

# OBSERVATORY

on South Mediterranean Television Markets

*work-in-progress*

(provisional statistical data)



11<sup>th</sup> Permanent Conference  
of Mediterranean Audiovisual Operators

Perpignan  
May 1-3, 2004

Co.Pe.A. 

Rai



Direzione Marketing Strategico



The “**Observatory on South Mediterranean Television Markets**” has been promoted by *Rai – Direzione Marketing* and assigned to *IsICult – Istituto italiano per l’Industria Culturale* (which for Rai already carries out an Observatory on Public Service Broadcasting in Europe)

### Objectives of the Observatory:

- 1) to give an **overview**, through an up-to-date and previously unpublished set of information and analyses, of the 13 States by convention defined as “South Mediterranean”, focusing on media and television markets
- 2) to promote a permanent monitoring of this area for a best possible **reciprocal awareness** and to stimulate cultural and commercial exchange

► This report is intended simply as a preliminary exploration. We comment on the experimental peculiarity of this set of information and statistical data. Apologizing for any incorrect information, we would be grateful for any rectification or suggestion.



### Observatory on South Mediterranean Television Markets

ALGERIA  
CYPRUS  
EGYPT  
ISRAEL  
JORDAN  
LEBANON  
LIBYA  
MALTA  
MOROCCO  
PALESTINE  
SYRIA  
TUNISIA  
TURKEY

#### OBJECTIVES of the OBSERVATORY



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The 13 “South Mediterranean” States here analyzed:

Algeria

Cyprus

Egypt

Israel

Jordan

Lebanon

Libya

Malta

Morocco

Palestinian Autonomy

Syria

Tunisia

Turkey

- More than **250 million people**
- Nearly **47 million tv households**
- A fast-growing **tv receiver penetration**: in 1980, 6.3 tv sets per 100 inhabitants; in 2000, 24.2 tv sets per 100 inhabitants

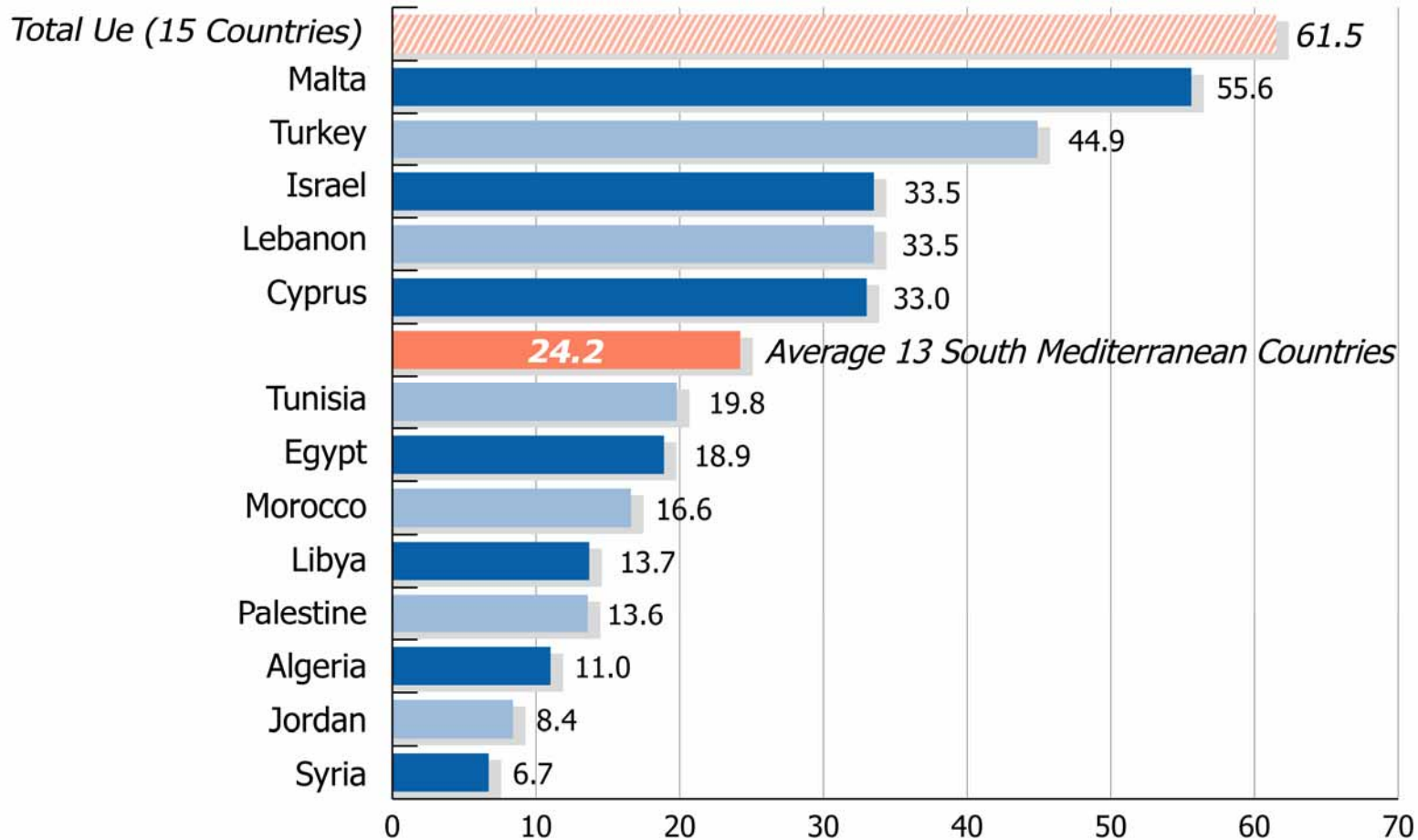


ALGERIA  
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TURKEY

GENERAL  
SCENARIO



### TV RECEIVERS PER 100 INHABITANTS (13 South Mediterranean States)



- ALGERIA
- CYPRUS
- EGYPT
- ISRAEL
- JORDAN
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- LIBYA
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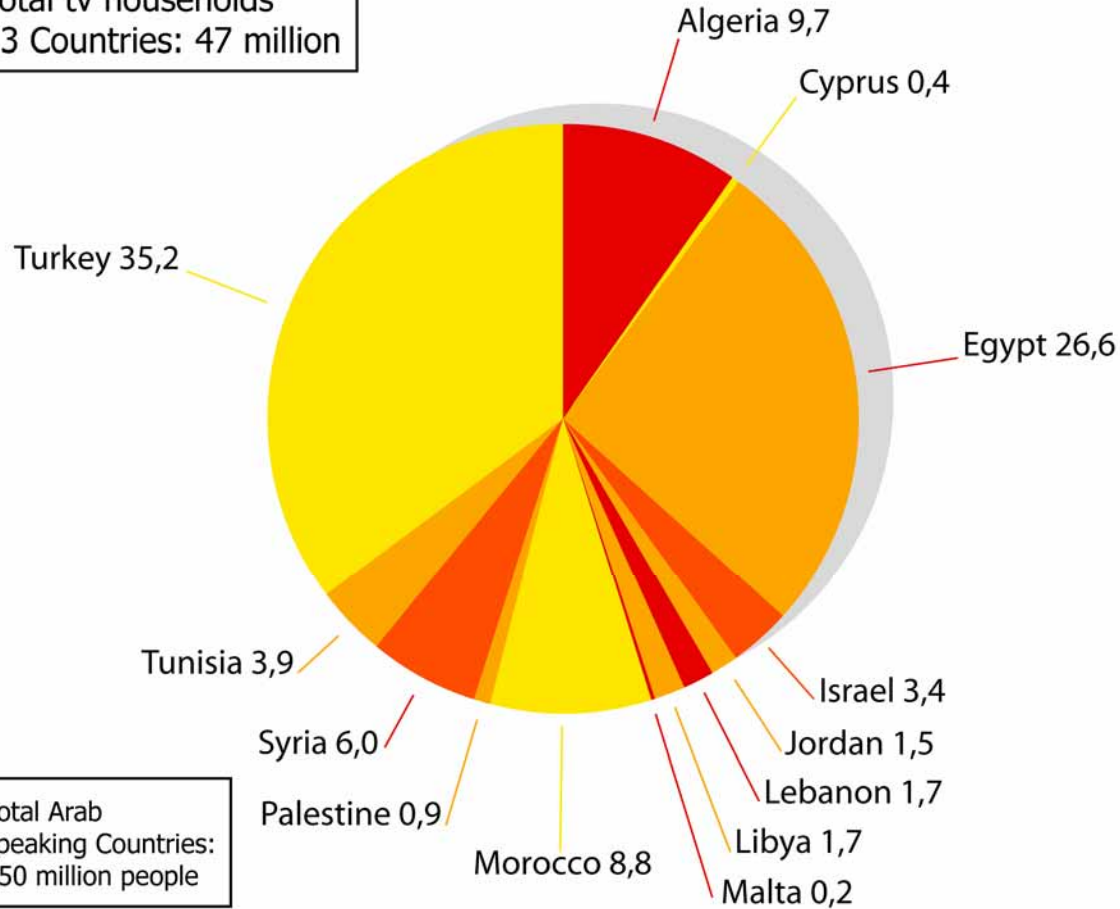
#### GENERAL SCENARIO



