



for **GROWTH**

a monthly series

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

Part 3

JUNE | 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

In our previous editions we looked at the booming Music & thriving Movie industry...

In this month's edition let's look at the fast-evolving Television Industry in the Middle East



The Transformation of the TV industry in the Middle East

Television in our region is **evolving** through a blend of **local culture** and **global influence**, shaped by **viewer preferences, technology**, and **digital transformation**.

The rise of streaming services and local productions is meeting **modern audience demands** while **honoring cultural heritage**. As the region grows as a media hub, **the future of television appears promising**, featuring a **mix of traditional formats and innovative content**.



Here are some **key trends in television** across the region:

Trend 1



SHIFT TO DIGITAL & STREAMING PLATFORMS

Trend 2



RISE OF ARABIC ORIGINALS & LOCAL PRODUCTIONS

Trend 3



BOOM OF BITE-SIZED ENTERTAINMENT

Trend 4



MULTICULTURAL STORIES WITH A UNIVERSAL HEARTBEAT

Trend 5



REALITY TV REIMAGINED

Trend 6



CONTENT WITH A CONSCIOUS GAINING MOMENTUM

Trend 7



FOCUS ON WOMEN-CENTRIC NARRATIVES

Trend 8



ADAPTING GLOBAL FORMATS TO REGIONAL TASTES

Trend 9



RAMADAN TV SERIES CONTINUE TO FLOURISH

Trend 10



GOVERNMENTS BACKING THE BIG & SMALL SCREENS

Trend 11



HYBRID VIEWING EXPERIENCES ARE THE NEW NORM

Trend 12



YOUTH IN THE DIRECTOR'S CHAIR

Trend 1

Shift to Digital and Streaming Platforms

The **rise of streaming platforms** like Netflix, Shahid VIP, StarzPlay, and OSN is transforming television consumption in the Middle East, with on-demand viewing overtaking traditional programming due to increased high-speed internet adoption. **Shahid VIP, the largest Arabic streaming service**, is growing by offering original Arabic content alongside international series.

Global services like Netflix are also creating **original Arabic content**, such as "Paranormal," catering to **regional preferences and appealing** to both local and global audiences.

Natasha Matos-Hemingway, chief commercial and marketing officer at Shahid, said: "Rather, it is testament to our continuous focus on our audiences, bringing the best and most diverse premium Arabic stories to multiple screens in the region and beyond, along with high-quality partnerships with major brands — from news and drama to entertainment and sport from around the world,"



Saudi Arabia's streaming market shifts as local content gains popularity



"Finding Ola" (2022) - A Netflix comedy-drama starring **Hend Sabry**, following the journey of a woman rediscovering herself after a divorce.



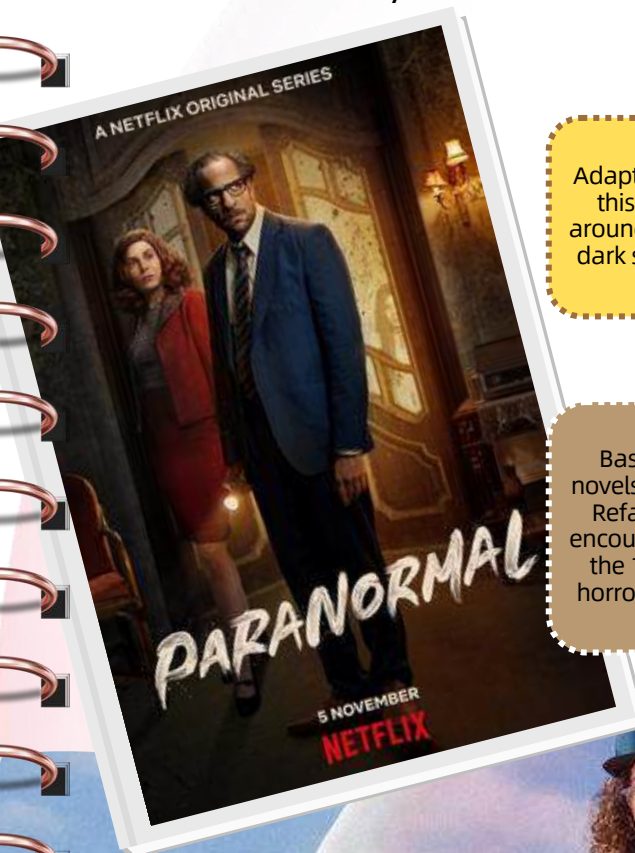
OSN is one of the leading premium entertainment networks in the Middle East, offering a wide range of content, including Hollywood blockbusters, Arabic films, and international series.

