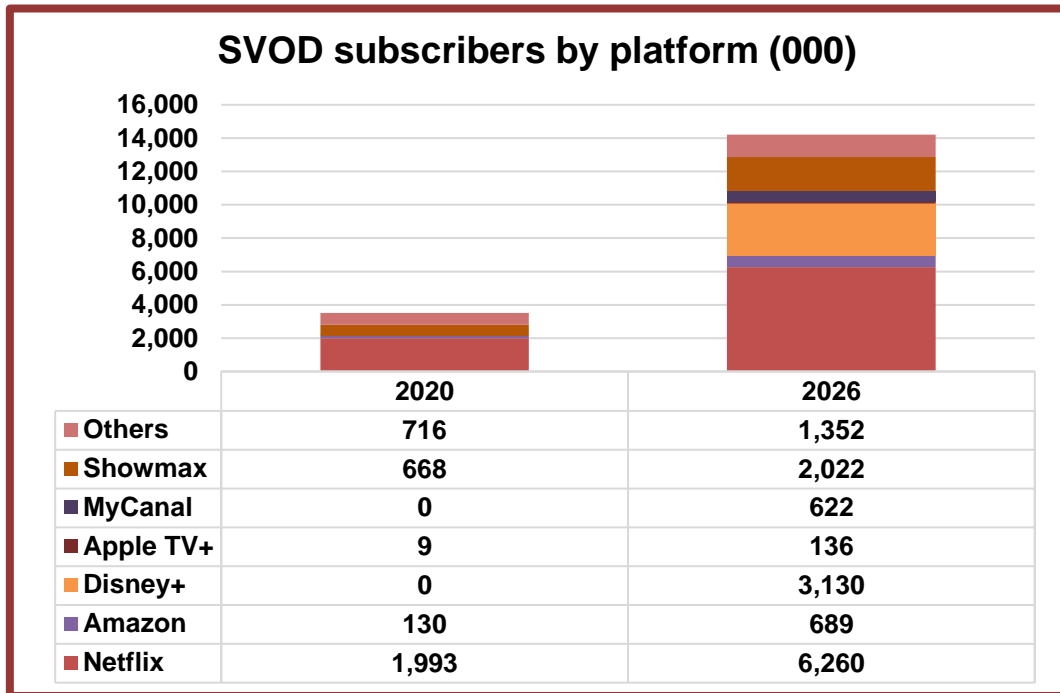


# African OTT to generate \$1.7 billion

African OTT movie and TV episode revenues will reach \$1,725 million by 2026 – up from \$392 million in 2020. South Africa will contribute a third of the region’s revenues by 2026, with Nigeria bringing in a further fifth.

SVOD is the main revenue driver by a long way. SVOD revenues will reach \$1,480 million by 2026; up from \$299 million in 2020.



*Source: Digital TV Research*

Netflix accounted for 57% of the region’s SVOD subscribers by end-2020. Its share will fall to 44% by 2026 (6.26 million subscribers – but triple from 1.99 million in 2020). Disney is not expected to start in the region until 2022, although it will have 3.13 million paying subscribers by 2026.

Simon Murray, Principal Analyst at Digital TV Research, said: “Regional players Showmax and MyCanal have upped their game in face of this added competition. Both of these platforms have sister pay TV companies. However, the SVOD platforms are emerging in their own right.”

## **Africa OTT TV & Video Forecasts**

### **Table of Contents**

Published in January 2021, this 235-page report covers movie and TV episode developments. It comes in three parts:

- Insight: Detailed country-by-country analysis in an 81-page PDF document.
- Outlook: Forecasts for 35 countries in a 74-page PowerPoint document full of charts, graphs and bullet points;
- An 80-page Excel workbook covering each year from 2010 to 2026 for 35 countries by household penetration, by SVOD subscribers and by OTT revenues for movies and TV episodes. As well as summary tables by country and by platform;

**For more information, [please click here](#) or contact [lydia@digitaltvresearch.com](mailto:lydia@digitaltvresearch.com)**