## TV HOUSEHOLDS (%)

(in alphabetical order)

Total tv households  
13 Countries: 47 million



Total Arab speaking Countries:  
250 million people

- ALGERIA
- CYPRUS
- EGYPT
- ISRAEL
- JORDAN
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### GENERAL SCENARIO

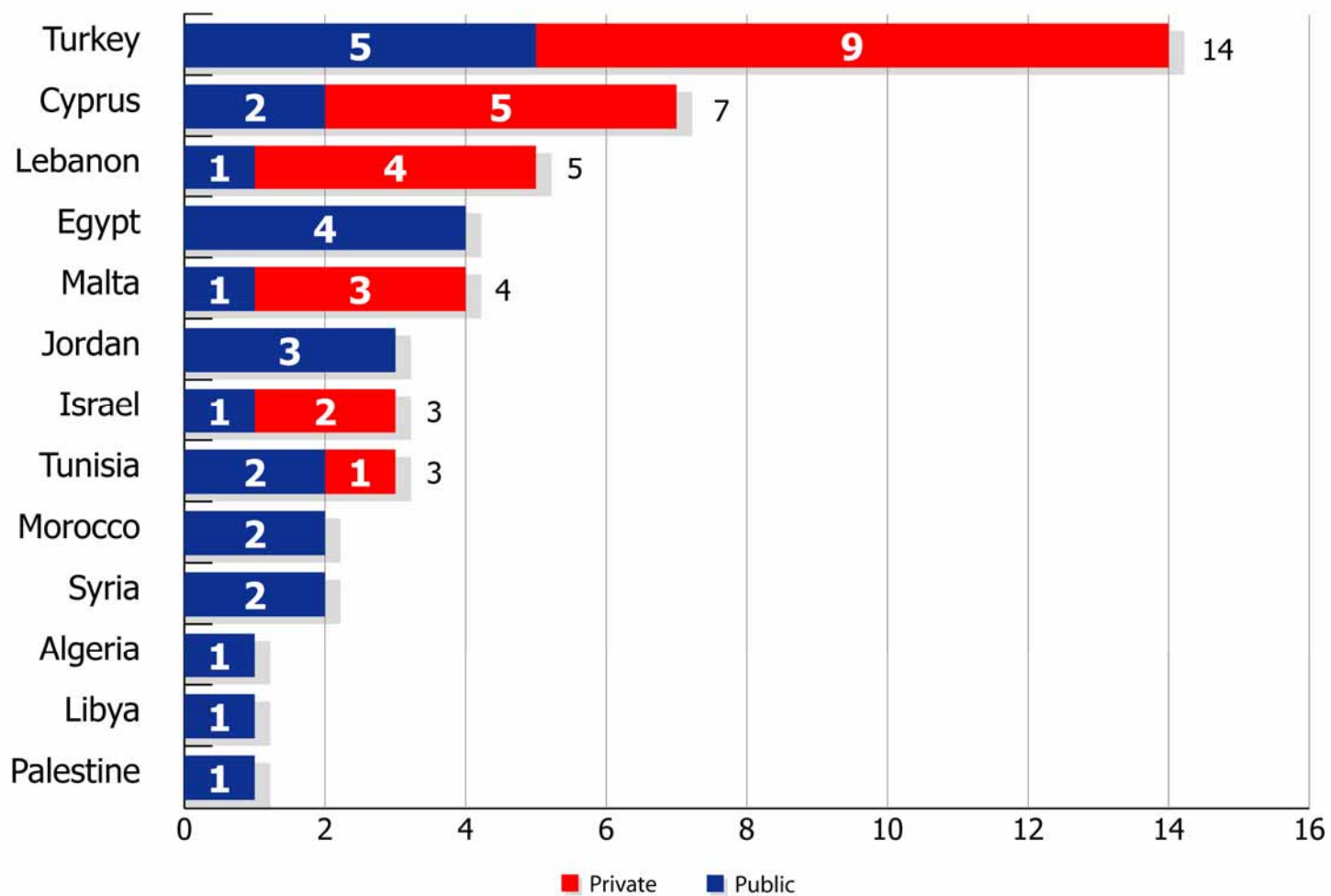


- Around **180 terrestrial and cable-satellite channels** in the 13 States, of which:
  - **50 terrestrial channels** (half public, half commercial)
  - More than **130 cab-sat channels** (81 % commercial, 19 % public)
- A significant **multi-channel penetration** (especially satellite):  
4 Countries over 70 %, most Countries over 30 %
- Collective viewing habits
- Many successful transnational and pan-Arab channels: the successful Mbc (230 mio \$ of advertising revenues in 2002), the pay-tv platforms Showtime, Art and Orbit (750.000 subscribers altogether)

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### TERRESTRIAL CHANNELS (national coverage)