Trend 2

Rise of Arabic Originals and Local Productions

There is a **growing demand for locally produced content** that resonates with Middle Eastern audiences. **Arabic-language originals are flourishing**, as platforms and broadcasters recognize the **importance of content that reflects the region's culture, values, and stories**.

Shows like, "Al Rawabi School for Girls" (Jordan), and "Paranormal" (Egypt) highlight this trend, showcasing Arabic-speaking actors and culturally relevant storylines.



Room 207 (2022)

Adapted from Ahmed Khaled Tawfik's novel, this psychological horror series revolves around a mysterious hotel room that harbors dark secrets. It masterfully blends suspense with supernatural elements.



Paranormal (2020)

Based on Ahmed Khaled Tawfik's novels, this Egyptian series follows Dr. Refaat Ismail, a hematologist who encounters supernatural events. Set in the 1960s, it combines elements of horror and mystery, marking Netflix's first Egyptian original.

AlRawabi School for Girls (2021–2023) – Netflix

A groundbreaking Jordanian series that explores the complexities of teenage life, bullying, and societal expectations within an all-girls school. Created by Tima Shomali, it offers a fresh perspective on the challenges faced by young women in the Middle East.



Trend 3

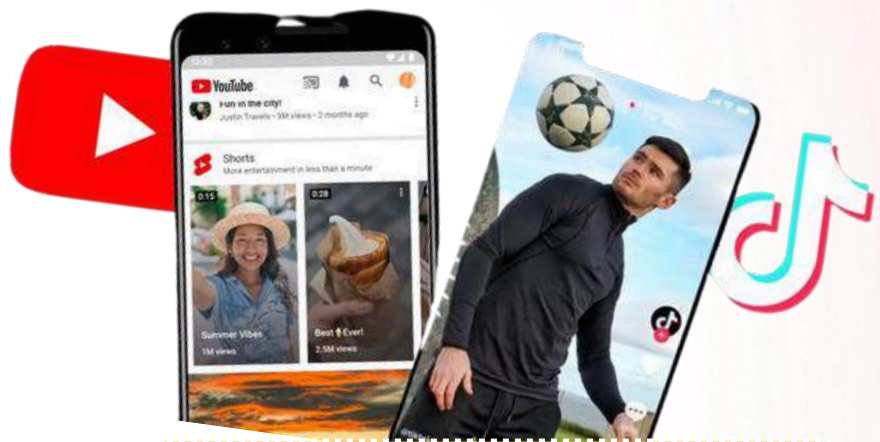
Boom of Bite-Sized Entertainment

With the rise of YouTube, Snapchat, and TikTok, short-form, **snackable content** has become a dominant format, especially among younger audiences. This shift is influencing television programming, where **bite-sized shows or series with shorter episodes** are becoming more common.

These platforms offer mini-series or episodic content that fits within mobile-viewing habits, giving broadcasters a new way to engage with a tech-savvy audience.



Short-form video entertainment, like Instagram Reels and YouTube Shorts, has gained significant traction in the Middle East. Platforms like Instagram Reels and TikTok are popular choices for users in the region to create and share short videos, particularly among younger audiences.



In countries like Saudi Arabia, TikTok has become a dominant platform, with users spending an average of 53 minutes daily. The platform is a hub for creative expression, featuring a plethora of content from comedy sketches to cultural parodies.



Bite-sized blockbusters: Mini series and shows are the new rage as viewers binge watch on smartphone-friendly, ultra-short episodes with gripping storylines



Trend 4

Multicultural Stories with a universal heartbeat

The Middle East's role as a cultural crossroads has led to a rising interest in international content, including popular Turkish dramas like "Ertugrul" and "Magnificent Century," which are dubbed into Arabic.

