



# **SIGHT** **for GROWTH**

a monthly series

**THE MAGIC OF  
MUSIC, MOVIES &  
MORE...**

**Part 2**

**MAY | 2025**



The **music, movie, and television landscape in the Middle East** has undergone a remarkable transformation over the past few decades, driven by cultural shifts, technological advances, and rising creative freedom.





In **2022**, the MENA music industry was valued at approximately **\$200 million**.

**2024**

The market saw a 22.8% year-over-year growth, making it the fastest-growing music market globally for the second time in three years.

**2025 projection**

Revenue in the digital music market is projected to reach \$701.5 million, with streaming services accounting for the majority.

**2027 Forecast**

The total market value is expected to increase to \$300 million, with streaming projected to grow by \$100 million.



(Statista)

**Growth Forecast**

The **Middle East's cinema market** is projected to generate approximately **\$1.66 billion** in revenue by the end of **2024**.

The industry is expected to expand at a Compound Annual Growth Rate (CAGR) of 8.41%, reaching around \$3.44 billion by 2033.

**Box Office Performance**

Box office revenues in the Middle East and North Africa (MENA) region are anticipated to reach \$1.3 billion in 2024.

(GlobeNewswire, Statista, PwC)

In the MENA region, the **TV and video market** is projected to generate approximately **\$13.45 billion** in revenue by **2025**.

**Smart TV Segment**

The Middle East and Africa (MEA) smart TV market reached a revenue of \$9.56 billion in 2024 and is expected to grow at a CAGR of 17.4% from 2025 to 2030.

