

# [Africa Pay TV Forecasts](#)

Published in January 2024, this 140-page PDF and excel report comes in two parts:

- Insight: Detailed country-by-country analysis in a 68-page PDF document.
- Excel workbook covering each year from 2015 to 2029 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.

For more information, [please click here](#) or contact [lydia@digitaltvresearch.com](mailto: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 2024. Pay DTT started in 2013; helping to push pay TV penetration from 32% at end-2023 to 33% in 2029. Pay TV revenues will increase from \$116 million in 2023 to \$157 million in 2029. About 51% (3.1 million) of homes in Ghana had a TV set at end-2023. This total will reach 4 million by 2029, or 57% of total households.

Main assumptions behind the forecasts
No cable or IPTV networks are expected to launch
Analog switch-off is expected in 2024.
Low GDP growth forecast
Substantial currency devaluation in 2023.

Main operators by subscribers (000)				
Operator	Pay TV subs	Fixed bb subs	Mobile subs	SVOD platforms
AirtelTigo	-	-	4,980	
DStv	220	-	-	Netflix; Amazon PV; Showmax
Globacom	-	-	800	
GOtv	578	-	-	
MTN	-	-	25,840	MTN Play
StarSat	170	-	-	
Vodafone	-	73	7,540	

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 578,000 subscribers by end-2023, with 726,000 expected by 2029.

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 in 2024. 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 220,000 subscribers in Ghana by end-2023, reaching 289,000 by 2029. 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 291,000 subscribers by 2029. 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** (25.84 million subscribers by September 2023) began VOD platform via MTN Play in February 2017. DStv mobile is also available.

Rival mobile operator **Vodafone** had 7.54 million mobile subscribers and 73,000 fixed broadband ones by December 2022. Vodafone launched its fiber optic network in February 2017. Telecel Group bought 70% of Vodafone Ghana in February 2023, with the government retaining the rest.

**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 207,000 fixed broadband subscribers by end-2022.

## Excel sample: Ghana pay TV forecasts

	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029
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 2024

	Title	Publication	Price
1	<a href="#">Africa Pay TV Forecasts</a>	January	£1500/€1725/\$1875
2	<a href="#">Middle East &amp; North Africa Pay TV Forecasts</a>	January	£1500/€1725/\$1875
3	<a href="#">Africa OTT TV and Video Forecasts</a>	February	£1500/€1725/\$1875
4	<a href="#">MENA OTT TV and Video Forecasts</a>	February	£1500/€1725/\$1875
5	<a href="#">North America Pay TV Forecasts</a>	February	£775/€890/\$965
6	<a href="#">North America OTT TV and Video Forecasts</a>	February	£775/€890/\$965
7	<a href="#">Latin America Pay TV Forecasts</a>	March	£1500/€1725/\$1875
8	<a href="#">Latin America OTT TV and Video Forecasts</a>	March	£1500/€1725/\$1875
9	<a href="#">Western Europe Pay TV Forecasts</a>	March	£1500/€1725/\$1875
10	<a href="#">Western Europe OTT TV and Video Forecasts</a>	March	£1500/€1725/\$1875
11	<a href="#">Eastern Europe Pay TV Forecasts</a>	March	£1500/€1725/\$1875
12	<a href="#">Eastern Europe OTT TV and Video Forecasts</a>	March	£1500/€1725/\$1875
13	<a href="#">Asia Pacific Pay TV Forecasts</a>	April	£1500/€1725/\$1875
14	<a href="#">Asia Pacific OTT TV and Video Forecasts</a>	April	£1500/€1725/\$1875
15	<a href="#">Global OTT TV &amp; Video Forecasts</a>	April	£1600/€1840/\$1990
16	<a href="#">Global Pay TV Forecasts</a>	April	£2000/€2300/\$2500
17	<a href="#">Global AVOD Forecasts</a>	April	£1600/€1840/\$1990
18	<a href="#">Global SVOD Forecasts (based on Dec 2023 results)</a>	April	£1600/€1840/\$1990
19	<a href="#">Global FAST Forecasts</a>	May	£1500/€1725/\$1875
20	<a href="#">Global Hybrid AVOD-SVOD Forecasts</a>	May	£1500/€1725/\$1875
21	<a href="#">Africa OTT TV and Video Forecasts</a>	August	£1500/€1725/\$1875
22	<a href="#">MENA OTT TV and Video Forecasts</a>	August	£1500/€1725/\$1875
23	<a href="#">Latin America OTT TV and Video Forecasts</a>	August	£1500/€1725/\$1875
24	<a href="#">North America OTT TV and Video Forecasts</a>	August	£775/€890/\$965
25	<a href="#">Eastern Europe OTT TV and Video Forecasts</a>	September	£1500/€1725/\$1875
26	<a href="#">Asia Pacific OTT TV and Video Forecasts</a>	September	£1500/€1725/\$1875
27	<a href="#">Western Europe OTT TV and Video Forecasts</a>	September	£1500/€1725/\$1875
28	<a href="#">Global SVOD Forecasts (based on June 2024 results)</a>	September	£1600/€1840/\$1990
29	<a href="#">Global AVOD Forecasts</a>	September	£1600/€1840/\$1990
30	<a href="#">Global OTT TV &amp; Video Forecasts</a>	September	£1600/€1840/\$1990
31	<a href="#">Global FAST Forecasts</a>	October	£1600/€1840/\$1990
32	<a href="#">Global Hybrid AVOD-SVOD Forecasts</a>	October	£1600/€1840/\$1990
33	<a href="#">Global Pay TV Forecasts</a>	November	£2000/€2300/\$2500

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