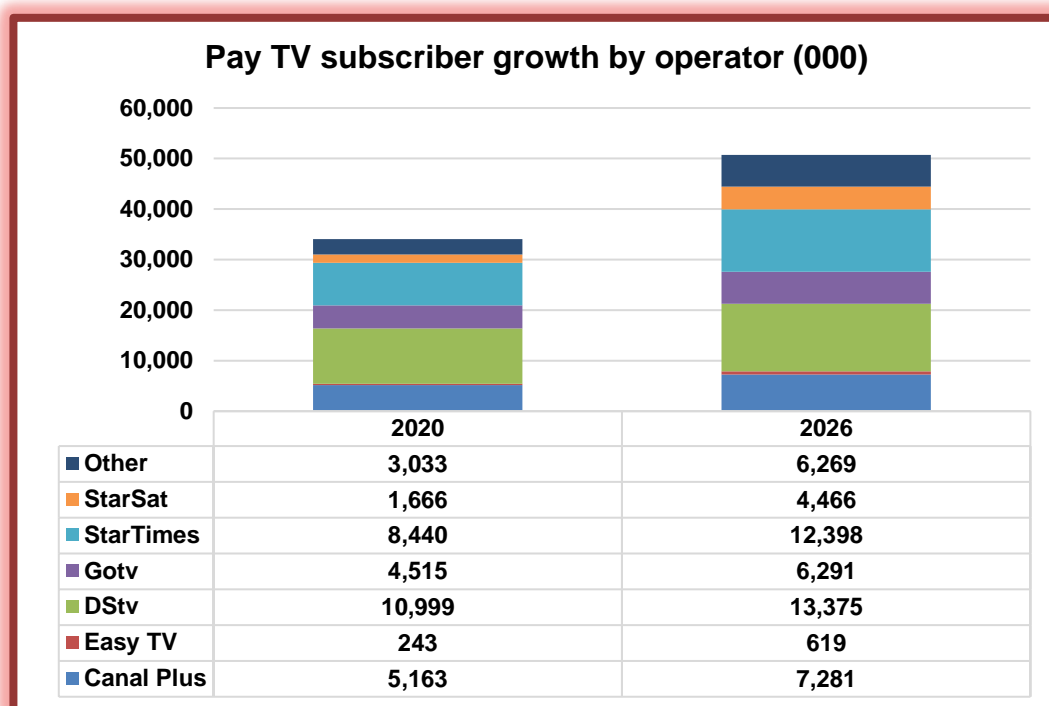


Africa to reach 51 million pay TV subs

Nearly 17 million pay TV subscribers will be added in Africa between 2020 and 2026 to take the total to 51 million. Nigeria will be close to 11 million, with South Africa bringing in another 9 million.



Source: Digital TV Research

Simon Murray, Principal Analyst at Digital TV Research, elaborated: “Multichoice had 15.51 million subs across satellite TV platform DStv and DTT platform GOtv by end-2020. This total will grow to 19.67 million by 2026, with a marked slowdown of satellite TV growth.”

China-based StarTimes/StarSat will enjoy the most impressive growth: from 10.11 million subs at end-2020 to 16.86 million by 2026. France’s Vivendi had 5.41 million subs to its Canal Plus satellite TV platform and Easy TV by end-2020, which will climb to 7.90 million by 2026.

[Africa Pay TV Forecasts](#)

Published in January 2021, this 276-page PDF, PowerPoint and excel report comes in three parts:

- Outlook: Forecasts for 35 countries in a 74-page PowerPoint document full of charts, graphs and bullet points;
- Excel workbook covering each year from 2010 to 2026 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 86-page PDF document.

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

Forecasts for the following 35 countries and 126 platforms:

Country	No of ops	Platforms
Angola	5	ZAP TV, DStv, 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	5	Canal Plus, DStv, StarTimes; StarSat; Easy TV
Kenya	6	Zuku cable, Zuku satellite, DStv, StarTimes, GOtv, StarSat
Liberia	2	DStv; StarSat
Madagascar	4	DStv; Canal Plus; StarSat; StarTimes
Malawi	4	Zuku, DStv, GOtv; StarSat
Mali	2	Canal Plus; StarSat
Mozambique	6	ZAP TV, DStv, 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 48% (2.68 million) of homes in Ghana had a **TV set** at end-2020. This total will reach 3.50 million by 2026, or 54% 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 2022.
- Analog switch-off is expected in 2023.

