

Saudi Arabia Television Market By Screen Size (50"-59", 40"-49", 39" and Below, Above 59"), By Display Type (LED, OLED, Others (LCD, QLED, etc.)), By Sales Channel (Supermarkets/Hypermarkets, Multi Branded Stores, Online, and Others (Institutional Sales, Exclusive Stores, etc.)), By Region, By Competition Forecast & Opportunities, 2019-2029F

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Abstracts

Saudi Arabia Television Market was valued at USD 8.56 billion in 2023 and is anticipated to project robust growth in the forecast period with a CAGR of 4.2% through 2029. The television market in Saudi Arabia is a dynamic and rapidly evolving industry that reflects the changing media landscape in the country. Television has long been a primary source of entertainment and information in Saudi Arabia, and it continues to be a significant part of the country's media landscape.

The Saudi Arabia television market encompasses a wide range of television services, including terrestrial broadcasting, satellite television, cable TV, and over-the-top (OTT) streaming services. The market is characterized by a growing number of television channels, both domestic and international, that cater to diverse audiences.

Television content in Saudi Arabia caters to diverse audiences. While news and religious programming hold a significant place, entertainment, including drama series, comedy shows, and sports events, are also popular. The Saudi government has been investing in local content production, fostering the creation of Saudi-made TV shows and films to promote local talent and culture.

The Saudi Arabian television market operates within a regulatory framework overseen

by the General Authority for Audiovisual Media (GCAM). GCAM regulates and monitors television content, ensuring it aligns with cultural norms and values.

The television market in Saudi Arabia is undergoing a digital transformation. With the widespread availability of high-speed internet and the increasing popularity of smartphones and smart TVs, OTT streaming services have gained prominence. Streaming platforms like Shahid, Netflix, and Amazon Prime Video have a growing subscriber base in the country, offering on-demand content and original programming.

The Saudi Arabian television market faces various challenges, including the need for more original and diverse content, competition from international streaming services, and the management of content regulations in the digital age. However, it also presents opportunities for local content creators, technology providers, and advertisers looking to tap into a growing and tech-savvy audience.

In conclusion, the television market in Saudi Arabia is a rapidly evolving industry that reflects the changing media landscape in the country. With a mix of traditional broadcasting and digital streaming services, it caters to a diverse and growing audience. As Saudi Arabia continues to invest in the production of local content and embraces digital innovations, the television market is poised for further growth and transformation in the coming years.

Key Market Drivers

Digital Transformation and the Rise of OTT Platforms

One of the primary drivers of change in the Saudi Arabia Television Market is the ongoing digital transformation, which has brought about the rise of Over-The-Top (OTT) platforms and streaming services. This shift has transformed the traditional television landscape and is redefining how Saudi audiences access and consume content. Several factors contribute to this transformation:

Internet Penetration and Connectivity: Saudi Arabia has witnessed a significant increase in internet penetration, with a rapidly growing number of households having access to high-speed broadband connections. This enhanced connectivity has paved the way for OTT platforms to thrive, allowing viewers to stream content on multiple devices, including smartphones, tablets, and smart TVs.

Diverse Content Libraries: Leading global streaming services like Netflix, Amazon Prime

Video, and Disney+ have entered the Saudi market, offering extensive libraries of content that cater to a wide range of preferences, from Hollywood blockbusters to local and regional productions. This diversity has provided viewers with a wealth of entertainment options.

Localization and Arabic Content: OTT platforms have recognized the importance of Arabic content to engage Saudi audiences. They are investing in producing and acquiring Arabic-language series, films, and documentaries, appealing to local tastes and cultural interests.

On-Demand Viewing: OTT services offer the convenience of on-demand viewing, enabling users to watch content at their own pace and according to their schedules. This flexibility has resonated with Saudis, who increasingly prefer to binge-watch their favorite shows or catch up on missed episodes.

Cord-Cutting and Cord-Nevers: With the rise of OTT platforms, some Saudi consumers are opting to cut the cord, cancelling traditional cable or satellite TV subscriptions. A younger generation of "cord-nevers" has grown up without traditional television services, further accelerating the shift to streaming.