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**GENERAL SCENARIO**



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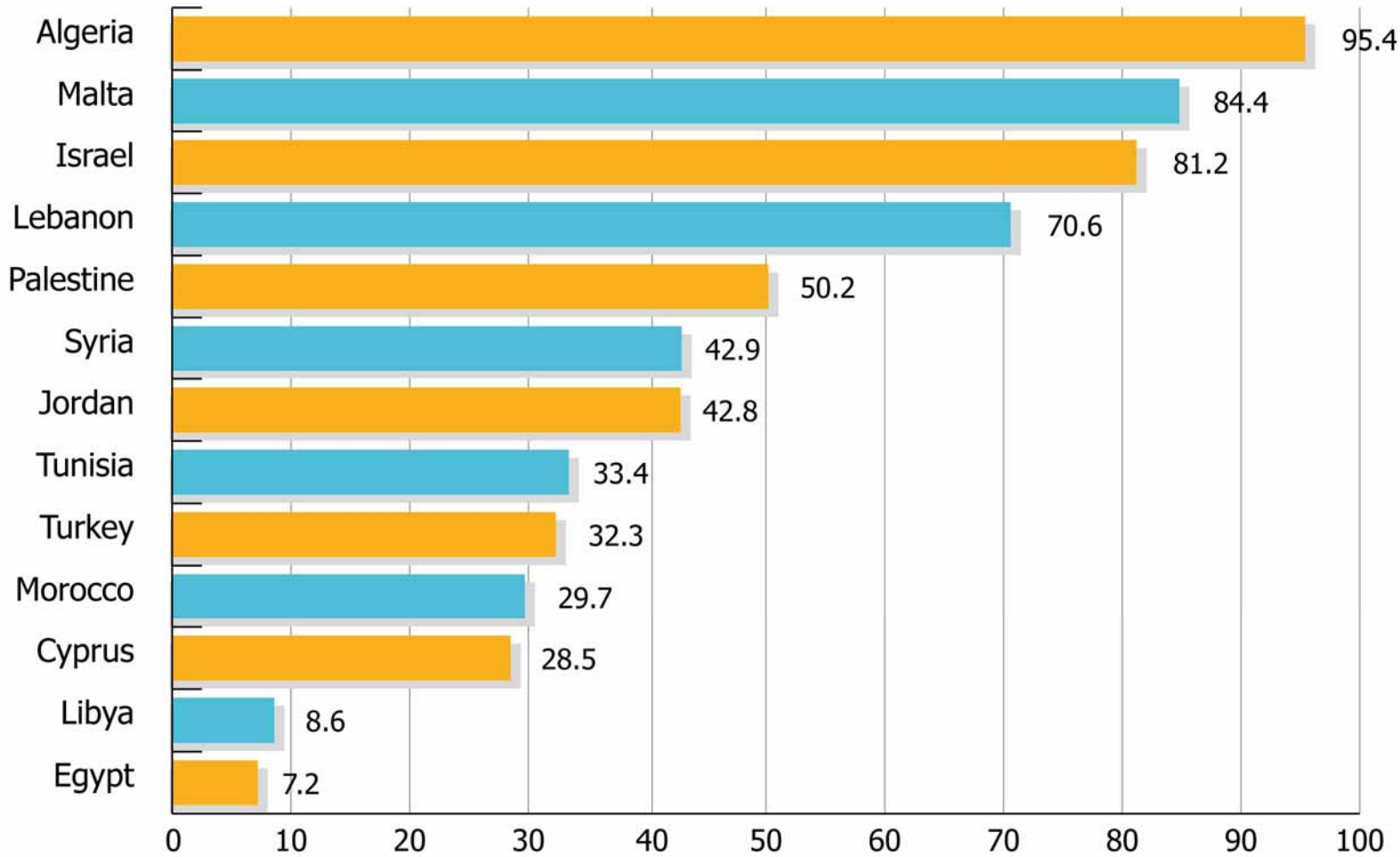


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## MULTI-CHANNEL PENETRATION

(% of total tv households)



- ALGERIA
- CYPRUS
- EGYPT
- ISRAEL
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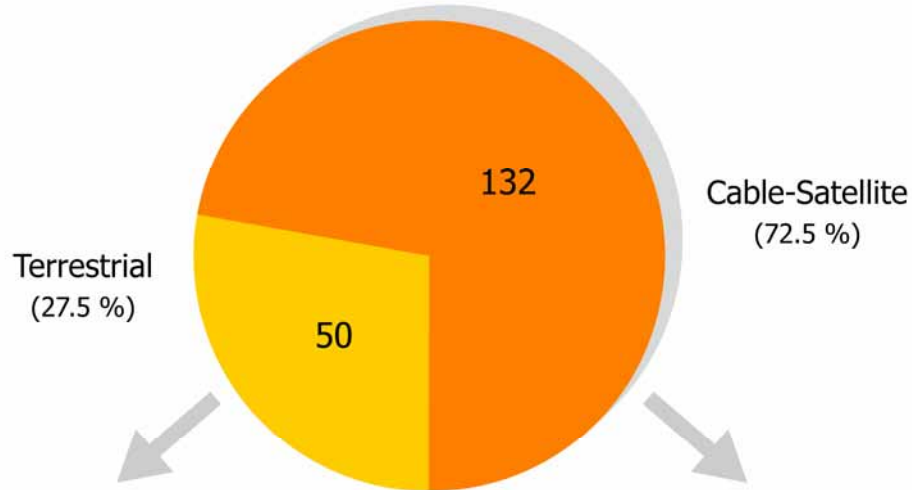
### GENERAL SCENARIO





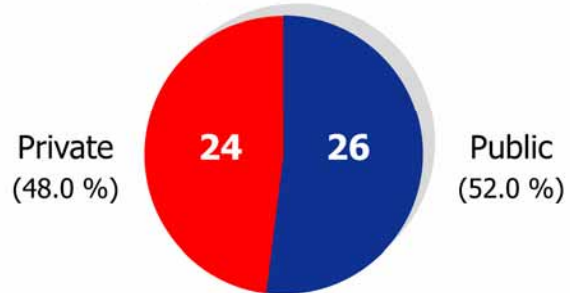
## NATIONAL CHANNELS

(Terrestrial vs Cable-Satellite)



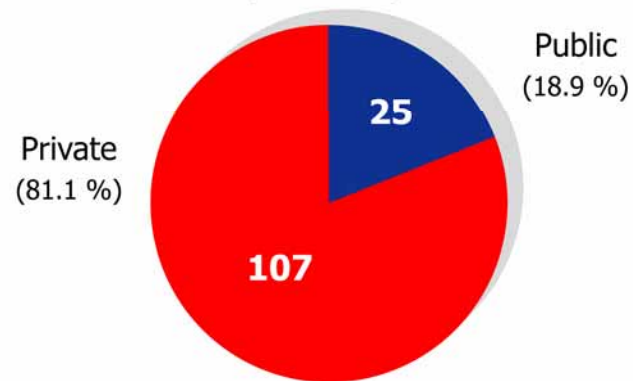
### NATIONAL TERRESTRIAL CHANNELS

(Public vs Private)



### NATIONAL CABLE-SATELLITE CHANNELS

(Public vs Private)



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CYPRUS  
EGYPT  
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### GENERAL SCENARIO



Tv in the South Mediterranean Region: **MEDIA CONSUMPTION SCENARIO ( A )**

**( A ) ADVERTISING, CINEMA, VIDEO, RADIO, MUSIC**

State	Population (millions)	Tv households (millions)	Advertising			Cinema		Video	Radio	Music
			Advertising Spend (millions Us\$)	Advertising Spend per-capita (Us\$)	Tv advertising revenues (millions Us\$)	Admissions (millions)	Produced films	Vcr (millions)	Radio x 100 inhab.	Music: cd + mc (millions)
Algeria	31,3	4,5	..	..	.	0,6	.	..	24,4	..
Cyprus	0,8	0,2	..	..	44,1	1,1	1	..	41,7	..
Egypt	70,5	12,4	505,8	7,2	177,0	16,0	24	1,1	33,9	11,5 + 0,1
Israel	6,3	1,6	746,0	118,4	248,0	9,2	10	1,3	52,6	0,1 + 3,5
Jordan	5,3	0,7	54,6	10,3	11,3	.	.	..	37,2	..
Lebanon	3,6	0,8	231,9	64,4	111,3	2,5	.	0,5	68,7	1,2 + 0,3
Libya	5,5	0,8	..	..	.	2,9	-	..	27,3	..
Malta	0,4	0,1	..	..	.	1,1	..	..	66,6	..
Morocco	30,1	4,1	114,8	3,8	92,3	14,3	3	..	24,7	..
Palestine	3,4	0,4	..	0	..	..	..	..	..	..
Syria	17,4	2,8	6,5	0,4	5,4	3,9	1	..	27,6	..
Tunisia	9,7	1,8	..	0	..	.	2	..	15,8	..
Turkey	70,3	16,4	715,0	10,2	347,0	26,0	17	1,9	57,3	23,4 + 4,5
<b>Total 13 States</b>	<b>254,6</b>	<b>46,6</b>	<b>(2.374,6)</b>	<b>9,3</b>	<b>(1.036,4)</b>	<b>(77,6)</b>	<b>(58)</b>	<b>(4,8)</b>	<b>..</b>	<b>36,2 + 8,4</b>

Notes: the year referred to is 2002, unless otherwise indicated: advertising investments: in 2003 (Cyprus, Israele, Jordan, Lebanon), in 2000 (Morocco), in 1999 (Syria, and Egypt for television only); cinema: in 2002 (Algeria and Morocco 1997, Libya 1999, Syria 1993); books published: in 1999 (Egypt, Lebanon, Malta and Palestine 1998, Jordan 1996, Libya 1994, Syria 1992);dailies and publishing: in 2000; column total is indicated in brackets, when the result of the sum of the only data available.

