



Dataxis

W E B I N A R

SUBSAHARAN AFRICA TV MARKET

9th May 2019

Market-leading data and executive events to understand the future of TV, Entertainment and Telecom



Intelligence

Our analytics and online database services provide in depth indicators on:

- TV
- OTT / Video
- Content distribution
- Telecom
- Technologies



Events

We believe in the power of face-to-face interactions to drive quality business.

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News

✓ **10,000+** Monthly Visitors






✓ **8,000+** Daily Subscribers

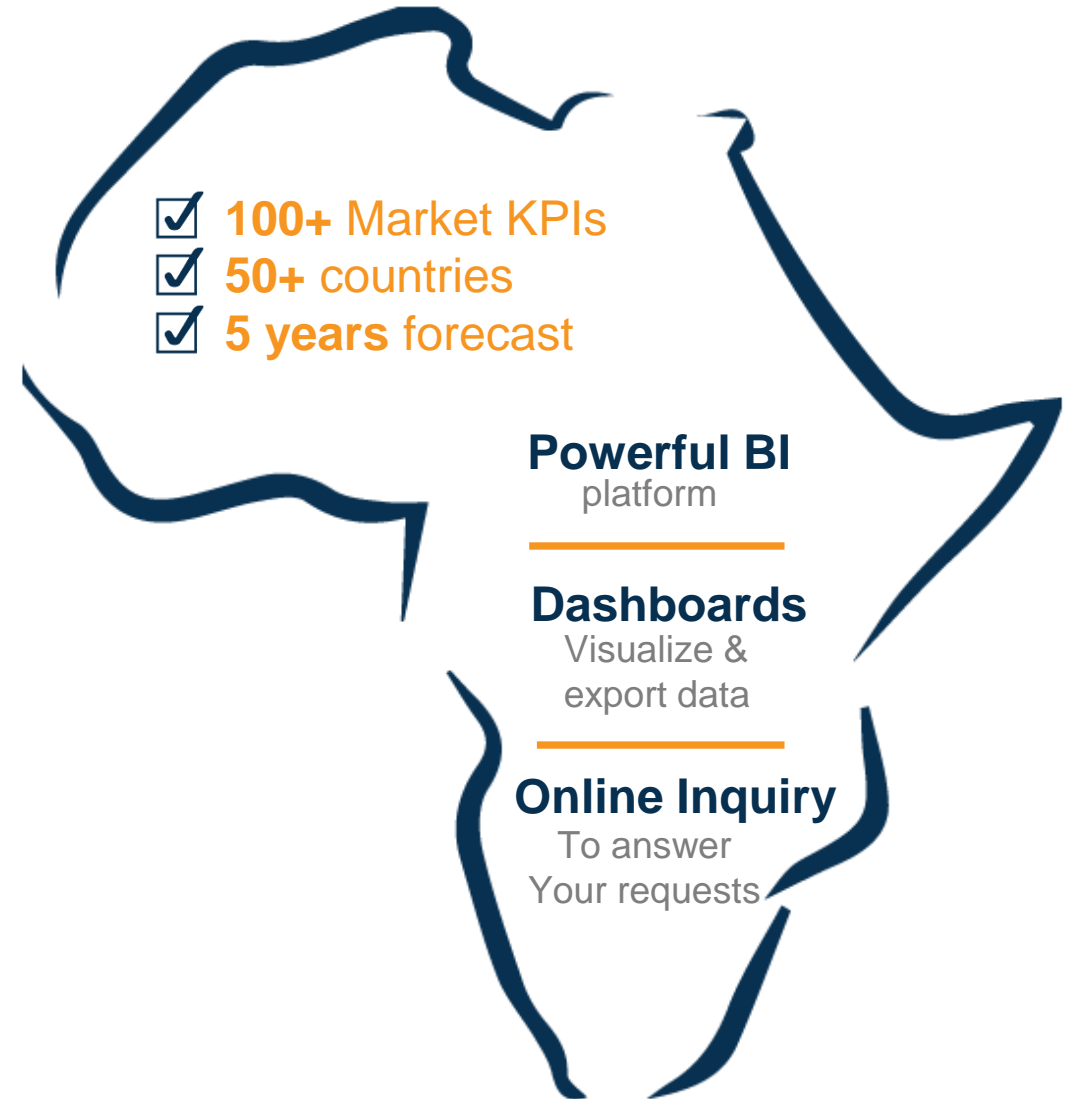
Dataxis

I N T E L L I G E N C E

At the heart of **TV, Telecom
& Media convergence**

Market Research on TV, OTT, Broadband & Mobile

-  Key indicators & analysis by operator & country
-  Quarterly statistics (subscribers, revenues, technologies)
-  Annual forecasts by country
-  TV channels tracker by country (+300 channels)
-  Enquiry support from our analysts