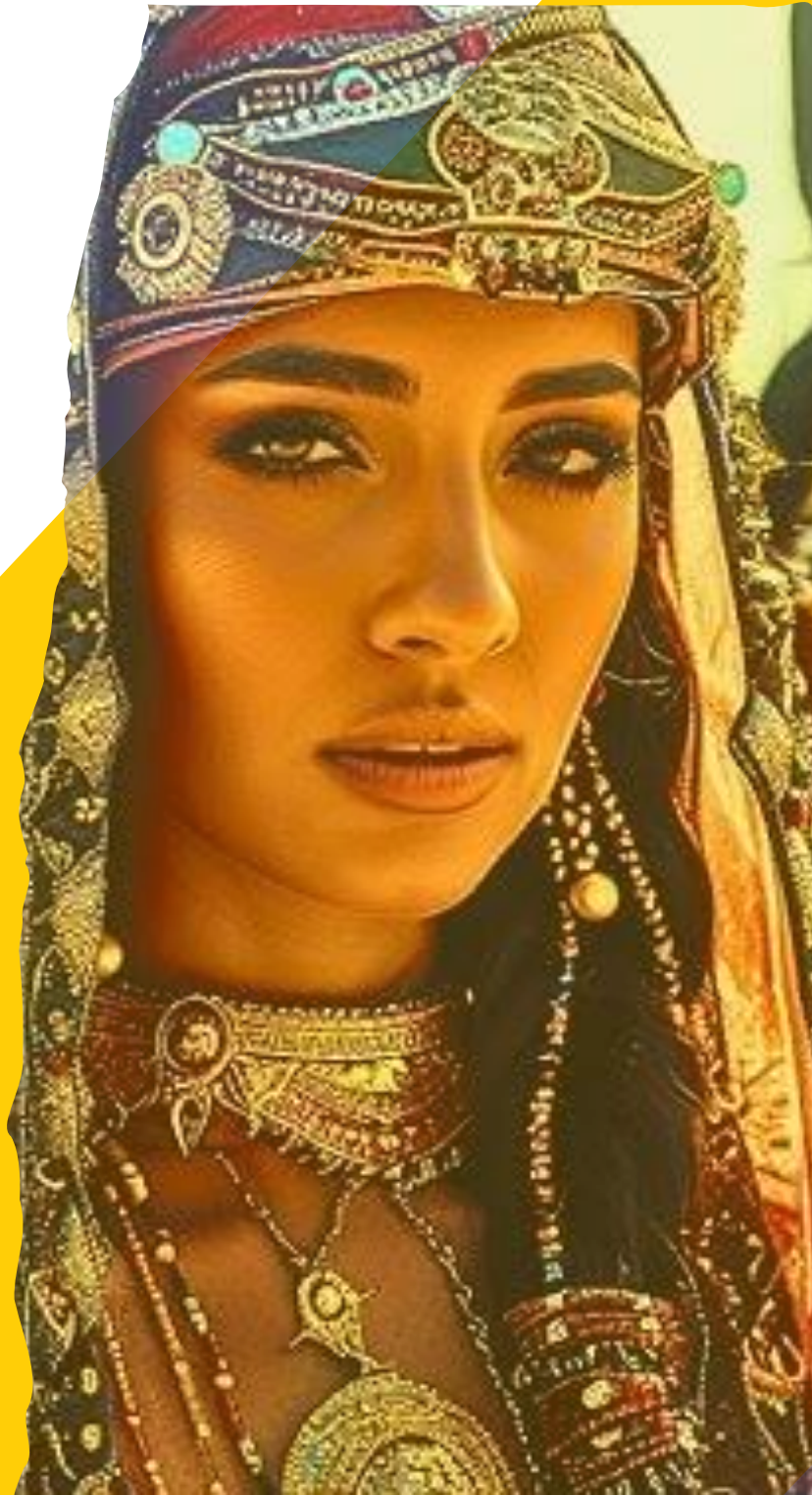
**Overall Television Market**

The MEA television market generated a revenue of \$22.37 billion in 2021 and is anticipated to grow at a CAGR of 11.3% from 2022 to 2028.

Grand View Research

Last month we looked at the booming Music industry

In this month's edition let's look at the thriving Movie Industry in the Middle East



## The **Magic of Movies** in the Middle East

The **Middle Eastern film industry** has been experiencing dynamic shifts in recent years, marked by **a surge in creativity, new platforms** for distribution, **global collaboration** and a **growing appetite for storytelling** that reflects both **regional traditions** and **global influences**.

As the region embraces more diverse forms of **storytelling**, **filmmakers** are **positioning Middle Eastern cinema** as a vital contributor to the global film landscape. With the **rise of streaming platforms**, the impact of major film festivals, and **the growing influence of women in the industry**, the future of cinema in the Middle East looks promising.





# Here are some **notable movie trends** in the Middle East:

## Trend 1

**SPOTLIGHT ON REGIONAL STORYTELLING**



## Trend 2

**CINEMA AS A MIRROR TO SOCIETY**



## Trend 3

**BORDERS BLUR & STORIES SOAR**



## Trend 4

**HER LENS, HER VOICE**



## Trend 5

**STREAMING PLATFORMS TAKE THE LEAD**



## Trend 6

**SAUDI CINEMA'S GRAND ENTRANCE**



## Trend 7

**REGION'S FILM FESTIVALS GAIN GLOBAL SPOTLIGHT**



## Trend 8

**GROWING POPULARITY OF DOCUMENTARIES AND REAL-LIFE STORIES**



## Trend 9

**CLASSIC FILM GENRES INFUSED WITH REGIONAL FLAVOR**



## Trend 10

**YOUTH-CENTRIC FILMS REDEFINE THE SILVER SCREEN**



## Trend 11

**CINEMATIC EXCELLENCE TAKES CENTER STAGE**



## Trend 1

# Spotlight on Regional Storytelling

Countries like Saudi Arabia, Egypt, Lebanon, Jordan, and the UAE are witnessing a boom in local cinema. There has been **a renewed focus on regional storytelling**, where **filmmakers draw from local history, culture, and social issues**.

For example, Saudi Arabia's movie industry has taken off after the cinema ban was lifted in 2018, with films like "Born a King" and "The Perfect Candidate" **gaining international recognition**.



**Mandoob (2024):** A Saudi thriller directed by Ali Kalthami, Mandoob (also known as Night Courier) achieved critical acclaim and became the biggest Arabic-language film at the Saudi box office, showcasing the country's evolving cinematic prowess.



**The Perfect Candidate (2019):** Directed by Haifaa Al-Mansour, this film delves into the challenges faced by a female doctor running for municipal council, highlighting gender dynamics in Saudi society.

