

Poland SVOD and Pay TV Forecasts

Published in September 2020, this 26-page PDF report covers the converging pay TV and OTT TV episode and movie sectors. The report covers the following:

- **OTT TV & Video Insights:** Commentary on the main players and developments
- Forecasts: OTT TV & Video Forecasts for every year from 2018 to 2025
- Chart: OTT TV & video revenues by source (AVOD, TVOD, DTO, SVOD) for 2018, 2019, 2020, 2021 and 2025
- Chart: SVOD subscribers by operator for 2018, 2019, 2020, 2021 and 2025
- Chart: SVOD revenues by operator for 2018, 2019, 2020, 2021 and 2025
- Forecasts for Netflix, Amazon Prime Video, Disney+, Apple TV+, Ipla, Player+, Play Now, HBO

- **Pay TV Insights:** Commentary on the main players and developments
- Forecasts: Pay TV Forecasts for every year from 2018 to 2025
- Chart: Breakdown of TV households by platform (digital cable, analog cable, IPTV, pay satellite TV, free-to-air satellite TV, analog terrestrial, free-to-air DTT and pay DTT) for 2018, 2019, 2020, 2021 and 2025
- Chart: Pay TV revenues by platform (digital cable, analog cable, IPTV, pay satellite TV and pay DTT) for 2018, 2019, 2020, 2021 and 2025
- Chart: Pay TV subscribers by operator (digital cable, analog cable, IPTV, pay satellite TV and pay DTT) for 2018, 2019, 2020, 2021 and 2025
- Chart: Pay TV revenues by operator (digital cable, analog cable, IPTV, pay satellite TV and pay DTT) for 2018, 2019, 2020, 2021 and 2025
- Forecasts for Multimedia, UPC, Vectra, Inea, Toya, Orange, Cyfra Polsat, Canal Plus, Netia

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digital TV research

SAMPLE: Ghana OTT TV & video insight

- OTT TV & video revenues are forecast to reach \$29 million by 2025, up from \$4 million in 2019. SVOD will contribute \$25 million to the total in 2025. There will be 238,000 SVOD subscriptions by 2025, up from 48,000 at end-2019.

Main assumptions behind the forecasts
• Mobile data subs 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
• Netflix is expensive by local standards.
• Showmax did not launch in Ghana as part of its May 2016 expansion.
Source: Digital TV Research

- **Netflix** launched in January 2016. We estimate 25,000 Netflix subs by end-2019, rising to 124,000 by 2025. Growth will be restricted by low credit card ownership, relatively high prices, no local partnerships (yet!) and low broadband penetration. The first original local production, *The Burial of Kojo*, will appear 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 10,000 subscribers by 2025.
- **Apple TV+** started in November 2019, with 12,000 subscribers forecast by 2025. We expect that **Disney+** will start in 2022, with 34,000 subscribers forecast by 2025. 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.
- Nigeria-based **iRokoTV** boosted its Ghanaian operations in November 2017 (including 25 kiosks in Accra); priced at only GHS25/year (\$0.40/month). We forecast 39,000 subscribers by 2025, up from 11,000 at end-2019. OTT platform **Mycanal** is free to Canal Plus subscribers.
- 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.
- 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.

Ghana OTT TV & video forecasts

	2018	2019	2020	2021	2022	2023	2024	2025
Population (000)								
Total households (000)								
TV households (000)								
Fixed broadband hholds (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 Smartphone users (000)								
OTT HH/Smartphone users								
Gross OTT TV & video total (000)								
Gross SVOD subscriptions (000)								
SVOD subs/TVHH								
SVOD subs/Fixed bband HH								
SVOD subs/Smartphone users								
Net SVOD homes (000)								
SVOD homes/TVHH								
SVOD homes/Fixed bband HH								
SVOD subscriptions/SVOD hh								
TV rental transactions (000)								
Movie rental transactions (000)								
Total rental transactions (000)								
TV download-to-own trans (000)								
Movie DTO trans (000)								
Total DTO trans (000)								
Online advg total (US\$ mil.)								