46 COUNTRIES



1 BILLION INHABITANTS



215 MILLION HOUSEHOLDS



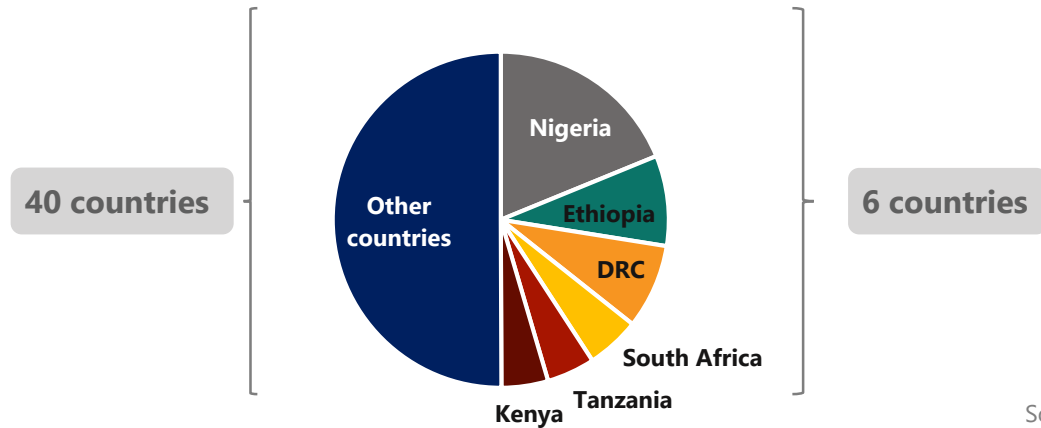
40% URBAN POPULATION



43% ELECTRIFICATION RATE

POPULATION IN SSA

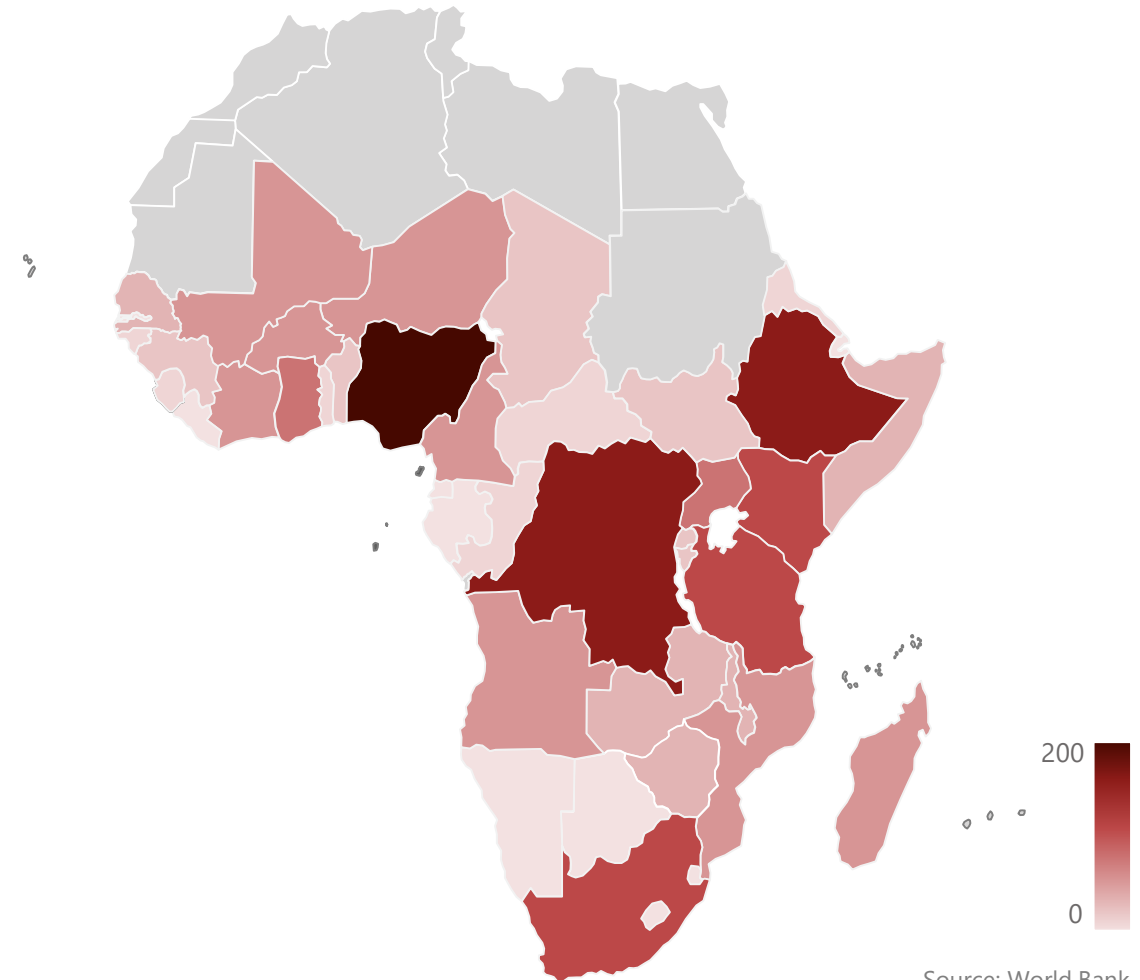
2018 – %Total population



Source: Dataxis

COUNTRIES BY POPULATION

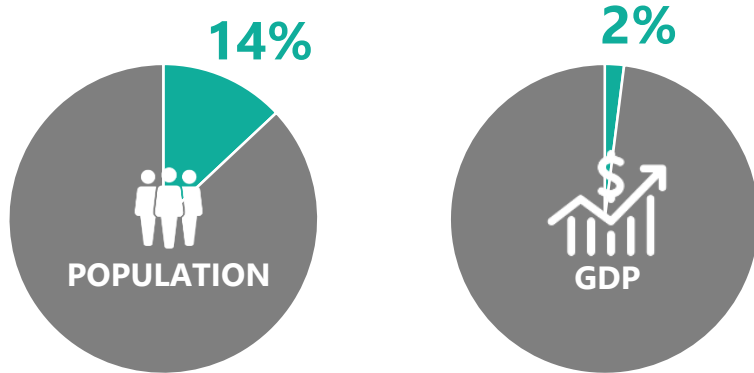
2018 – Million inhabitants



Source: World Bank

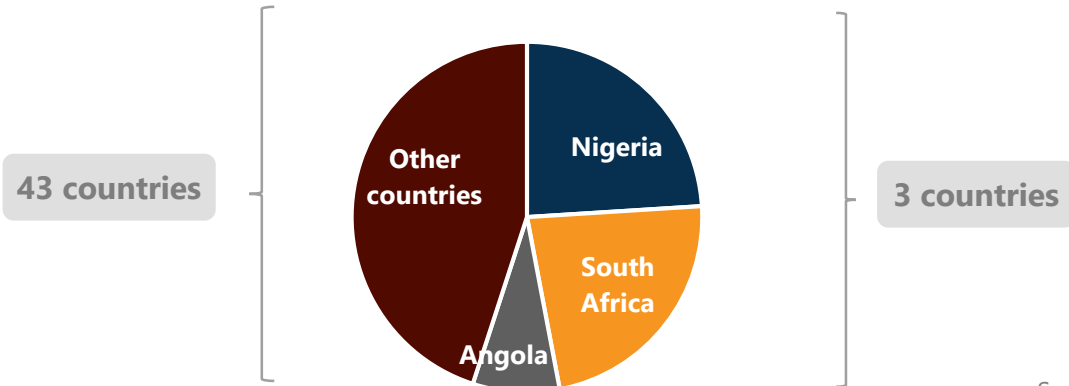
SSA IN THE WORLD

%World penetration - 2018



GDP IN SSA

2017 current US Dollars

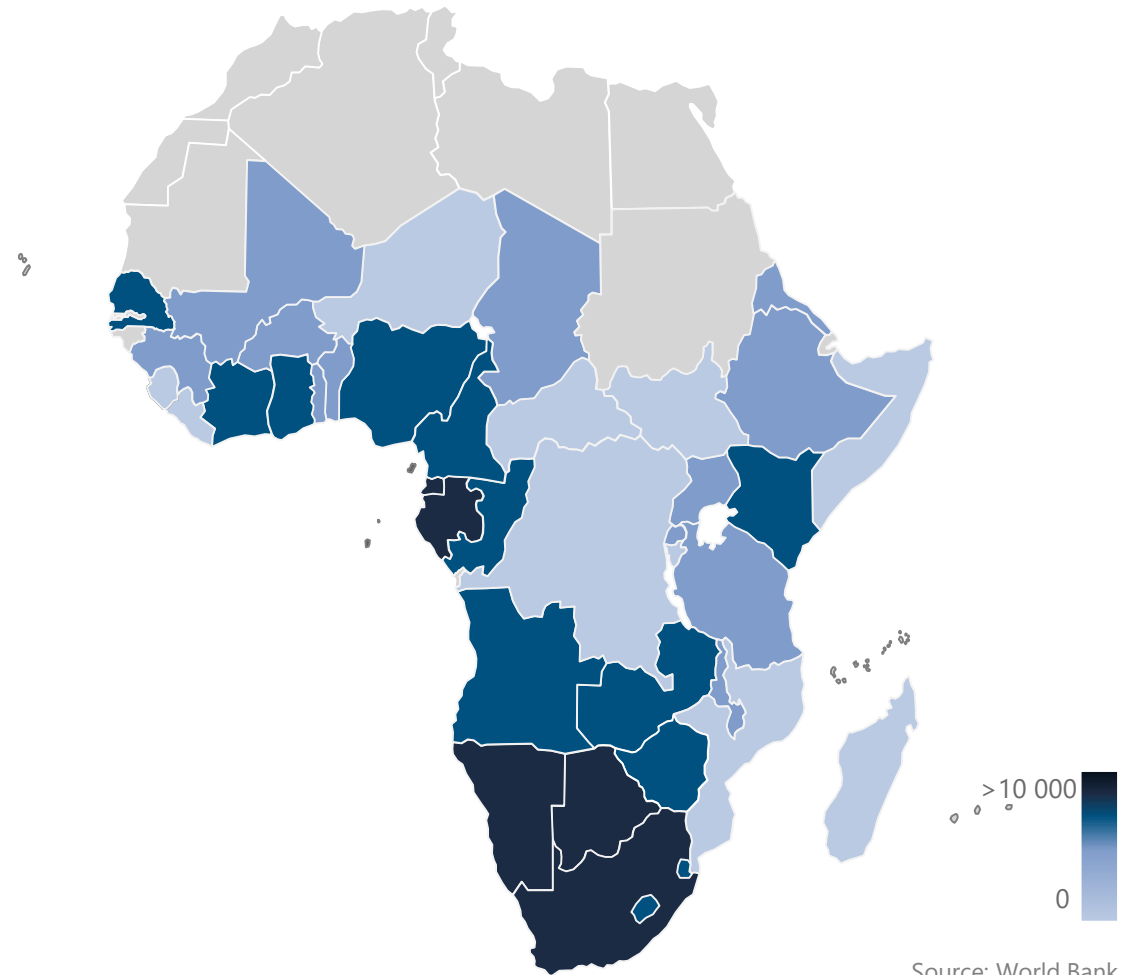


Source: World Bank

Source: Dataxis

COUNTRIES BY GDP PER CAPITA

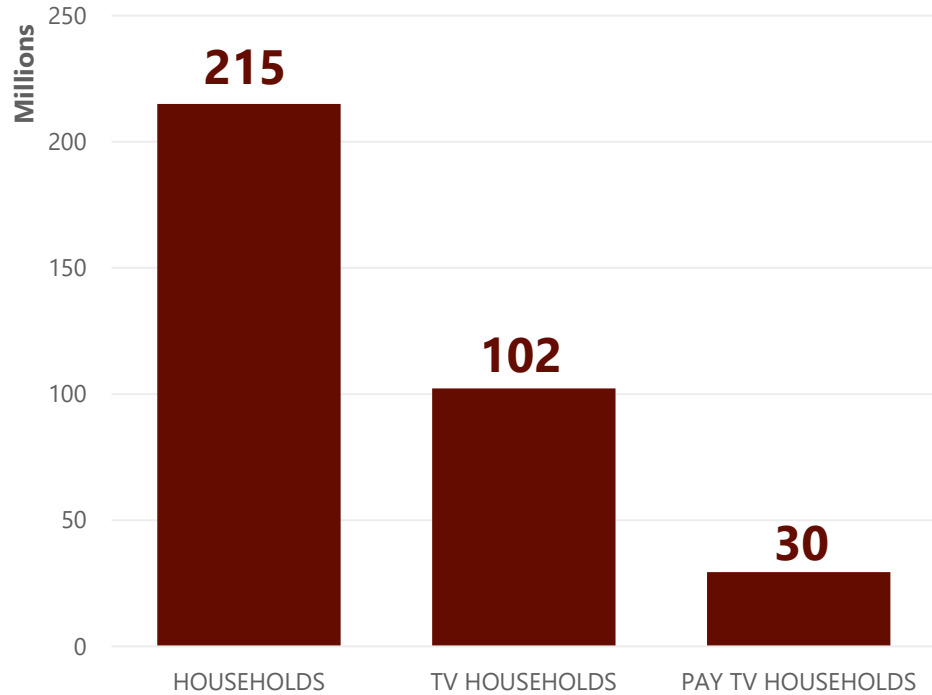
2017 – current US Dollars



Source: World Bank