**Born a King (2019):** A historical drama depicting the true story of 14-year-old Prince Faisal of Saudi Arabia, who was sent to London in 1919 to secure the formation of the Kingdom of Saudi Arabia. The film achieved international recognition, highlighting Saudi Arabia's diplomatic history and cultural heritage.





## Trend 2

### Cinema as a Mirror to Society

Middle Eastern films are increasingly addressing **cultural identity and social issues**. Topics like **women's rights, identity, displacement, and societal expectations** are being explored through cinema.

Movies like "Capernaum" (Lebanon) and "The Perfect Candidate" (Saudi Arabia) highlight the struggles of marginalized groups, giving voice to underrepresented communities.



**Capernaum (2018) - Lebanon**  
 Directed by Nadine Labaki, Capernaum tells the story of Zain, a 12-year-old boy living in the slums of Beirut, who sues his parents for neglect. The film delves into issues of child neglect, poverty, and the struggles of undocumented immigrants. It received critical acclaim and was nominated for the Academy Award for Best Foreign Language Film.



**Inshallah a Boy (2023) - Jordan**  
 Directed by Amjad Al Rasheed, Inshallah a Boy portrays the story of Nawal, a recently widowed woman who must pretend to be pregnant with a son to protect her inheritance rights under Jordanian law. The film sheds light on gender-based legal inequalities and the societal pressures faced by women in Jordan.



**The Swimmers (2022) - Syria/UK**  
 Directed by Sally El Hosaini, this film tells the true story of Syrian sisters Yusra and Sara Mardini, who fled their war-torn country and became Olympic swimmers. The narrative highlights the refugee experience, resilience, and the pursuit of dreams amidst adversity.



### Trend 3

## Borders Blur & Stories Soar

There is a growing trend of **collaborations between Middle Eastern filmmakers and international studios, enhancing local stories' production value and reaching global audiences.** Co-productions with European & American filmmakers blend authenticity with global appeal.

Streaming platforms like Netflix, Disney+, and Amazon Prime are investing in regional content, exemplified by Netflix's first Arabic original series "Jinn," produced in Jordan and showcasing regional mythology.



**AlRawabi School for Girls (2021-2023)** is a Jordanian series, tackling issues such as bullying and societal expectations. As Netflix's second Arabic original, it features a predominantly female cast and crew, highlighting regional stories on a global stage.



**Perfect Strangers (2022) - Pan-Arab / Netflix**  
 An Arabic-language adaptation of the Italian film *Perfetti Sconosciuti*, this Netflix original features a cast from across the Arab world, including Egypt, Lebanon, and Jordan. The film explores themes of privacy and secrets among friends, reflecting universal human experiences through a Middle Eastern lens.



**Jinn (2019) - Jordan / Netflix**  
 Jinn is Netflix's first Arabic-language original series, a supernatural teen drama set in Petra, Jordan. Directed by Lebanese filmmaker Mir-Jean Bou Chaaya, the series combines Middle Eastern folklore with contemporary storytelling, aiming to resonate with both regional and international audiences.



## Trend 4

### Her Lens, Her Voice

**Female filmmakers** in the Middle East are **gaining prominence**, with many using cinema as a platform to **address issues related to women's empowerment and breaking societal norms**.

**Directors** like Haifaa Al-Mansour (Saudi Arabia), Nadine Labaki (Lebanon), and Annemarie Jacir (Palestine) are among the **most influential women in Middle Eastern cinema, bringing unique and powerful narratives to the screen**.



#### **Annemarie Jacir (Palestine)**

Annemarie Jacir is a pioneering Palestinian filmmaker whose work often centers on themes of displacement and identity. Her debut feature, *Salt of This Sea* (2008), follows a Brooklyn-born woman returning to Palestine to reclaim her family's heritage.



**Nadine Labaki is a Lebanese filmmaker** known for her acclaimed film *"Caramel"* (2007), which explores the lives of five women dealing with love and tradition. Her 2018 film *"Capernaum"* tells the story of a 12-year-old boy suing his parents for neglect, highlighting poverty and child neglect in Beirut. It won the Jury Prize at Cannes and was nominated for an Oscar for Best Foreign Language Film.