Additionally, Korean dramas and international formats from Latin America and Europe are gaining traction, often subtitled or dubbed for local viewers.



Dirilis: Ertugrul: This historical epic chronicles the life of Ertugrul Bey, father of Osman I, founder of the Ottoman Empire. The series gained immense popularity, peaking as the fourth most in-demand show worldwide in May 2020.



Izzet Pinto, who runs Global Agency, which sells the rights of Turkish series abroad, said they are popular among Arabs because of cultural similarities. "Turkish soap operas reached popularity peak with 'Magnificent Century' (about the Ottoman Empire), which created its own market in which Arab fans bought Ottoman costumes and organized Ottoman-themed family parties," Pinto told Arab News.



Sep 28, 2024

Viral Korean Wave That Overwhelmed the Entertainment World in Middle East

Korean Dramas: The "Hallyu" or Korean Wave has made significant inroads into the Middle Eastern entertainment landscape. K-dramas are appreciated for their high production values, intricate plots, and cultural themes that often mirror societal norms in the region.

Trend 5

Reality TV Reimagined

Reality TV shows have seen a significant rise in popularity across the Middle East. Programs that **focus on talent competitions, lifestyle, and cultural traditions are among the most watched.**

Shows like "Arab Idol," "The Voice Arabia," and "Arab's Got Talent" are **regional adaptations of global formats that have become household names.**

Additionally, homegrown reality shows such as "Project Runway Middle East" and "Stars of Science" (a competition for aspiring innovators) **resonate deeply with local audiences, blending entertainment with cultural pride.**



The runaway success of 'Dubai Bling' in the Middle East and beyond



Arabs Got Talent: Part of the global "Got Talent" franchise, this show highlighted a variety of talents, including singing, dancing, and magic acts. Judges such as Najwa Karam and Ahmed Helmy evaluated performances from contestants across the Arab region.

Netflix's third-most- watched non-English-language TV show on the week of its release. The next week, it rose to second place.



12 Arab innovators to fight it out on MBC's 'Stars of Science'

نجوم
العلوم 16

Trend 6

Content with a Conscious gaining momentum

There is an increasing trend towards **producing television content that addresses social issues, reflecting the changing dynamics of Middle Eastern societies**. Shows tackling topics like women empowerment, youth unemployment, mental health, and gender roles are finding space in both traditional broadcasting and on streaming platforms.

Documentaries and docu-series are also becoming more popular, shedding light on regional issues and **personal stories of resilience, success, and challenges**.



SAUDI WOMEN'S DRIVING SCHOOL

Saudi Women's Driving School: This Middle East documentary looks at the effects this new allowance has on the women, as well as the families, of Saudi Arabia.



THE WHITE HELMETS

A NETFLIX DOCUMENTARY SHORT

TO SAVE A LIFE
IS TO SAVE ALL OF HUMANITY

The 40-minute documentary follows the lives of volunteers who are the first to help victims after an airstrike.

Netflix drops new trailer for 'Saudi Pro League: Kickoff' documentary

OFFICIAL TRAILER



Trend 7

Focus on Women-Centric Narratives

Television in the Middle East is increasingly **embracing female-driven stories that put women's perspectives up center**. These shows not only address women's rights and social roles but also **celebrate women's achievements**. Programs like "Al Rawabi School for Girls" (Netflix) and Egyptian series like "Leh La'a" (Why Not?) are examples of shows that focus on female empowerment, youth experiences, and social challenges faced by women in the region.

Women in leading roles within TV production and directing are also on the rise, contributing to more diverse and inclusive narratives.



"Leh La'a (Why Not?)" is an Egyptian series about a young woman who challenges societal norms by leaving her family home to live independently. It explores self-discovery, societal pressure, and the quest for personal freedom.



Sirens (Lebanon): This documentary follows Lebanon's first all-female metal band, Slave to Sirens, as they navigate sexism, censorship, and internal conflicts.



New Kuwaiti series on Netflix sees women in lead roles

NAILA AND THE UPRISING

WOMEN WAR & PEACE II



Naila and the Uprising (Palestine)
 Directed by Julia Bacha, this film tells the story of Palestinian feminist Naila Ayesh and other women who played prominent roles in the First Intifada, highlighting their contributions to the nonviolent resistance movement.