### Forecasts for the following 35 countries:

Country	SVOD ops	SVOD Platforms
Angola	3	Netflix; Amazon; Disney+
Benin	4	Netflix; Amazon; Disney+; MyCanal
Botswana	4	Netflix; Amazon; Disney+; Showmax
Burkina Faso	4	Netflix; Amazon; Disney+; MyCanal
Burundi	5	Netflix; Amazon; Disney+; MyCanal; Showmax
Cameroon	5	Netflix; Amazon; Disney+; MyCanal; Showmax
CAR	5	Netflix; Amazon; Disney+; Showmax; MyCanal
Chad	5	Netflix; Amazon; Disney+; Showmax; MyCanal
DR Congo	5	Netflix; Amazon; Disney+; MyCanal; Showmax
Rep Congo	6	Netflix; Amazon; Disney+; Apple TV+; MyCanal; Showmax
Cote d'Ivoire	5	Netflix; Amazon; Disney+; MyCanal; Showmax
Eq. Guinea	5	Netflix; Amazon; Disney+; Showmax; MyCanal
Ethiopia	3	Netflix; Amazon; Disney+; Showmax
Gabon	5	Netflix; Amazon; Disney+; Showmax; MyCanal
Gambia	6	Netflix; Amazon; Disney+; Apple TV+; Showmax; MyCanal
Ghana	5	Netflix; Amazon; Disney+; Apple TV+; Showmax
Guinea	5	Netflix; Amazon; Disney+; MyCanal; Showmax
Kenya	4	Netflix; Amazon; Disney+; Showmax
Liberia	4	Netflix; Amazon; Showmax; Disney+
Madagascar	5	Netflix; Amazon; Disney+; MyCanal; Showmax
Malawi	4	Netflix; Amazon; Disney+; Showmax
Mali	4	Netflix; Amazon; Disney+; MyCanal
Mozambique	4	Netflix; Amazon; Disney+; Showmax
Namibia	5	Netflix; Amazon; Disney+; Apple TV+; Showmax
Niger	5	Netflix; Amazon; Disney+; Apple TV+; MyCanal
Nigeria	4	Netflix; Amazon; Disney+; Showmax
Rwanda	5	Netflix; Amazon; Disney+; MyCanal; Showmax
Senegal	5	Netflix; Amazon; Disney+; MyCanal; Showmax
Sierra Leone	4	Netflix; Amazon; Disney+; MyCanal
South Africa	5	Netflix; Amazon; Disney+; Apple TV+; Showmax;
Tanzania	4	Netflix; Amazon; Disney+; Showmax
Togo	4	Netflix; Amazon; Disney+; MyCanal
Uganda	5	Netflix; Amazon; Disney+; Apple TV+; Showmax
Zambia	4	Netflix; Amazon; Disney+; Showmax
Zimbabwe	4	Netflix; Amazon; Disney+; Showmax



## SAMPLE: Ghana OTT TV & video insight

- OTT TV & video revenues are forecast to reach \$42 million by 2026, up from \$6 million in 2020. SVOD will contribute \$39 million to the total in 2026. There will be 378,000 SVOD subscriptions by 2026, up from 56,000 at end-2020.

Main assumptions behind the forecasts	
•	Mobile data subscriber count is high. Fixed broadband is low.
•	No cable networks are expected to launch in the medium term, although we expect IPTV to start in 2019.
•	Netflix will remain the SVOD market leader
•	Showmax started in Ghana in mid-2020.
Source: Digital TV Research	

- **Netflix** launched in January 2016. We estimate 48,000 Netflix subs by end-2020, rising to 168,000 by 2026. Growth will be restricted by low credit card ownership, relatively high prices and low broadband penetration. The first original local production, *The Burial of Kojo*, aired in 2020.
- **Amazon Prime Video** started operations in Ghana in November 2016 as part of its global rollout. Subscriptions are cheaper than Netflix at \$5.99/month, but Amazon offers less original content. We forecast 18,000 subscribers by 2026.
- **Apple TV+** started in November 2019, with 11,000 subscribers forecast by 2026. We expect that **Disney+** will start in 2022, with 84,000 subs forecast by 2026. However, **HBO Max** is not expected to start in Africa due to HBO's deal with Showmax and MultiChoice.
- **Showmax** did not launch in Ghana as part of its May 2016 expansion. Showmax expanded its offer in mid-2020, extending to some new countries including Ghana and Nigeria. An innovation was providing pared down mobile services for the first time.