#### **Haifaa Al-Mansour (Saudi Arabia)**

Haifaa Al-Mansour is recognized as Saudi Arabia's first female filmmaker. Her debut feature, *Wadjda* (2012), tells the story of a young girl in Riyadh who dreams of owning a bicycle, challenging societal norms. This film was the first Saudi Arabian submission for the Academy Awards.

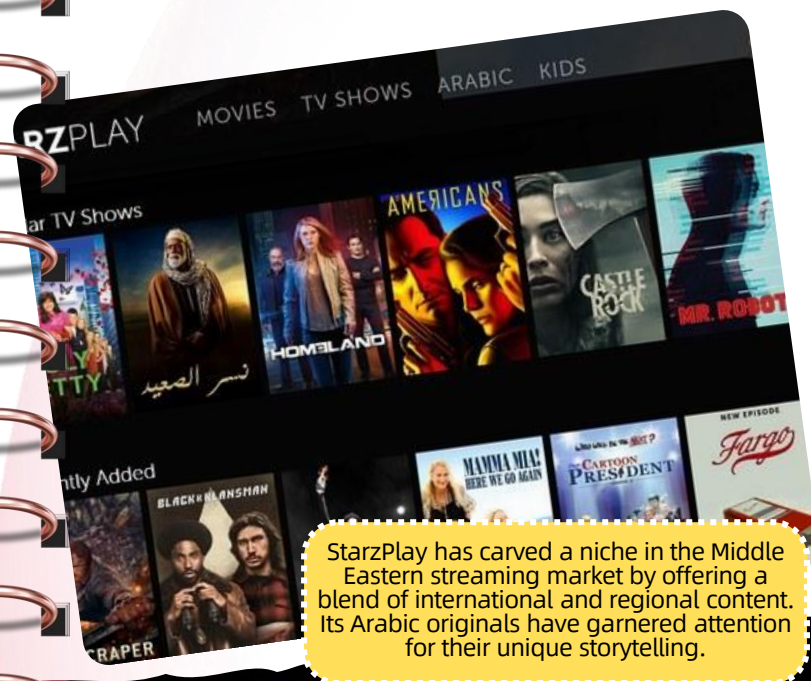


## Trend 5

### Streaming Platforms take the lead

With the **rise of streaming services**, more **Middle Eastern films** are being distributed online. Platforms like **Netflix**, **StarzPlay**, and **Shahid VIP** are providing local filmmakers with opportunities to showcase their work to a broader audience.

Streaming is **democratizing access to films in the region**, allowing independent and smaller-budget productions to find their audience. This shift is leading to **more diverse content, spanning across genres like drama, comedy, horror, and science fiction**.



StarzPlay has carved a niche in the Middle Eastern streaming market by offering a blend of international and regional content. Its Arabic originals have garnered attention for their unique storytelling.



Operated by MBC Group, **Shahid VIP** has emerged as a leading platform for Arabic content, offering a mix of original series, movies, and live TV. With a focus on regional narratives, Shahid VIP has produced and streamed a variety of successful titles.

Netflix has significantly expanded its Middle Eastern catalog, investing in original productions and acquiring regional content to cater to a global audience.





## Trend 6

### Saudi Cinema's Grand Entrance

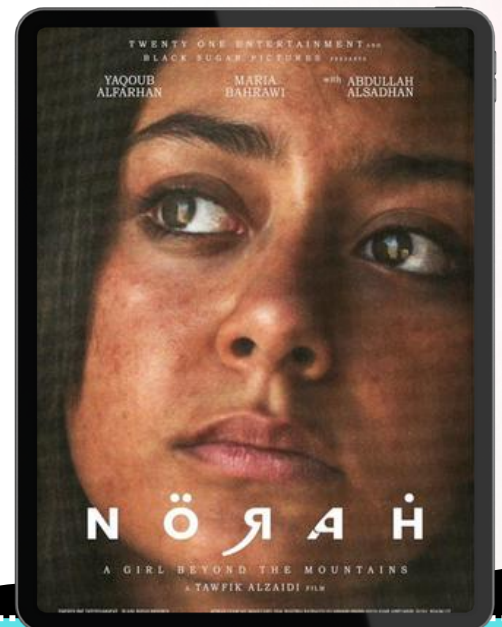
Saudi Arabia's **decision to open cinemas in 2018** has catalyzed the country's film industry. There's been a **focus on building local talent and creating content that aligns with Vision 2030**, the country's plan for cultural and economic diversification.