Expanding Smart TV Market

The proliferation of smart TVs is another significant driver shaping the Saudi Arabia Television Market. The adoption of smart TV technology has been instrumental in enhancing the viewing experience and further facilitating access to digital content. Several factors are contributing to the growth of the smart TV market in Saudi Arabia:

Internet-Enabled Televisions: The availability of internet-enabled smart TVs has become widespread in Saudi households. These devices come equipped with built-in apps for popular streaming services, making it easier for viewers to access online content directly through their televisions.

User-Friendly Interfaces: Smart TVs are designed with intuitive user interfaces that allow for seamless navigation through streaming platforms. Viewers can easily switch between traditional TV channels and online content, making it a versatile and user-friendly option.

Compatibility with Mobile Devices: Smart TVs often come with the ability to connect to smartphones and tablets, enabling screen mirroring, content sharing, and remote

control through mobile apps. This connectivity enhances the overall viewing experience.

High-Quality Displays: Smart TVs boast high-definition and 4K displays, providing viewers with superior picture quality and immersive viewing experiences. The demand for larger screen sizes, including home theater systems, is on the rise.

Gaming and Interactive Features: Some smart TVs offer gaming and interactive features, attracting a younger demographic of users who appreciate the ability to play video games, use social media, and engage with content beyond passive viewing.

Growing Investment in Local Content Production

The Saudi Arabia Television Market is also being driven by a significant increase in investment in local content production. This trend is closely aligned with the government's vision for economic diversification and cultural development, and it has several implications for the market:

Vision 2030 Initiatives: The Saudi Vision 2030 plan places a strong emphasis on developing the local media and entertainment sector. This includes the promotion of local talent and the creation of content that resonates with Saudi audiences.

Production Studios and Talent Hubs: The Saudi government has actively invested in building state-of-the-art production studios and cultural hubs to support content creators. Initiatives like the King Abdulaziz Center for World Culture (Ithra) and the Red Sea Film Festival aim to foster local talent and produce high-quality content.

Regional and Global Partnerships: Saudi content creators are increasingly collaborating with regional and international production companies, expanding their reach and making Saudi content accessible to global audiences.

Quality and Diversity: The investment in local content has resulted in a diverse range of TV shows, films, documentaries, and series that cater to various genres and age groups. This diversity ensures that Saudi audiences have access to content that reflects their cultural identity and interests.

Cultural Impact: By promoting Saudi stories, heritage, and values, local content production contributes to the preservation and promotion of Saudi culture, while also supporting the development of a thriving creative industry.

Key Market Challenges

Shifting Consumer Preferences

One of the primary challenges facing the Saudi Arabian television market is the shifting preferences of consumers, especially among the younger population. The rise of digital streaming platforms and video-on-demand services has altered the way people consume content. As a result, traditional television broadcasters are encountering challenges in retaining viewers and maintaining advertising revenue.

Younger viewers, in particular, are more inclined to access content through the internet on various devices, including smartphones, tablets, and smart TVs. This shift toward digital platforms poses a challenge to TV broadcasters in terms of adapting their content and distribution methods to remain competitive. To address this challenge, many Saudi broadcasters are expanding their online presence and developing apps to provide on-demand and live streaming services. This allows them to engage with younger audiences and compete with digital-native platforms.

Regulatory and Content Censorship

Saudi Arabia has strict regulations governing media and content, including television broadcasts. The Kingdom's conservative cultural and religious norms influence the content that can be shown on television. Television broadcasters must navigate a complex regulatory environment to ensure that their content complies with local norms and values.

This regulatory challenge extends to international content, which often needs to be censored or modified to meet Saudi standards. These restrictions can limit the variety and diversity of content available to viewers, potentially affecting the market's ability to attract a broader audience. Broadcasters need to strike a delicate balance between providing appealing content to viewers and adhering to regulatory requirements. As Saudi Arabia continues to open up to international influences and entertainment, broadcasters may need to adapt to changing content standards.

Competition and Fragmentation

The Saudi Arabian television market has become increasingly competitive and fragmented. The proliferation of satellite television channels, including international channels, has led to a vast array of content choices for viewers. This fragmentation

makes it challenging for broadcasters to stand out and retain a dedicated audience.

