

Sub-Saharan Africa Pay TV Forecasts

The number of pay TV subscribers in Sub-Saharan Africa will increase by 74% between 2017 and 2023 to reach 40.89 million. However, the Sub-Saharan Africa Pay TV Forecasts report estimates that subscriber growth will outstrip revenue progress. Pay TV revenues will climb by 41% to \$6.64 billion by 2023, up by \$2 billion on 2017.

From the 23.49 million pay TV subscribers at end-2017, 13.78 million were satellite TV and 9.11 million DTT. By 2023, satellite TV will contribute 20.89 million and DTT 17.53 million. This means an extra 7 million pay satellite TV subscribers and 8 million more pay DTT homes.

Published in January 2018, this 322-page PDF and excel report comes in seven parts:

- Executive summary and regional forecasts, with handy comparison tables to reveal the best growth prospects;
- Major pay TV operators, including market share for each;
- Regional forecasts summary from 2010 to 2023 by platform, by household penetration, by pay TV subscribers and by pay TV revenues;
- Top-line forecasts (population, population per household, households and TV households) for 42 countries;
- Country insights for 35 territories;
- Detailed country forecasts for 35 nations for every year from 2010 to 2023.
- **NEW FOR 2018:** [Prospects. Summary subscriber forecasts for 35 countries in a graphically appealing 73-page document.](#)

For more information, please email editor@blycroft.com

If you do not want the full report, you can buy the Sub-Saharan Africa Pay TV Prospects report for half the price of the full report.



digital TV research

Forecasts for the following 35 countries and 136 platforms:

Country	No of ops	Platforms
Angola	7	ZAP TV, DStv, Canal Plus, StarSat, StarTimes; Angola Telecom, TV Cabo
Benin	5	DStv, Canal Plus; Easy TV; StarSat; StarTimes
Botswana	3	DStv, GOtv; StarSat
Burkina Faso	3	DStv, Canal Plus; StarSat
Burundi	4	DStv, Canal Plus; StarSat; StarTimes
Cameroon	4	DStv, Canal Plus; StarSat; StarTimes
CAR	3	Canal Plus; StarSat; StarTimes
Chad	3	Canal Plus; StarSat; StarTimes
DR Congo	5	DStv, Canal Plus; StarSat; StarTimes; Easy TV
Rep Congo	5	DStv, Canal Plus; StarSat; StarTimes; Easy TV
Cote d'Ivoire	5	Canal Plus, DStv, StarTimes; StarSat; Easy TV
Eq. Guinea	2	Canal Plus, DStv
Ethiopia	2	DStv; StarSat
Gabon	5	Canal Plus, DStv, StarTimes; StarSat
Gambia	2	Canal Plus, DStv
Ghana	4	Canal Plus, DStv, GOtv; StarSat
Guinea	5	Canal Plus, DStv, StarTimes; StarSat; Easy TV
Kenya	6	Zuku cable, Zuku satellite, DStv, StarTimes, GOtv, StarSat
Liberia	3	DStv; Canal Plus; StarSat
Madagascar	4	DStv; Canal Plus; StarSat; StarTimes
Malawi	4	Zuku, DStv, GOtv; StarSat
Mali	2	Canal Plus; StarSat
Mozambique	7	ZAP TV, DStv, Canal Plus, StarSat, StarTimes; GOtv, TV Cabo
Namibia	3	DStv, GOtv; Easy TV
Niger	4	DStv; Canal Plus; StarSat; Easy TV
Nigeria	5	GOtv, DStv, StarTimes, StarSat; Canal Plus
Rwanda	6	Zuku, DStv, StarTimes, StarSat; GOtv, Canal Plus
Senegal	5	Canal Plus, DStv, Orange; StarSat; Easy TV
Sierra Leone	4	DStv; Canal Plus; StarSat; StarTimes
South Africa	3	DStv, StarSat, GOtv
Tanzania	4	Zuku, DStv, StarTimes, StarSat
Togo	4	Canal Plus, DStv, StarSat; Easy TV
Uganda	5	Zuku, DStv, StarTimes, GOtv, StarSat
Zambia	5	Zuku, DStv, StarTimes, GOtv, StarSat
Zimbabwe	3	DStv, StarSat, GOtv



SAMPLE: Ghana pay TV insight

- About [REDACTED] by 2023, or [REDACTED] of total households.

