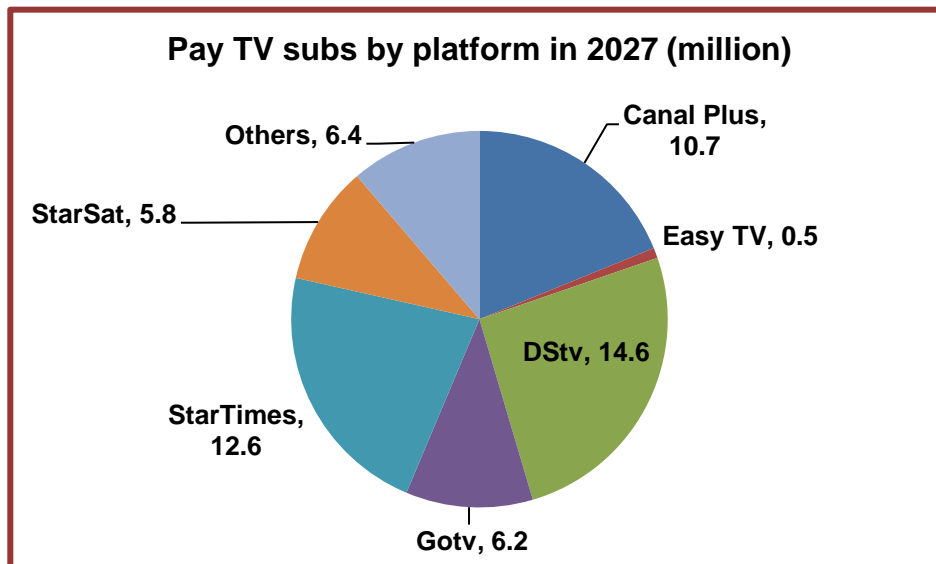


Africa to add 18 million pay TV subs

Africa will add 18 million pay TV subscribers between 2021 and 2027 to take the total to 57 million.

Subscriber numbers will climb by 46% over this period, but pay TV revenues will rise by only 35% - indicating that subscribers will pay less. Pay TV revenues will reach \$6.46 billion by 2027, up from \$4.78 billion on 2021.



Three groups account for 90% of Africa's pay TV subscribers. Multichoice, through its DStv and GOtv platforms, will continue to lead - with 20.8 million subscribers expected by 2027. StarTimes (18.4 million) and Canal Plus (11.2 million) will follow.

Simon Murray, Principal Analyst at Digital TV Research, said: "Few new players are expected. Instead, the three protagonists will battle for supremacy – often by cutting prices."

For more information [on the Africa Pay TV Forecasts report](#), please contact: Simon Murray, simon@digitaltvresearch.com, Tel: +44 20 8248 5051

[Africa Pay TV Forecasts](#)

Published in January 2022, this 232-page PDF, PowerPoint and excel report comes in three parts:

- Outlook: Forecasts for 35 countries in a 77-page PowerPoint document full of charts, graphs and bullet points;
- Excel workbook covering each year from 2010 to 2027 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 a 77-page PDF document.

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

Forecasts for the following 35 countries and 129 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; 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	3	DStv; StarSat; Canal Plus
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	5	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	5	Zuku, DStv, StarTimes, StarSat; Azam TV
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

Digital TV penetration will reach 100% by 2025; up from 85% at end-2021. Pay DTT started in 2013. This will help to push **pay TV penetration** from 27% at end-2021 to 35% in 2027. Pay TV revenues will increase from \$87 million in 2021 to \$146 million in 2027.

Main assumptions behind the forecasts

- No cable networks are expected to launch in the medium term, although we expect IPTV to start in 2023.
- Analog switch-off is expected in 2025.

About 49% (2.81 million) of homes in Ghana had a **TV set** at end-2021. This total will reach 3.66 million by 2027, or 55% of total households.

Main operators by subscribers (000)

Operator	Pay TV subs	Fixed bb subs	Mobile subs	SVOD platforms
AirtelTigo	-	-	4,980	
DStv	186	-	-	Netflix; Amazon PV; Showmax
Globacom	-	-	800	
GOtv	447	-	-	
MTN	-	-	25,220	MTN Play
StarSat	115	-	-	
Vodafone	-	63	9,590	

Pay TV market leader since 2015, GOtv will retain top slot. StarSat will quickly gain subs to its low-priced satellite TV platform (stifling growth for both GOtv and DStv).

