

# Satellite and Pay TV Trends in Africa: 5 Things You Need to Know



Africa represents a diverse television market with immense opportunity for programmers and broadcasters. General economic trends are poised for steady growth. GDP for Sub-Saharan Africa is projected to grow between 3.7 and 4.1% from 2021 to 2025<sup>1</sup> which, combined with digitization, is driving investments in media infrastructure.

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## Satellite remains the best enabler in the African media market

With only 42% TV penetration of the 240M Sub-Sahara African households—35% of TV households subscribing to a Pay TV bouquet, and 65% receiving Free TV content— growth prospects in subscription and advertising revenue are plentiful for content providers. Linear content distribution retains the lion's share of current and forecasted revenue for the foreseeable future.

2

## Only satellite can overcome connectivity challenges in Africa

Unlike other areas of the world, OTT in Africa is underwhelming. Slow adoption is caused by the lack of affordability, quality of service, and coverage<sup>2</sup> Internet penetration is estimated at only 33.9%, leaving around 700 million people in Sub-Saharan Africa without access. 270 million people also live outside mobile broadband coverage areas. As a result, OTT suffers from high data fees for fixed and mobile broadband which few can practically afford. Satellite doesn't rely on terrestrial infrastructure and so can be delivered across significant coverage areas.

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## It's the perfect time for content providers to capture younger audiences

Almost 60% of Africa's population is under the age of 25, making Africa the world's youngest continent. Such a young population is attractive for content providers and advertisers as viewers tend to form viewing habits at a young age that will influence their viewing choices for the rest of their life. But garnering this data has typically been lacking in Africa. Intelsat is heavily invested in helping customers collect and qualify audience measurement more accurately.

<sup>1</sup> IMF, 2021

<sup>2</sup> ITU: Digital Trends 2021



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### Africa's multi-cultural population wants diverse content relevant to them

TV in Africa is multipurpose. It provides everything from news and sports to education, entertainment, and cultural or religious programming to its viewers. Because Africa is not a culturally homogenous continent, there is an abundance of opportunity to provide the variety of content viewers are looking for, in one of the 2,000 ethnic languages represented. To attract new viewers and retain existing ones, providers can leverage satellite's global distribution capacity to better reflect the continent's diversity and quench audiences' thirst for content they can identify with.



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### Intelsat is already a major force in Africa

Intelsat's Africa video neighborhoods are used for DTH and DTT and carry many national African broadcasters, Free TV platforms, as well as the largest Pay TV operator in the region. Intelsat 20 (IS-20) covers most of Sub-Saharan Africa and carries over 600 channels, connecting people to content across multiple genres. IS-20 reaches 45+ million free-to-air urban adult viewers in the top six African economies alone.

## The Benefits of Satellite



### More content

Offers viewers access to more premium and regional channels



### More coverage

Covers a larger expanse of the region than internet-based methods, and provides connectivity to other regions



### More flexibility

Meets audiences where they are, leading them to higher-quality programming



### More revenue

Gives broadcasters confidence in the sustainability of their business model

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