► Source: IsCult using various data (United Nations, Ocse, Imf, Unesco, Mpa and others) for Rai – Direzione Marketing.

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**GENERAL  
SCENARIO**



TV in the South Mediterranean region: **MEDIA CONSUMPTION SCENARIO ( B )**

**( B ) PRESS, PUBLISHING, TELEPHONY, COMPUTERS, INTERNET**

State	Population (millions)	Tv households (millions)	Press		Publishing Books published	Telephony		Computers and Internet	
			Dailies (x 100 inhabs.)	Dailies: circulation (million copies)		Telephones (x 100 inhabs.)		PC (x 100 inhabs.)	Internet (x 100 inhabs.)
						Fixed	Cellular		
Algeria	31.3	4.5	2.7	1.1	133	6.0	0.3	0.7	0.2
Cyprus	0.8	0.2	11.1	1.0	931	64.2	45.6	28.0	22.1
Egypt	70.5	12.4	3.5	2.4	1,410	10.3	4.3	1.5	0.9
Israel	6.3	1.6	29.0	..	1,969	47.6	80.8	24.6	23.0
Jordan	5.3	0.7	7.7	0.3	511	12.7	16.7	3.3	4.0
Lebanon	3.6	0.8	10.7	0.3	289	19.5	21.2	5.6	8.6
Libya	5.5	0.8	1.5	0.1	26	10.9	0.9	..	0.4
Malta	0.4	0.1	..	..	237	53.0	35.4	23.0	25.3
Morocco	30.1	4.1	2.8	0.8	386	3.9	15.7	1.3	1.3
Palestine	3.4	0.4	..	..	2	..	..	..	1.8
Syria	17.4	2.8	2.0	0.3	598	10.9	1.2	1.6	0.4
Tunisia	9.7	1.8	1.9	0.2	1,260	17.5	0.6	2.4	4.1
Turkey	70.3	16.4	11.1	..	2,920	28.5	30.2	11.9	9.1
<b>Total 13 States</b>	<b>254.6</b>	<b>46.6</b>	<b>..</b>	<b>6.5</b>	<b>10,672</b>	<b>..</b>	<b>..</b>	<b>..</b>	<b>..</b>

Note: the year referred to is 2002, unless otherwise indicated: advertising investments: in 2003 (Cyprus, Israel, Jordan, Lebanon), in 2000 (Morocco), in 1999 (Syria, and Egypt for television only) cinema: in 2002 (Algeria and Morocco 1997, Libya 1999, Syria 1993); books published: in 1999 (Egypt, Lebanon, Malta and Palestine 1998, Jordan 1996, Libya 1994, Syria 1992); dailies and publishing: in 2000; column total is indicated in brackets, when the result of the sum of the only data available.

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**GENERAL SCENARIO**

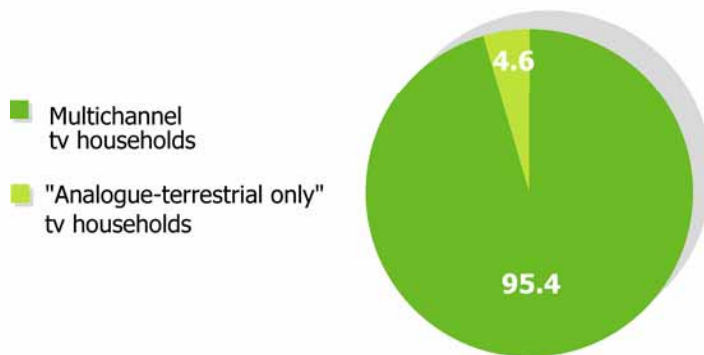


## ALGERIA

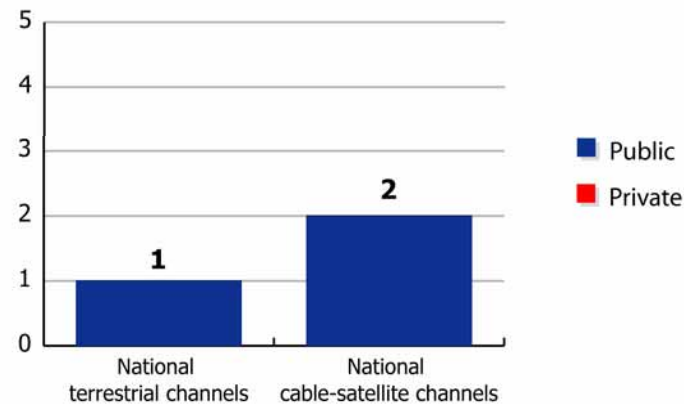
- **Monopoly.** Persistent monopoly in terrestrial and multi-channel broadcasting (but a 2002 law foresees commercial broadcasting)
- Very high multi-channel penetration (95,4 % of 4,5 million tv households)
- Low pc and internet penetration (less than 1 pc per 100 inhabitants)
- Entv (public service broadcaster) has a 23 mio € budget and 6.000 employees (year 2000)

### Multi-channel penetration

(% of total tv households)



### Channels: public and private



#### ALGERIA

CYPRUS  
EGYPT  
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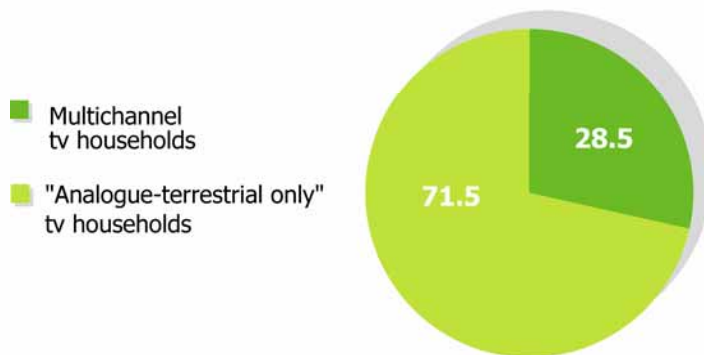


## CYPRUS

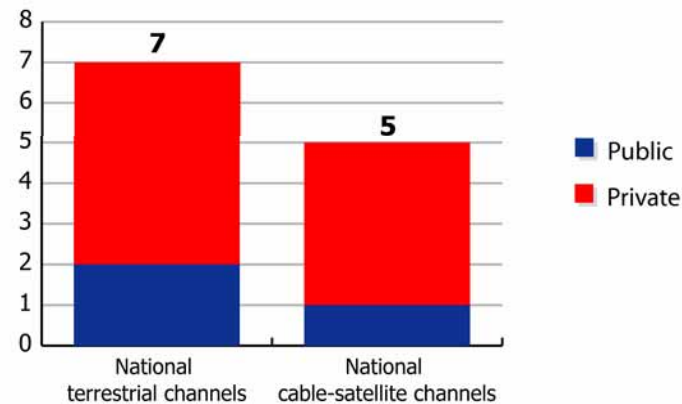
- **No Monopoly**
- Only 226.000 tv households (and 33 television sets per 100 inhabitants)
- Tv advertising market: 44,1 mio \$ (2003)
- More than 40 % audience share collected by Greek broadcasters (Antenna Tv, Mega Channel, Ert)
- 40.000 subscribers to pay-tv (18 % of tv households)
- Cybc (public service broadcaster) has a 29 mio € budget (year 1999)