Multichoice's **GOtv** launched in Accra in January 2013, using the DVB-T2 standard. GOtv had 447,000 subscribers by end-2021, which will reach 637,000 by 2027. Packages cost GHS50-99/month (\$8.20-16.23) for 40-70 channels.

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. National conversion will happen until 2025. In September 2011, the NCA announced the adoption of the DVB-T2 standard. There are 28 FTA DTT channels.

Multichoice's **DStv satellite TV platform** had 186,000 subscribers in Ghana by end-2021, reaching 306,000 by 2027. As well as controlling rights to English Premier League and La Liga soccer, MultiChoice's SuperSport screens the European Champions League matches. Packages cost GHS52-390/month (\$8.52-63.93) – more expensive than StarTimes - for 15-90 channels.

StarTimes launched a satellite TV platform in October 2016. We forecast 251,000 subscribers by 2027. StarTimes won the 10-year rights to screen the local soccer league. Subscribers pay GHS22-79/month (\$3.61-12.95).

Satellite TV operator **Canal Plus Afrique** has 10,000 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.

Mobile operator **MTN** (25.22 million subscribers by September 2021 – with the regulator accusing it of market dominance) began VOD platform via MTN Play in February 2017. DStv mobile is also available.

Rival mobile operator **Vodafone** had 9.59 million mobile subscribers and 63,000 fixed broadband ones by September 2021. Vodafone launched its fiber optic network in February 2017.

Globacom (Glo Mobile) has 800,000 mobile subscribers.

Mobile operators **Tigo**, owned by Millicom, and **Airtel** merged operations in March 2017. The merged operation has 4.98 million subscribers. The government bought the operator in October 2020 with the view to sell it later.

The ITU estimated 78,371 **fixed broadband subscribers** by end-2020.

SAMPLE: Ghana pay TV forecasts

	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027
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																		
Revenues (US\$ million)																		
Digital cable TV																		
Analog cable TV																		
IPTV																		
Satellite TV																		
DTT																		
Total revenues																		
Average Revenue Per User (ARPU - US\$)																		
Digital cable TV																		
Analog cable TV																		
IPTV																		
Satellite TV																		
DTT																		
Average monthly ARPU																		

