

Sub-Saharan Africa attracts global TV players

These are exciting times for TV in Sub-Saharan Africa. Report author Simon Murray said: “Governments are opening up to investment, which involves several pioneering foreign TV players. Populations are growing fast and incomes per capita are on the rise, creating a burgeoning number of middle class consumers.”

Sub-Saharan Africa’s household totals (148 million at end-2011, rising by 20 million over the next six years) are fast approaching similar levels to Western Europe, according to a new report from *Digital TV Research*. However, the region’s TV household total (38 million at end-2011 – or a quarter of homes) is only equal to the total for Germany. Sub-Saharan Africa will have 50 million TV households by 2017 – or 30% of total homes.

According to the **Digital TV Sub-Saharan Africa** report, Nigeria will account for about a quarter of the region’s TV households (for the 42 countries covered in the report) in 2017, with South Africa contributing a further 15%.

Three-quarters of the region’s TV households still received analog terrestrial signals by end-2011, though this proportion will drop to 46% (23 million TV households) in 2017.

About a quarter of TV homes (9.2 million) received digital signals at end-2011, and this digital TV penetration will rocket to 54% by 2017 – with household numbers tripling to 27.3 million. South Africa, the market leader by far, will have achieved 100% digital migration by 2017 (or 7.9 million homes). Proportions in the other countries will be much lower, though Nigeria will have 7.0 million digital homes by 2017 (up from 1.9 million in 2011).

Pay TV penetration of TV households will grow from 19% in 2011 to 28% in 2017. Of the 7.2 million pay TV subscribers at end-2011, 6.1 million were pay DTH. The pay TV total will double to 14.1 million by 2017, with DTH contributing 8.2 million and pay DTT chiming in with 5.2 million. South Africa supplied 4.0 million of the 2011 total, and will grow to 5.1 million in 2017. Nigeria will climb from 1.2 million in 2011 to 3.1 million in 2017.

A third of homes will take DTT (pay and FTA combined) in 2017, up from only 4% at end-2011. Sub-Saharan Africa will have 16.4 million DTT homes by 2017 – 11.2 million FTA and 5.2 million pay – up tenfold from 2011. Nigeria will be the largest DTT nation in 2017, both for FTA (3.2 million) and for pay (1.7 million).

Digital pay DTH penetration will remain at just over 16% of TV households. However, this is distorted by South Africa where penetration is nudging 60%. The next highest penetration will be 12% in 2017 - in Tanzania and Uganda.

Only a small proportion of African homes can afford premium DTH packages. There were 6.1 million pay DTH subscribers by end-2011, with the total expected to rise to 8.2 million in 2017. South Africa accounted for 4.0 million of the 2011 total, rising to 4.7 million in 2017.

Table of Contents

Published in February 2012, this 100-page report is the most comprehensive to ever be published on the region. The PDF and excel report comes in five parts:

- Executive Summary and regional forecasts.
- Country profiles for 34 territories.
- Global forecasts summary from 2007 to 2017
- Top-line forecasts (population, population per household, households and TV households) for 42 countries.
- Detailed country forecasts for nine territories (*Angola, Cote D'Ivoire, Ghana, Kenya, Nigeria, South Africa, Tanzania, Uganda and Zambia*).

34 countries profiled:

Angola	Benin	Botswana	Burkina Faso
Burundi	Cameroon	CAR	Chad
DR Congo	Rep Congo	Cote d'Ivoire	Eq. Guinea
Ethiopia	Gabon	Gambia	Ghana
Guinea	Kenya	Liberia	Madagascar
Malawi	Mali	Mozambique	Namibia
Niger	Nigeria	Rwanda	Senegal
Sierra Leone	South Africa	Tanzania	Uganda
Zambia	Zimbabwe		



Detailed forecasts (2007-2017) for nine countries (Angola, Cote D'Ivoire, Ghana, Kenya, Nigeria, South Africa, Tanzania, Uganda and Zambia) contain the following entries:

Households (000)	Revenues (US\$ million)
TV households (000)	<i>Stand-alone digital cable revs</i>
Digital cable subs (000)	<i>Dual-play digital cable TV revenues</i>
Analog cable subs (000)	<i>Triple-play digital cable TV revenues</i>
Pay IPTV subscribers (000)	Digital cable TV subs revenues
Pay digital DTH subscribers (000)	Digital cable TV on-demand revs
Digital free DTH households (000)	Digital cable TV revenues
Analog DTH Households (000)	Analog cable TV subs revs
Analog terrestrial households (000)	Cable TV revenues
Primary FTA DTT households (000)	
Primary Pay DTT households (000)	<i>Stand-alone IPTV revenues</i>
	<i>Dual-play IPTV revenues</i>
Digital homes (000)	<i>Triple-play IPTV revenues</i>
Analog homes (000)	IPTV subscription revenues
Pay TV subscribers (000)	IPTV on-demand revenues
	IPTV revenues
Digital cable subs/TV HH	
Analog cable subs/TV HH	DTH subscription revenues
Pay IPTV subs/TV HH	DTH on-demand revenues
Pay DTH/TV HH	DTH revenues
Digital free DTH/TV HH	
Analog DTH/TV HH	DTT subscription revs
Analog terrestrial/TVHH	DTT on-demand revenues
Primary FTA DTT/TV HH	DTT revenues
Primary pay DTT/TV HH	
	Subscription revenues
TVHH/HH	On-demand revenues
Digital/TV HH	Total revenues
Analog/TV HH	
Pay TV Subs/TV HH	Average Revenue Per User (ARPU - US\$)
	<i>Stand-alone digital cable subs</i>
<i>Stand-alone digital cable subs (000)</i>	<i>Dual-play digital cable TV subs</i>
<i>Dual-play digital cable subs (000)</i>	<i>Triple-play digital cable TV subs</i>
<i>Triple-play digital cable subs (000)</i>	Average digital cable (subs & VOD)
	Analog cable TV subs
<i>Stand-alone pay IPTV subs (000)</i>	<i>Stand-alone IPTV subs</i>
<i>Dual-play pay IPTV subs (000)</i>	<i>Dual-play IPTV subs</i>
<i>Triple-play pay IPTV subs (000)</i>	<i>Triple-play IPTV subs</i>
	Average IPTV (subs and VOD)
	Pay DTH (subs)
	Pay DTH (subs and PPV)
	Pay DTT (subs)
	Pay DTT (subs and PPV)
	Average monthly ARPU