**Saudi's Red Sea Film Festival** has become an important platform for showcasing new talent and celebrating Middle Eastern cinema. Saudi filmmakers are now **producing more big-budget productions** aimed at both local and international markets, with **many projects focusing on national heritage and modern identity**.



#### Red Sea International Film Festival

Established in 2019 and held annually in Jeddah, the Red Sea International Film Festival has become a pivotal platform for showcasing Saudi and Middle Eastern cinema. The festival's "New Saudi/New Cinema" program spotlights emerging local talent, offering stories that explore cultural identity, personal triumphs, and modern societal trends.



"Norah" (2023), directed by Tawfik Alzaidei, is the first Saudi film filmed entirely in AlUla. The film premiered at the Red Sea International Film Festival and was selected for the Cannes Film Festival's Un Certain Regard section.



**Muawiya (2025):** This historical TV series, produced by MBC Studios with a budget of approximately \$100 million, portrays the life of Muawiya ibn Abi Sufyan, the founder of the Umayyad Caliphate. Despite facing delays and controversies, it stands as one of the most ambitious Arab television productions.



## Trend 7

# Region's Film Festivals gaining Global spotlight

Film festivals like the **Dubai International Film Festival**, **Cairo International Film Festival**, **El Gouna Film Festival**, and **Doha's Ajyal Film Festival** are vital for promoting Arab films and talent. They provide a **platform for independent filmmakers and enhance the visibility of Middle Eastern cinema globally**.

The **Red Sea International Film Festival in Saudi Arabia** is emerging as a **significant influence, attracting stars and industry professionals worldwide**.



Held in the Red Sea resort town of El Gouna, this festival has quickly gained prominence since its inception. The 7th edition in 2024 showcased 77 films from 32 countries, emphasizing themes of peace and cultural dialogue. Notable films included *The Inevitable Journey to Find a Wedding Dress* by Jaylan Auf and *Tell Them About Us* by Rand Beiruty.



Organized by the Doha Film Institute, Ajyal focuses on youth and community engagement through cinema. The 2024 edition featured 66 films from 42 countries, including a special section titled "Voices from Palestine," showcasing stories of resilience and resistance. The festival also opened with the documentary *Sudan, Remember Us*, highlighting youth activism in Sudan.



As one of the oldest film festivals in the Arab world, the Cairo International Film Festival continues to be a significant cultural event. The 45th edition in 2024 awarded the Golden Pyramid for Best Film to *The New Year That Never Came* by Romanian director Bogdan Mureșanu. Egyptian filmmaker Noha Adel's *Spring Came Laughing* received multiple accolades, highlighting the festival's support for regional talent.

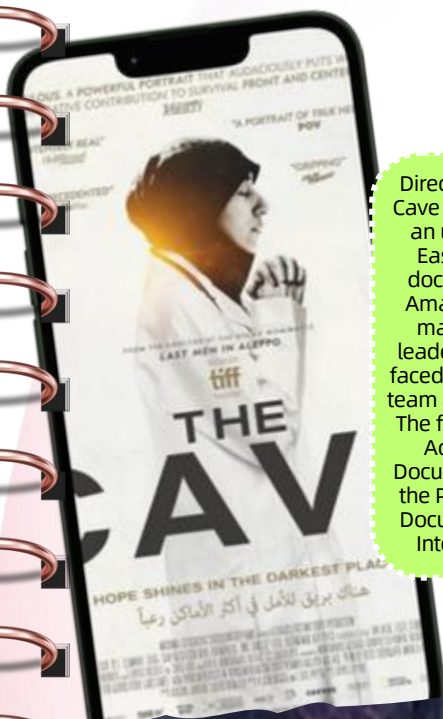


## Trend 8

# Growing popularity of Documentaries & Real-Life Stories

There is an **increasing appetite for documentary filmmaking** in the region, focusing on **real-life stories** and **social issues**, such as historical narratives and human resilience.

