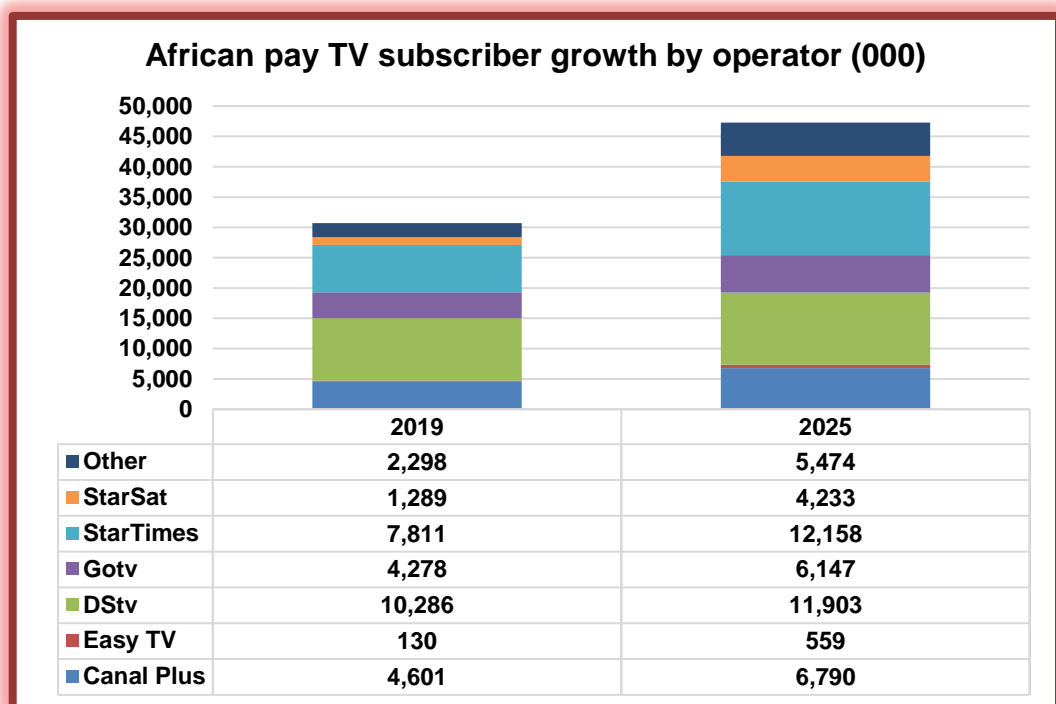


# Africa to gain 17 million pay TV subs

Africa will have 47.26 million pay TV subscribers by 2025, up from 30.70 million at end-2019. Nigeria will contribute 10 million subscribers by 2025 – having overtaken South Africa in 2020.

African subscriber numbers will climb by 54% between 2019 and 2025, but pay TV revenues will rise by only 31% - indicating that subscribers will pay less. Pay TV revenues will reach \$7.20 billion by 2025, up by \$1.72 billion on 2019.

Simon Murray, Principal Analyst at Digital TV Research, said: “Despite the strong subscriber growth, competition is intense. Prices and ARPUs are falling as rivals fight to gain subscribers.”



*Source: Digital TV Research*

Three groups accounted for 93% of Sub-Saharan Africa’s pay TV subscribers in 2019 – although this proportion will fall to 88% by 2025. Each of the three main groups provides a satellite TV platform and a pay DTT platform.

Multichoice had 14.56 million subs across satellite TV platform DStv and DTT platform GOtv by end-2019. This total will grow to 18.05 million by 2025, with a marked slowdown in satellite TV growth.

France’s Vivendi had 4.73 million subs to its Canal Plus satellite TV platform and Easy TV DTT platforms by end-2019. Its total will climb to 7.35 million by 2025. StarTimes/StarSat will enjoy the most impressive growth: from 9.10 million subs at end-2019 to 16.39 million by 2025.

# [Africa Pay TV Forecasts](#)

Published in January 2020, this 282-page PDF, PowerPoint and excel report comes in three parts:

- Outlook: Forecasts for 35 countries in a 76-page PowerPoint document full of charts, graphs and bullet points;
- Excel workbook covering each year from 2010 to 2025 for 35 countries by household penetration, by pay TV subscribers, by pay TV revenues and by major operator. As well as summary tables by country and by platform;
- Insight: Detailed country-by-country analysis in an 88-page PDF document.