Ghana OTT TV & video forecasts

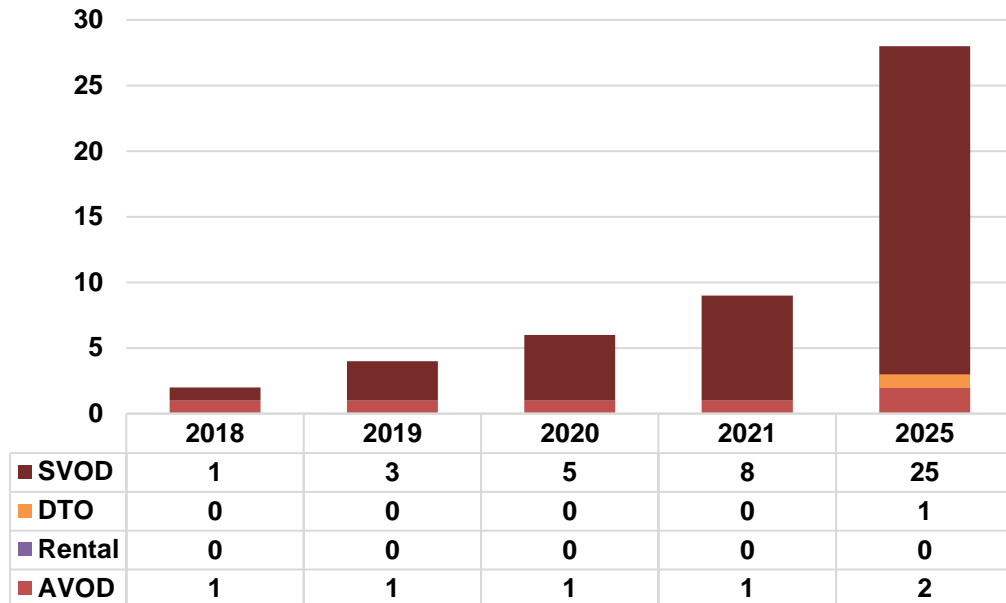
	2018	2019	2020	2021	2022	2023	2024	2025
AVOD (US\$ mil.)								
Online TV rental revs (US\$ mil.)								
Online movie rental revs (US\$ mil.)								
<i>Online rental revs (US\$ mil.)</i>								
DTO TV revenues (US\$ mil.)								
DTO movie revenues (US\$ mil.)								
<i>DTO video revenues (US\$ mil.)</i>								
SVOD revenues (US\$ mil.)								
OTT TV & video revs (US\$ mil.)								
SVOD subscribers by operator (000)								
Netflix								
Amazon								
Disney+								
Apple TV+								
Iroko								
Others								
<i>Share of SVOD subscribers by operator (%)</i>								
Netflix								
Amazon								
Disney+								
Apple TV+								
Iroko								
Others								
SVOD revenues by operator (US\$ mil.)								
Netflix								
Amazon								
Disney+								
Apple TV+								
Iroko								
Others								
<i>Share of SVOD revenues by operator (%)</i>								
Netflix								
Amazon								
Disney+								
Apple TV+								
Iroko								
Others								