Trend 8

Adapting Global Formats to Regional Tastes

The Middle East is seeing a **trend of adapting popular global TV formats** for regional audiences, with shows being localized to **reflect Arabic cultural values and interests**.

Formats like **"Big Brother", "The Voice", and "MasterChef"** have been successfully adapted, bringing international formats to Arab audiences while reflecting local customs and societal norms.

Game shows and talent shows remain extremely popular, often being broadcast **during peak times like Ramadan, when viewership is highest**.



Top Chef Middle East: This culinary competition brings together chefs from across the Arab world, challenging them with tasks that often incorporate local ingredients and traditional recipes, thus celebrating the region's rich culinary heritage.



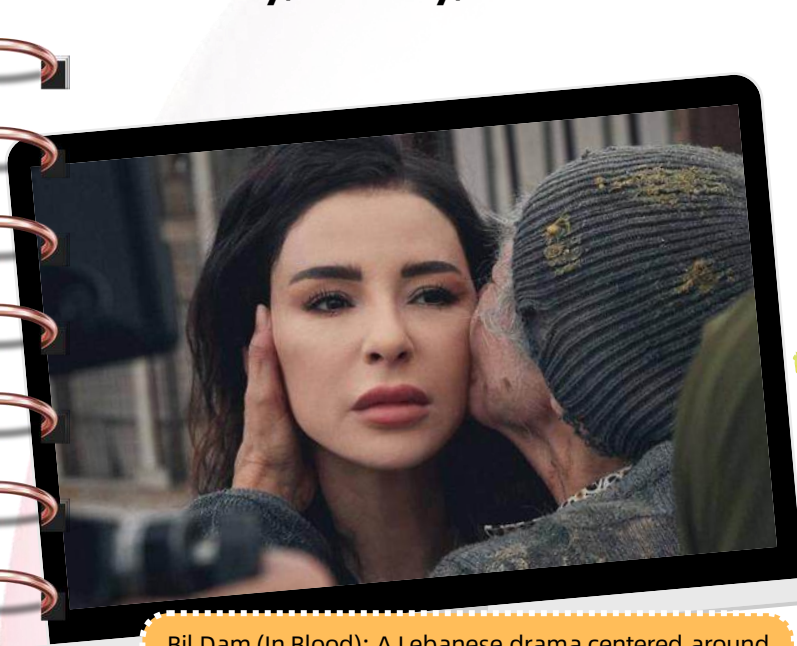
The Voice Arabia: Launched in 2012 by MBC, this adaptation of the global franchise features celebrity coaches from the Arab world, such as Kadim Al Sahir and Nancy Ajram, mentoring contestants from across the region.

Trend 9

Ramadan TV Series continue to flourish

Every year, **the month of Ramadan is a major period for television consumption**, with networks launching a host of new series to capture the attention of millions. Known as the Ramadan Musalsalat season, this period is crucial for broadcasters, as families gather to watch television after Iftar.