Films like **"For Sama" (Syria)** and **"The Cave"** provide a **raw, unfiltered view of life in conflict zones** and have gained widespread acclaim and recognition at international film festivals, including the **Academy Awards**.



Directed by Feras Fayyad, The Cave offers a gripping look into an underground hospital in Eastern Ghouta, Syria. The documentary focuses on Dr. Amani Ballour, the hospital's manager, showcasing her leadership and the challenges faced by her all-female medical team amidst the Syrian civil war. The film was nominated for an Academy Award for Best Documentary Feature and won the People's Choice Award for Documentaries at the Toronto International Film Festival.



Directed by Lina Soualem, this personal documentary explores the life of her mother, actress Hiam Abbass, who left her Palestinian village to pursue acting. The film delves into themes of identity, family, and the sacrifices made for personal ambition. It premiered at the Venice International Film Festival and was Palestine's submission for the Best International Feature at the 96th Academy Awards.



Directed by Waad al-Kateab and Edward Watts, For Sama is an intimate portrayal of al-Kateab's life during the Syrian uprising. The film chronicles her experiences as a young mother in Aleppo, capturing the harrowing realities of war and the strength of maternal love. It received widespread acclaim, including a BAFTA Award for Best Documentary and an Academy Award nomination for Best Documentary Feature.

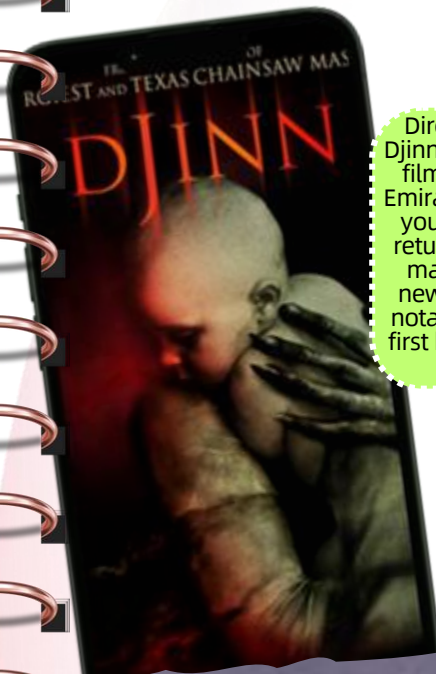


## Trend 9

### Classic film genres infused with regional flavor

Middle Eastern cinema is expanding into new **genres like horror, sci-fi, and fantasy**, which are traditionally less explored in the region. This **diversification is creating exciting opportunities** for filmmakers to **experiment with storytelling techniques**.

There's also a trend of **producing local adaptations of successful international films** and formats. Middle Eastern versions of popular global films or TV shows are being tailored to suit local tastes, norms, and culture.



Directed by Tobe Hooper, *Djinn* is a supernatural horror film set in the United Arab Emirates. It tells the story of a young Emirati couple who return home and encounter malevolent spirits in their new apartment. The film is notable for being one of the first horror films produced in the UAE.



**El Ab El Rohy (Egypt)**  
 An Egyptian adaptation of *The Godfather*, this series mirrors the themes of family, power, and crime from the original film, tailored to fit Egyptian cultural contexts.



Directed by Darren Lynn Bousman and written by Turki Al-Sheikh, this horror film tells the story of an aspiring cellist who acquires a cursed cello. The film stars Jeremy Irons and Tobin Bell and marks a significant entry into Saudi Arabia's burgeoning film industry.

## Trend 10

### Youth-Centric Films redefine the silver screen

Films and series **targeting young audiences are on the rise**. Themes such as **self-discovery, rebellion, and the challenges faced** by the younger generation are becoming more prominent, as the region's youth population grows.

Youth-driven narratives in films like "Jinn", "Barakah Meets Barakah" (Saudi Arabia), and "Very Big Shot" (Lebanon) reflect the aspirations and concerns of a new generation.