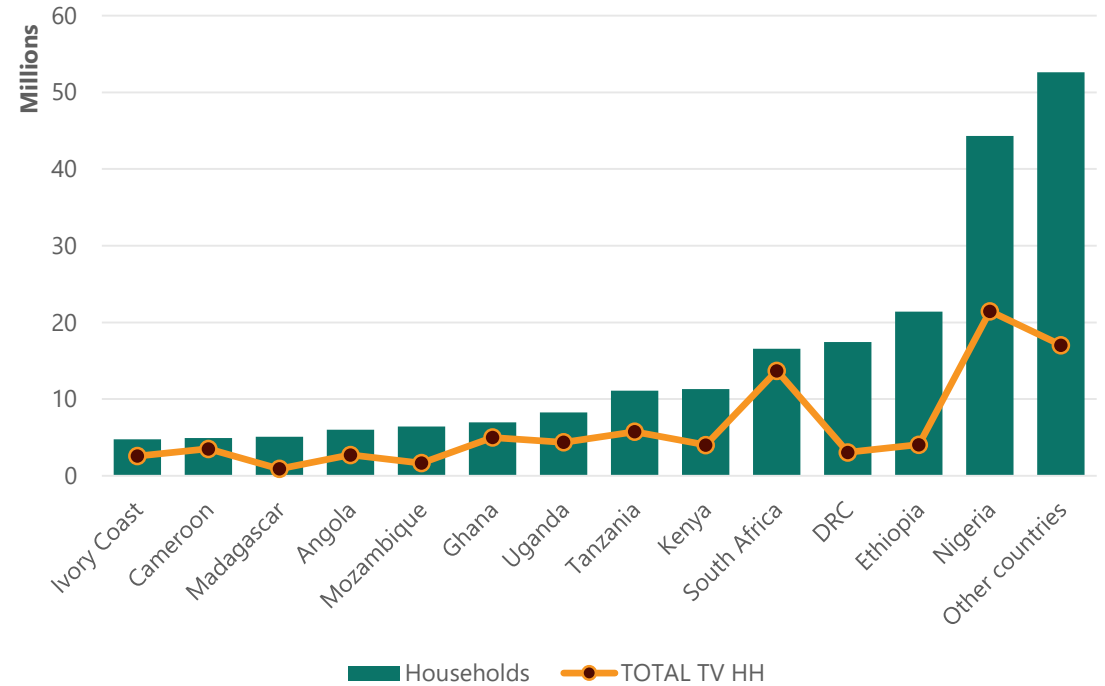
Among the 215 million households of the region, around 102 million have access to television in 2018. Even though the penetration is progressing, reaching 42% in 2018 compared to 40% in 2017, television has not yet fully penetrated into subsaharan African homes.

HOUSEHOLDS 2018



Source: Dataxis

TV PENETRATION %Total households - 2018

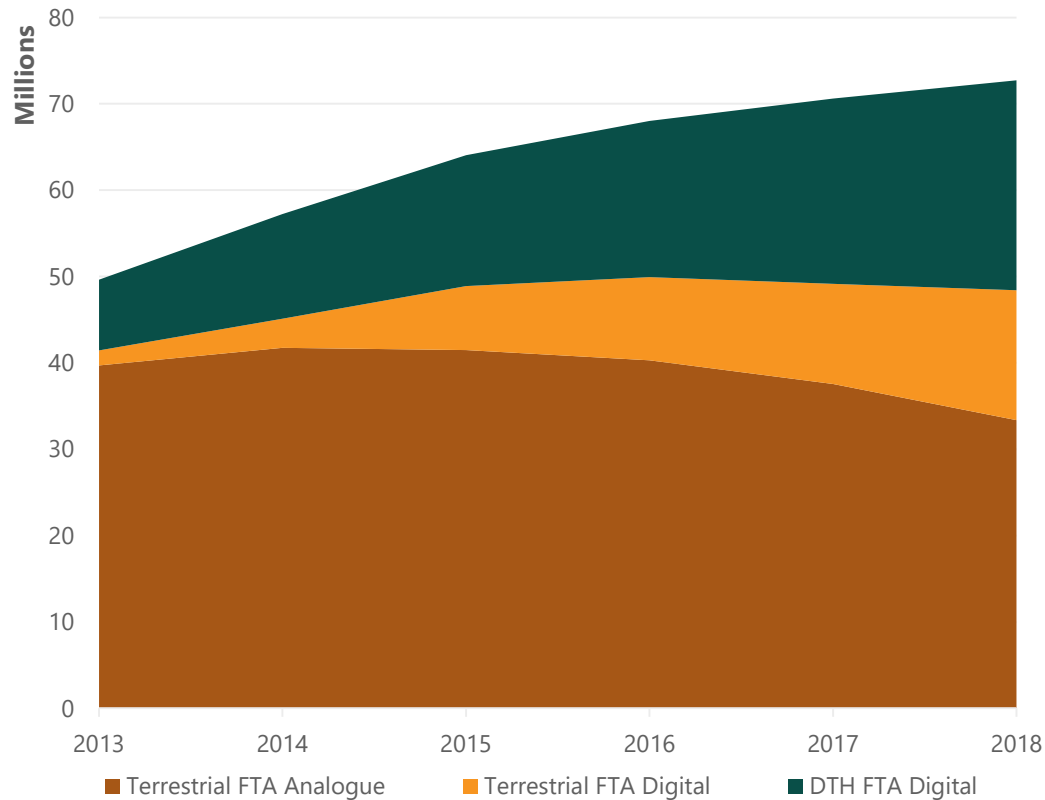


Source: Dataxis

Households receiving exclusively free-to-air channels have been making up most of television households for many years, despite the FTA offers' limitations in terms of number of channels and quality of content. This model could be revised with the adoption of DTH FTA platforms and the DTT migration.