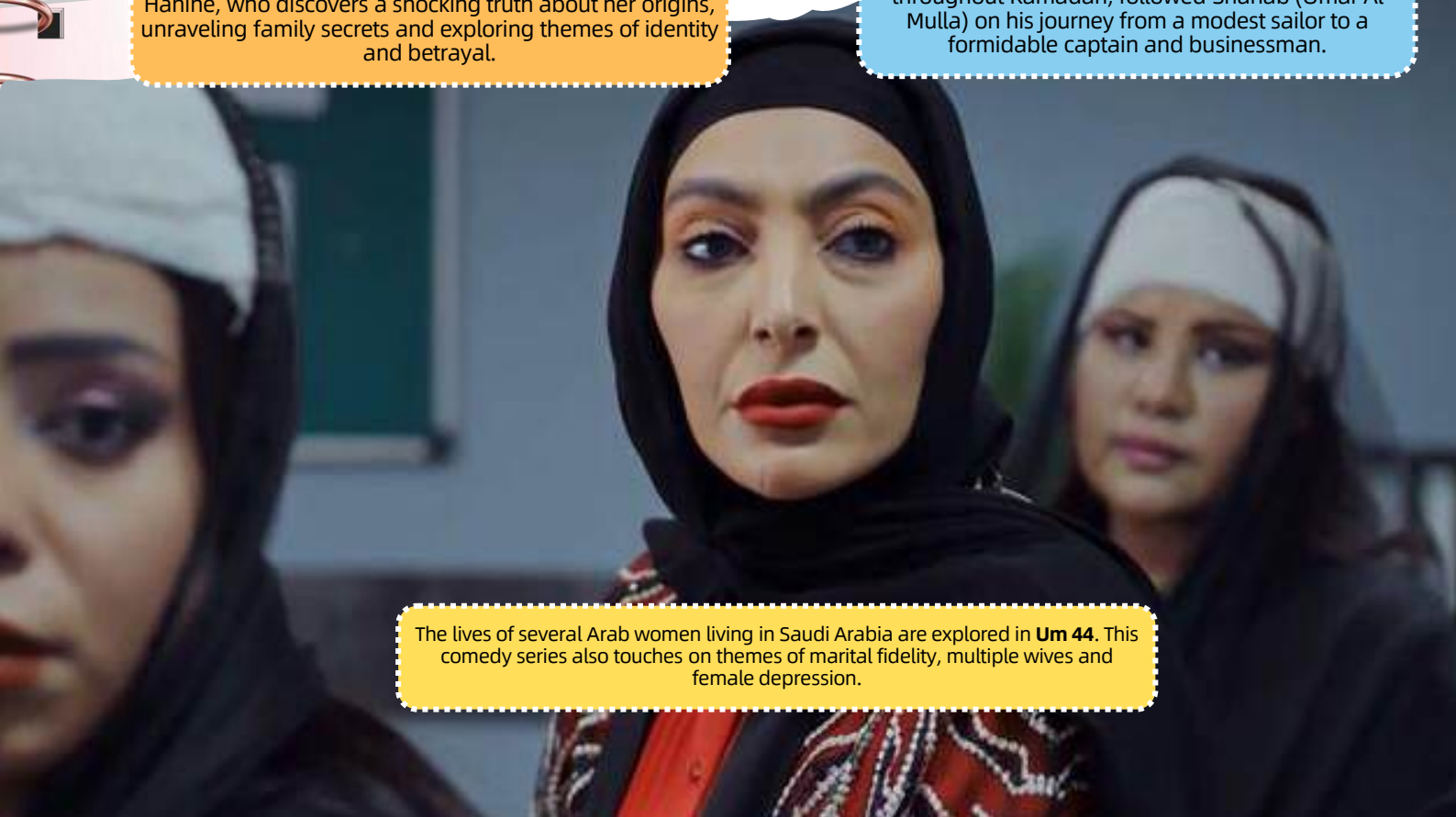
Producers often save their biggest shows for Ramadan, releasing **epic dramas, comedies, and action-packed series that touch on themes of family, morality, and historical narratives**.



Bil Dam (In Blood): A Lebanese drama centered around Hanine, who discovers a shocking truth about her origins, unraveling family secrets and exploring themes of identity and betrayal.



Bigger, bolder, and better - the Emirati period drama continues to grow in strength in its second season. Last year's debut, a 30-episode series that aired throughout Ramadan, followed Shahab (Omar Al Mulla) on his journey from a modest sailor to a formidable captain and businessman.



The lives of several Arab women living in Saudi Arabia are explored in **Um 44**. This comedy series also touches on themes of marital fidelity, multiple wives and female depression.

Trend 10

Governments backing the big and small screens

Governments across the Middle East, especially in **Saudi Arabia and the UAE**, are investing heavily in their entertainment sectors, including television. In Saudi Arabia, as part of Vision 2030, the **government is promoting local productions**, with a push toward developing original TV content to foster local talent.

Investment in media cities like Dubai Media City and TwoFour54 in Abu Dhabi has led to **the growth of production hubs**, further boosting the creation of **high-quality content in the region**.



Dubai Media City: Serving as a regional hub for media organizations, it hosts major international outlets like CNN and BBC, as well as local production companies, fostering a vibrant media ecosystem.



Fueled by Vision 2030, the Saudi media sector presents a dynamic landscape of opportunities.