Main assumptions behind the forecasts	
[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]

Source: Digital TV Research

- Digital TV penetration will reach [REDACTED] in 2023.
- GOTV became the pay TV market leader in 2015, and [REDACTED]. However, StarSat will quickly gain subs to its low-priced satellite TV platform (which will somewhat stifle growth for both GOTV and DStv).

DStv subscription fees (GHS)		
Package	Channels	Price
Premium	135	330
Compact+	171	195
Compact	164	125
Family	139	65
Access	126	35

Source: DStv

- Multichoice's DStv satellite TV platform had [REDACTED] by 2023 – low growth due to competition, principally from Kwese TV. Multichoice's operation in Ghana is a partnership with Richard Darko, Bryan Harris, Louis Casely-Hayford and Ardeley Investments.
- As well as controlling rights to English Premier League and La Liga soccer, MultiChoice's SuperSport screens the European Champions League matches. However, SuperSport no longer has the rights to the local soccer league. DStv added some French-language Canal Plus channels in May 2013.
- Prices were dropped in November 2016 (as a reaction to the launch of StarTimes' satellite TV platform) and again in August 2017 (as a reaction against Kwese TV and Mega-Choice).

GOtv subscription fees (GHS)		
Package	Channels	Price
Max	50	60
Plus	45	35
Value	29	18
Lite	22	9
Source: GOtv		

- DStv's sister company **GOtv** launched in Accra in January 2013, using the DVB-T2 standard. We estimate that GOtv had [REDACTED] by 2023. Decoder prices were halved in June 2017 from GHS175 to GHS99. The Max package was introduced in October 2017, which includes La Liga soccer.
- The government wants to convert all homes to digital in 2018 (delayed from the original deadline of September 2017), with Accra completed by end-2016. We do not think that national conversion will happen until 2019. The government will give 1 million free settop boxes to poorer homes. In September 2011, the NCA announced the adoption of the DVB-T2 standard, with full network conversion achieved by late 2016. K-Net is constructing the network with support from SES. There are 28 FTA DTT channels.
- The government originally appointed Exim Bank China to finance the construction of the **DTT transmission network**. In July 2011, StarTimes signed a joint venture DTT deal with local company Directv. However, the government lost patience at the lack of progress and rescinded the licenses in 2013.

StarTimes satellite subscription fees (GHS)		
Package	Channels	Price
Super	105	60
Smart	74	30
Nova	42	15
Source: StarTimes		

- Despite this setback and perhaps assuming that a DTT license is unlikely to be awarded, **StarTimes** launched a satellite TV platform in October 2016. We forecast [REDACTED] by 2023. As well as France's La Ligue, Italy's Serie A and exclusive Bundesliga action (2017/18), StarTimes won the 10-year rights to screen the local soccer league. Multichoice held the previous rights. StarTimes also has the rights to the 2018 World Cup in Russia.

Kwese TV subscription fees (GHS)		
3-day	7-day	30-day
15	35	110
Source: Kwese		

- Zimbabwe-backed **Kwese TV** started pay TV operations (75 channels (of which 30% are exclusive) for GHS110/month, \$25.11) via satellite and in a deal with mobile operator MTN in February 2017.

- This follows on from its FTA sports channel launch in March (which includes NBA, NFL and English Premier League matches). Econet Media has promised \$1.19 billion for content to Kwese TV across Africa over the next five years (\$592 million for sports and \$600 million for general entertainment). MTG sold FTA channel TV3 to Kwese's parent Econet Media in December 2016. Kwese also has distribution deals with Netflix and Ifix.