FTA HOUSEHOLDS

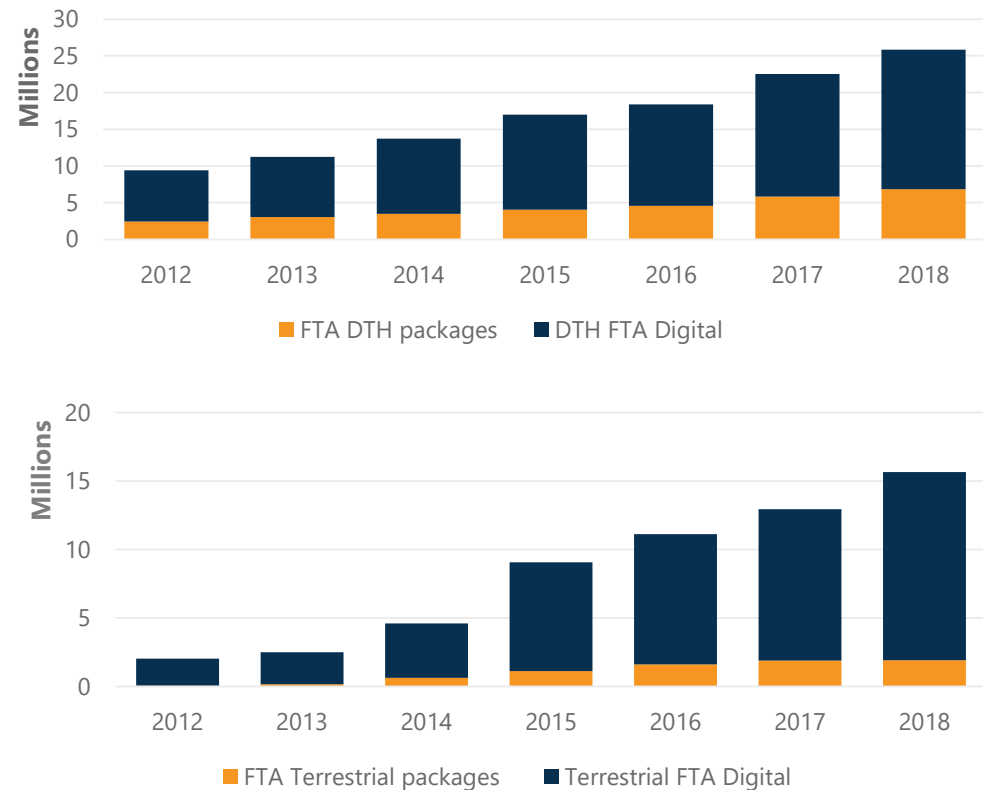
Number of households



Source: Dataxis

FTA PACKAGES

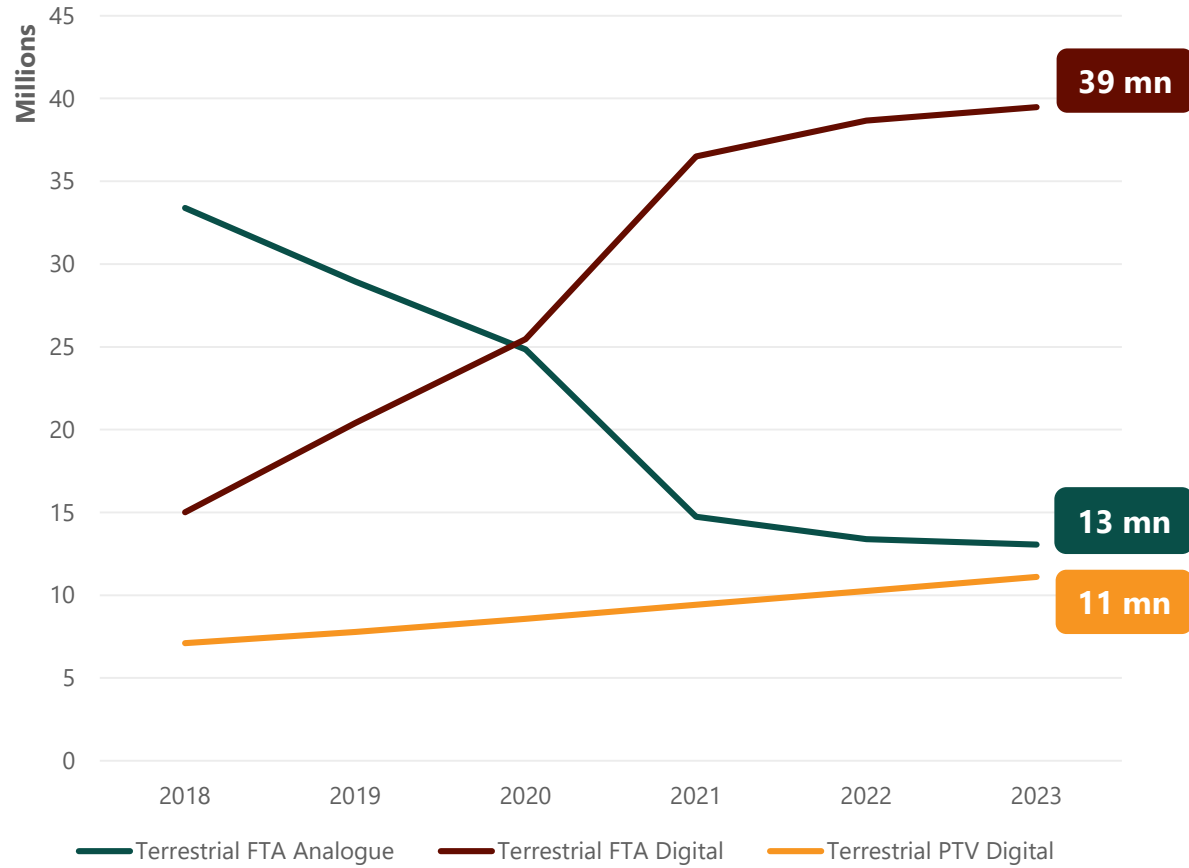
Number of households



Source: Dataxis

DIGITAL SWITCHOVER

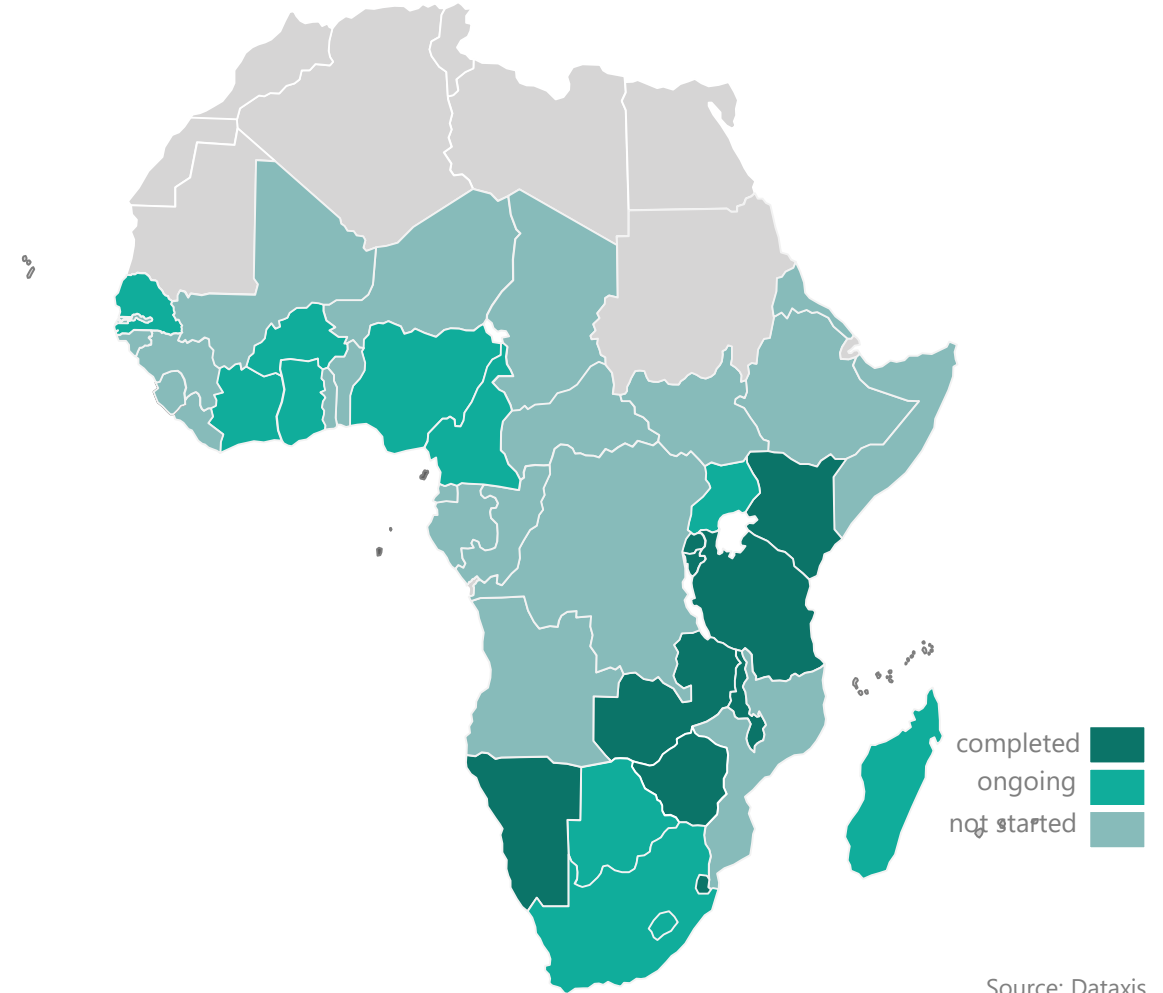
Number of households



Source: Dataxis

DSO STATUS BY COUNTRY

Digital migration stage - 2018



Source: Dataxis

FTA REVENUES KEY FIGURES

2018



