

South Africa OTT and Pay TV Forecasts

Published in January 2021, this 22-page PDF report covers the converging pay TV and OTT TV episode and movie sectors. The report covers the following:

TV and OTT TV episode and movie sectors. The report tracks the following:

- **OTT TV & Video Insights:** Commentary on the main players and developments
- Forecasts: OTT TV & Video Forecasts for every year from 2019 to 2026
- Chart: OTT TV & video revenues by source (AVOD, TVOD, DTO, SVOD) for 2019, 2020, 2021, 2022 and 2026
- Chart: SVOD subscribers by operator for 2019, 2020, 2021, 2022 and 2026
- Chart: SVOD revenues by operator for 2019, 2020, 2021, 2022 and 2026
- Forecasts for Netflix, Amazon Prime Video, Disney+, Apple TV+ and Showmax

- **Pay TV Insights:** Commentary on the main players and developments
- Forecasts: Pay TV Forecasts for every year from 2019 to 2026
- 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 2019, 2020, 2021, 2022 and 2026
- Chart: Pay TV revenues by platform (digital cable, analog cable, IPTV, pay satellite TV and pay DTT) for 2019, 2020, 2021, 2022 and 2026
- Chart: Pay TV subscribers by operator (digital cable, analog cable, IPTV, pay satellite TV and pay DTT) for 2019, 2020, 2021, 2022 and 2026
- Chart: Pay TV revenues by operator (digital cable, analog cable, IPTV, pay satellite TV and pay DTT) for 2019, 2020, 2021, 2022 and 2026
- Forecasts for DStv, StarSat, GOtv

Price: £500/€550/\$650

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

This is just one country. We can provide the same level of detail for a further 137 countries.

Please [contact us](#) to request a different country.

Discounts are available for multiple country purchases.



digital TV research

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.

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
<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

	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								
Gross OTT TV & video total (000)								
Gross SVOD subscriptions (000)								
SVOD subs/TVHH								
SVOD subs/Fixed broadband HH								
SVOD subs/Smartphone users								
Net SVOD homes (000)								
SVOD homes/TVHH								
SVOD homes/Fixed broadband HH								
SVOD subscriptions/SVOD homes								
TV rental transactions (000)								
Movie rental transactions (000)								
Total rental transactions (000)								
TV download-to-own transactions (000)								
Movie download-to-own transactions (000)								
Total download-to-own transactions (000)								
Online display advertising total (US\$ mil.)								



Ghana OTT TV & video forecasts

	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.)								
Total OTT TV & video revenues (US\$ mil.)								
SVOD subscribers by operator (000)								
Netflix								
Amazon								
Disney+								
Apple TV+								
Showmax								
Others								
Share of SVOD subscribers by operator (%)								
Netflix								
Amazon								
Disney+								
Apple TV+								
Showmax								
Others								
SVOD revenues by operator (US\$ mil.)								
Netflix								
Amazon								
Disney+								
Apple TV+								
Showmax								
Others								
Share of SVOD revenues by operator (%)								
Netflix								
Amazon								
Disney+								
Apple TV+								
Showmax								
Others								