Source: Digital TV Research

- Digital TV penetration** will reach 100% by 2023; up from 81% at end-2020. Pay DTT started in 2013. This will help to push **pay TV penetration** from 26% at end-2020 to 31% in 2026. Pay TV revenues will increase from \$63 million in 2020 to \$97 million in 2026.

Main operators by subscribers (000)

Operator	Pay TV subs	Fixed bb subs	Mobile subs	SVOD platforms
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

Source: Digital TV Research

- 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 173,000 subscribers in Ghana by end-2020. This total is forecast to reach 236,000 by 2026 – 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 399,000 subscribers by end-2020, which will reach 554,000 by 2026.

- The government originally wanted to convert all homes to digital in 2018 (delayed from the original deadline of September 2017), with Accra completed by end-2016. Following several delays, we do not think that national conversion will happen until 2022. In September 2011, the NCA announced the adoption of the DVB-T2 standard. There are 28 FTA DTT channels.
- **StarTimes** launched a satellite TV platform in October 2016. We forecast 200,000 subscribers by 2026. 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 9,000 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 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 pay TV forecasts

	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026
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 homes (000)																	
Analog terrestrial households (000)																	
Primary FTA DTT households (000)																	
Primary Pay DTT households (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 digital cable subs (000)</i>																	
<i>Dual-play digital cable subs (000)</i>																	
<i>Triple-play digital cable subs (000)</i>																	
<i>Stand-alone pay IPTV subs (000)</i>																	
<i>Dual-play pay IPTV subs (000)</i>																	
<i>Triple-play pay IPTV subs (000)</i>																	



Ghana pay TV forecasts

	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026
Revenues (US\$ million)																	
<i>Stand-alone digital cable revs</i>																	
<i>Dual-play digital cable TV revenues</i>																	
<i>Triple-play digital cable TV revenues</i>																	
Digital cable TV subs revenues																	
Digital cable TV on-demand revs																	
Digital cable TV revenues																	
Analog cable TV subs revs																	
Cable TV revenues																	
<i>Stand-alone IPTV revenues</i>																	
<i>Dual-play IPTV revenues</i>																	
<i>Triple-play IPTV revenues</i>																	
IPTV subscription revenues																	
IPTV on-demand revenues																	
IPTV revenues																	
Satellite TV subscription revenues																	
Satellite TV on-demand revenues																	
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\$)																	
<i>Stand-alone digital cable subs</i>																	
<i>Dual-play digital cable TV subs</i>																	
<i>Triple-play digital cable TV subs</i>																	
Average digital cable (subs & VOD)																	
Analog cable TV subs																	
<i>Stand-alone IPTV subs</i>																	
<i>Dual-play IPTV subs</i>																	
<i>Triple-play IPTV subs</i>																	
Average IPTV (subs and VOD)																	
Pay satellite TV (subs)																	
Pay satellite TV (subs and PPV)																	
Pay DTT (subs)																	
Pay DTT (subs and PPV)																	
Average monthly ARPU																	



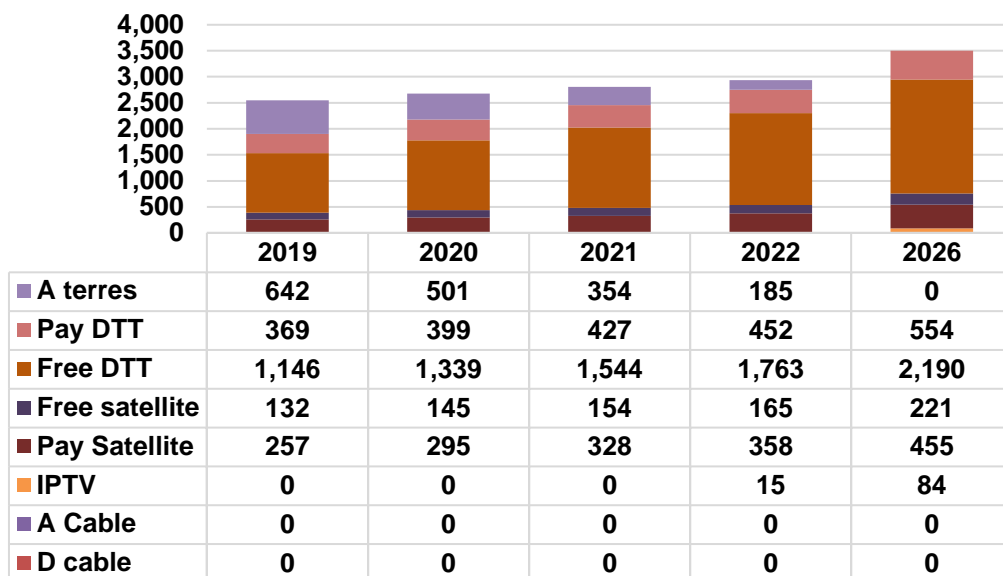
Ghana pay TV forecasts

	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026
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)																	

