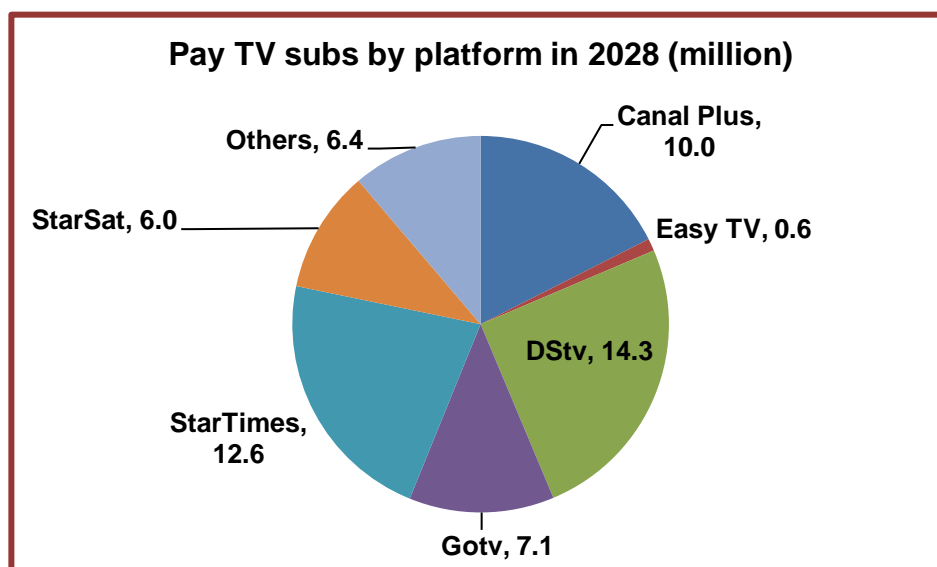


Africa to reach 57 million pay TV subs

About 16 million pay TV subscribers will be added in Africa between 2022 and 2028 to take the total to 57 million.

Subscriber numbers will climb by 38% over this period, but pay TV revenues will rise by only 29% - indicating that subscribers will pay less. Pay TV revenues will reach \$6.44 billion by 2028, up from \$4.99 billion on 2022.



Three groups account for 89% of Africa's pay TV subscribers. Multichoice, through its DStv and GOtv platforms, will continue to lead - with 21 million subscribers expected by 2028. StarTimes/StarSat (19 million) and Canal Plus/Easy TV (11 million) will follow.

Simon Murray, Principal Analyst at Digital TV Research, said: "No new major players will start. Instead, these three operators will battle for supremacy – often by cutting prices."

[Africa Pay TV Forecasts](#)

Published in January 2023, this 144-page PDF and excel report comes in two parts:

- Insight: Detailed country-by-country analysis in a 72-page PDF document.
- Excel workbook covering each year from 2015 to 2028 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. [NEW FOR 2023: Filter worksheet – every row on one spreadsheet, allowing for easy comparisons.](#)

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 91% at end-2022. Pay DTT started in 2013. This will help to push pay TV penetration from 31% at end-2022 to 41% in 2028. Pay TV revenues will increase from \$104 million in 2022 to \$178 million in 2028.

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 50% (2.94 million) of homes in Ghana had a TV set at end-2022. This total will reach 3.82 million by 2028, or 56% of total households.

Main operators by subscribers (000)

| Operator | Pay TV subs | Fixed bb subs | Mobile subs | SVOD platforms |
|------------|-------------|---------------|-------------|-----------------------------|
| AirtelTigo | - | - | 4,980 | |
| DStv | 208 | - | - | Netflix; Amazon PV; Showmax |
| Globacom | - | - | 800 | |
| GOtv | 558 | - | - | |
| MTN | - | - | 28,500 | MTN Play |
| StarSat | 135 | - | - | |
| Vodafone | - | 72 | 7,430 | |

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 558,000 subscribers by end-2022, with 845,000 expected by 2028.

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 208,000 subscribers in Ghana by end-2022, reaching 321,000 by 2028. As well as controlling rights to English Premier League and La Liga soccer, MultiChoice's SuperSport screens the European Champions League matches.

StarTimes launched a satellite TV platform in October 2016. We forecast 272,000 subscribers by 2028. StarTimes won the 10-year rights to screen the local soccer league.

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** (28.50 million subscribers by September 2022 – 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 7.43 million mobile subscribers and 72,000 fixed broadband ones by September 2022. 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 5 million subscribers. The government bought the operator in October 2020 with the view to sell it later.

The ITU estimated 114,543 fixed broadband subscribers by end-2021.