0,7% CAGR 2014-2018



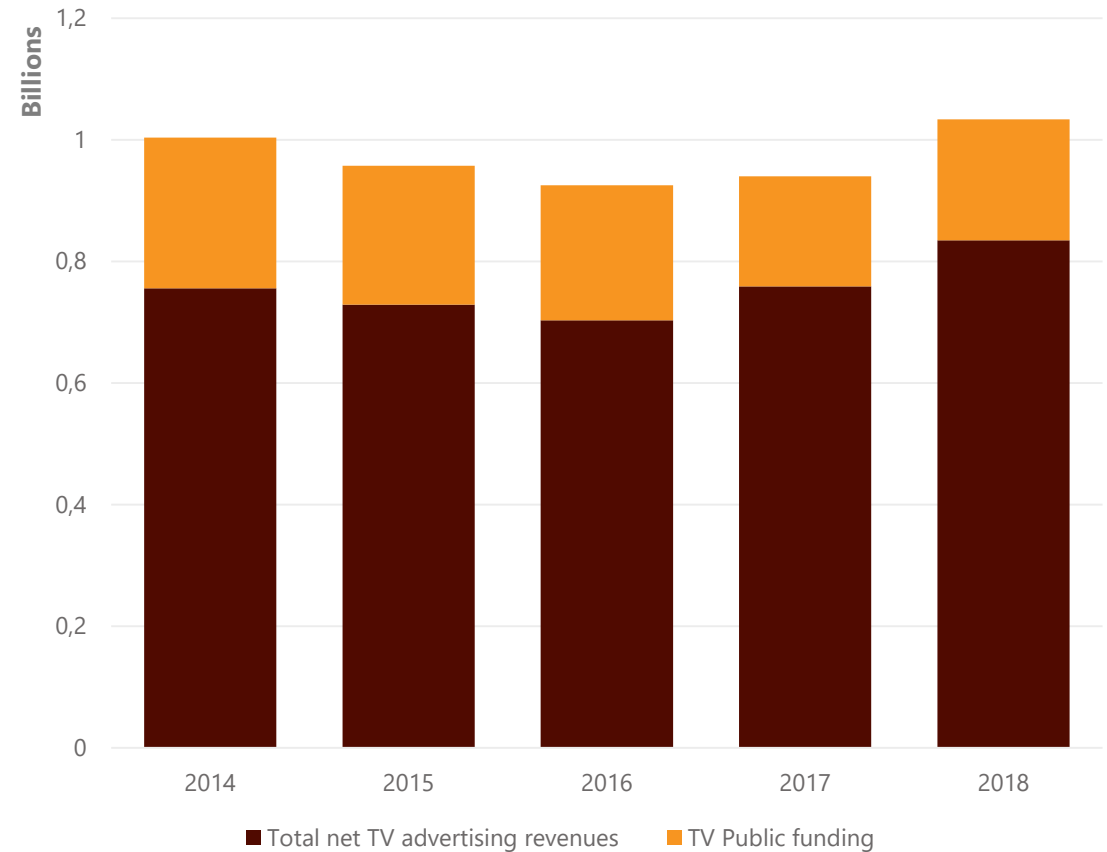
19% PUBLIC FUNDING



44% GENERATED IN SOUTH AFRICA

FTA BROADCASTERS REVENUES

US Dollars

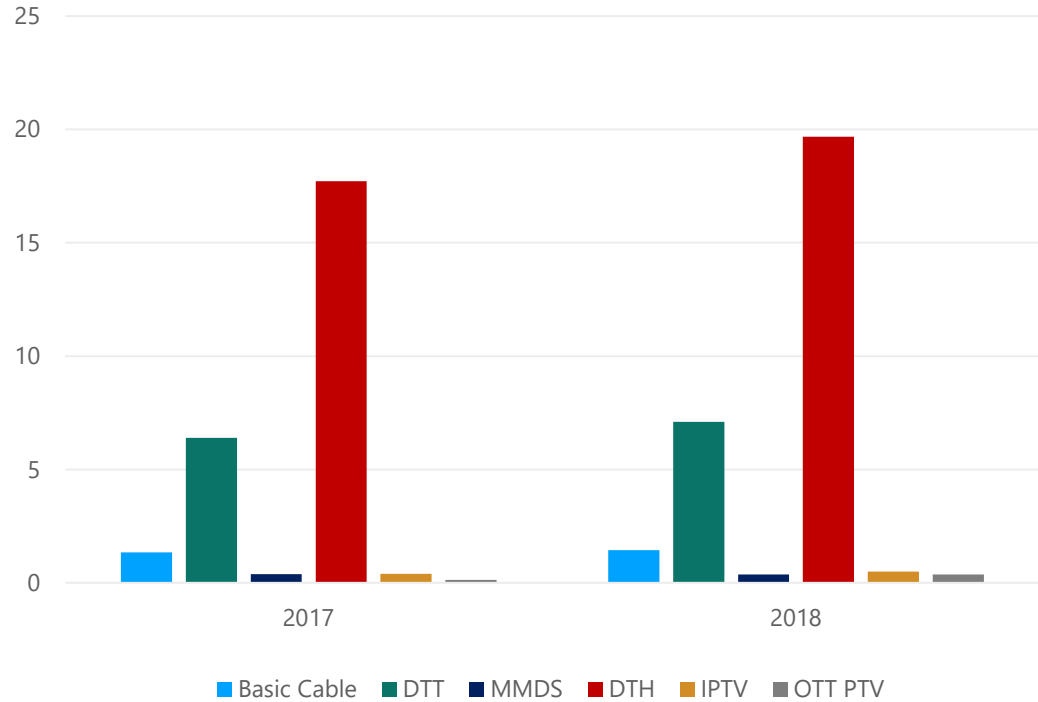


30 MILLION PAY TV SUBSCRIBERS

Pay TV penetration, although continuously increasing, only represents 30% of TV homes at the end of 2018. The growth could be driven by the emergence of a young, digital oriented middle class.