### Multi-channel penetration

(% of total tv households)



### Channels: public and private



ALGERIA

**CYPRUS**

EGYPT

ISRAEL

JORDAN

LEBANON

LIBYA

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PALESTINE

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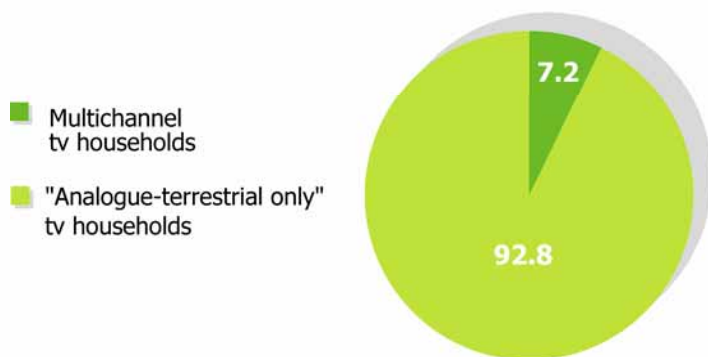


## EGYPT

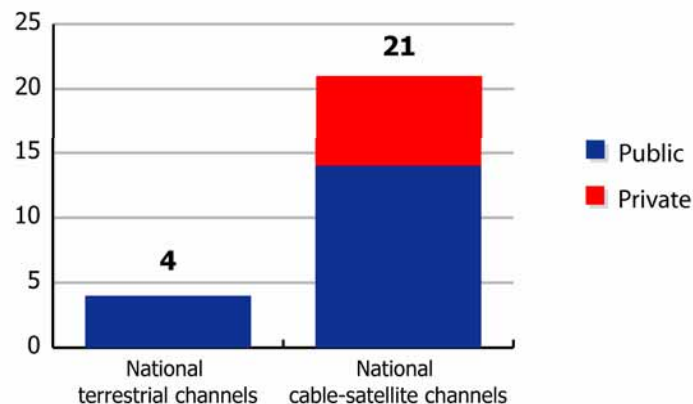
- **Monopoly (terrestrial broadcasting only)**
- 12,4 million tv households (but only 19 television sets per 100 inhabitants)
- Multi-channel penetration: 7 % of total tv households
- A very active public broadcaster (Ertu broadcasts 2 national channels, 6 regional channels and around 15 cab-sat channels, through Nilesat)
- Total advertising market: 505 mio \$ (35 % from television advertising)

### Multi-channel penetration

(% of total tv households)



### Channels: public and private



ALGERIA  
CYPRUS  
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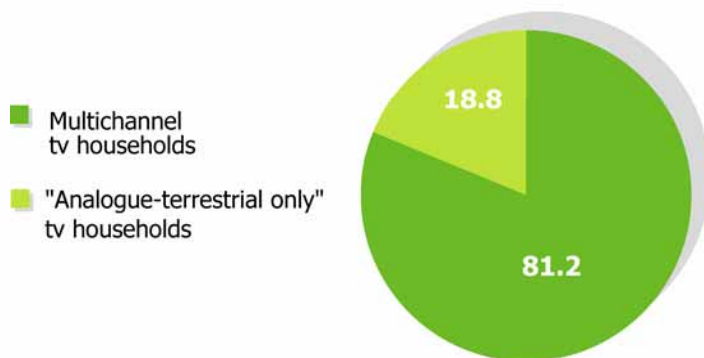


## ISRAEL

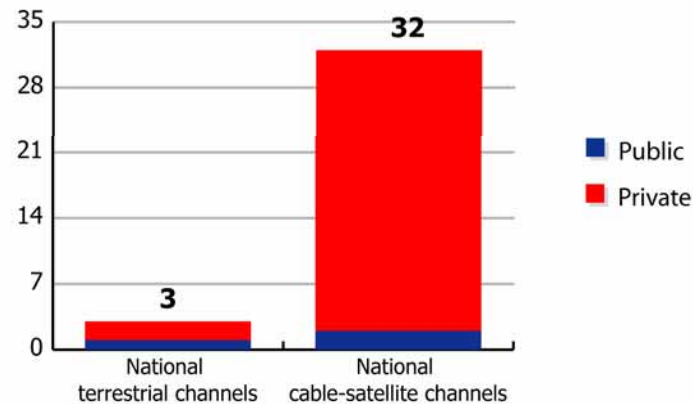
- **No Monopoly**
- The richest advertising market among the considered countries: 746 mio \$ (33 % from tv)
- Very high multichannel penetration: 81 % of total tv households
- 4 pay-tv platforms (3 on cable, 1 on satellite), dth-pay is on the increase
- Fragmented audience: Channel 1 (leading public broadcaster) collects 10 % of share
- Iba (public service broadcaster) has a 190 mio \$ budget

### Multi-channel penetration

(% of total tv households)



### Channels: public and private



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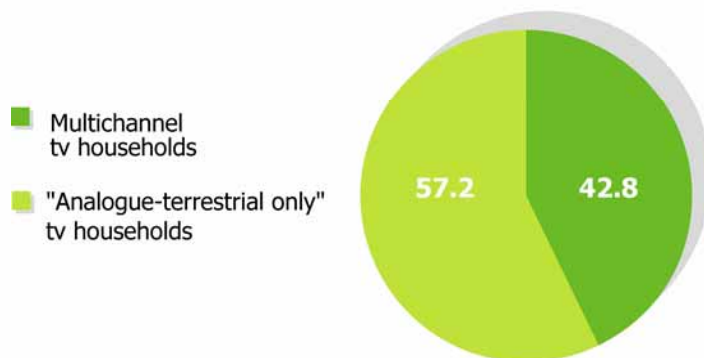


## JORDAN

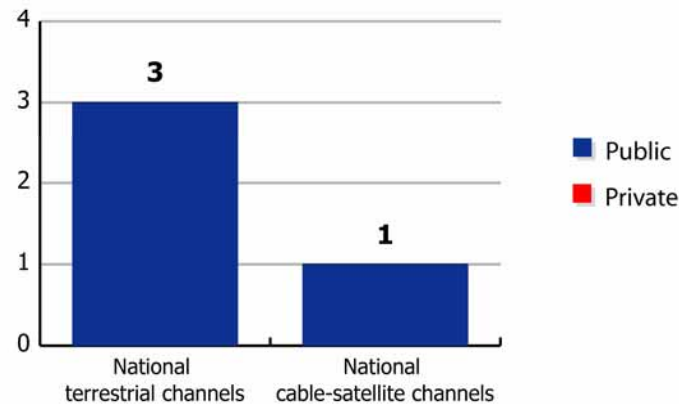
- **Monopoly.** Persistent monopoly in terrestrial and multi-channel broadcasting
- Low tv penetration (8 television sets per 100 inhabitants)
- Good multi-channel penetration (43 % of total tv households)
- Total advertising market 2003: 55 mio \$ (20 % from television advertising) but – 35 % against 2002

### Multi-channel penetration

(% of total tv households)