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

## Forecasts for the following 35 countries and 128 platforms:

Country	No of ops	Platforms
Angola	6	ZAP TV, DStv, Canal Plus, StarSat, Angola Telecom, TV Cabo
Benin	4	DStv; Canal Plus; 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	4	Canal Plus, DStv, StarTimes; StarSat
Gambia	2	Canal Plus, DStv
Ghana	4	Canal Plus, DStv, GOtv; StarSat
Guinea	4	Canal Plus, DStv, StarTimes; StarSat
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; StarSat
Niger	3	DStv; Canal Plus; StarSat
Nigeria	5	GOtv, DStv, StarTimes, StarSat; Canal Plus
Rwanda	6	Zuku, DStv, StarTimes, StarSat; GOtv, Canal Plus
Senegal	4	Canal Plus, DStv, Orange; StarSat
Sierra Leone	4	DStv; Canal Plus; StarSat; StarTimes
South Africa	3	DStv, StarSat, GOtv
Tanzania	4	Zuku, DStv, StarTimes, StarSat
Togo	3	Canal Plus, DStv, StarSat
Uganda	5	Zuku, DStv, StarTimes, GOtv, StarSat
Zambia	5	Zuku, DStv, StarTimes, GOtv, StarSat
Zimbabwe	2	DStv, StarSat

## SAMPLE: Ghana pay TV insight

- About 46% (2.55 million) of homes in Ghana had a **TV set** at end-2019. This total will reach 3.35 million by 2025, or 53% of total households.

### Main assumptions behind the forecasts

- No cable networks are expected to launch in the medium term, although we expect IPTV to start in 2019.
- Analog switch-off is expected in 2022.

*Source: Digital TV Research*

- **Digital TV penetration** will reach 100% by 2022; up from 77% at end-2019. Pay DTT started in 2013. This will help to push **pay TV penetration** from 24.0% at end-2019 to 31.2% in 2025. Pay TV revenues will increase from \$66 million in 2019 to \$100 million in 2025.
- GOtv became the pay TV market leader in 2015, and will retain top slot. However, StarSat will quickly gain subs to its low-priced satellite TV platform (which will somewhat stifle growth for both GOtv and DStv).
- Multichoice's **DStv satellite TV platform** had 145,000 subscribers in Ghana by end-2019. This total is forecast to reach 205,000 by 2025 – low growth due to competition.
- 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.
- DStv's sister company **GOtv** launched in Accra in January 2013, using the DVB-T2 standard. We estimate that GOtv had 369,000 subscribers by end-2019, which will reach 526,000 by 2025.
- The government wanted 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 2022. 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. 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. In 2018, FTA broadcasters protested against the government's apparent decision to allow StarTimes to become involved in the DTT sector again.



- 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 197,000 subscribers by 2025. As well as exclusive Bundesliga and Europa League action, StarTimes won the 10-year rights to screen the local soccer league.
- Satellite TV operator **Canal Plus Afrique** has 11,000 subscribers in Ghana. Ghana's neighboring countries are Francophone.
- **MultiTV** serves homes with 20 FTA local channels via the SES satellite system. Launched in 2009, MultiTV claimed to have sold 3 million settop boxes in West Africa by mid-2017.
- Strong Technologies, trading as **MyTV**, also provides 55 FTA and pay TV channels.
- Broadband operator **First Digital** offers satellite TV and DTT platforms for GHS25/month with 12 channels.
- 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 10 million subscribers, of which 5.6 million are data users.
- Mobile operator **MTN** (19.18 million subscribers by September 2019) began its own VOD platform via MTN Play in February 2017. DStv mobile is also available.
- Rival mobile operator **Vodafone** (9.96 million mobile subscribers and 56,000 fixed by June 2019) already distributes iRoko to its subscribers. Vodafone launched its fiber optic network in February 2017. Mobile competitor **Globacom** (Glo Mobile) has 800,000 subscribers.
- The population was 30.17 million at end-2019. GDP per capita was \$2,223 in 2019. The IMF forecasts below average GDP growth for the next five years.