In addition to traditional broadcasters, streaming platforms and on-demand services have entered the market, intensifying the competition. Global giants like Netflix, Amazon Prime Video, and local platforms such as Shahid and Jawwy TV are vying for viewers' attention. This competitive landscape means that Saudi broadcasters must invest in high-quality, engaging content to compete effectively. At the same time, they must address the demands of advertisers who want to reach their target audiences through diverse channels.

Furthermore, the emergence of social media as a content consumption platform adds to the challenge. Platforms like YouTube, Instagram, and TikTok are popular choices for Saudi viewers, and they offer unique opportunities for content creators and advertisers.

To navigate this challenge, broadcasters in Saudi Arabia are increasingly focusing on producing original and exclusive content to attract and retain viewers. Additionally, collaborations with international content providers and regional media companies can help diversify offerings and cater to different audience segments.

Key Market Trends

Transition to Digital and Smart TVs

One of the most prominent trends in the Saudi Arabian television market is the rapid transition from traditional CRT and LED TVs to digital and smart TVs. This shift is primarily driven by the growing consumer demand for advanced features and capabilities. Digital and smart TVs offer high-definition (HD) and ultra-high-definition (UHD) displays, superior sound quality, and internet connectivity, which enhance the overall viewing experience.

As the Saudi population becomes more tech-savvy, there is a rising interest in smart TVs that can access streaming services, such as Netflix and YouTube, and offer interactive features. The convenience of accessing a plethora of content on-demand has made smart TVs increasingly popular, especially among younger consumers.

Moreover, the Saudi government has been promoting the digital switchover in the television broadcasting system. Analog broadcasting was officially switched off in 2018, pushing consumers to adopt digital television services. As a result, there has been a surge in the sales of digital TVs and the usage of satellite and digital terrestrial

television platforms.

This trend not only benefits consumers but also opens up opportunities for advertisers, content providers, and manufacturers in the television industry. Advertisers can leverage the interactive features of smart TVs to create more engaging and targeted ad campaigns, while content providers can explore partnerships with streaming services to reach a wider audience. Television manufacturers, on the other hand, are continuously innovating to introduce new models with enhanced features, contributing to market growth.

OTT and Streaming Services

Over-the-top (OTT) and streaming services have witnessed remarkable growth in Saudi Arabia, fundamentally transforming the way viewers access and consume content. Services like Shahid, WAVO, and Netflix have gained popularity as they offer a vast library of content, including regional and international shows and movies, available on various devices.

The adoption of OTT and streaming services has been fueled by several factors. First, the Saudi population is increasingly seeking flexibility in their viewing habits. With OTT services, viewers can watch content at their own pace and on multiple devices, which is particularly appealing to the younger demographic.

Second, the COVID-19 pandemic accelerated the shift to online entertainment. Lockdowns and social distancing measures led to a surge in demand for streaming services as people spent more time at home. This trend is expected to continue, with viewers showing a preference for a diverse range of content accessible from their smart TVs, smartphones, and tablets.

To cater to the growing demand for streaming content, Saudi production companies are investing in creating original Arabic content, further enhancing the appeal of OTT services. This not only boosts the local entertainment industry but also strengthens the international presence of Saudi content.

Advertisers have also recognized the potential of OTT platforms for targeted advertising. Data analytics and user insights allow for precise ad targeting, which can be more effective and cost-efficient than traditional television advertising. This trend is expected to shape the future of advertising in the Saudi television market.

Regulatory Reforms and Diversification of Content

Saudi Arabia is experiencing a transformative phase in its media and entertainment industry, with regulatory reforms contributing to the diversification of content. The Saudi government's Vision 2030 initiative aims to boost the entertainment sector, diversify the economy, and reduce the country's dependence on oil revenue.

As a result, the Kingdom has witnessed an influx of international entertainment events, shows, and concerts. These events not only attract international talent but also serve as a platform for the local entertainment industry to flourish. Consequently, there is a growing demand for television content that aligns with the changing cultural and entertainment landscape in Saudi Arabia.