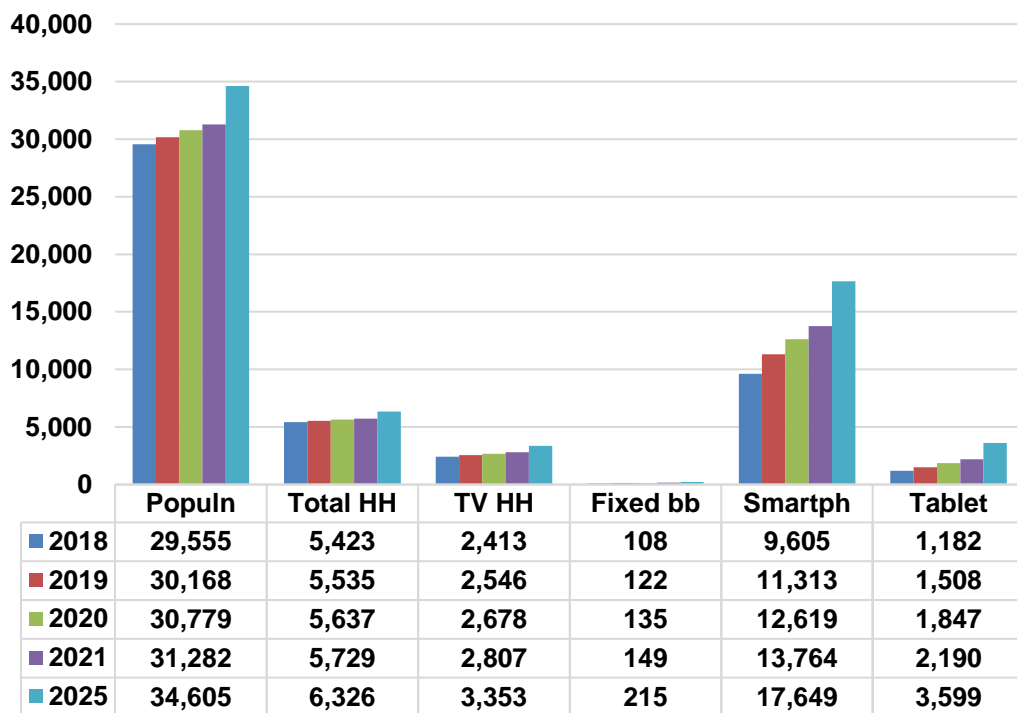
Ghana OTT TV & video forecasts								
	2018	2019	2020	2021	2022	2023	2024	2025
SVOD ARPU by operator (\$)								
Netflix								
Amazon								
Disney+								
Apple TV+								
Iroko								
AVOD revenues by platform (\$ million)								
YouTube								
Facebook/Instagram								
Other social media sites								
FTA broadcasters								
Pay TV broadcasters								
AVOD platforms								
Other								
<i>Source: Digital TV Research. Revenues from professionally-made TV shows and movies - so not, for example, sports or UGC.</i>								

Ghana OTT outlook

Revenues by source (\$m)

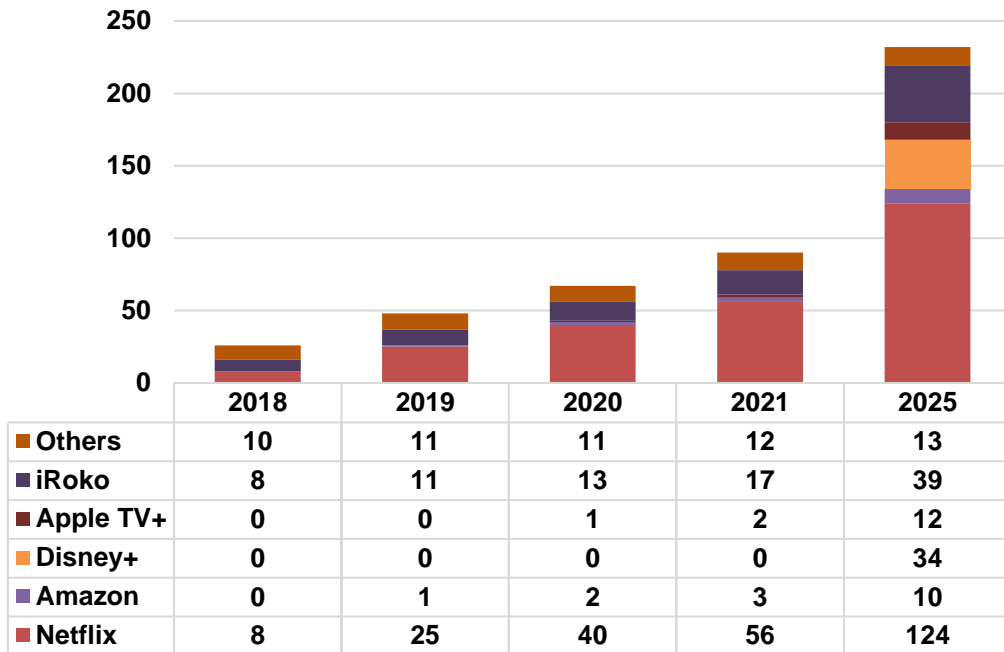


Device penetration (000)