Directed by Mahmoud Sabbagh, this romantic comedy tells the story of Barakah, a municipal civil servant, and Bibi, a video blogger from a wealthy family. Their budding relationship challenges Saudi Arabia's conservative norms, offering a humorous yet poignant look at youth culture and social restrictions.



This Lebanese dark comedy revolves around three brothers who run a small pizzeria as a front for drug smuggling. When they decide to produce a film to cover up a major drug deal, they become entangled in the world of cinema, blurring the lines between reality and fiction. The film satirizes the Lebanese film industry and explores themes of ambition and deception.



Nezouh (2022) - Syria

Directed by Soudade Kaadan, Nezouh is a Syrian drama that centers on a 14-year-old girl named Zeina living in war-torn Damascus. The film portrays her imaginative escapism and the challenges faced by her family amidst conflict. It won the Armani Beauty Audience Award at the 2022 Venice Film Festival and the 2023 Amnesty International Human Rights Award at the Rome MedFilm Festival.



## Trend 11

### Cinematic excellence takes center stage

Middle Eastern filmmakers are now placing more emphasis on **high-quality production values, special effects, and world-class storytelling techniques**.

This focus is driven by the **growing demand for cinematic excellence**, especially as streaming platforms prioritize **content with universal appeal**. This trend is moving regional films **closer to Hollywood-level production standards**, especially in countries like the UAE and Saudi Arabia.