The regulatory environment is evolving to accommodate this shift. Regulatory bodies, such as the General Authority for Audiovisual Media (GCAM), are working on promoting creativity, cultural exchange, and adherence to content standards. These changes provide opportunities for content creators, broadcasters, and streaming platforms to offer diverse and appealing content while adhering to regulatory guidelines.

One noteworthy development is the licensing of cinemas in Saudi Arabia, which was previously banned for several decades. The return of cinemas has not only created a new avenue for entertainment but also increased the demand for content related to film and cinema.

Segmental Insights

Screen Size Insights

In the Saudi Arabia television market, the 50"-59" segment has carved out a significant share and continues to enjoy a strong presence. This particular size range of televisions is a popular choice among Saudi consumers for various reasons, contributing to its dominance in the market.

Televisions in the 50"-59" range offer a sweet spot for screen size, providing viewers with an immersive and cinematic experience in the comfort of their homes. Saudi consumers appreciate the larger screen size for watching their favorite shows, movies, and sports events, making it a favored choice for family entertainment.

Saudi Arabia has witnessed a surge in affluence and urbanization over the years. As a

result, there is an increasing demand for larger and more advanced television sets. The 50"-59" category strikes a balance between size and affordability, making it an attractive option for households looking to upgrade their viewing experience.

The 50"-59" television segment aligns well with the growing trend of creating home entertainment centers. With the rise of streaming services, gaming consoles, and the desire for a theater-like experience at home, Saudi consumers are investing in larger TVs that offer versatility and compatibility with a range of entertainment options.

Saudi Arabia has a passionate sports and entertainment culture, with a strong interest in soccer, motor racing, and international events. The 50"-59" television size range caters to sports enthusiasts who want to enjoy the thrill of live matches and events on a larger screen.

In Saudi households, family entertainment is highly valued. Larger televisions in the 50"-59" category accommodate multiple viewers, making them ideal for family gatherings and watching popular Ramadan series, which are a significant part of Saudi culture.

Manufacturers have responded to the demand for larger televisions in Saudi Arabia by incorporating advanced technologies and features into this size range. Smart TVs with internet connectivity, 4K and 8K resolution, and enhanced sound systems are readily available, enhancing the overall viewing experience.

Saudi consumers often seek to replicate the cinematic experience within the confines of their homes. The 50"-59" televisions are well-suited for this purpose, offering a large enough screen to enjoy movies and series with high-definition visuals and immersive sound.

Retailers in Saudi Arabia often run promotions and discounts on televisions in the 50"-59" range, making them more accessible to a broader consumer base. These promotions, combined with the variety of brands and models available, contribute to the segment's substantial share in the market.

Sales Channel Insights

The online segment has rapidly gained a significant share in the Saudi Arabian television market, transforming the way consumers access and interact with television content. This shift can be attributed to various factors, including the increasing internet

penetration, the growth of online streaming platforms, and changing consumer preferences.

Saudi Arabia has witnessed remarkable growth in internet penetration and connectivity over the past decade. With a tech-savvy population and widespread access to high-speed broadband and mobile internet, more consumers have turned to online platforms for their television content. This increased connectivity has created a favorable environment for online television services to thrive.

The surge in popularity of online streaming services has been a game-changer in the Saudi Arabian television market. Platforms like Netflix, Amazon Prime Video, and local services such as Shahid have made it easy for viewers to access a vast library of content, from international movies and TV shows to regional and Arabic content. The convenience of streaming content on-demand and across multiple devices has attracted a large and growing subscriber base.

To cater to the diverse preferences of Saudi Arabian viewers, online streaming platforms have invested in producing and licensing localized content. This includes Arabic-language series, films, and documentaries that resonate with the cultural and linguistic nuances of the region. By offering such content, online platforms have significantly expanded their share of the television market in Saudi Arabia.

The availability of Smart TVs and mobile devices has made it easier for consumers to access online television content. Smart TVs come equipped with pre-installed streaming apps, allowing viewers to seamlessly switch between traditional broadcasts and online content. Additionally, the widespread use of smartphones and tablets has enabled on-the-go streaming, further boosting the online television segment.