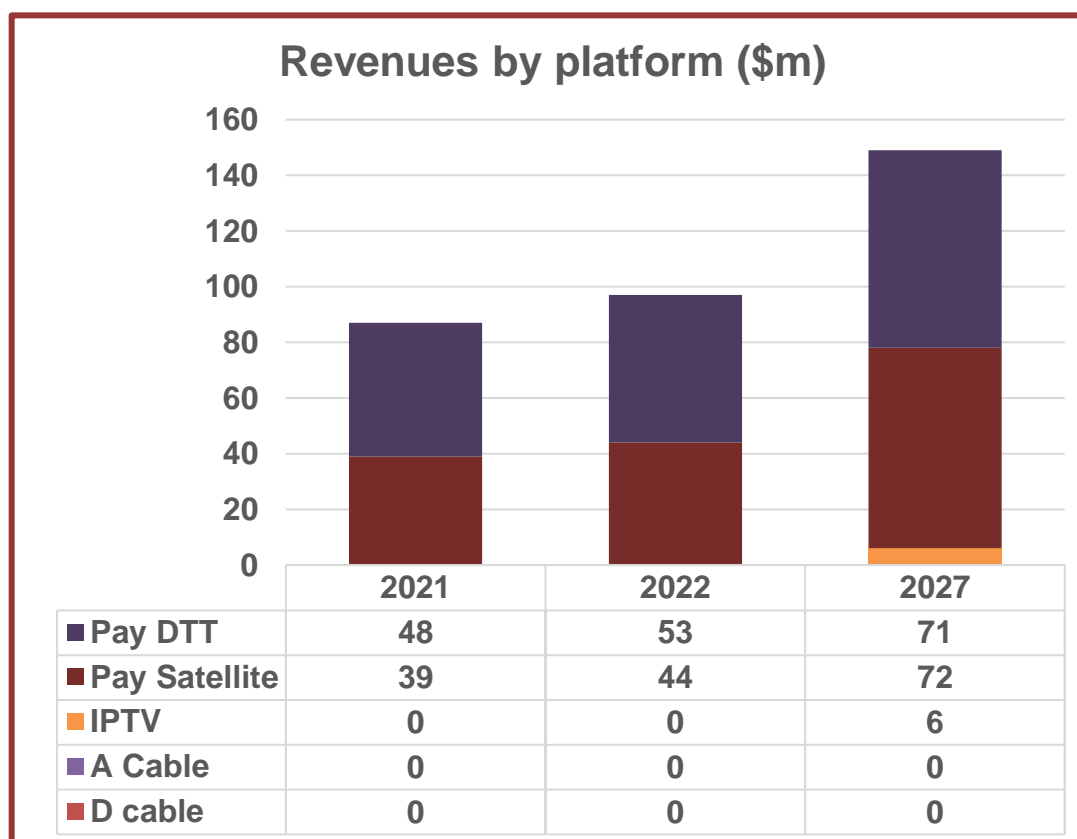
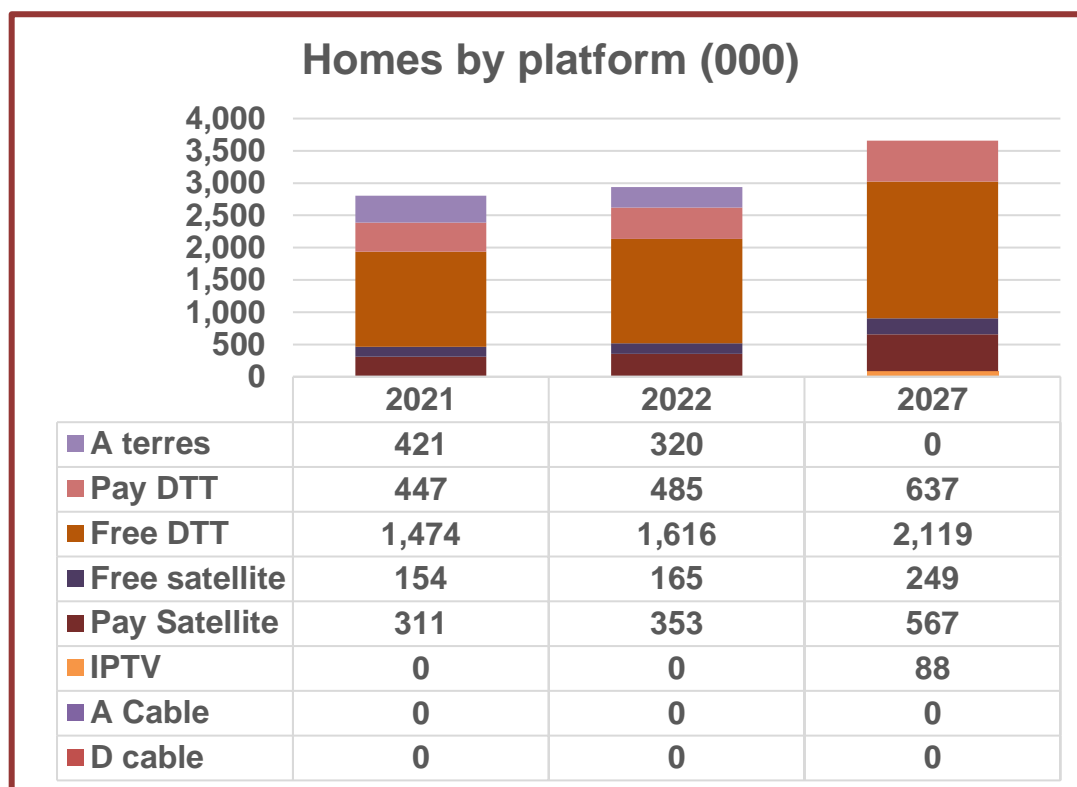


