

[Sub-Saharan Africa Pay TV Forecasts](#)

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Published in January 2017, this 258-page PDF and excel report combines two of last year's reports: [Digital TV Sub-Saharan Africa Forecasts](#) and the relevant countries from [Middle East & Africa Pay TV Operator Forecasts](#) in one convenient place. The report comes in six 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 2022 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 profiles for 35 territories;
- Detailed country forecasts for 35 nations.

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



Forecasts for the following 35 countries and 137 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; Easy TV
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; Easy TV
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 briefing

- About ██████████ of homes in Ghana had a **TV set** at end-2016. This total will reach ██████████ by 2022, or ██████ of total households.

Main assumptions behind the forecasts	
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Source: Digital TV Research

- **Digital TV penetration** will reach ██████████% at end-2016. Pay DTT started in 2013 and this will help to push **pay TV penetration** from ██████████ in 2022. Pay TV subscriptions will more than double between 2016 and 2022. Pay TV revenues will increase from ██████████ in 2022.
- 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 ██████████ subscribers in Ghana by end-2016. This total is forecast to reach ██████████ by 2022. 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 soccer, MultiChoice's SuperSport screens the European Champions League matches. DStv added some French-language Canal Plus channels in May 2013.
- Subscription prices range from GHS50 to GHS365/month (\$11.82-86.29 for 79-149 channels). Prices were dropped by 7-10% in November 2016 – as a reaction to the launch of StarTimes, with the company freezing prices across most of the region in April. A pan-regional price rise (to counter exchange rate fluctuations) a year earlier backfired, with DStv losing subscribers. An HD decoder costs GHS350 (\$83), with Explora at GHS499 (\$118 – about half the price from a year earlier).
- DStv's sister company **GOtv** launched in Accra in January 2013, using the DVB-T2 standard. The pay DTT operator charges GHS6/month (\$1.42) for 22 channels in the Lite pack, GHS32/month (\$7.57) for the 32-channel Value pack or GHS45/month (\$10.64) for 42 channels in the Plus pack. We estimate that GOtv had ██████████ subscribers by end-2016, which will reach ██████████ by 2022.

- The government wants to convert all homes to digital by September 2017, with Accra completed by end-2016. We do not think that national conversion will happen until [REDACTED]. 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.
- 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] subscribers by 2022.
- After paying GHS140 (\$33) for a hybrid DTT and DTH settop box, subscribers can choose from Nova (26 channels for GHS15/month, \$3.55), Smart (54 channels for GHS30/month, \$7.09) or Super (82 channels for GHS60/month, \$14.18). StarTimes won the 10-year rights to screen the local soccer league.
- Satellite TV operator **Canal Plus Afrique** offers 205 channels in its Tout Canal package for GHS290/month (\$68.56); 181 channels on Evasion Plus (GHS130/month, \$30.73); 147 channels in its Access Plus (GHS110/month, \$26.00); 168 channels in its Evasion pack for GHS70/month (\$16.55); and 140 channels in Access for GHS35/month (\$8.27). Decoders cost GHS120-290 (\$28-69). We estimate that Canal Plus has [REDACTED] subscribers in Ghana. Ghana's neighboring countries are Francophone.
- Some satellite TV competition comes from **MultiTV**, which serves homes with 27 FTA signals of local channels via the SES Astra satellite system. Launched in 2009, MultiTV claimed to have sold 1.2 million settop boxes (priced at GHC240, \$63) in West Africa by September 2013.
- Strong Technologies, trading as **MyTV**, also provides 21 FTA satellite TV channels and 18 pay TV ones (\$0.25/day).
- The ITU estimated 75,092 **fixed broadband subscribers** by end-2015; up from 70,170 a year earlier.
- GDP per capita was \$1,551 in 2016 – or around the regional average. The IMF forecasts good GDP growth for the next five years. The population was 28.28 million at end-2016, with 2.32 million in Accra and 2.72 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
Households (000)													
TV households (000)													
Digital cable subs (000)													
Analog cable subs (000)													
Pay IPTV subscribers (000)													
Pay digital satellite TV subs (000)													
Digital free satellite TV homes (000)													
Analog satellite TV hh (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)													
Total DTT homes (000)													
Digital cable subs/TV HH													
Analog cable subs/TV HH													
Pay IPTV subs/TV HH													
Pay satellite TV/TV HH													
Digital free satellite TV/TV HH													
Analog 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													
Total DTT/TVHH													
<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
Revenues (US\$ million)													
<i>Stand-alone digital cable revs</i>													
<i>Dual-play digital cable TV revs</i>													
<i>Triple-play digital cable TV revs</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
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.													