Showmax pricing monthly plans (GHS)		
	Normal	Mobile
Showmax	45.99	22.99
Showmax Pro	119.99	59.99

- This also meant the addition of Showmax Pro, whose main attraction is the addition of live sports. DStv Premium subscribers access Showmax for free, whereas Compact and Compact Plus subscribers receive a 50% discount. Subscribers to DStv's top Explora settop box can also access Netflix and Amazon Prime Video.
- Nigeria and Kenya were the first Showmax Pro countries in July 2020, rapidly followed by South Africa, Uganda and Ghana. All of these countries have local currency pricing.

- Pay TV operator **StarTimes** began offering 150 channels via a mobile app in December 2018.
- SVOD platform **Zip TV**, owned by Broadband Home Ghana, has a distribution deal with mobile operator MTN. Zip TV (GHS50-250/month) provides up to 40 linear channels and on-demand titles.

<b>Main operators by subscribers (000)</b>				
<b>Operator</b>	<b>Pay TV subs</b>	<b>Fixed bb subs</b>	<b>Mobile subs</b>	<b>SVOD platforms</b>
AirtelTigo	-	-	5,000	
DStv	173	-	-	Netflix; Amazon PV; Showmax
Globacom	-	-	800	
GOtv	399	-	-	
MTN	-	-	23,380	Zip TV
StarSat	103	-	-	
Vodafone	-	55	8,590	2C TV
<i>Source: Digital TV Research</i>				

- The ITU estimated 58,808 **fixed broadband subscribers** by end-2018.
- Mobile operators **Tigo**, owned by Millicom, and **Airtel** merged operations in March 2017. The merged operation has 5 million subscribers. The government bought the operator in October 2020 with the view to sell it later.
- Mobile operator **MTN** (23.38 million subscribers by September 2020 – with the regulator accusing it of market dominance) began its own VOD platform via MTN Play in February 2017. DStv mobile is also available.
- Rival mobile operator **Vodafone** (8.59 million mobile subscribers and 55,000 fixed by September 2020) already distributes iRoko to its subscribers. Vodafone launched its fiber optic network in February 2017.
- Mobile competitor **Globacom** (Glo Mobile) has 800,000 subscribers.

## Ghana OTT TV & video forecasts

	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026
Population (000)																	
Total households (000)																	
TV households (000)																	
Fixed broadband households (000)																	
Smartphone users (000)																	
Tablet users (000)																	
TV HH/Total HH																	
Fixed broadband HH/Total HH																	
Smartphone users/Population																	
Tablet users/Population																	
OTT TV & video fixed broadband households (000)																	
OTT TV & video HH/Fixed broadband HH																	
OTT TV & video HH/TV HH																	
OTT TV & video Smartphone users (000)																	
OTT TV & video HH/Smartphone users																	
<b>Gross OTT TV &amp; video total (000)</b>																	
<b>Gross SVOD subscriptions (000)</b>																	
<i>SVOD subs/TVHH</i>																	
<i>SVOD subs/Fixed broadband HH</i>																	
<i>SVOD subs/Smartphone users</i>																	
<b>Net SVOD homes (000)</b>																	
<i>SVOD homes/TVHH</i>																	
<i>SVOD homes/Fixed broadband HH</i>																	
<i>SVOD subscriptions/SVOD homes</i>																	
TV rental transactions (000)																	
Movie rental transactions (000)																	
<i>Total rental transactions (000)</i>																	
TV download-to-own transactions (000)																	
Movie download-to-own transactions (000)																	
<i>Total download-to-own transactions (000)</i>																	
Online display advertising total (US\$ mil.)																	



## Ghana OTT TV & video forecasts

	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026
AVOD (US\$ mil.)																	
Online TV rental revenues (US\$ mil.)																	
Online movie rental revenues (US\$ mil.)																	
<i>Online rental revenues (US\$ mil.)</i>																	
Download-to-own TV revenues (US\$ mil.)																	
Download-to-own movie revenues (US\$ mil.)																	
<i>Download-to-own video revenues (US\$ mil.)</i>																	
SVOD revenues (US\$ mil.)																	
<b>Total OTT TV &amp; video revenues (US\$ mil.)</b>																	
<b>SVOD subscribers by operator (000)</b>																	
Netflix																	
Amazon																	
Disney+																	
Apple TV+																	
Showmax																	
Others																	
<b>Share of SVOD subscribers by operator (%)</b>																	
Netflix																	
Amazon																	
Disney+																	
Apple TV+																	
Showmax																	
Others																	
<b>SVOD revenues by operator (US\$ mil.)</b>																	
Netflix																	
Amazon																	
Disney+																	
Apple TV+																	
Showmax																	
Others																	
<b>Share of SVOD revenues by operator (%)</b>																	
Netflix																	
Amazon																	
Disney+																	
Apple TV+																	
Showmax																	
Others																	