SAMPLE: Ghana pay TV forecasts

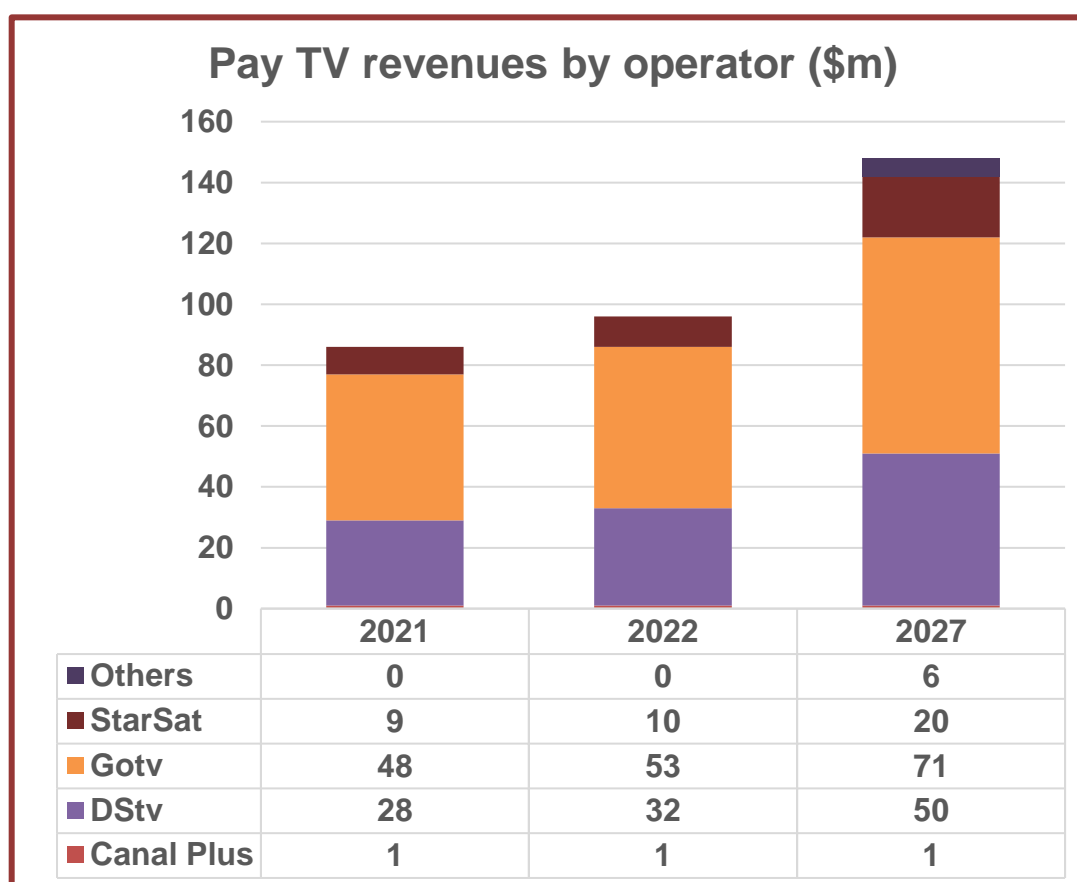
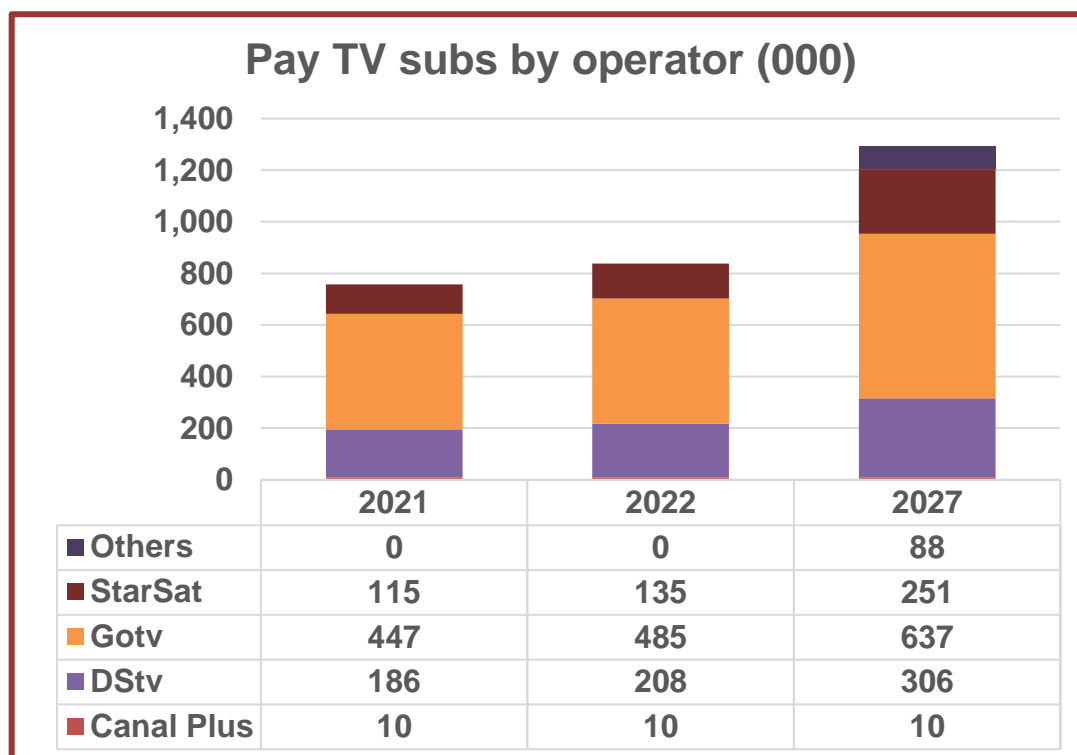
	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027
Pay TV subscribers by operator (000)																		
Canal Plus (satellite)																		
DStv (satellite)																		
Gotv (DTT)																		
StarSat (satellite)																		
Others																		
Share of pay TV subs by operator %																		
Canal Plus (satellite)																		
DStv (satellite)																		
Gotv (DTT)																		
StarSat (satellite)																		
Others																		
Revenues by operator (\$ 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																		