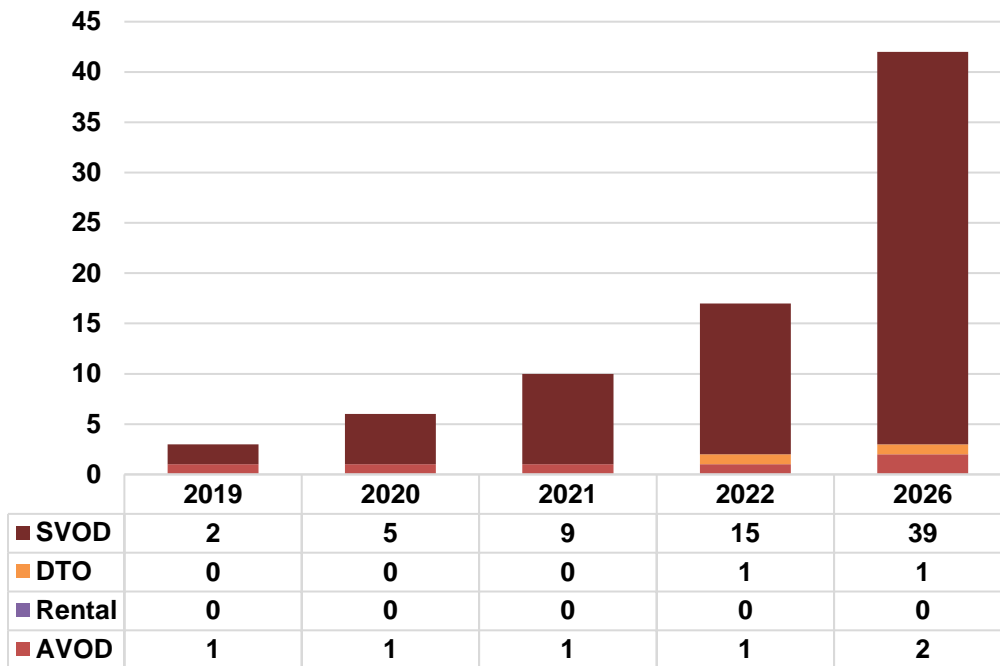


Ghana OTT TV & video forecasts

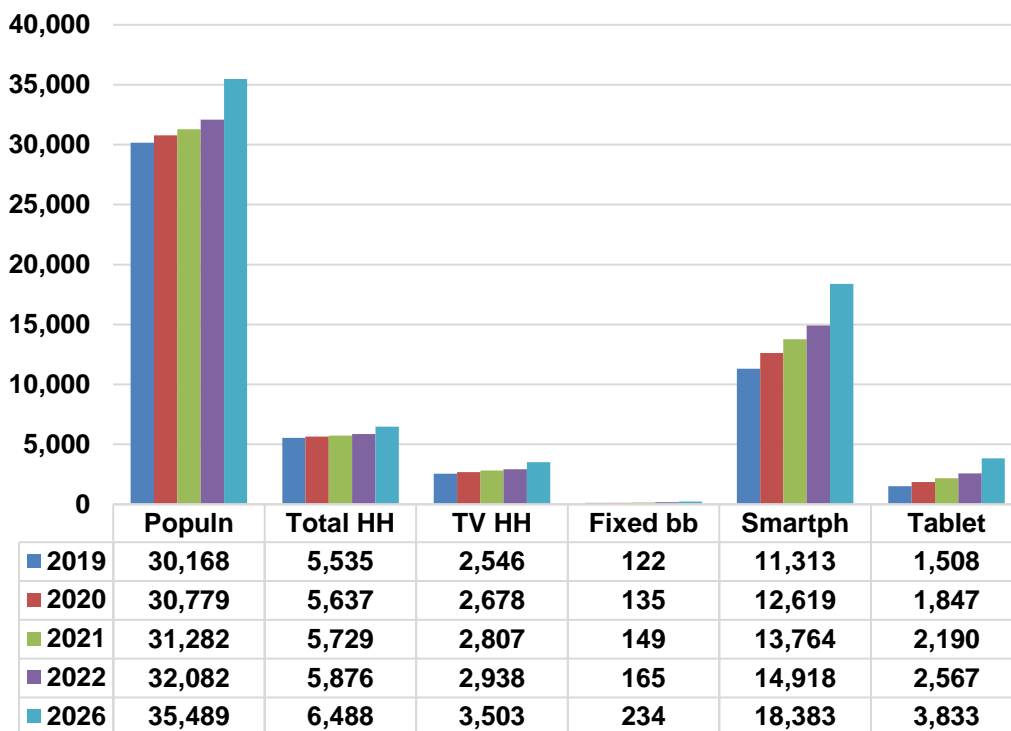
	2019	2020	2021	2022	2023	2024	2025	2026
SVOD ARPU by operator (\$)								
Netflix								
Amazon								
Disney+								
Apple TV+								
Showmax								
AVOD revenues by platform (\$ million)								
YouTube								
Facebook/Instagram								
Other social media sites								
FTA broadcasters								
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)