## Ghana pay TV forecasts

	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025
Households (000)																
TV households (000)																
Digital cable subs (000)																
Analog cable subs (000)																
Pay IPTV subscribers (000)																
Pay digital sat TV subs (000)																
Free-to-air sat TV homes (000)																
Analog terrestrial holds (000)																
Primary FTA DTT hholds (000)																
Primary Pay DTT hholds (000)																
Digital homes (000)																
Analog homes (000)																
Pay TV subscribers (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																
TVHH/HH																
Digital/TV HH																
Analog/TV HH																
Pay TV Subs/TV HH																
<i>Stand-alone dig cab subs (000)</i>																
<i>Dual-play dig cable subs (000)</i>																
<i>Triple-play dig cab subs (000)</i>																
<i>Stand-alone IPTV subs (000)</i>																
<i>Dual-play IPTV subs (000)</i>																
<i>Triple-play IPTV subs (000)</i>																



## Ghana pay TV forecasts

	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025
<b>Revenues (US\$ million)</b>																
<i>Stand-alone digital cable revs</i>																
<i>Dual-play digital cable TV revs</i>																
<i>Triple-play digl cable TV revs</i>																
<b>Digital cable TV subs revs</b>																
<b>Dig cab TV on-demand revs</b>																
<b>Digital cable TV revenues</b>																
<b>Analog cable TV subs revs</b>																
<b>Cable TV revenues</b>																
<i>Stand-alone IPTV revenues</i>																
<i>Dual-play IPTV revenues</i>																
<i>Triple-play IPTV revenues</i>																
<b>IPTV subscription revenues</b>																
<b>IPTV on-demand revenues</b>																
<b>IPTV revenues</b>																
<b>Satellite TV subscription revs</b>																
<b>Satellite TV on-demand revs</b>																
<b>Satellite TV revenues</b>																
<b>DTT subscription revs</b>																
<b>DTT on-demand revenues</b>																
<b>DTT revenues</b>																
<b>Subscription revenues</b>																
<b>On-demand revenues</b>																
<b>Total revenues</b>																
<b>Average Revenue Per User (ARPU - US\$)</b>																
<i>Stand-alone digital cable subs</i>																
<i>Dual-play dig cable TV subs</i>																
<i>Triple-play dig cable TV subs</i>																
<b>Average dig cab (subs &amp; VOD)</b>																
<b>Analog cable TV subs</b>																
<i>Stand-alone IPTV subs</i>																
<i>Dual-play IPTV subs</i>																
<i>Triple-play IPTV subs</i>																
<b>Average IPTV (subs and VOD)</b>																
<b>Pay satellite TV (subs)</b>																
<b>Pay sat TV (subs and PPV)</b>																
<b>Pay DTT (subs)</b>																
<b>Pay DTT (subs and PPV)</b>																
<b>Average monthly ARPU</b>																