SAMPLE: Ghana pay TV outlook



SAMPLE: Ghana pay TV outlook



Digital TV Research report schedule for 2022

Title	Publication	Price
1 Africa Pay TV Forecasts	January	£1400/€1600/\$1875
2 Middle East & North Africa Pay TV Forecasts	January	£1400/€1600/\$1875
3 SVOD Forecasts Update (based on December 2021 results)	February	£1800/€2050/\$2400
4 Africa OTT TV and Video Forecasts	February	£1400/€1600/\$1875
5 Middle East & North Africa OTT TV and Video Forecasts	February	£1400/€1600/\$1875
6 North America Pay TV Forecasts	February	£700/€800/\$940
7 North America OTT TV and Video Forecasts	February	£700/€800/\$940
8 Latin America Pay TV Forecasts	March	£1400/€1600/\$1875
9 Latin America OTT TV and Video Forecasts	March	£1400/€1600/\$1875
10 Asia Pacific Pay TV Forecasts	March	£1400/€1600/\$1875
11 Asia Pacific OTT TV and Video Forecasts	March	£1400/€1600/\$1875
12 Eastern Europe Pay TV Forecasts	April	£1400/€1600/\$1875
13 Eastern Europe OTT TV and Video Forecasts	April	£1400/€1600/\$1875
14 Western Europe Pay TV Forecasts	May	£1400/€1600/\$1875
15 Western Europe OTT TV and Video Forecasts	May	£1400/€1600/\$1875
16 Global OTT TV & Video Forecasts	May	£2000/€2300/\$2600
17 Global SVOD Forecasts (based on March 2022 results)	May	£1800/€2050/\$2400
18 Global Pay TV Subscriber Forecasts	June	£1800/€2050/\$2400
19 Global Pay TV Revenue Forecasts	June	£1800/€2050/\$2400
20 Global Pay TV Operator Forecasts	June	£1800/€2050/\$2400
21 Global AVOD Forecasts	June	£1800/€2050/\$2400
22 SVOD Forecasts Update (based on June 2022 results)	August	£1800/€2050/\$2400
23 Africa SVOD Forecasts	August	£1200/€1380/\$1600
24 Middle East & North Africa SVOD Forecasts	August	£1200/€1380/\$1600
25 Asia Pacific SVOD Forecasts	August	£1200/€1380/\$1600
26 Latin America SVOD Forecasts	September	£1200/€1380/\$1600
27 North America SVOD Forecasts	September	£600/€690/\$800
28 Eastern Europe SVOD Forecasts	September	£1200/€1380/\$1600
29 Western Europe SVOD Forecasts	October	£1200/€1380/\$1600
30 SVOD Forecasts Update (based on September 2022 results)	November	£1800/€2050/\$2400
31 Pay TV Forecasts Update	November	£2000/€2300/\$2700

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