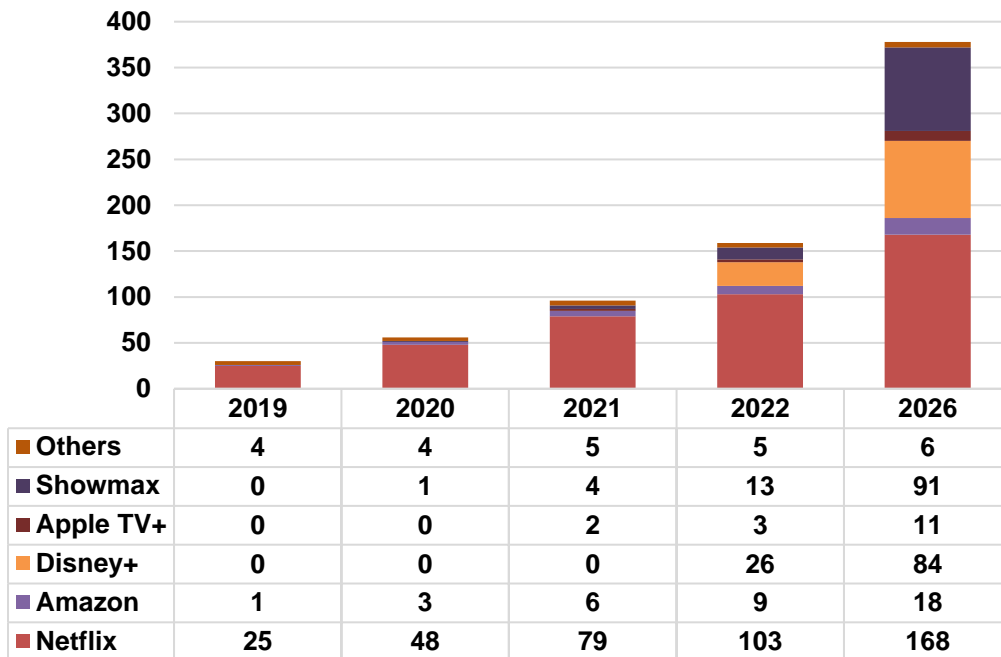


Device penetration (000)

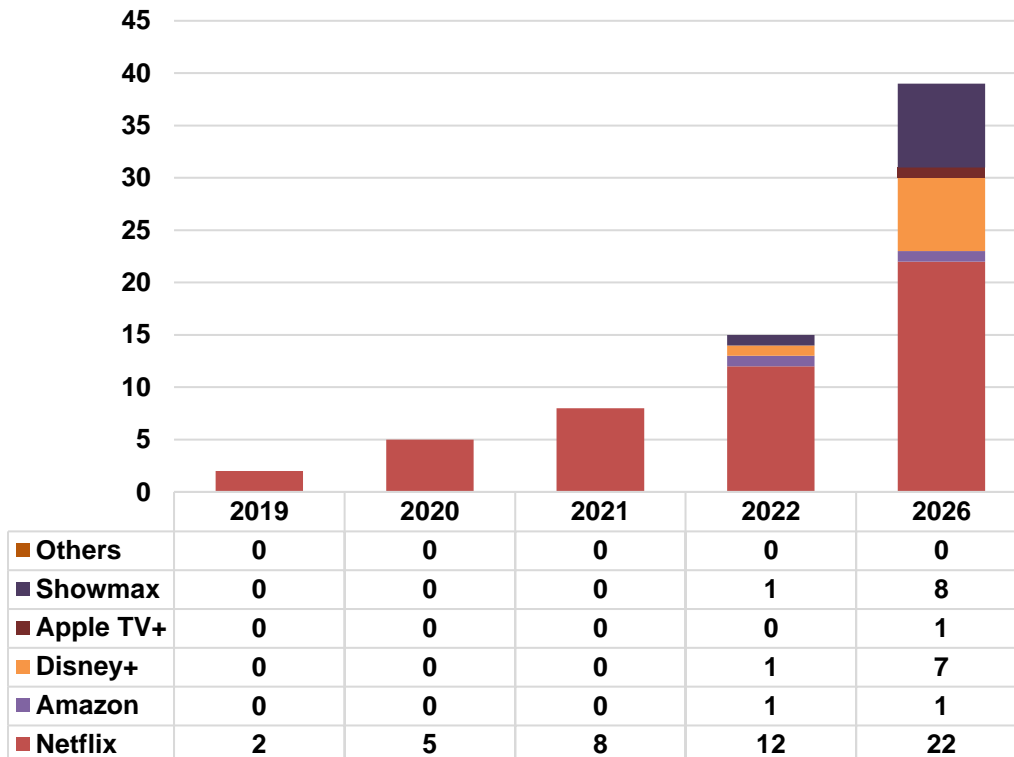


Ghana SVOD outlook

Subscribers by operator (000)



Revenues by operator (\$m)