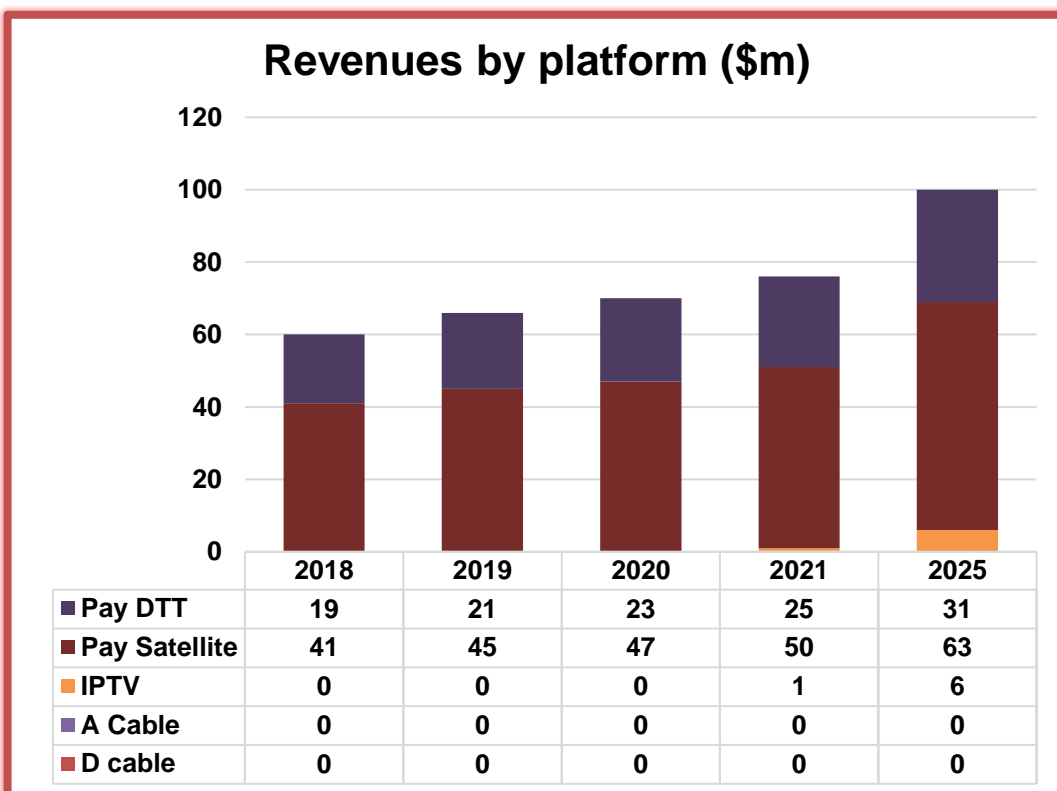
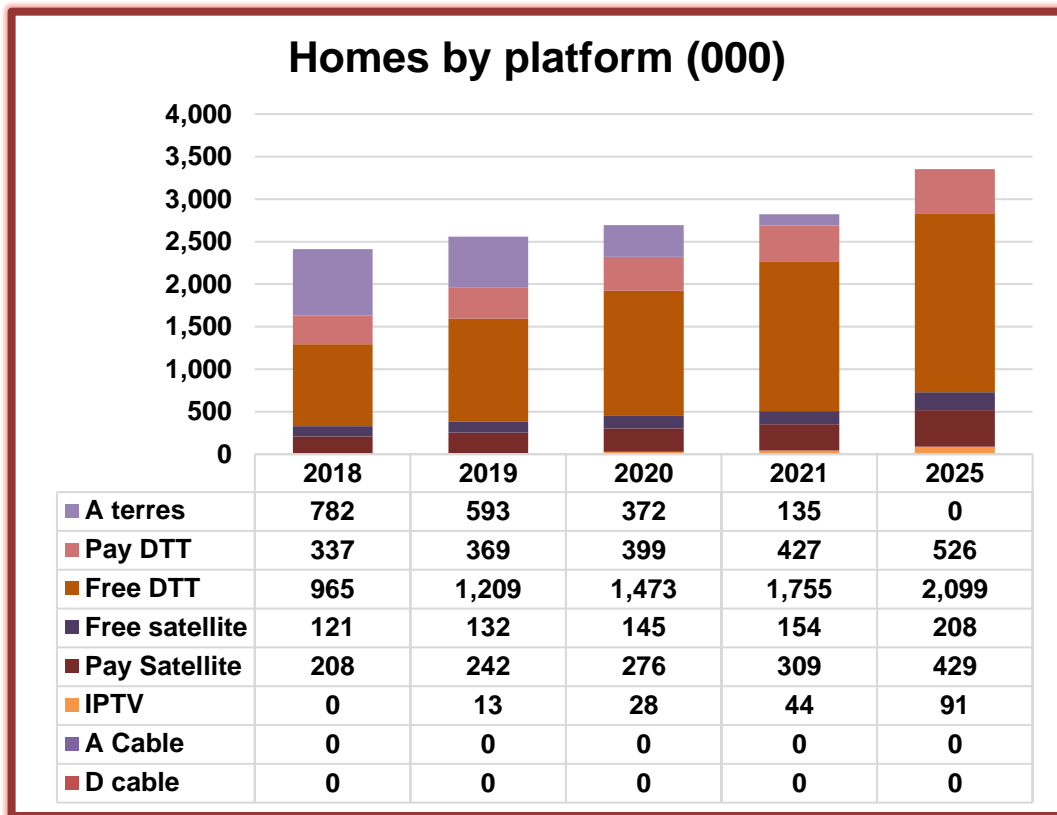
## Ghana pay TV forecasts

	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025
<b>Pay TV subscribers by operator (000)</b>																
Canal Plus (satellite)																
DStv (satellite)																
Gotv (DTT)																
StarSat (satellite)																
Others																
<b>Share of pay TV subs by operator %</b>																
Canal Plus (satellite)																
DStv (satellite)																
Gotv (DTT)																
StarSat (satellite)																
Others																
<b>Subscription &amp; VOD revenues (US\$ million)</b>																
Canal Plus (satellite)																
DStv (satellite)																
Gotv (DTT)																
StarSat (satellite)																
Others																
<b>Share of pay TV revenues by operator %</b>																
Canal Plus (satellite)																
DStv (satellite)																
Gotv (DTT)																
StarSat (satellite)																
Others																
<b>Average Revenue Per User (ARPU - US\$)</b>																
Canal Plus (satellite)																
DStv (satellite)																
Gotv (DTT)																
StarSat (satellite)																
Source: digital TV research Ltd.																