## Ghana OTT TV & video forecasts

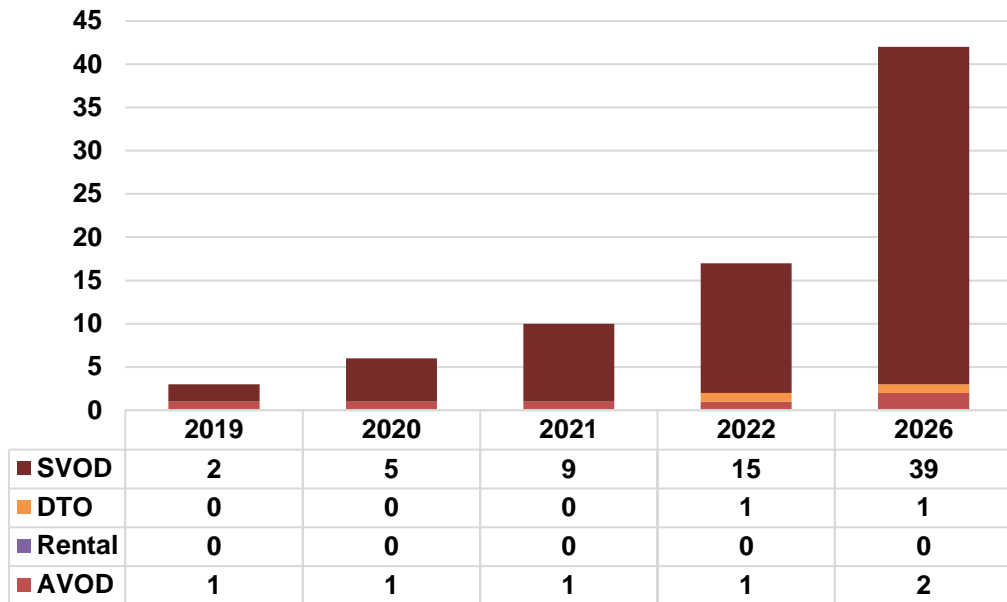
	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026
<b>SVOD ARPU by operator (\$)</b>																	
Netflix																	
Amazon																	
Disney+																	
Apple TV+																	
Showmax																	
<b>AVOD revenues by platform (\$ million)</b>																	
YouTube																	
Facebook/Instagram																	
Other social media sites																	
FTA broadcasters																	
Pay TV broadcasters																	
AVOD platforms																	
Other																	