### Channels: public and private



ALGERIA  
CYPRUS  
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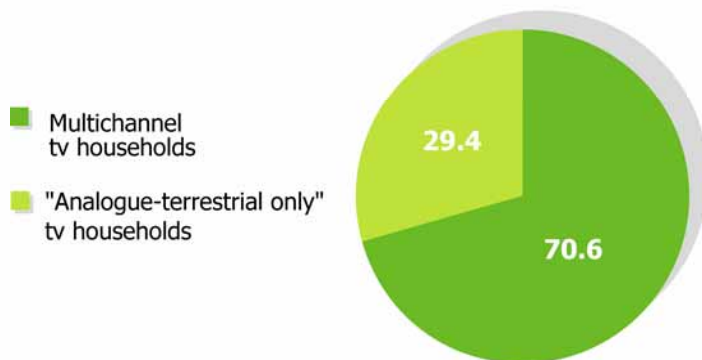




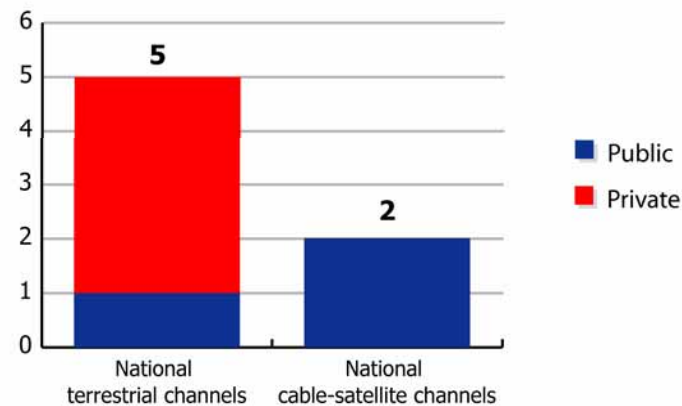
## LEBANON

- **No Monopoly.** A pluralistic broadcasting scenario (with 1 public and 4 private terrestrial channels)
- A good multi-channel penetration (71 % of 0.8 million tv households)
- Commercial broadcaster Lbci is dominant audience leader (47,5 % share)
- Total advertising market 2003: 232 mio \$ (48 % from television advertising)

**Multi-channel penetration**  
(% of total tv households)



**Channels: public and private**



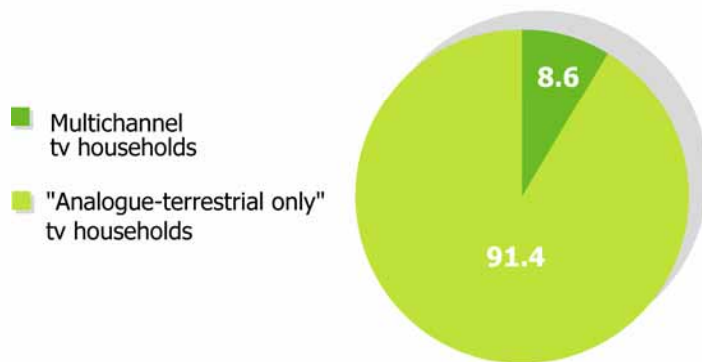
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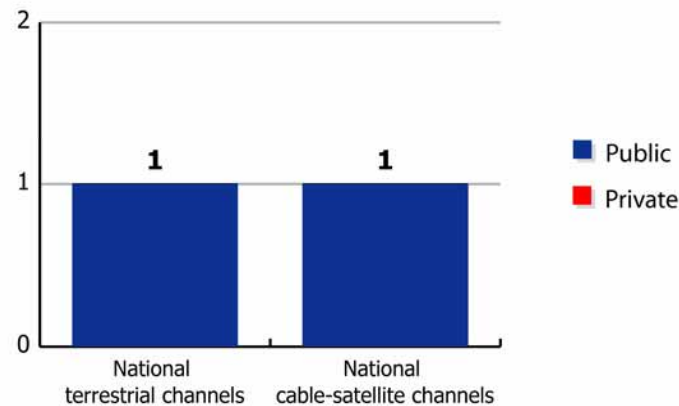
## LIBYA

- **Monopoly.** Persistent monopoly in terrestrial and multi-channel broadcasting (but no “dish ban”)
- Libyan Jamahiriya Broadcasting (public broadcaster) has a 21 mio € budget and 1.800 employees
- Libya is promoting “9.9.99 tv”, a pan-African tv project
- Multi-channel penetration is estimated at 8.6 % of total 0.7 million tv households

**Multi-channel penetration**  
(% of total tv households)



**Channels: public and private**



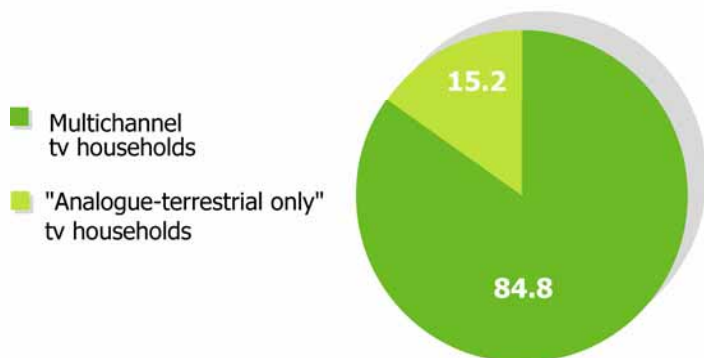
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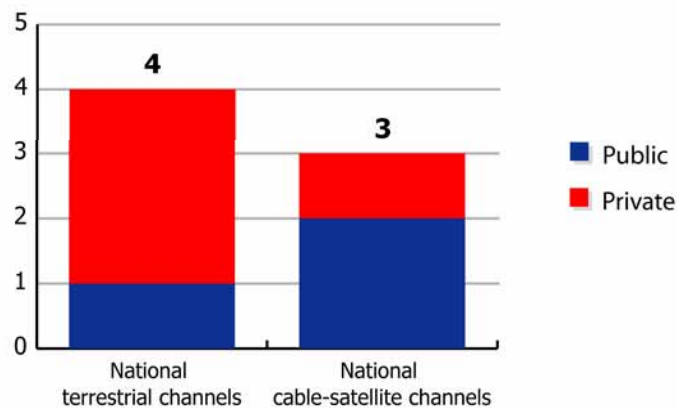
## MALTA

- **No Monopoly**
- Multi-channel penetration is estimated at 85 % of total 119.000 tv households
- 1 terrestrial and 2 cable channels from Public Broadcasting Services
- Two channels owned by political parties
- Italian channels collect nearly 20 % of audience share in prime-time

**Multi-channel penetration**  
(% of total tv households)

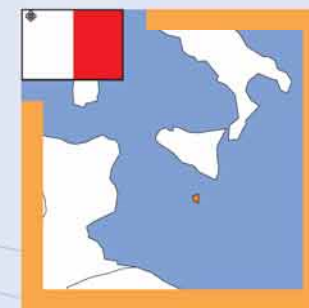


**Channels: public and private**



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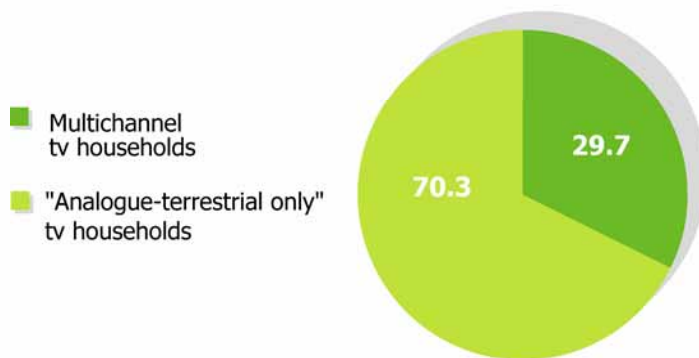