Digital TV Research publication schedule for 2016

	Title	Publication Date	Price
1	Digital TV Sub-Saharan Africa Forecasts	January	:900/\$1350/€1125
2	Digital TV Middle East & North Africa Forecasts	January	:900/\$1350/€1125
3	Digital TV Asia Pacific Forecasts	March	:900/\$1350/€1125
4	Digital TV Latin America Forecasts	March	:900/\$1350/€1125
5	Digital TV North America Forecasts	March	£500/\$750/€625
6	Digital TV Eastern Europe Forecasts	April	:900/\$1350/€1125
7	Digital TV Western Europe Forecasts	April	:900/\$1350/€1125
8	Digital TV World Household Forecasts	April	1300/\$1950/€1625
9	Digital TV World Revenue Forecasts	May	1300/\$1950/€1625
10	Digital TV World Databook	May	:800/\$1200/€1000
11	Middle East & Africa OTT TV & Video Forecasts	May	:900/\$1350/€1125
12	Asia Pacific OTT TV & Video Forecasts	June	:900/\$1350/€1125
13	Latin America OTT TV & Video Forecasts	June	:900/\$1350/€1125
14	North America OTT TV & Video Forecasts	June	£500/\$750/€625
15	Eastern Europe OTT TV & Video Forecasts	July	:900/\$1350/€1125
16	Western Europe OTT TV & Video Forecasts	July	:900/\$1350/€1125
17	Global OTT TV & Video Forecasts	July	1500/\$2250/€1875
18	Asia Pacific Pay TV Operator Forecasts	August	:900/\$1350/€1125
19	Middle East & Africa Pay TV Operator Forecasts	August	00/\$1350/€1125
20	Latin America Pay TV Operator Forecasts	August	00/\$1350/€1125
21	North America Pay TV Operator Forecasts	September	£500/\$750/€625
22	Eastern Europe Pay TV Operator Forecasts	September	00/\$1350/€1125
23	Western Europe Pay TV Operator Forecasts	September	00/\$1350/€1125
24	Global Pay TV Operator Forecasts	October	1500/\$2250/€1875
25	Middle East & Africa SVOD Forecasts	October	:900/\$1350/€1125
26	Asia Pacific SVOD Forecasts	October	00/\$1350/€1125
27	Latin America SVOD Forecasts	November	00/\$1350/€1125
28	North America SVOD Forecasts	November	£500/\$750/€625
29	Eastern Europe SVOD Forecasts	November	00/\$1350/€1125
30	Western Europe SVOD Forecasts	December	00/\$1350/€1125
31	Global SVOD Forecasts	December	1500/\$2250/€1875

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Digital TV Research publication schedule for 2017

	Title	Publication	Price
1	Sub-Saharan Africa Pay TV Forecasts	<i>January</i>	£1200/€1440/\$1560
2	Middle East & North Africa Pay TV Forecasts	<i>February</i>	£1200/€1440/\$1560
3	Asia Pacific Pay TV Forecasts	<i>March</i>	£1200/€1440/\$1560
4	Latin America Pay TV Forecasts	<i>March</i>	£1200/€1440/\$1560
5	North America Pay TV Forecasts	<i>April</i>	£750/€900/\$975
6	Eastern Europe Pay TV Forecasts	<i>April</i>	£1200/€1440/\$1560
7	Western Europe Pay TV Forecasts	<i>May</i>	£1200/€1440/\$1560
8	Global Pay TV Subscriber Forecasts	<i>May</i>	£1800/€2160/\$2340
9	Global Pay TV Revenue Forecasts	<i>June</i>	£1800/€2160/\$2340
10	Global Pay TV Operator Forecasts	<i>June</i>	£1800/€2160/\$2340
11	Global Pay TV Databook	<i>July</i>	£1000/€1200/\$1300
12	Sub-Saharan Africa OTT TV & Video Forecasts	<i>August</i>	£1200/€1440/\$1560
13	Middle East & North Africa OTT TV & Video Forecasts	<i>August</i>	£1200/€1440/\$1560
14	Asia Pacific OTT TV & Video Forecasts	<i>September</i>	£1200/€1440/\$1560
15	Latin America OTT TV & Video Forecasts	<i>September</i>	£1200/€1440/\$1560
16	North America OTT TV & Video Forecasts	<i>October</i>	£750/€900/\$975
17	Eastern Europe OTT TV & Video Forecasts	<i>October</i>	£1200/€1440/\$1560
18	Western Europe OTT TV & Video Forecasts	<i>November</i>	£1200/€1440/\$1560
19	Global OTT TV & Video Forecasts	<i>November</i>	£1800/€2160/\$2340
20	Global SVOD Forecasts	<i>December</i>	£1800/€2160/\$2340

Please note that the regional Pay TV reports (1-7 above) contain the content from last year's Digital TV series and the Pay TV Operator series – so two reports in one for 2017. Likewise, the regional OTT reports (12-18 above) contain the content from 2016's OTT series as well as the content from 2016's SVOD series.

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