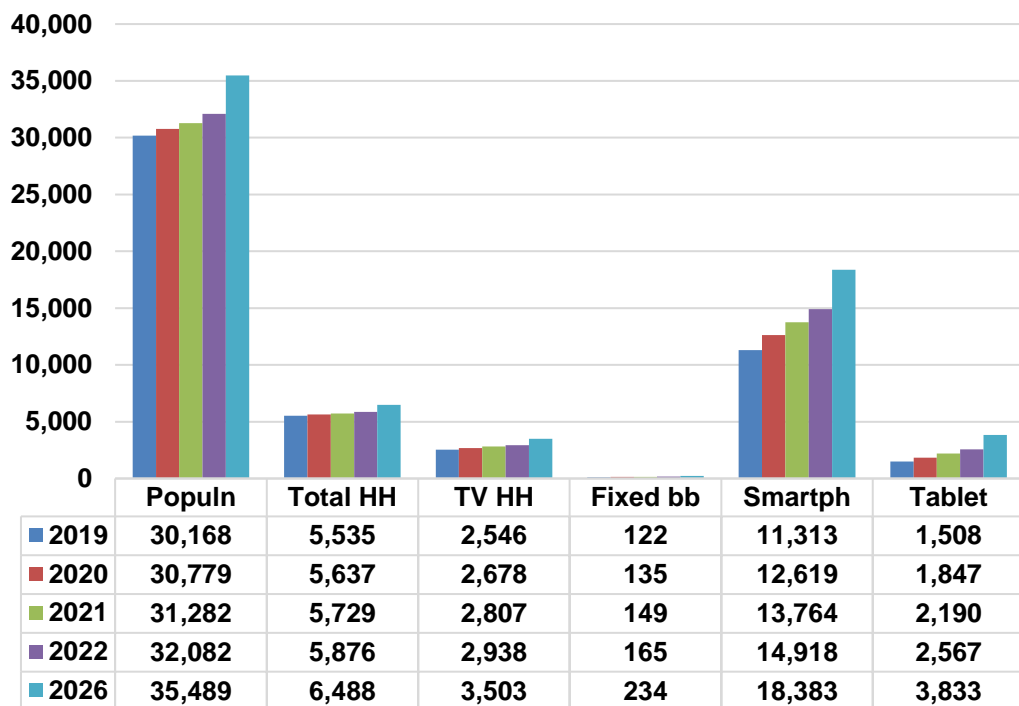


# Ghana OTT outlook

## Revenues by source (\$m)

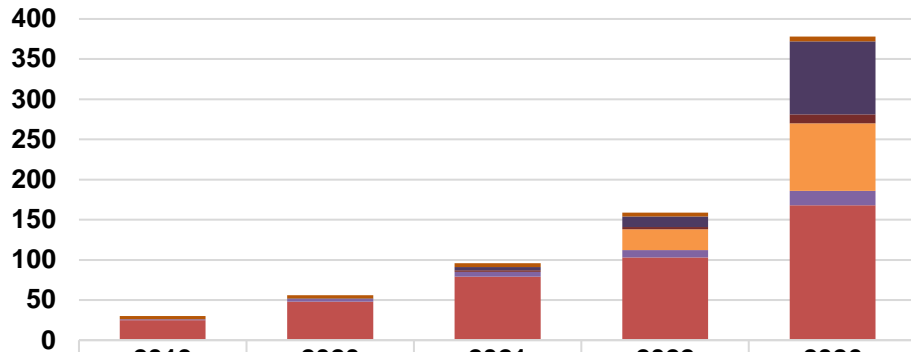


## Device penetration (000)



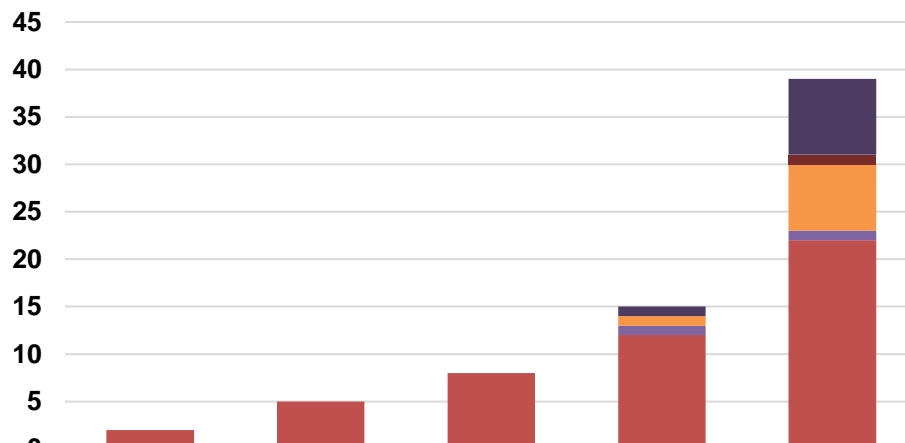
# Ghana SVOD outlook

## Subscribers by operator (000)



	2019	2020	2021	2022	2026
Others	4	4	5	5	6
Showmax	0	1	4	13	91
Apple TV+	0	0	2	3	11
Disney+	0	0	0	26	84
Amazon	1	3	6	9	18
Netflix	25	48	79	103	168

## Revenues by operator (\$m)



	2019	2020	2021	2022	2026
Others	0	0	0	0	0
Showmax	0	0	0	1	8
Apple TV+	0	0	0	0	1
Disney+	0	0	0	1	7
Amazon	0	0	0	1	1
Netflix	2	5	8	12	22