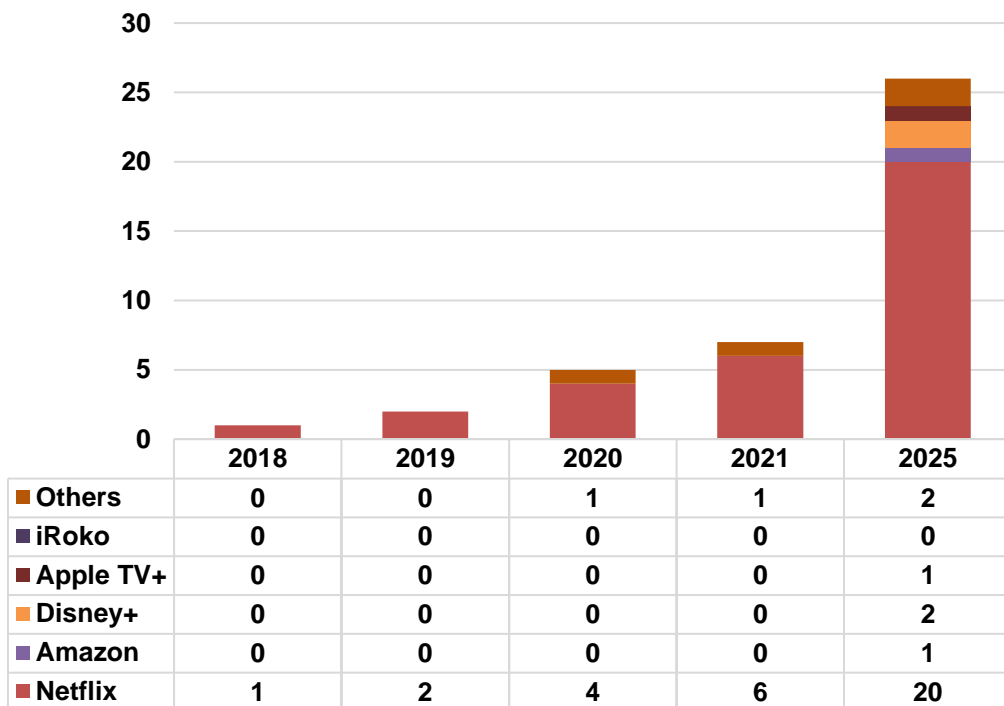


Ghana SVOD outlook

Subscribers by operator (000)



Revenues by operator (\$m)



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								
	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>								

