

# Satellite TV increases market share in West Africa

Satellite operator SES has set up TV satellite platforms in West Africa. As part of that work, it carried out two national surveys, one in Ghana and the other in Nigeria. This week we look at what these surveys can tell us about the changes in two of West Africa's biggest broadcast markets.



Image by 123RF

Both surveys were carried out by IPSOS and have results from the end of 2015 so are just over 12 months old. They are important because they provide the first publicly available national snapshot of any accuracy for both countries.

One key issue the findings for both countries sheds light on is the progress of the transition to digital broadcasting. In both countries the process has been very slow. But in Ghana, the Government has created a process for the switchover, whereas in Nigeria the Government is only really beginning to get to grips with it.

## Nigeria

With Nigeria, the problem has always been that there has been little accurate publicly available data and where it exists, few people use it. Also the estimates for the overall population (even from the census) are not widely trusted. I have been in meetings where Nigerian broadcasters have talked of 50 million TV households so to get some figures grounded in research is refreshing. They may not be exactly right to the last million but they are certainly more likely to be right than guessing.

Based on the survey results that used a national sample, there are 34 million homes of which 32.92 million (a 97.3% penetration) are TV homes. Of the TV homes, 23% (7.66 million) have flat screen TVs and the rest have tube-based TVs.

In terms of mode of reception, unlike in Ghana, terrestrial remains dominant: Terrestrial (20.41 million); satellite (8.98 million) and cable (3.53 million). SES 's platform is calculated to reach 2.81 million of cable and satellite households

The overall average for satellite market share in TV households for Nigeria is 27%.

The states with above average satellite share are as follows: Kaduna (62%); Bauchi (48%); and Kano (35%). Not surprisingly, this is some of the key Northern states in Nigeria.

Even without a proper Government process in place, the number of digital TV households already exceeds the number of analogue households. There are 18.37 million digital TV homes versus 14.54 million analogue TV homes. The digital TV homes break down as follows: 8.98 million satellite TV homes; 5.27 million terrestrial TV homes; and 3.53 million cable TV homes.

## Ghana

Based on the survey results that used a national sample, there are 7 million homes of which 5.71 million (a 93.1% penetration) are TV homes. The number of TV homes gone from 5.58 million in 2014 to 5.71 million in 2015. Of the TV homes, 22% (1.26 million) have flat screen TVs and the rest have tube-based TVs. This figure is very similar to the figure for Nigeria.

In terms of mode of reception, satellite has become a competitor mode to terrestrial and cable has only a tiny market share: Terrestrial (3.5 million); satellite (2.15 million) and cable (0.06 million). SES 's platform is calculated to reach 2.01 million of cable and satellite households. Satellite homes increased from 1.72 million in 2014 to 2.15 million in 2015 and this represents 38% TV market share.

The overall average for satellite market share in TV households for Ghana is 38%%.

Areas with above average satellite share: Eastern (59%); Volta (59%); Upper West (56%); Brong Ahafo (52%); Western (48%); Upper East (45%); and Northern (42%).

Although the Government has now got in place a digital transition process, unlike in Nigeria, analogue TV households still exceed digital TV households. There are 3.33 million analogue TV households versus 2.27 million digital households. The digital TV homes break down as follows: 2.15 million satellite TV households; 0.05 million terrestrial TV households; and 0.06 million cable TV households.

So what are the takeaways from these numbers? Firstly, how television is delivered has and will continue to change rapidly. Anyone selling programmes or channels needs to understand that selling to one terrestrial TV channel in a country no longer represents reaching the maximum audience.

Secondly, satellite as a TV delivery mode in Sub-Saharan Africa has legs and will continue to grow. This will be particularly true for those countries there are very slow in getting to the digital transition in broadcasting. Thirdly, given the importance of television to the development of African countries, surveys like this should be conducted on an annual basis by regulators in those countries where data is not available.

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