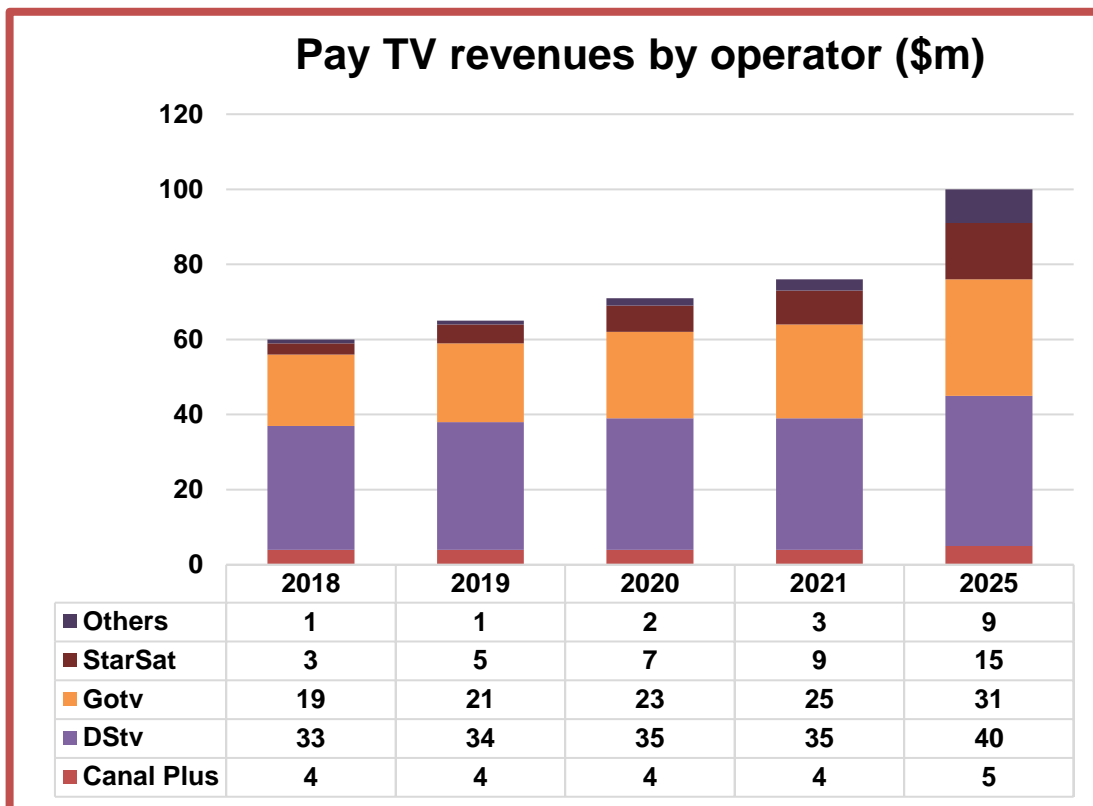
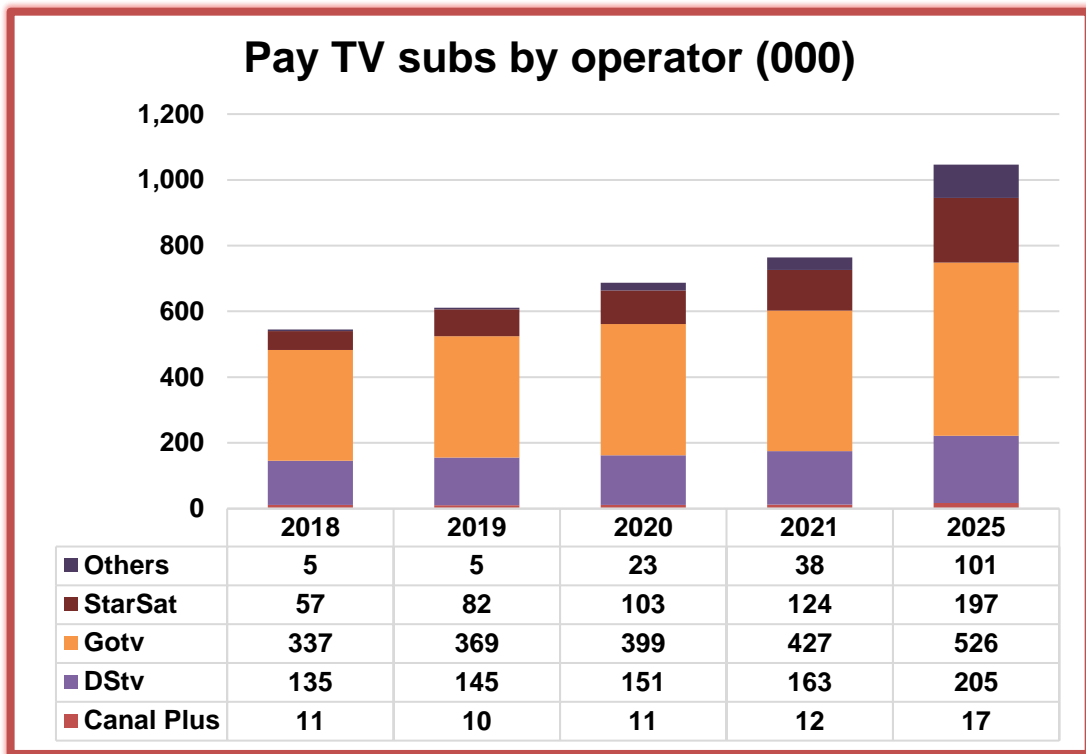