SAMPLE: Ghana pay TV insight

- About 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

	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

	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								

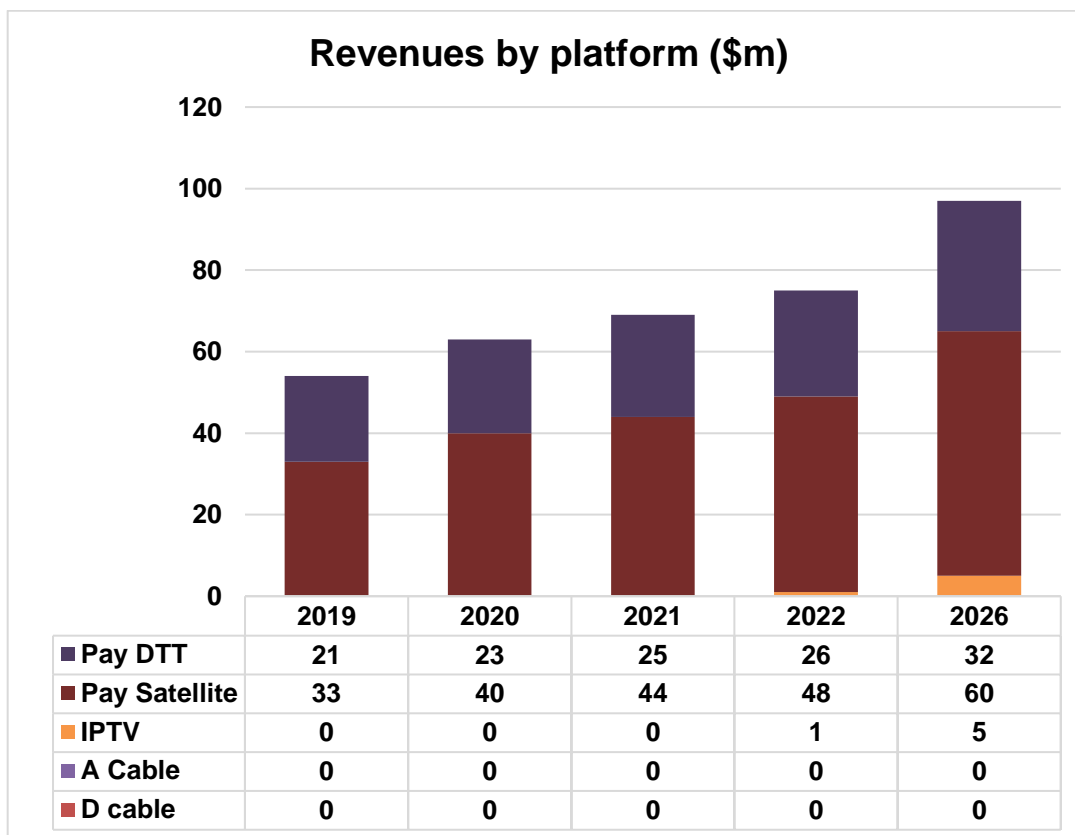
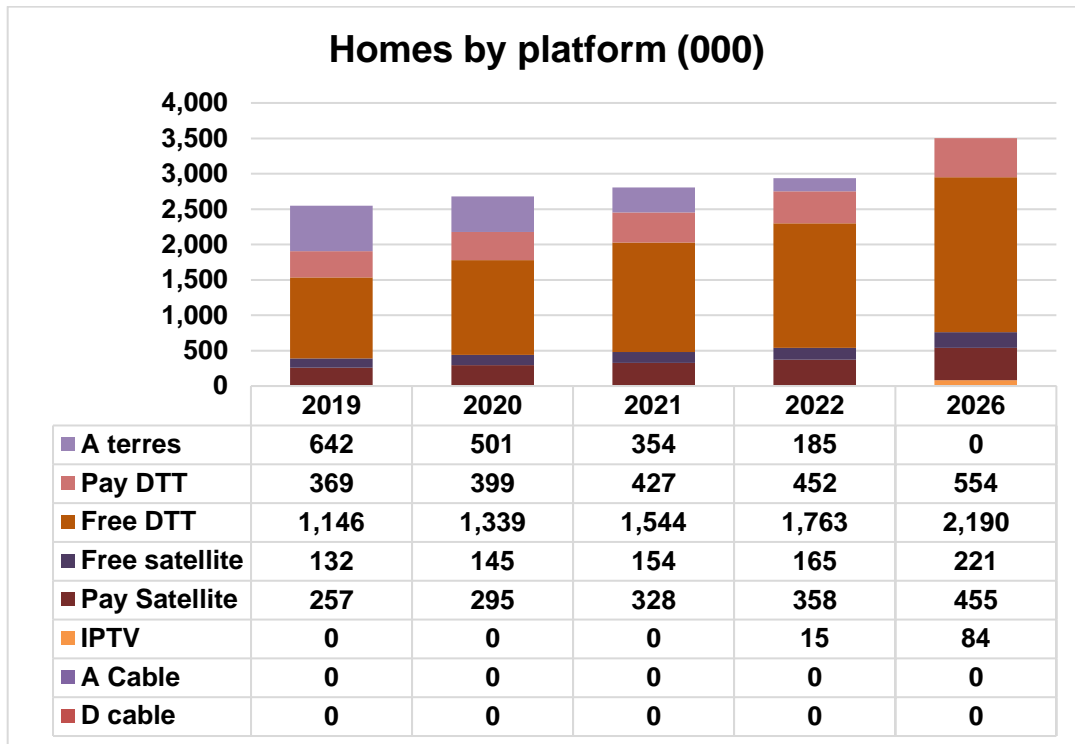


Ghana pay TV forecasts

	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



Ghana pay TV outlook