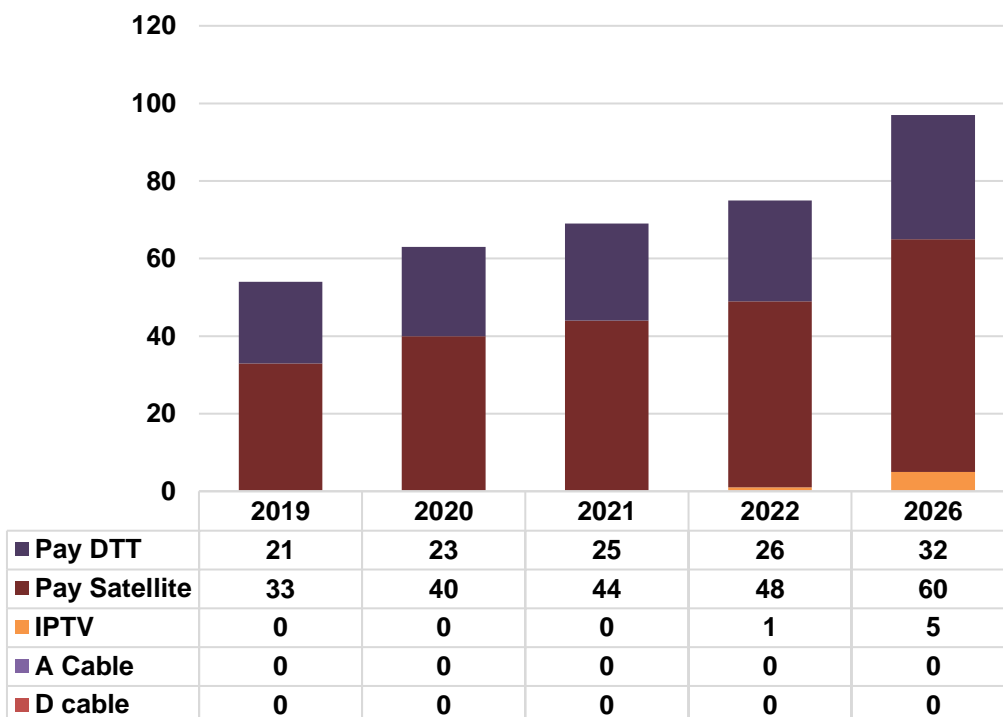


Ghana pay TV outlook

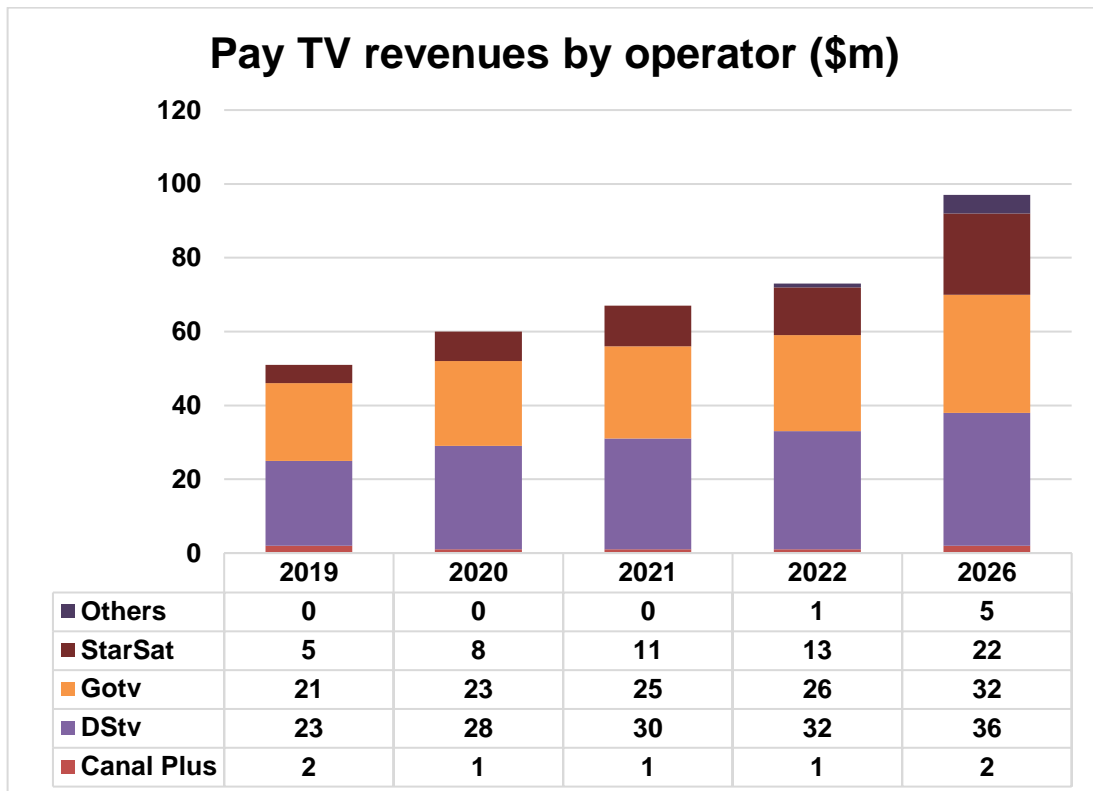
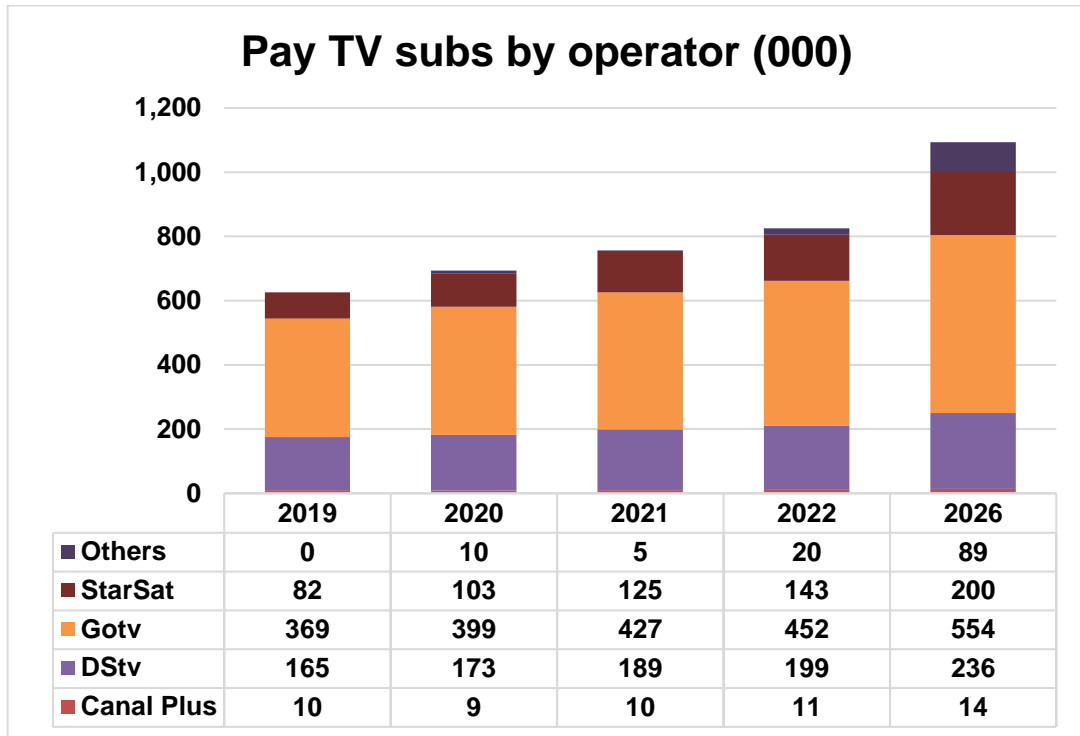
Homes by platform (000)



Revenues by platform (\$m)



Ghana pay TV outlook



Digital TV Research publication schedule for 2020

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

[PLEASE CLICK HERE FOR MORE INFORMATION ON OUR LATEST PUBLICATIONS](#)

[PLEASE CLICK HERE TO ACCESS OUR CORPORATE BROCHURE](#)

Discounts are available for multiple report purchases and annual subscriptions.

Please contact lydia@digitaltvresearch.com



digital TV research