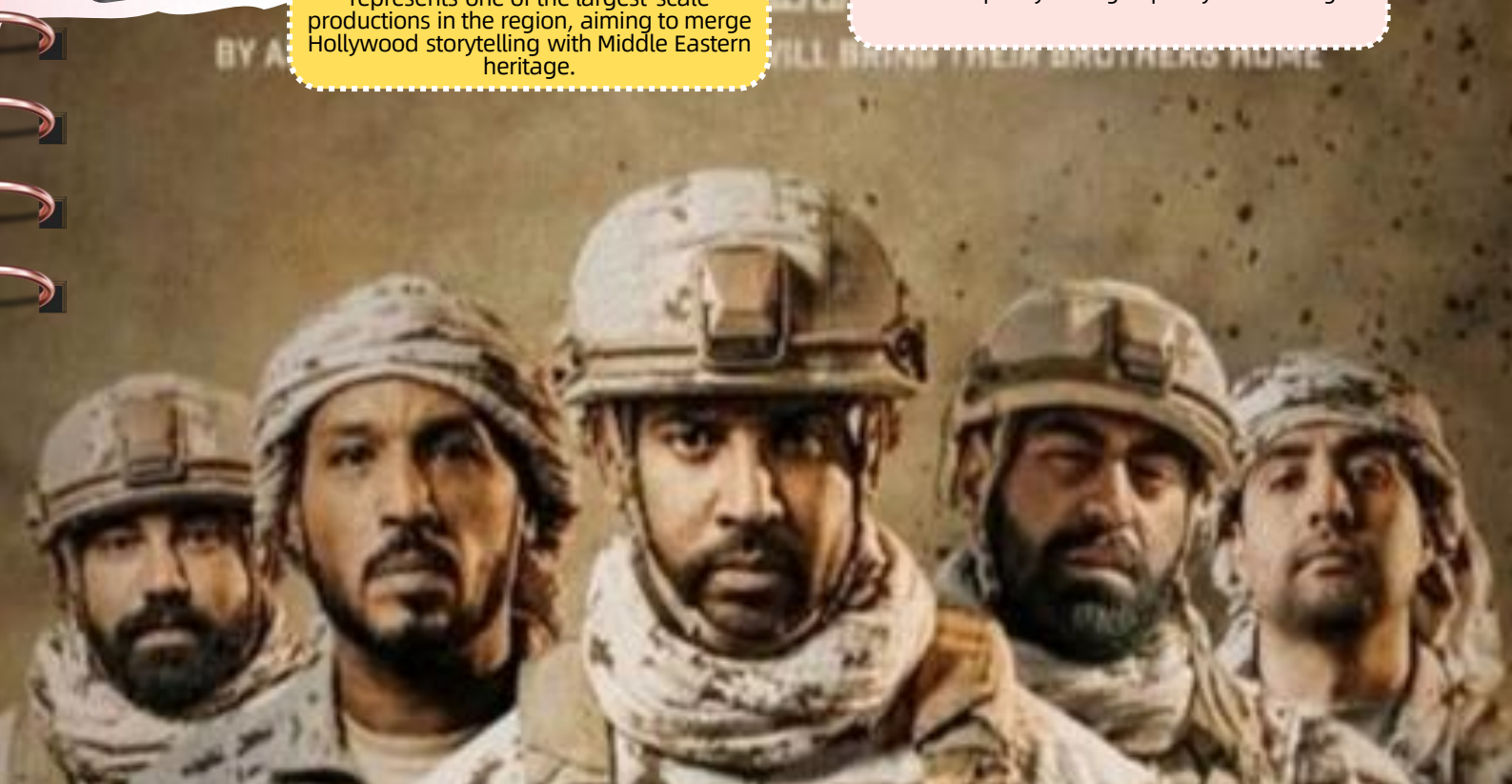


#### Desert Warrior (Upcoming)

This ambitious historical action drama, starring Anthony Mackie and Ben Kingsley, was filmed in NEOM, Saudi Arabia. With a budget exceeding \$140 million, it represents one of the largest-scale productions in the region, aiming to merge Hollywood storytelling with Middle Eastern heritage.

#### Al Kameen (The Ambush) (2021)

Directed by Pierre Morel, this Emirati action-war film is based on a true story and stands as the highest-grossing Emirati and Arabic-language film in the UAE. Its large-scale production involved a 400-member crew, emphasizing the UAE's capacity for high-quality filmmaking.



# Mind-the-Gap

Here is a snapshot of the generational mindsets to help better connect with them...



## GEN ALPHA (2012 onwards)

### The Screen-First Generation

- Digital natives are accustomed to tablets, YouTube Kids, short-form video and gaming
- They prefer interactive formats: AR/VR content, bite-size storytelling, and app-based videos over traditional long films
- In MENA likely use of YouTube Kids, smartphone/tablet streaming, educational content, and gaming video for their core entertainment



## GEN Z (1997 - 2012)

### The Digital Natives

- Mobile-first & screen natives prefer YouTube, TikTok, Snapchat over traditional TV; 49% view SVOD daily, often via mobile
- Less frequent cinema visits except for "event" films or high spectacle (e.g., big franchises)
- Preferred genres include comedy (74%), horror (50%), adventure (55%), sci-fi—all trending higher than older groups
- In MENA heavy engagement with regional content on TikTok and YouTube; online series and mini-dramas on Shahid & WatchIt.



## GEN Y (1981 - 1996)

### The Global Explorers

- They are mobile & multi-platform natives. They enjoy a hybrid viewing style—streaming on Netflix (~69%), Prime (~50%), but still engaging with some broadcast TV (1-3 hrs/day)
- They prefer socially conscious, diverse stories, binge-watching series & movies. Horror is one of the favorite genres with ~20% showing a preference
- In MENA, they drive local streaming consumption—on Shahid, WatchIt, and YouTube—with regional dramas and podcasts gaining traction



## GEN X (1965 - 1980)

### The Bridge Generation

- They blend between TV and digital: Around 39% still watch live TV daily, while SVOD usage is high
- They prefer a mix of nostalgia, indie cinema, documentaries, & quality storytelling—often engaging with content online through podcasts and film forums
- They enjoy genres like comedy, drama, action, and true-story docuseries
- In the Middle East, they likely support both regional and international content via streaming platforms



## BABY BOOMERS (1946 - 1964)

### The Golden Era Fans

- They prefer traditional TV & in-cinema experiences., About 56% of Boomers still use Pay TV, balancing it with local SVOD services
- They spend ~20 hours/week on audiovisual content, mostly movies & documentaries
- Favorite platforms include Netflix, Prime Video, Disney+, and YouTube Premium—leaning toward crime, action, & documentary genres
- Many attend Arab cinema screenings. Boomers may gravitate toward historical dramas and classic Egyptian or regional films



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