## MOROCCO

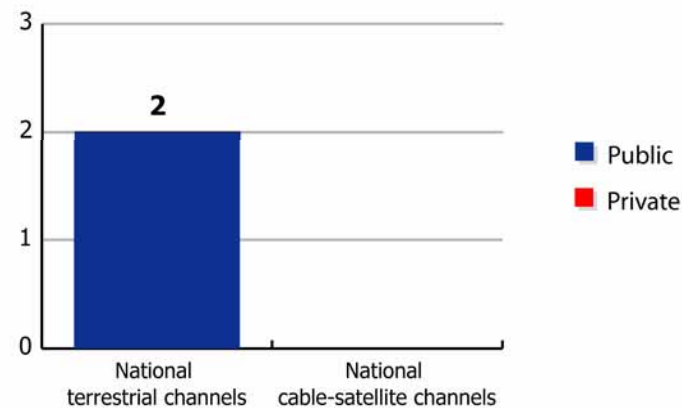
- **Monopoly.** Persistent monopoly in terrestrial broadcasting (2 public channels: Tvm and 2M)
- Multi-channel penetration at 30 % of total 4,1 million tv households
- Rtm (public broadcaster) has a 51 mio € budget and more than 2.200 employees (2002)
- Tv advertising market at 92 mio \$ (2M gets 70 % of the market)

### Multi-channel penetration

(% of total tv households)



### Channels: public and private



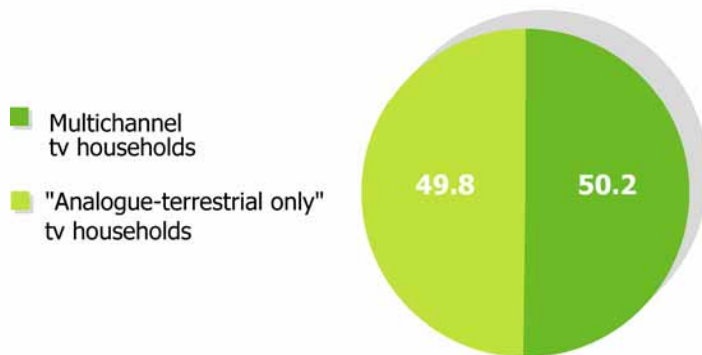
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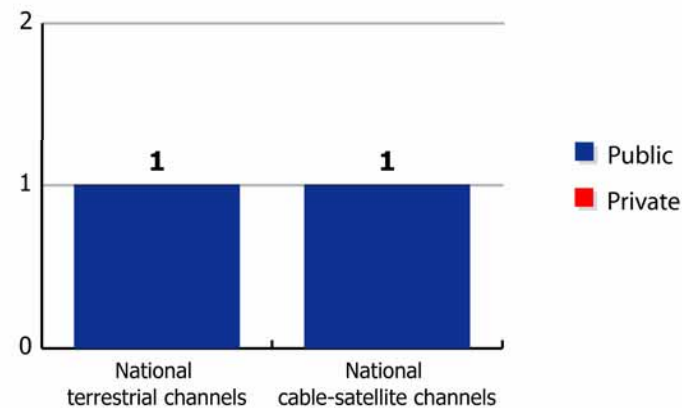
## PALESTINE

- **Monopoly** (for national broadcasting)
- Multi-channel penetration at 50 % of total tv households
- Two public channels: Pbc (terrestrial) and Psc (satellite)
- Nearly 20 local terrestrial channels, broadcasting erratically
- Media spending is understandably very low

**Multi-channel penetration**  
(% of total tv households)



**Channels: public and private**



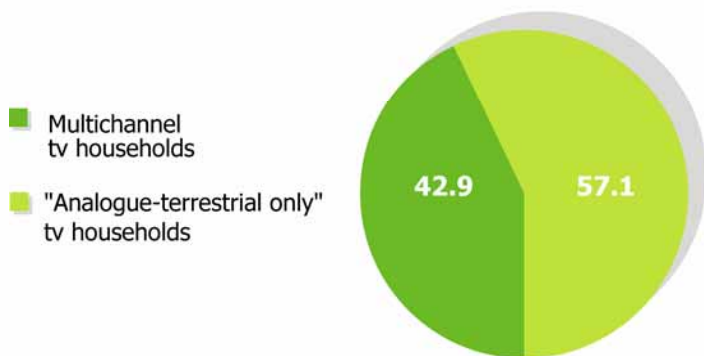
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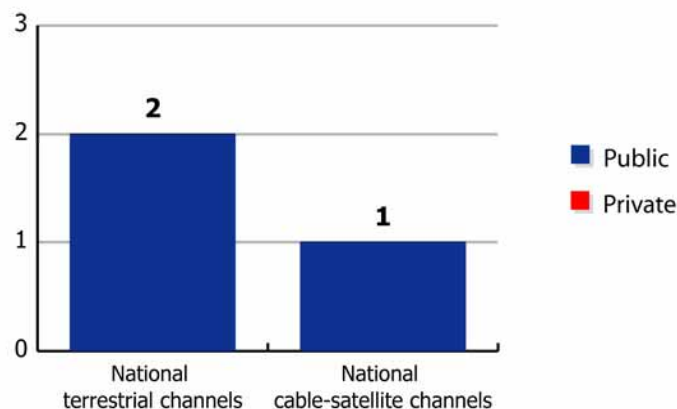
# SYRIA

- **Monopoly.** Persistent monopoly in terrestrial (Stv 1 and 2) and multi-channel (Syria Space Channel) broadcasting
- Very high audience share for public channels (estimated at 85 %)
- Good multi-channel penetration: 43 % of total 2,8 million of tv households
- Last available advertising market estimate at 6,5 mio \$ (mostly from tv)

**Multi-channel penetration**  
(% of total tv households)



**Channels: public and private**



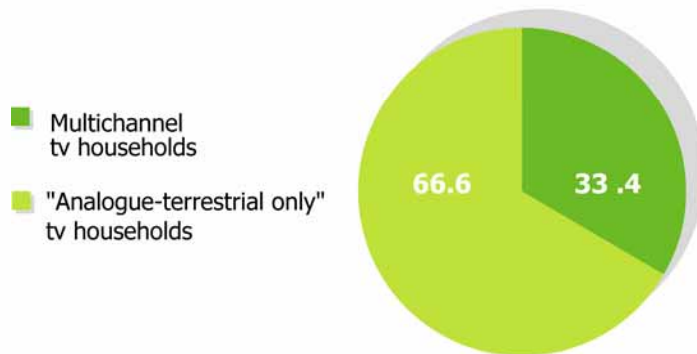
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- SYRIA**
- TUNISIA
- TURKEY



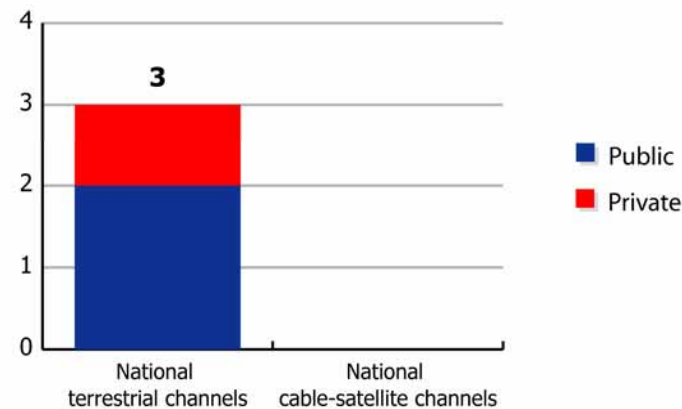
## TUNISIA

- **No Monopoly** (as from summer 2004)
- A generally low media penetration
- Multi-channel penetration at 33 % of total 1,8 millions tv households
- Two public channels: Tunis 7 and Channel 21
- A new commercial channel (Nasr Tv) will be launched in summer 2004