Excel sample: Ghana pay TV forecasts

| | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 | 2022 | 2023 | 2024 | 2025 | 2026 | 2027 | 2028 |
|--|------|------|------|------|------|------|------|------|------|------|------|------|------|------|
| Households (000) | | | | | | | | | | | | | | |
| TV households (000) | | | | | | | | | | | | | | |
| Digital cable subs (000) | | | | | | | | | | | | | | |
| Analog cable subs (000) | | | | | | | | | | | | | | |
| Pay IPTV subscribers (000) | | | | | | | | | | | | | | |
| Pay satellite TV subs (000) | | | | | | | | | | | | | | |
| FTA satellite TV homes (000) | | | | | | | | | | | | | | |
| Analog terrestrial hholds (000) | | | | | | | | | | | | | | |
| Primary FTA DTT hholds (000) | | | | | | | | | | | | | | |
| Primary Pay DTT hholds (000) | | | | | | | | | | | | | | |
| Digital homes (000) | | | | | | | | | | | | | | |
| Analog homes (000) | | | | | | | | | | | | | | |
| Pay TV subscribers (000) | | | | | | | | | | | | | | |
| 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 | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | |
| Pay TV subscribers by operator (000) | | | | | | | | | | | | | | |
| Canal Plus (satellite) | | | | | | | | | | | | | | |
| DStv (satellite) | | | | | | | | | | | | | | |
| Gotv (DTT) | | | | | | | | | | | | | | |
| StarSat (satellite) | | | | | | | | | | | | | | |
| Others | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | |
| Revenues by operator (\$ million) | | | | | | | | | | | | | | |
| Canal Plus (satellite) | | | | | | | | | | | | | | |
| DStv (satellite) | | | | | | | | | | | | | | |
| Gotv (DTT) | | | | | | | | | | | | | | |
| StarSat (satellite) | | | | | | | | | | | | | | |
| Others | | | | | | | | | | | | | | |
| Average Revenue Per User (ARPU - US\$) | | | | | | | | | | | | | | |
| Digital cable TV | | | | | | | | | | | | | | |
| Analog cable TV | | | | | | | | | | | | | | |
| IPTV | | | | | | | | | | | | | | |
| Satellite TV | | | | | | | | | | | | | | |
| DTT | | | | | | | | | | | | | | |
| Average monthly ARPU | | | | | | | | | | | | | | |



Digital TV Research report schedule for 2023

| | Title | Publication | Price |
|----|---|-------------|--------------------|
| 1 | Africa Pay TV Forecasts | January | £1250/€1440/\$1500 |
| 2 | Middle East & North Africa Pay TV Forecasts | January | £1250/€1440/\$1500 |
| 3 | SVOD Forecasts Update (based on December 2022 results) | February | £1600/€1840/\$1900 |
| 4 | Africa OTT TV and Video Forecasts | February | £1250/€1440/\$1500 |
| 5 | MENA OTT TV and Video Forecasts | February | £1250/€1440/\$1500 |
| 6 | North America Pay TV Forecasts | February | £700/€805/\$875 |
| 7 | North America OTT TV and Video Forecasts | February | £700/€805/\$875 |
| 8 | Latin America Pay TV Forecasts | March | £1250/€1440/\$1500 |
| 9 | Latin America OTT TV and Video Forecasts | March | £1250/€1440/\$1500 |
| 10 | Asia Pacific Pay TV Forecasts | March | £1250/€1440/\$1500 |
| 11 | Asia Pacific OTT TV and Video Forecasts | March | £1250/€1440/\$1500 |
| 12 | Western Europe Pay TV Forecasts | March | £1250/€1440/\$1500 |
| 13 | Western Europe OTT TV and Video Forecasts | March | £1250/€1440/\$1500 |
| 14 | Eastern Europe Pay TV Forecasts | April | £1250/€1440/\$1500 |
| 15 | Eastern Europe OTT TV and Video Forecasts | April | £1250/€1440/\$1500 |
| 16 | Global OTT TV & Video Forecasts | May | £1600/€1840/\$1900 |
| 17 | Global Pay TV Forecasts | May | £2000/€2300/\$2400 |
| 18 | Global AVOD Forecasts | May | £1600/€1840/\$1900 |
| 19 | Global SVOD Forecasts (based on March 2023 results) | June | £1600/€1840/\$1900 |
| 20 | Africa OTT & TV Update | August | £1250/€1440/\$1500 |
| 21 | MENA OTT & TV Update | August | £1250/€1440/\$1500 |
| 22 | Latin America OTT & TV Update | August | £1250/€1440/\$1500 |
| 23 | North America OTT & TV Update | August | £700/€805/\$875 |
| 24 | Eastern Europe OTT & TV Update | September | £1250/€1440/\$1500 |
| 25 | Asia Pacific OTT & TV Update | September | £1250/€1440/\$1500 |
| 26 | Western Europe OTT & TV Update | September | £1250/€1440/\$1500 |
| 27 | SVOD Forecasts Update (based on June 2023 results) | September | £1600/€1840/\$1900 |
| 28 | AVOD Forecasts Update | September | £1600/€1840/\$1900 |
| 29 | OTT TV & Video Forecasts Update | September | £1600/€1840/\$1900 |
| 30 | Pay TV Forecasts Update | October | £2000/€2300/\$2400 |
| 31 | SVOD Forecasts Update (based on September 2023 results) | December | £1600/€1840/\$1900 |

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