Online television platforms provide features for personalization and interactivity that traditional broadcast TV often cannot match. Viewers can create profiles, receive tailored recommendations, and engage with interactive content, such as live chats and polls during shows. This level of engagement appeals to a tech-savvy audience and has contributed to the growing share of online TV.

While online television gains momentum, traditional television broadcasting has faced certain challenges. Viewership of scheduled broadcasts has declined as many consumers prefer the flexibility of choosing when and what to watch. This shift has prompted traditional broadcasters to adapt and explore online distribution as well, blurring the lines between the two segments.

The Saudi Arabian government has recognized the growing significance of online content delivery and has put in place regulations to govern online media and streaming services. These regulations aim to ensure that online content adheres to cultural and societal norms and values while fostering a competitive and innovative media environment.

Regional Insights

The western region of Saudi Arabia holds a significant share in the country's television market, contributing to the nation's robust and rapidly evolving media landscape. Several factors contribute to the Western region's prominence in this sector, making it a pivotal player in the Saudi Arabian television market.

The Western region, including major cities like Jeddah and Mecca, holds cultural and economic significance in Saudi Arabia. It is home to a diverse and cosmopolitan population, including expatriates from various backgrounds. This cultural diversity is reflected in the content and programming preferences of the region's television viewers, making it a hub for content creation and consumption.

The Western region is an economic powerhouse in Saudi Arabia, with Jeddah serving as a major commercial and financial center. The region's economic prosperity has led to increased consumer spending on television and entertainment services. Residents in this area have the financial capacity to invest in advanced television technology and premium content.

Jeddah, in particular, has emerged as a media and entertainment hub in Saudi Arabia. It is home to numerous production companies, broadcasting studios, and media outlets. This concentration of media infrastructure has contributed to the Western region's significance in the television market. It is the epicenter of content creation and dissemination, catering to a wide range of tastes and preferences.

As a gateway to the holy cities of Mecca and Medina, the Western region witnesses a significant influx of tourists and pilgrims. This global connectivity has led to a demand for international television content and news channels. Television providers in the region often offer a diverse array of channels, including international ones, to cater to the diverse needs of the population and visitors.

The Western region is characterized by a diverse demographic landscape, with

residents hailing from various cultural backgrounds and nationalities. This diversity translates into a wide range of programming preferences, with viewers seeking content that aligns with their cultural, linguistic, and entertainment needs. Television providers in the region recognize this diversity and tailor their offerings accordingly.

The Western region has embraced technological advancements in the television industry. This includes the adoption of high-definition (HD) and ultra-high-definition (UHD) television sets, smart TVs, and streaming services. These technological innovations have led to an increased demand for high-quality content, further solidifying the region's significance in the television market.

The Western region often hosts major sports events, entertainment festivals, and cultural exhibitions. These events draw both national and international attention, leading to a surge in television viewership. Sports enthusiasts and entertainment aficionados in the region rely on their televisions to stay connected with these events, contributing to the market's growth.

Key Market Players

United Matbouli Group

Zagzoog For Home Appliance

LG Electronics Saudi Arabia Limited

Alesayi Electronics Co. Ltd.

Modern Electronics Company Limited

Digital & Electronics Solutions Development Co. Ltd

Al Jabr Holding Co

Huawei Tech Investment Saudi Arabia Co. Ltd.

Emam Distribution Company Ltd.

Samsung Electronics

Report Scope:

In this report, the Saudi Arabia television market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Saudi Arabia Television Market, By Screen Size:

50"-59"

40"-49"

39" and Below

Above 59"

Saudi Arabia Television Market, By Display Type:

LED

OLED

Others

Saudi Arabia Television Market, By Sales Channel:

Supermarkets/Hypermarkets

Multi Branded Stores

Online

Others

Saudi Arabia Television Market, By Region:

Western

Northern & Central

Eastern

Southern

Competitive Landscape

Company Profiles: Detailed analysis of the major companies presents in the Saudi Arabia television market.

Available Customizations:

Saudi Arabia Television Market report with the given market data, Tech Sci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional market players (up to five).

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