Canal Plus subscription fees (GHS)		
Package	Channels	Price
Tout	220	290
Evasion+	202	150
Evasion	182	70
Access	147	35

Source: Canal Plus

- Satellite TV operator **Canal Plus Afrique** has 10,000 subscribers in Ghana. Ghana's neighboring countries are Francophone.
- Sister company to FTA broadcaster Crystal TV, **Mega-Choice Digital** began satellite TV operations in January 2017, with 36 FTA and pay channels. Mega-Choice plans to expand to other West African countries.
- **MultiTV** serves homes with 20 FTA signals of local channels via the SES Astra satellite system. Launched in 2009, MultiTV claimed to have sold 3 million settop boxes (priced at GHC240, \$55) in West Africa by mid-2017.
- Strong Technologies, trading as **MyTV**, also provides 55 FTA and pay TV channels (\$0.25/day).
- The ITU estimated 86,596 **fixed broadband subscribers** by end-2016; up from 73,172 a year earlier.
- Mobile operators **Tigo**, owned by Millicom, and **Airtel** merged operations in March 2017. The merged operation has 10 million subscribers, of which 5.6 million are data users.
- Mobile operator **MTN** (16.79 million subscribers by March 2017) began its own VOD platform via MTN Play in February 2017. MTN extended this offer in April by agreeing to carry **Kwese Play** (fixed and mobile). MTN may float some of its equity on the local exchange during 2017.
- Rival mobile operator **Vodafone** (8.56 million subscribers by March 2017) already distributes iRoko to its subscribers. Vodafone launched its fiber optic network in February 2017. Mobile competitor **Globacom** (Glo Mobile) has 1.2 million subscribers.

- SVOD platform **Iflix** began operations in Ghana in September 2017, following on from Nigeria and Kenya. Rival SVOD platform **Zip TV**, owned by Broadband Home Ghana, has a distribution deal with mobile operator MTN. Nigeria-based **iRokoTV** started Ghanaian operations in November 2017; priced at only GHS25/year.
- GDP per capita was \$1,608 in 2017 – or around the regional average. The IMF forecasts average GDP growth for the next five years; down from good growth in the last edition.
- The population was 28.28 million at end-2017, with average growth forecast by the IMF. Accra has a population of 2.36 million, with 2.84 million in Kumasi.
- Nana Akufo-Addo won the presidential election in December 2016; beating incumbent John Mahama.



Ghana pay TV forecasts

	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023
Households (000)														
TV households (000)														
Digital cable subs (000)														
Analog cable subs (000)														
Pay IPTV subscribers (000)														
Pay digital satellite TV subs (000)														
Free-to-air satellite TV hh (000)														
Analog terrestrial hha (000)														
Primary FTA DTT hha (000)														
Primary Pay DTT hha (000)														
Digital homes (000)														
Analog homes (000)														
Pay TV subscribers (000)														
Total DTT homes (000)														
Digital cable subs/TV HH														
Analog cable subs/TV HH														
Pay IPTV subs/TV HH														
Pay satellite TV/TV HH														
Free-to-air satellite TV/TV HH														
Analog terrestrial/TVHH														
Primary FTA DTT/TV HH														
Primary pay DTT/TV HH														
TVHHHH														
Digital/TV HH														
Analog/TV HH														
Pay TV Subs/TV HH														
Total DTT/TVHH														
Standalone dig cable subs (000)														
Dual-play dig cable subs (000)														
Triple-play dig cable subs (000)														
Stand-alone pay IPTV subs (000)														
Dual-play pay IPTV subs (000)														
Triple-play pay IPTV subs (000)														



Ghana pay TV forecasts

	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023
Revenues (US\$ million)														
Stand-alone digital cable revs														
Dual-play digital cable TV revs														
Triple-play digital cable TV revenues														
Digital cable TV subs revs														
Dig cable TV on-demand revs														
Digital cable TV revenues														
Analog cable TV subs revs														
Cable TV revenues														
Stand-alone IPTV revenues														
Dual-play IPTV revenues														
Triple-play IPTV revenues														
IPTV subscription revenues														
IPTV on-demand revenues														
IPTV revenues														
Satellite TV subscription revs														
Satellite TV on-demand revs														
Satellite TV revenues														
DTT subscription revs														
DTT on-demand revenues														
DTT revenues														
Subscription revenues														
On-demand revenues														
Total revenues														
Average Revenue Per User (ARPU - US\$)														
Stand-alone digital cable subs														
Dual-play dig cable TV subs														
Triple-play dig cable TV subs														
Ave dig cable (subs & VOD)														
Analog cable TV subs														
Stand-alone IPTV subs														
Dual-play IPTV subs														
Triple-play IPTV subs														
Average IPTV (subs and VOD)														
Pay satellite TV (subs)														
Pay satellite TV (subs & PPV)														
Pay DTT (subs)														
Pay DTT (subs and PPV)														
Average monthly ARPU														