PAY TV MARKET BY TECHNOLOGY

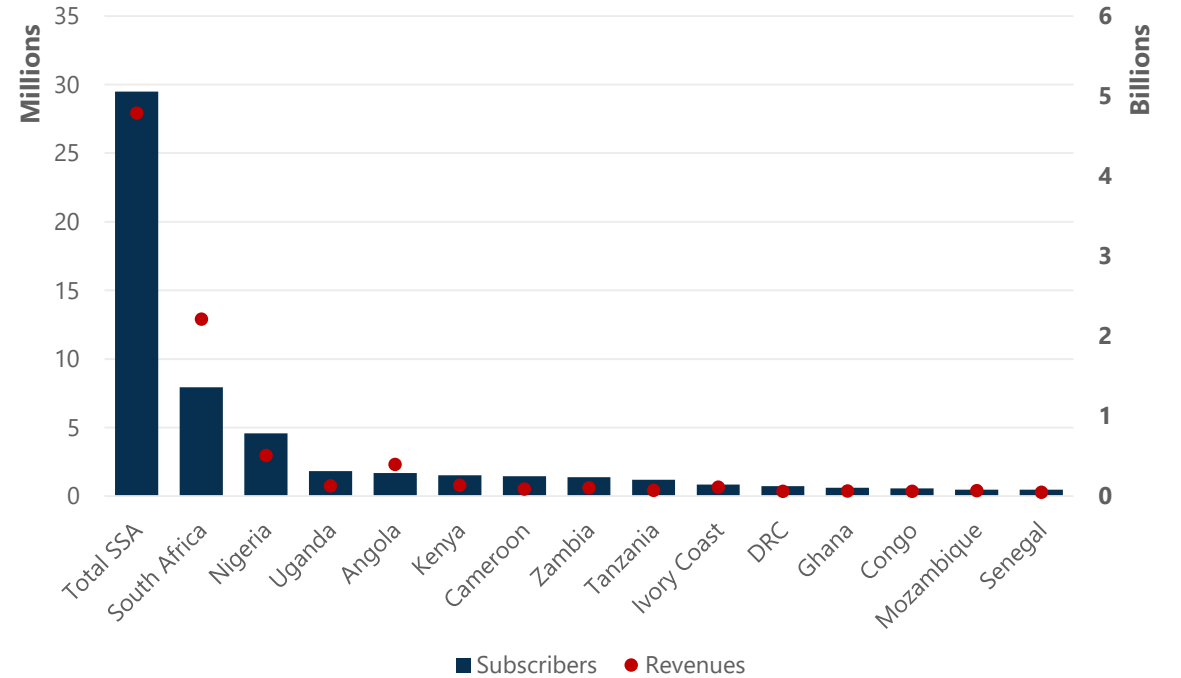
Number of subscribers



Source: Dataxis

PAY TV MARKET BY COUNTRY

2018 – number of subscribers – revenues in US Dollars



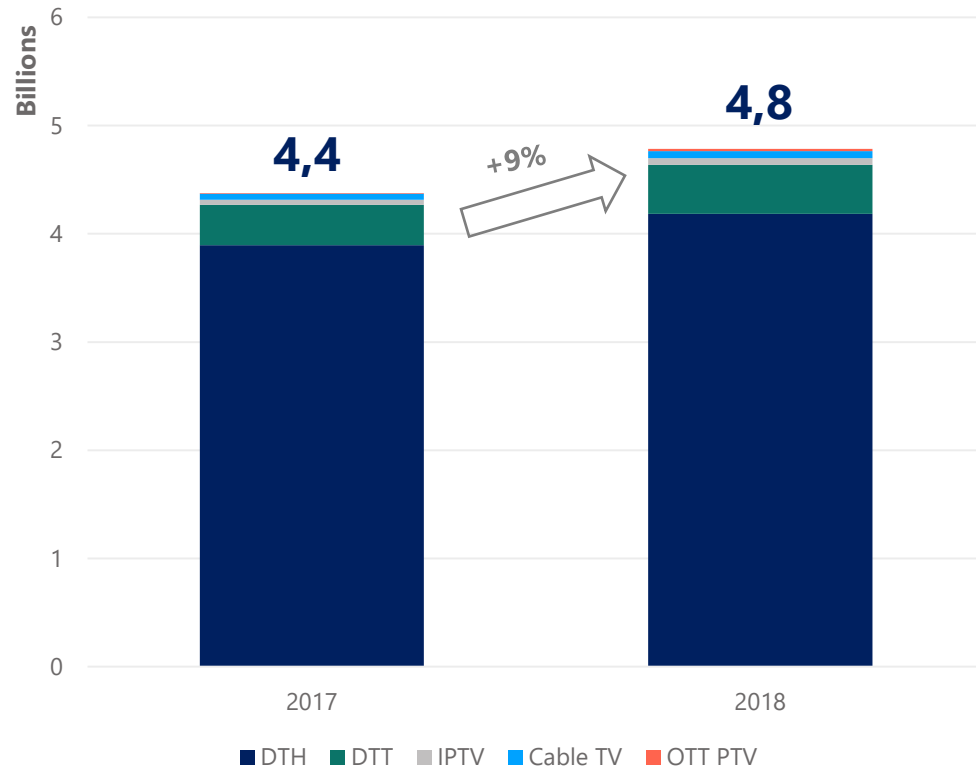
Source: Dataxis

A \$4,8 BILLION MARKET

Although pay television operators' ARPUs are globally decreasing, the revenues generated by television subscriptions are progressing and the pay TV market recorded a 9% growth in 2018. Average amounts paid to receive premium content remain high for the region.

PAY TV REVENUES BY TECHNOLOGY

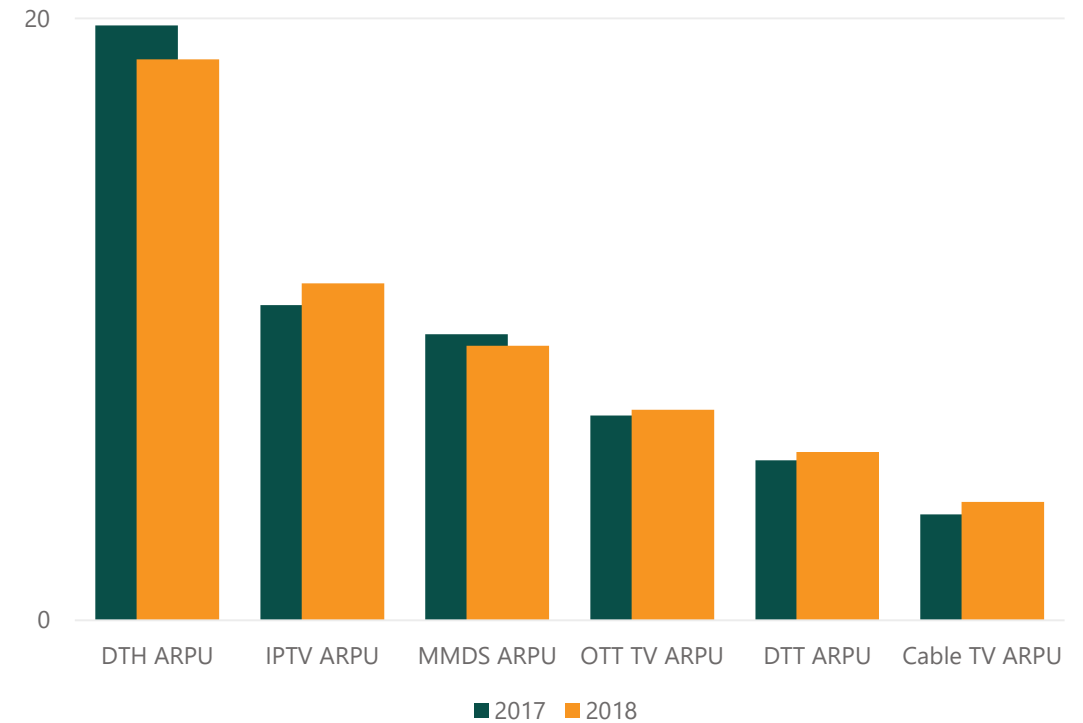
US Dollars



Source: Dataxis

PAY TV ARPU BY TECHNOLOGY

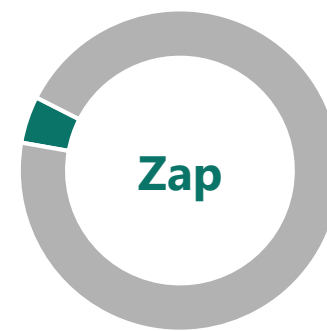
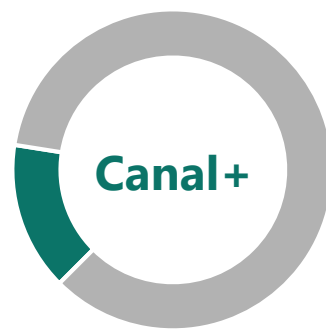
US Dollars