Discover thriving opportunities in the ever-evolving Saudi media sector, driven by the nation's transformation, with endless potential awaiting



TwoFour54 (Abu Dhabi): This government-backed media zone has facilitated over 2,300 productions, including international films like Mission: Impossible – Fallout and Dune: Part Two. It also supports local content, such as the Arabic soap opera Inheritance, produced in collaboration with MBC Studios and Image Nation Abu Dhabi.

Trend 11

Hybrid Viewing Experiences the new norm

Traditional **TV is now competing with a growing range of digital platforms**, but instead of fading, it is adapting by offering hybrid viewing experiences. Many **TV stations are expanding their reach by offering content both on-air and online, making it available for on-demand viewing.**

Second-screen experiences (watching TV while engaging on social media platforms) are becoming increasingly common, allowing networks **to engage viewers in real-time through Twitter, Instagram, and YouTube during broadcast.**



Al Mashhad Media: Launched in 2023, Al Mashhad Media operates as a multi-platform outlet, delivering news and entertainment through traditional TV broadcasts and digital channels. Their content strategy emphasizes real-time updates and interactive segments, engaging audiences across various platforms.



LaLiga Xtra App: In collaboration with Digital Virgo, LaLiga introduced the LaLiga Xtra app in the Middle East, enhancing football broadcasts with real-time statistics, interactive polls, and social media integration. This second-screen experience enriches viewer engagement during live matches.



Zee Alwan and Zee Aflam: These channels have expanded their reach by offering content through YouTube and FAST (Free Ad-Supported Streaming TV) channels on platforms like Samsung Plus. This strategy combines traditional broadcasting with digital accessibility, meeting audiences where they are.

On Now



Fear Factor
19:30 - 20:30



Wipeout Extra
20:00 - 21:00



Gunjan Saxena
19:30 - 20:30



Call the Midwife
20:00 - 21:00

Trend 12

Youth in the Director's Chair

Given the region's young population, many networks and platforms are producing content that caters specifically to Generation Z and millennials. Youth-focused shows with fast-paced storylines, edgy themes, and modern-day issues are resonating strongly with younger viewers.

Channels like MBC4 and OSN are catering to this demographic with a mix of reality shows, foreign imports, and social media-driven content.

MBC4 caters to younger audiences with youth-focused dramas that tackle themes of identity, relationships, and social challenges. The channel also leverages social media platforms like Instagram and Twitter for real-time viewer engagement.



OSN targets Generation Z and millennials through its streaming service OSN+, offering on-demand access to popular shows and movies. It features youth-centric content covering mental health, social dynamics, and international perspectives, ensuring a diverse and relatable lineup.



International shows are popular in the Middle East, especially among younger audiences who are interested in fashion, culture, and love stories. The popularity is influenced by factors like strong global appeal, relatable themes, and convenient streaming availability.

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

- Minimal traditional TV viewing. Live broadcast viewing is rare.
- They tend to watch YouTube Kids, on-demand clips, cartoons—likely on mobile/connected devices.
- They prefer short, educational, or interactive media over full-length



GEN Z (1997 – 2012)

The Digital Natives

- Live TV is on the decline for this cohort. ~48% say live TV is “a thing of the past.”. Daily live TV viewing is low among them
- Streaming dominance with ~95–100% using streaming/video-on-demand; YouTube is top for on-demand & CTV use .
- They are heavy users of TikTok, Instagram Reels for snackable video .
- YouTube on CTV is increasingly popular; driven by connected TV devices



GEN Y (1981 – 1996)

The Global Explorers

- Termed as the Cord-cutters in progress; ~60% still tune in monthly to linear TV (~1.5 hrs/day), but ~92% use streaming platforms
- UAE & KSA millennials spend >3 hrs/day on online video mostly YouTube - >60% of MENA's YouTube audience are millennials
- They are influential in family entertainment, combining kids' content and lifestyle material via YouTube



GEN X (1965 – 1980)

The Bridge Generation

- They are hybrid viewers with about 75% watching TV monthly, averaging ~3 hours/day & ~79% using streaming services
- They use a blend of linear TV and online viewing, similar to Boomers but lean more towards digital



BABY BOOMERS (1946 – 1964)

