL KEY SVOD PLATFORMS HAD AN INCREASE IN SUBSCRIPTIONS THIS YEAR IN UAE AND KSA

THE NUMBER OF SVOD SUBSCRIPTIONS PAID IN UAE IS MORE THAN THE NUMBER BEING CANCELLED; ON AN AVERAGE USERS PAY FOR 3.5 BRANDS WHILE 1 IS BEING CANCELLED.

VIEWERS IN KSA TEND TO MOSTLY SUBSCRIBE TO ONLINE CONTENT FOR THE REASON OF NOT CONTAINING ANY AD BREAKS.















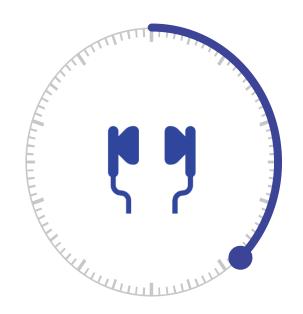




etc.....



MUSIC STREAMING PLATFORMS ARE ALSO GAINING A LOT OF TRACTION IN THE MENA REGION..



38%
USE MUSIC PLATFORMS DAILY
IN UAE



13%
LISTEN TO PODCATS MONTHLY
IN KSA

Sample of the 15+ Music streaming brands tracked









etc.....



TECHNICAL INFORMATION OF THE STUDY

3
Markets in MENA

	Sample Size
Saudi Arabia	1,000
United Arab Emirates	1,000
Egypt	1,000



- Online survey using Ipsos online panels
- Length of interview :15 minutes
- Data calibrated to total market size via the lpsos Tech Tracker survey



FINANCIAL INVESTMENT

	Investment
Saudi Arabia	10,000 USD
United Arab Emirates	10,000 USD
Egypt	10,000 USD

The above price excludes VAT



IPSOS DISCOUNT

- 10% discount if 3 markets
- 7% discount if 2 markets



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