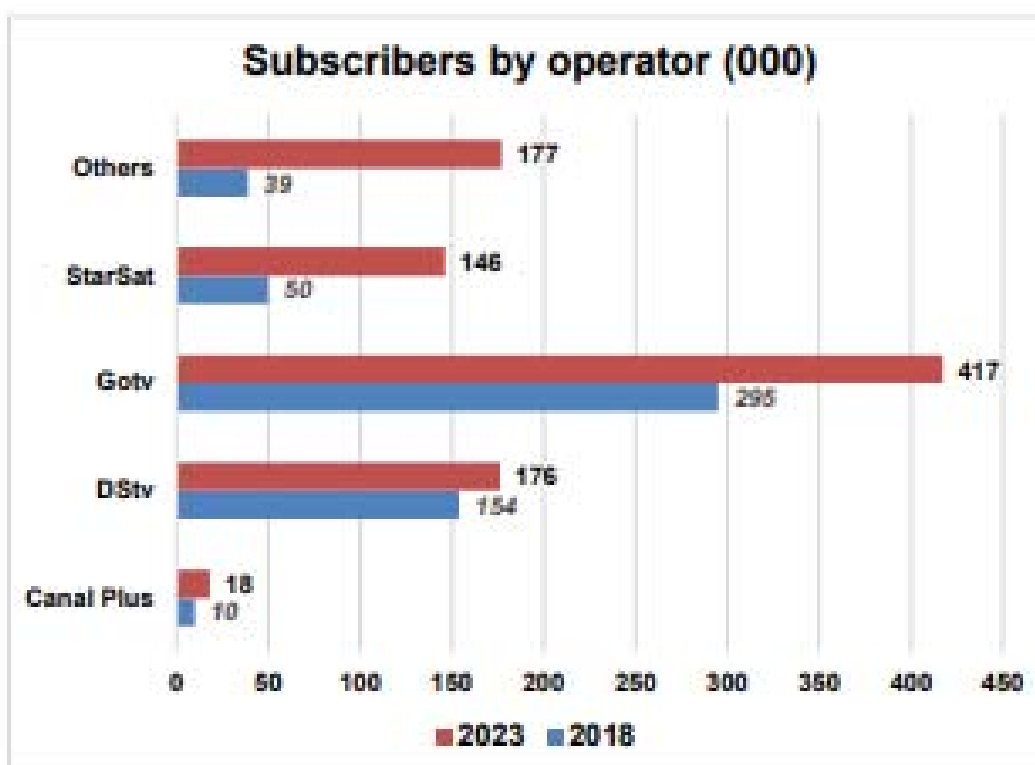
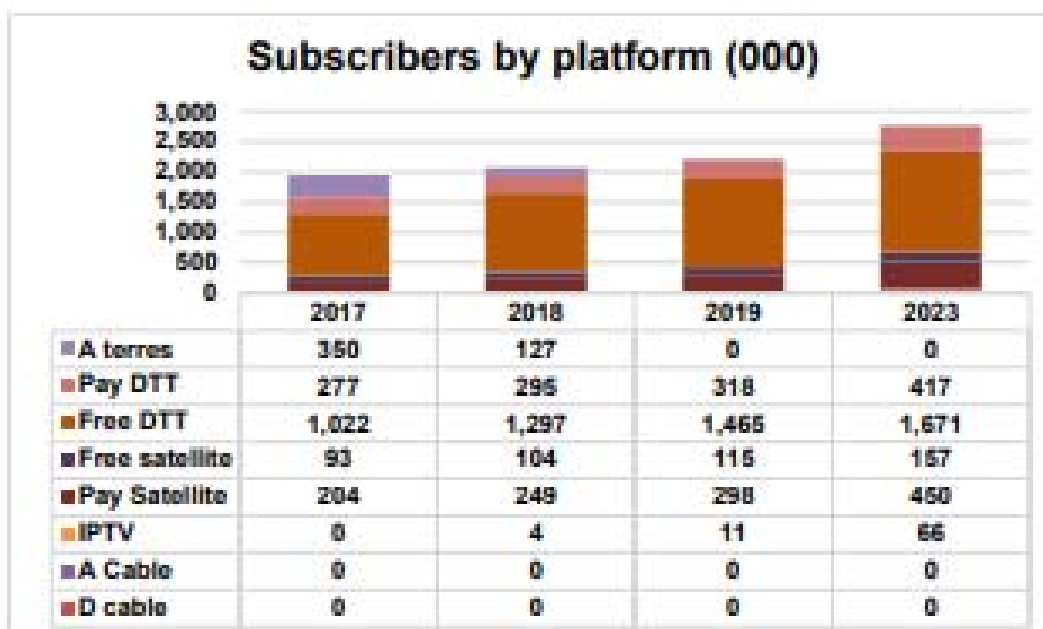