## Digital TV Research publication schedule for 2020

	<b>Title</b>	<b>Publication</b>	<b>Price</b>
1	<b>Africa Pay TV Forecasts</b>	<i>January</i>	£1200/€1320/\$1440
2	<b>Africa OTT TV and Video Forecasts</b>	<i>January</i>	£1200/€1320/\$1440
3	<b>Middle East &amp; North Africa Pay TV Forecasts</b>	<i>January</i>	£1200/€1320/\$1440
4	<a href="#">Middle East &amp; North Africa OTT TV and Video Forecasts</a>	<i>February</i>	£1200/€1320/\$1440
5	<a href="#">SVOD Platform Forecasts</a>	<i>February</i>	£800/€880/\$960
6	<a href="#">North America Pay TV Forecasts</a>	<i>February</i>	£600/€660/\$720
7	<a href="#">North America OTT TV and Video Forecasts</a>	<i>March</i>	£600/€660/\$720
8	<a href="#">Asia Pacific Pay TV Forecasts</a>	<i>March</i>	£1200/€1320/\$1440
9	<a href="#">Asia Pacific OTT TV and Video Forecasts</a>	<i>March</i>	£1200/€1320/\$1440
10	<a href="#">Latin America Pay TV Forecasts</a>	<i>March</i>	£1200/€1320/\$1440
11	<a href="#">Latin America OTT TV and Video Forecasts</a>	<i>March</i>	£1200/€1320/\$1440
12	<a href="#">Eastern Europe Pay TV Forecasts</a>	<i>April</i>	£1200/€1320/\$1440
13	<a href="#">Eastern Europe OTT TV and Video Forecasts</a>	<i>April</i>	£1200/€1320/\$1440
14	<a href="#">Western Europe Pay TV Forecasts</a>	<i>April</i>	£1200/€1320/\$1440
15	<a href="#">Western Europe OTT TV and Video Forecasts</a>	<i>April</i>	£1200/€1320/\$1440
16	<a href="#">Global OTT TV &amp; Video Forecasts</a>	<i>May</i>	£1800/€1980/\$2160
17	<a href="#">Global SVOD Forecasts</a>	<i>May</i>	£1600/€1760/\$1920
18	<a href="#">Global Pay TV Subscriber Forecasts</a>	<i>May</i>	£1600/€1760/\$1920
19	<a href="#">Global Pay TV Revenue Forecasts</a>	<i>May</i>	£1600/€1760/\$1920
20	<a href="#">Global Pay TV Operator Forecasts</a>	<i>June</i>	£1600/€1760/\$1920
21	<a href="#">Global AVOD Forecasts</a>	<i>June</i>	£1600/€1760/\$1920
22	<a href="#">Smartphone SVOD Forecasts</a>	<i>June</i>	£1000/€1200/\$1300
23	<a href="#">SVOD Forecasts by Vendor</a>	<i>July</i>	£1200/€1320/\$1440
24	<a href="#">OTT TV and Video Databook</a>	<i>August</i>	£800/€880/\$960
25	<a href="#">SVOD Databook</a>	<i>August</i>	£800/€880/\$960
26	<a href="#">Pay TV Databook</a>	<i>August</i>	£800/€880/\$960
27	<a href="#">Eastern Europe SVOD Forecasts</a>	<i>September</i>	£1000/€1200/\$1300
28	<a href="#">Western Europe SVOD Forecasts</a>	<i>September</i>	£1000/€1200/\$1300
29	<a href="#">North America SVOD Forecasts</a>	<i>September</i>	£600/€660/\$720
30	<a href="#">Latin America SVOD Forecasts</a>	<i>September</i>	£1000/€1200/\$1300
31	<a href="#">Asia Pacific SVOD Forecasts</a>	<i>September</i>	£1000/€1200/\$1300
32	<a href="#">Middle East &amp; North Africa SVOD Forecasts</a>	<i>September</i>	£1000/€1200/\$1300
33	<a href="#">Africa SVOD Forecasts</a>	<i>October</i>	£1000/€1200/\$1300
34	<a href="#">SVOD Forecasts Update</a>	<i>October</i>	£1600/€1760/\$1920
35	<a href="#">Pay TV Forecasts Update</a>	<i>October</i>	£1200/€1320/\$1440
36	<a href="#">SVOD Platform Forecasts</a>	<i>November</i>	£800/€880/\$960

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