Source: Dataxis

PAY TV SUBSCRIBERS

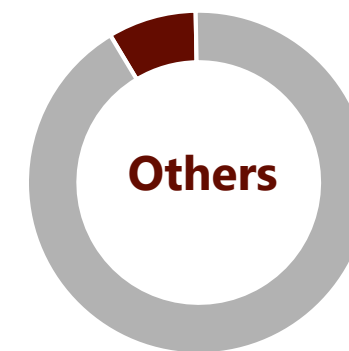
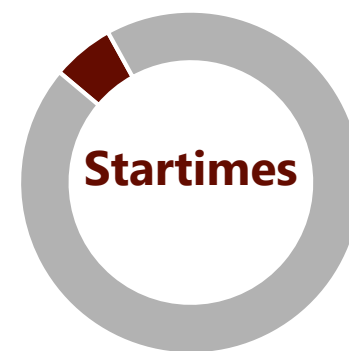
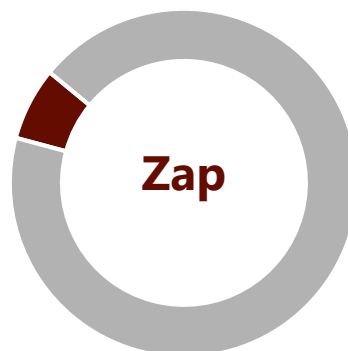
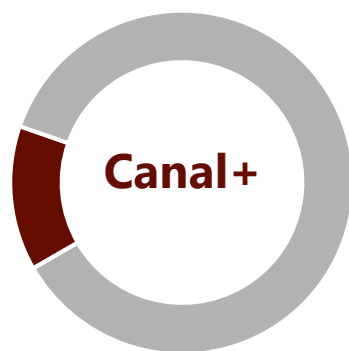
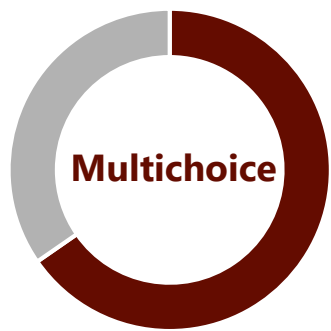
Market share by operator - 2018



Source: Dataxis

PAY TV REVENUES

Market share by operator - 2018

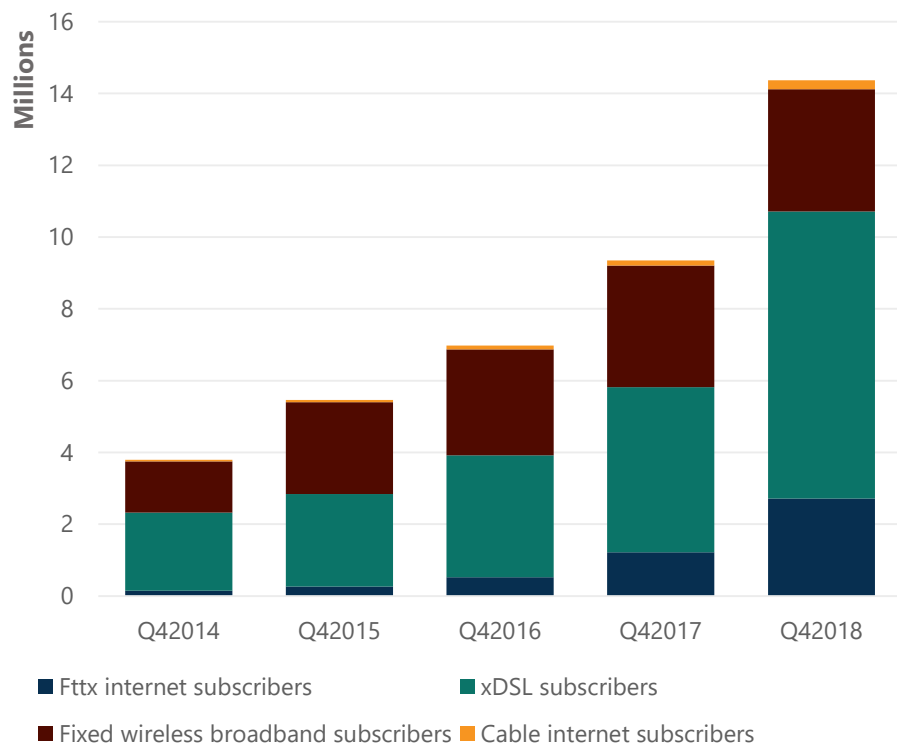


Source: Dataxis

Broadband is forecasted to gain in availability and affordability in the coming years and this deployment would create the necessary conditions for the spread of OTT content consumption.

FIXED BROADBAND EVOLUTION

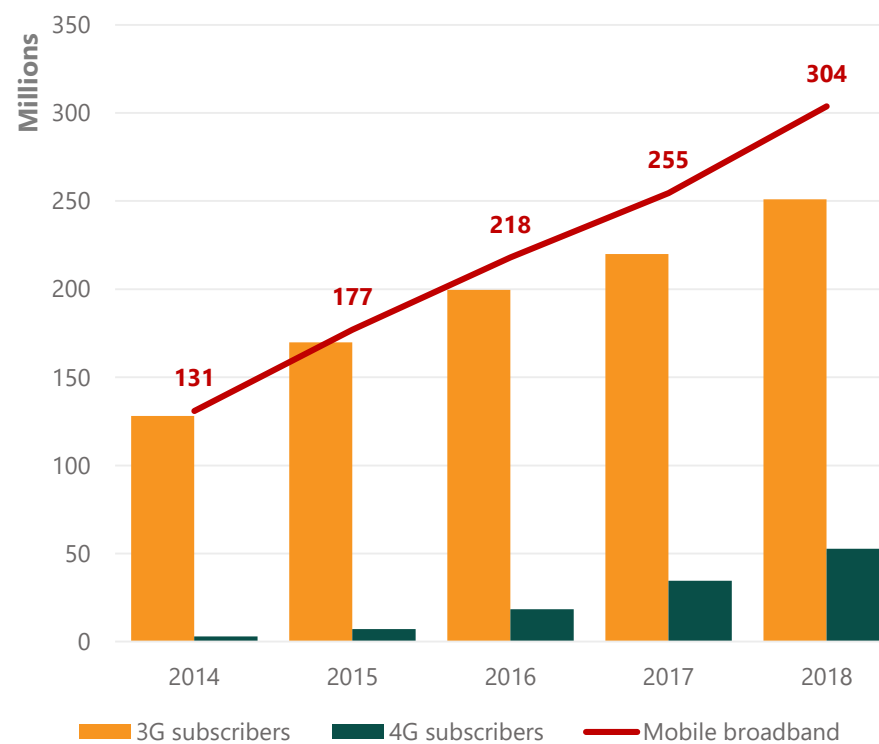
Number of subscribers



Source: Dataxis

MOBILE BROADBAND EVOLUTION

Number of subscribers

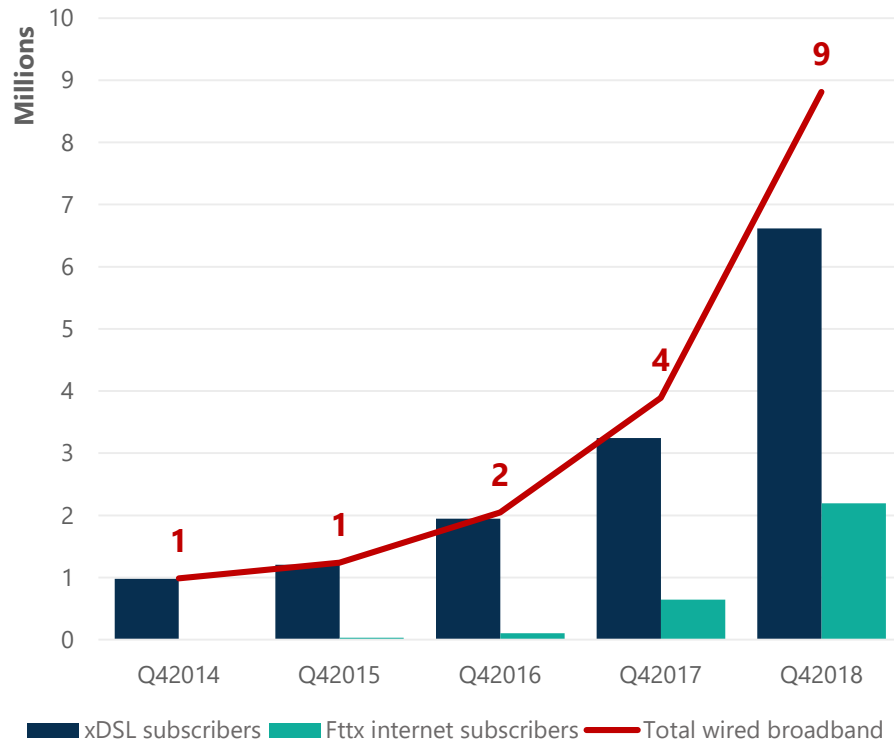


Source: Dataxis

A serious boom in fixed connectivity has been observed in South Africa in the recent years: xDSL and fiber connections are increasing at a fast pace. This surge benefits from South Africa's specific model, encouraging open access networks.