Ghana pay TV forecasts

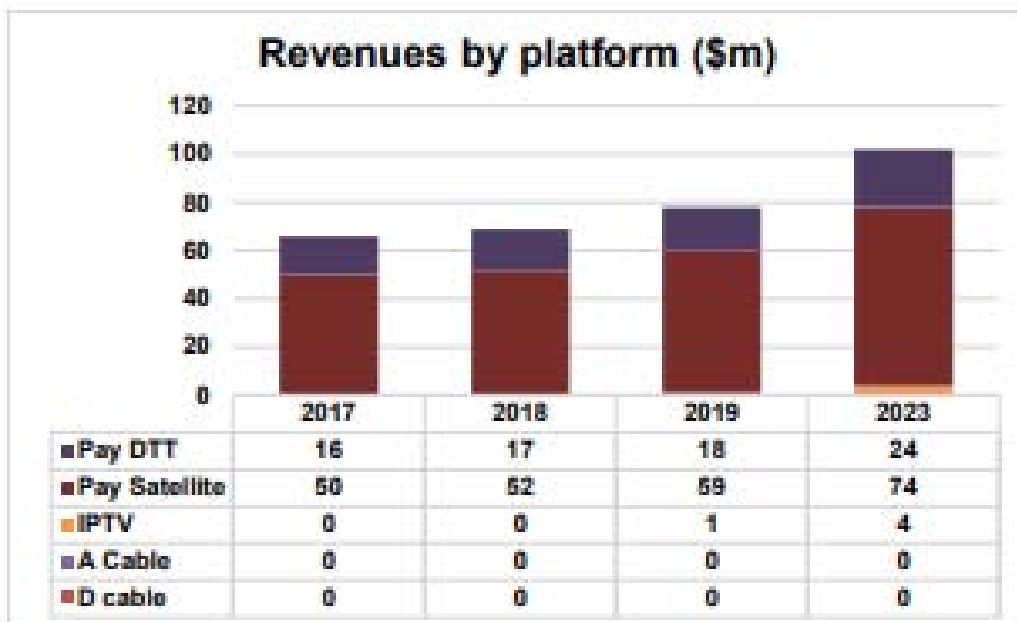
	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023
Pay TV subscribers by operator (000)														
Canal Plus (satellite)														
DStv (satellite)														
Gotv (DTT)														
StarSat (satellite)														
Others														
Share of pay TV subs by operator %														
Canal Plus (satellite)														
DStv (satellite)														
Gotv (DTT)														
StarSat (satellite)														
Others														
Subscription & VOD revenues (US\$ million)														
Canal Plus (satellite)														
DStv (satellite)														
Gotv (DTT)														
StarSat (satellite)														
Others														
Share of pay TV revenues by operator %														
Canal Plus (satellite)														
DStv (satellite)														
Gotv (DTT)														
StarSat (satellite)														
Others														
Average Revenue Per User (ARPU - US\$)														
Canal Plus (satellite)														
DStv (satellite)														
Gotv (DTT)														
StarSat (satellite)														
Source: digital TV research Ltd.														



Ghana pay TV subscriber prospects



Ghana pay TV revenue prospects



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