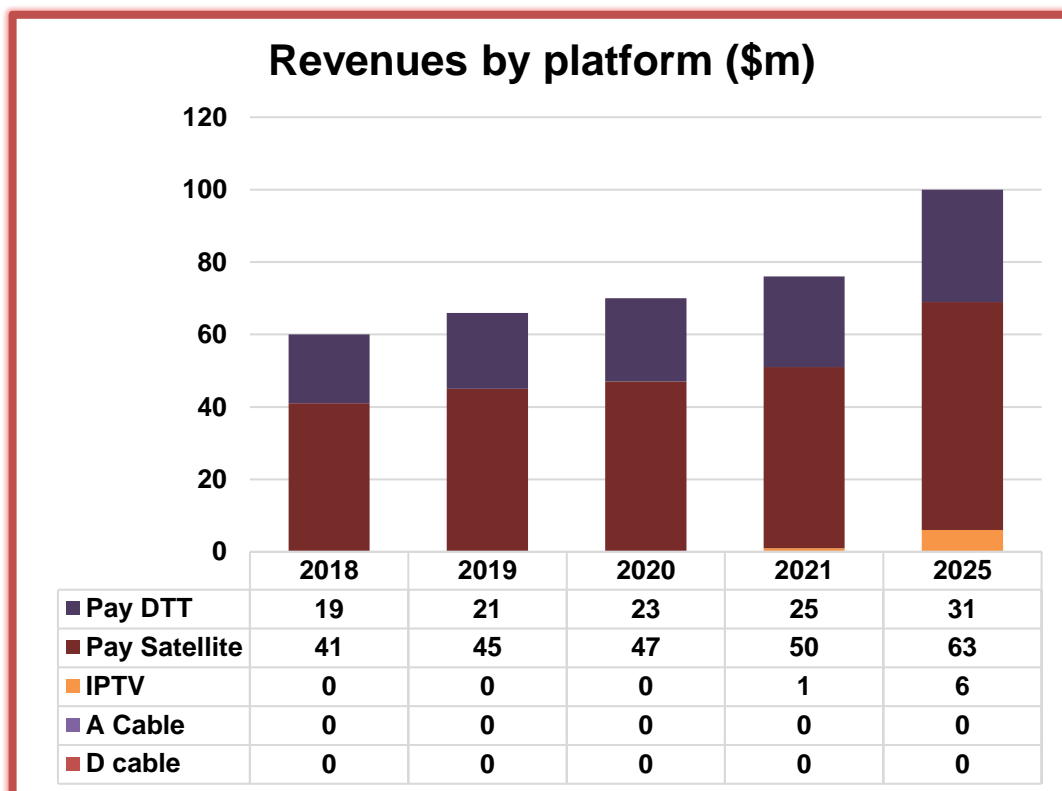
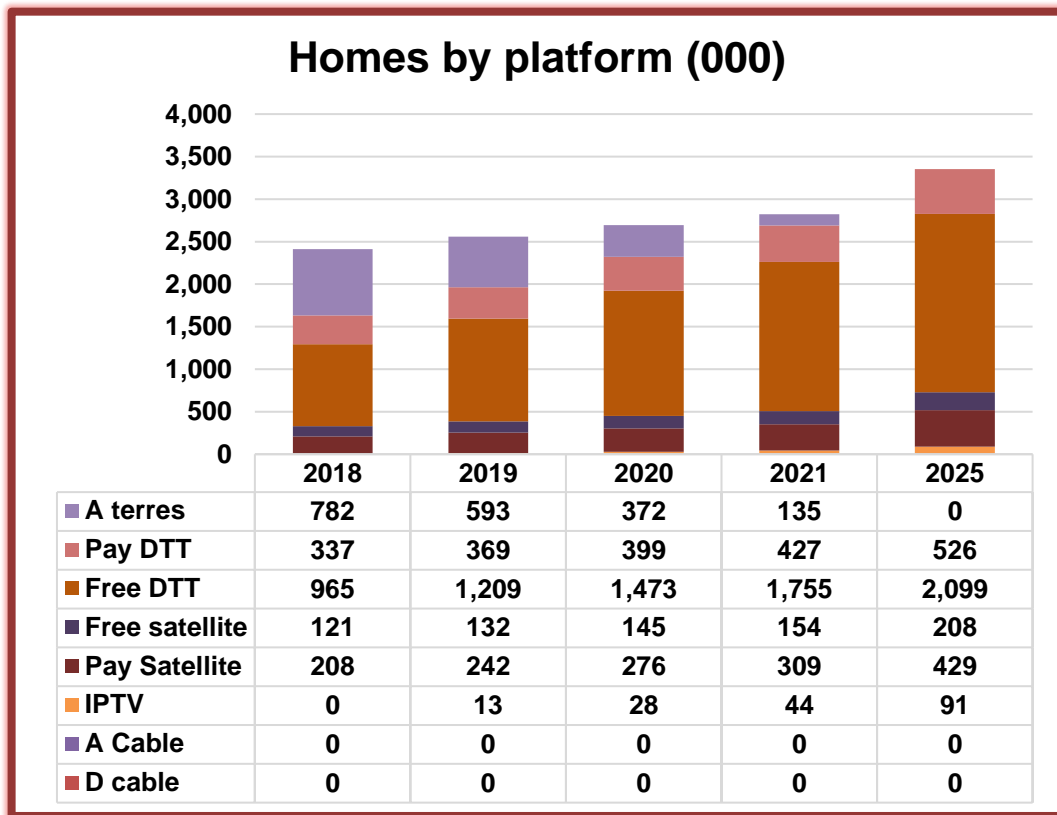
Ghana pay TV forecasts

	2018	2019	2020	2021	2022	2023	2024	2025
Revenues (US\$ million)								
<i>Stand-alone digital cable revs</i>								
<i>Dual-play digital cable TV revs</i>								
<i>Triple-play digl cable TV revs</i>								
Digital cable TV subs revs								
Dig cab 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 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\$)								
<i>Stand-alone digital cable subs</i>								
<i>Dual-play dig cable TV subs</i>								
<i>Triple-play dig cable TV subs</i>								
Average dig cab (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 sat TV (subs and PPV)								
Pay DTT (subs)								
Pay DTT (subs and PPV)								
Average monthly ARPU								



Ghana pay TV forecasts								
	2018	2019	2020	2021	2022	2023	2024	2025
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 outlook



Ghana pay TV outlook