# Ghana pay TV outlook



# Ghana pay TV outlook



## **Digital TV Research publication schedule**

<b>Title</b>	<b>Publication</b>	<b>Price</b>
<b>2020</b>		
<a href="#"><u>Africa Pay TV Forecasts</u></a>	January	£1200/€1340/\$1440
<a href="#"><u>Africa OTT TV and Video Forecasts</u></a>	January	£1200/€1340/\$1440
<a href="#"><u>Middle East &amp; North Africa Pay TV Forecasts</u></a>	January	£1200/€1340/\$1440
<a href="#"><u>Middle East &amp; North Africa OTT TV and Video Forecasts</u></a>	January	£1200/€1340/\$1440
<b>2019</b>		
<a href="#"><u>SVOD Platform Forecasts</u></a>	November	£750/€900/\$975
<a href="#"><u>Pay TV Forecasts Update</u></a>	September	£1000/€1200/\$1300
<a href="#"><u>SVOD Forecasts Update</u></a>	September	£1000/€1200/\$1300
<a href="#"><u>OTT TV and Video Databook</u></a>	September	£750/€900/\$975
<a href="#"><u>SVOD Databook</u></a>	September	£750/€900/\$975
<a href="#"><u>Pay TV Databook</u></a>	September	£750/€900/\$975
<a href="#"><u>Global OTT TV &amp; Video Forecasts</u></a>	June	£1800/€2160/\$2340
<a href="#"><u>Global SVOD Forecasts</u></a>	June	£1500/€1800/\$1950
<a href="#"><u>Global Pay TV Subscriber Forecasts</u></a>	June	£1500/€1800/\$1950
<a href="#"><u>Global Pay TV Revenue Forecasts</u></a>	June	£1500/€1800/\$1950
<a href="#"><u>Global Pay TV Operator Forecasts</u></a>	June	£1500/€1800/\$1950
<a href="#"><u>Global AVOD Forecasts</u></a>	June	£750/€900/\$975
<a href="#"><u>Western Europe Pay TV Forecasts</u></a>	June	£1000/€1200/\$1300
<a href="#"><u>Western Europe OTT TV and Video Forecasts</u></a>	June	£1000/€1200/\$1300
<a href="#"><u>Eastern Europe Pay TV Forecasts</u></a>	May	£1000/€1200/\$1300
<a href="#"><u>Eastern Europe OTT TV and Video Forecasts</u></a>	May	£1000/€1200/\$1300
<a href="#"><u>North America Pay TV Forecasts</u></a>	April	£500/€600/\$650
<a href="#"><u>North America OTT TV and Video Forecasts</u></a>	April	£500/€600/\$650
<a href="#"><u>Latin America Pay TV Forecasts</u></a>	April	£1000/€1200/\$1300
<a href="#"><u>Latin America OTT TV and Video Forecasts</u></a>	April	£1000/€1200/\$1300
<a href="#"><u>Asia Pacific Pay TV Forecasts</u></a>	March	£1000/€1200/\$1300
<a href="#"><u>Asia Pacific OTT TV and Video Forecasts</u></a>	March	£1000/€1200/\$1300

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