FIXED BROADBAND EVOLUTION

Number of subscribers



Source: Dataxis

OPEN ACCESS NETWORK MODEL

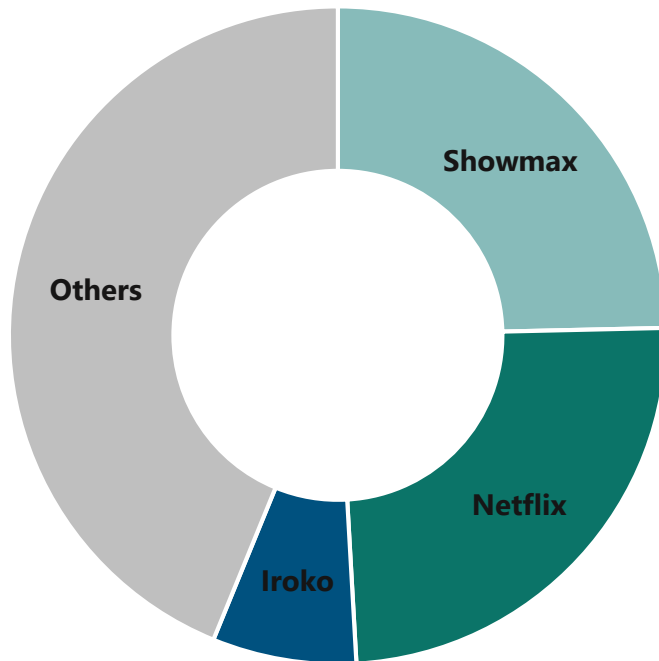
Implications for FTTx players

- PRIVATE LOCAL INITIATIVES
- REDUCE BARRIERS TO ENTRY FOR NEW ENTRANTS
- ENABLES TECHNOLOGY SHIFT FOR EXISTING PLAYERS
- ENCOURAGES LAUNCH OF ADVANCED SERVICES
- ENCOURAGES LAUNCH OF MULTIPLAY OFFERS

A full development of the OTT market would imply in priority an improved connectivity both in terms of coverage and prices, increased payments possibilities, and strong quality content.

SVOD AND PAY STREAMING SERVICES

%Market share by operator



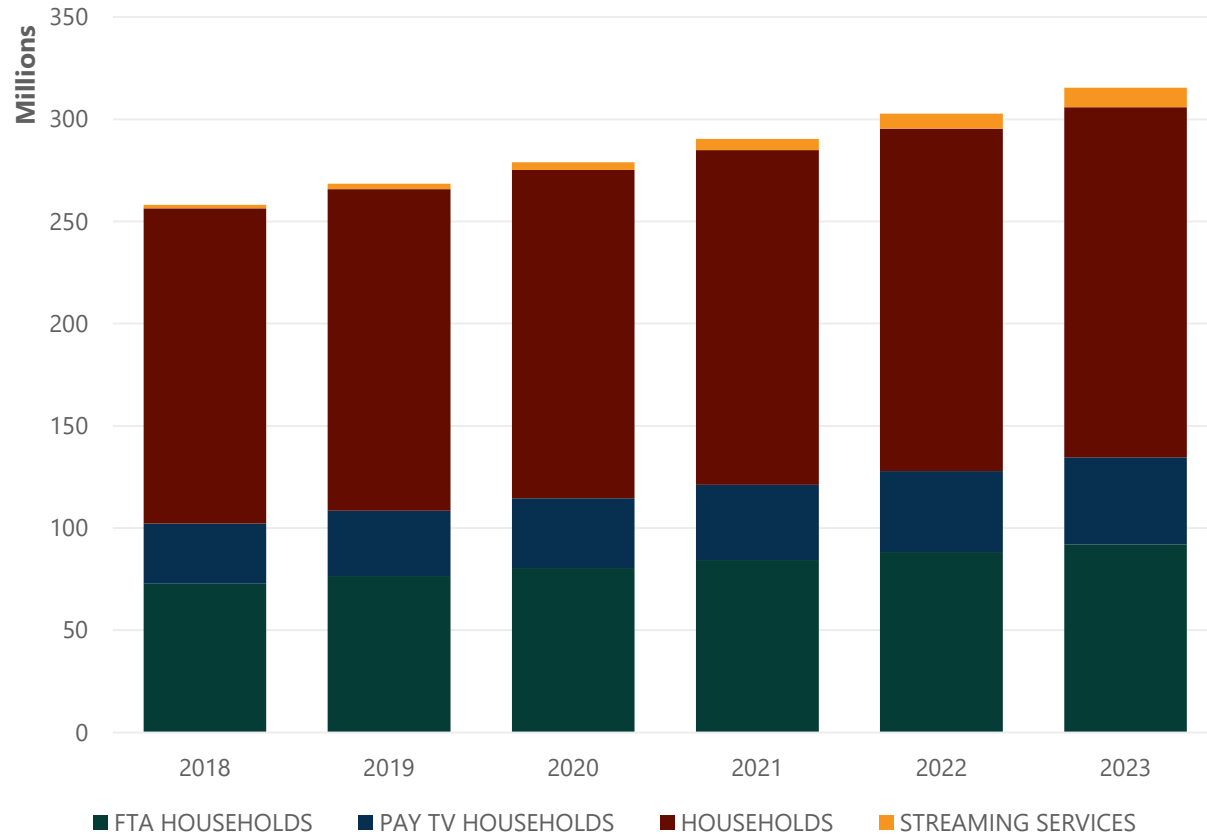
Source: Dataxis

OTT EXPANSION KEY ISSUES

- DATA AFFORDABILITY AND AVAILABILITY
- PAYMENT METHODS
- QUALITY CONTENT
- LONG TERM FUNDING
- DISTRIBUTION
- PIRACY

TV FORECASTS

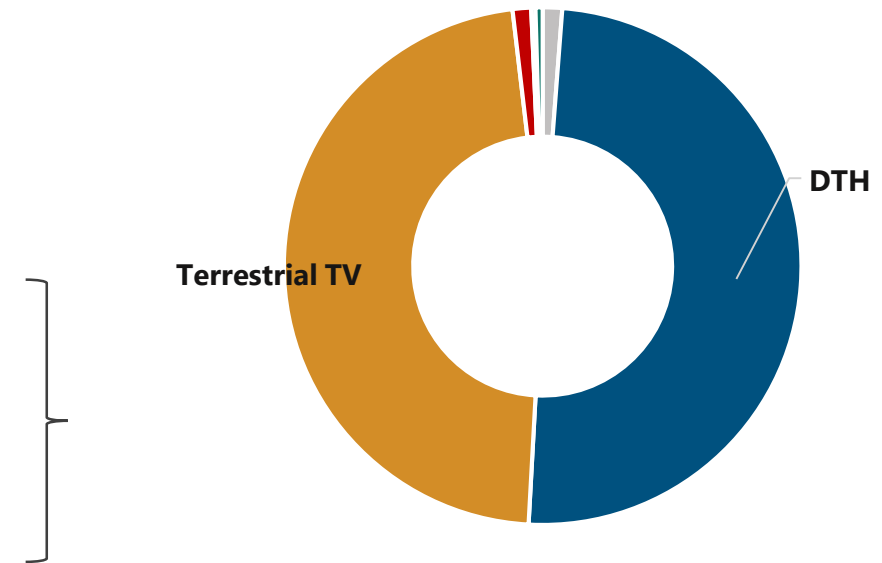
Number of households



Source: Dataxis

TECHNOLOGY SPLIT FORECAST

FTA AND PAY TV - 2023



Source: Dataxis

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& BROADCASTERS

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