**Multi-channel penetration**  
(% of total tv households)



**Channels: public and private**



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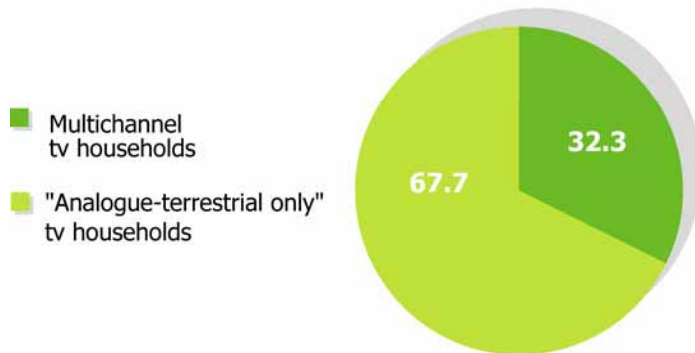


## TURKEY

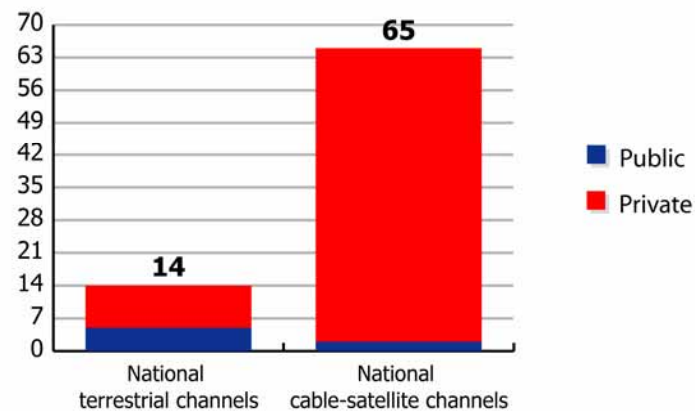
- **No Monopoly.** 14 national broadcasters (5 public and 9 private) and 230 channels
- Media penetration close to european average
- Advertising market at 715 mio \$ (347 from tv)
- Multi-channel penetration at 32 % of total 14 millions tv households
- Around 1 million pay-tv subscribers
- Pub-caster Trt has a 316 mio € budget and 8.000 employees (2.100 for tv service)
- Private Kanal D is audience leader (16 % of share in a fragmented market)

### Multi-channel penetration

(% of total tv households)



### Channels: public and private



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## Transnational and pan-Arab Tv

- In this context, we provide a brief outline of a future in-depth analysis on transnational television in the States selected for research;
- Those broadcasters that have been taken into consideration televise from outside the region but the target audience is also within the states included in the research;
- the long established operator, **Mbc** – Middle East Broadcasting distinguishes itself (recently transferring its base from London to Dubai), launched in 1991 and today producer of free-to-air channels Mbc 1 (generalist), Mbc 2 (film), Al Arabiya (news), aired in all continents;
- In addition to public broadcasters such as the French-speaking Tv 5 and the Italian Rai Med, there are French broadcasters that address the Berber populations or those French-speaking of Algeria and Morocco, as well as the pan-Arab newscaster Al Jazeera and, by way of example, the local variation of the “global” Disney Channel;
- As regards the **pay-tv platforms**, **Showtime**, **Art** and **Orbit** share the subscriber-pool, up from year-end 2002 to around 750,000 units (including neighbouring regions such as the Arabian peninsular). Art counted little over 300,000; Showtime around 280,000 and Orbit 180,000 units.

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### PAN-ARAB TV



### ARAB STATES – Major transnational and pan-Arab networks

Network	Launch	Based	Ownership and origin	Main target	Distribution	
Tv 5 Monde	1984	France	France Télévision 47.4 %, Arte France 12.5 %, Srg Ssr 11.1 %, Rtf 11.1 %, Radio Canada 6.7 % Télé Québec 4.4 %, Rfo 4.0 %, Ina 2.6 %, others 0.2 %	Middle East and French-speaking Africa	Arabsat, Eutelsat, Nilesat	
Mbc	Mbc 1	1991	Dubai (ex London)	Ara International (Walid Ali Ibrahim, Saudi Arabia)	Arab language States	Eutelsat, Arabsat, Nilesat, Amos
	Mbc 2	2003				
	Al Arabiya	2003				
Al Jazeera	1996	Qatar	Sceikh Hamad bin Khalifa al-Thani	Arab language States	Arabsat, Eutelsat, Nilesat	
Disney Channel Middle East	1997	Dubai	Disney (Usa)	Middle East and North Africa	Orbit Showtime	
Berbère Télévision	2000	France	Berbère Radio Television 100 % (Morocco)	North Africa Berber language	Eutelsat Hot Bird 6	
Beur Tv	2000	France	Nacer Kettane, Aime C2, Nadjim Kettane, Richard Malka, Arlette Casas, Rachid Medjnah (Morocco)	Maghreb	Eutelsat Hot Bird, Astra	
Rai Med	2001	Italy	Rai Radio Televisione Italiana	Maghreb	Eutelsat Hot Bird 2	
Khalifa Tv *	2002	France	Khalifa Group (Algeria)	Algeria	Eutelsat Hot Bird 2	
Ma 3	2003	France	B&B Prod. (Morocco)	Morocco	Eutelsat Hot Bird	
Rotana Tv (ex Art Music)	2003	Saudi Arabia	Kingdom Holding Group (Al Waleed bin Talal, Saudi Arabia)	Arab language States	Eutelsat, Arabsat, Nilesat, Amos	

Notes: (\*) there are rumors for a possible re-launch of Khalifa Tv from London in Spring 2004.

► Source: IsICult research for RAI – Direzione Marketing.

### ARAB STATES – Main transnational pan-Arab platforms

Platform	Launch	Based	Ownership and origin	N° channels	Subscribers
Art / Add (Arab Radio and Television Network / Arab Digital Distribution)	1993	Saudi Arabia, Egypt, Italy	Arab Media Corporation (Dallah Albaraka Group, Al-Waleed bin Talal, Saudi Arabia)	60	303,000
Orbit	1993	Italy, Bahrain	Mawarid Group (Khalid bin Abdullah, Saudi Arabia)	42	182,000
Showtime	1996	Dubai	Viacom 50%, Kipco (Kuwait Projects Company) 50% (Usa, Kuwait)	50	281,000

Note : situation as at year end 2002, for Showtime at end of 2003.

Source: IsICult using various data, for Rai – Direzione Marketing.

**Observatory**

on South Mediterranean Television Markets

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**PAN-ARAB TV**



**Rai**

Direzione Marketing Strategico



## Conclusion

- **The “work-in-progress” of the Observatory**

This document does not in any way constitute a complete, organic unity, it is intended simply as an initial exploration of a territory that – as demonstrated – presents many areas that are as yet uncharted, given the acute lack of knowledge (or at least of shared public knowledge amongst operators and professionals in the Tv community, as well as in the academic world);

- **The first edition of the Observatory is scheduled for the end of 2004,** together with a series of analyses on the situation regarding offer and consumption of television programmes (keeping in mind that in many Arab states, particularly those in which a state monopoly continues to exist on the airwaves, there has never been a strong tradition of research on the public sphere);
- **The final purpose remains that of achieving a greatly improved knowledge of television systems in the South Mediterranean region, with the aim of paving the way to every possible collaboration, whether creative, productive, in planning or distribution.**

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**CONCLUSION**