The Golden Era Fans

- Traditional & connected TV fans, they mostly watch TV averaging ~5 hours/day. They remain the heaviest weekly TV watchers
- There is a shift to digital & they are the fastest growing adopters of streaming via connected TV (Netflix, Prime Video)

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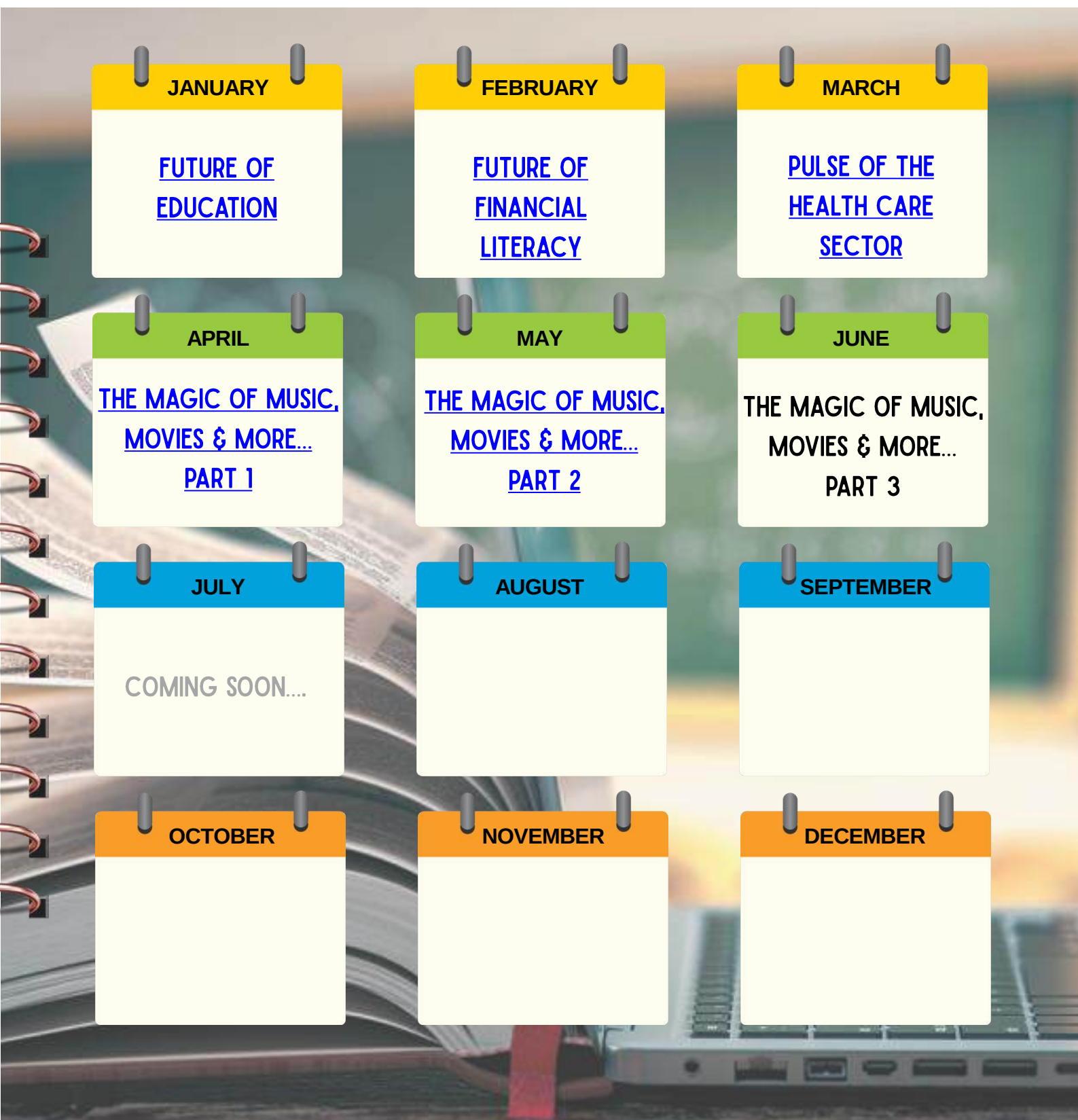
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