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83 million African households to have access to Digital Terrestrial Television by the end of 2020, but will they actually be consuming it?

15 November 2018

Top Story

The slow progress of Africa's migration from analogue to digital broadcasting has been frustrating for everyone in the broadcast industry.

Balancing Act's latest report Analogue to Digital Broadcasting Migration Africa shows there has been some progress but there's still a long way to go. Balancing Act's Head of Research Matthew Dawes looks at whether Africa will reach the finish line just as viewers take their loyalty to other screens.

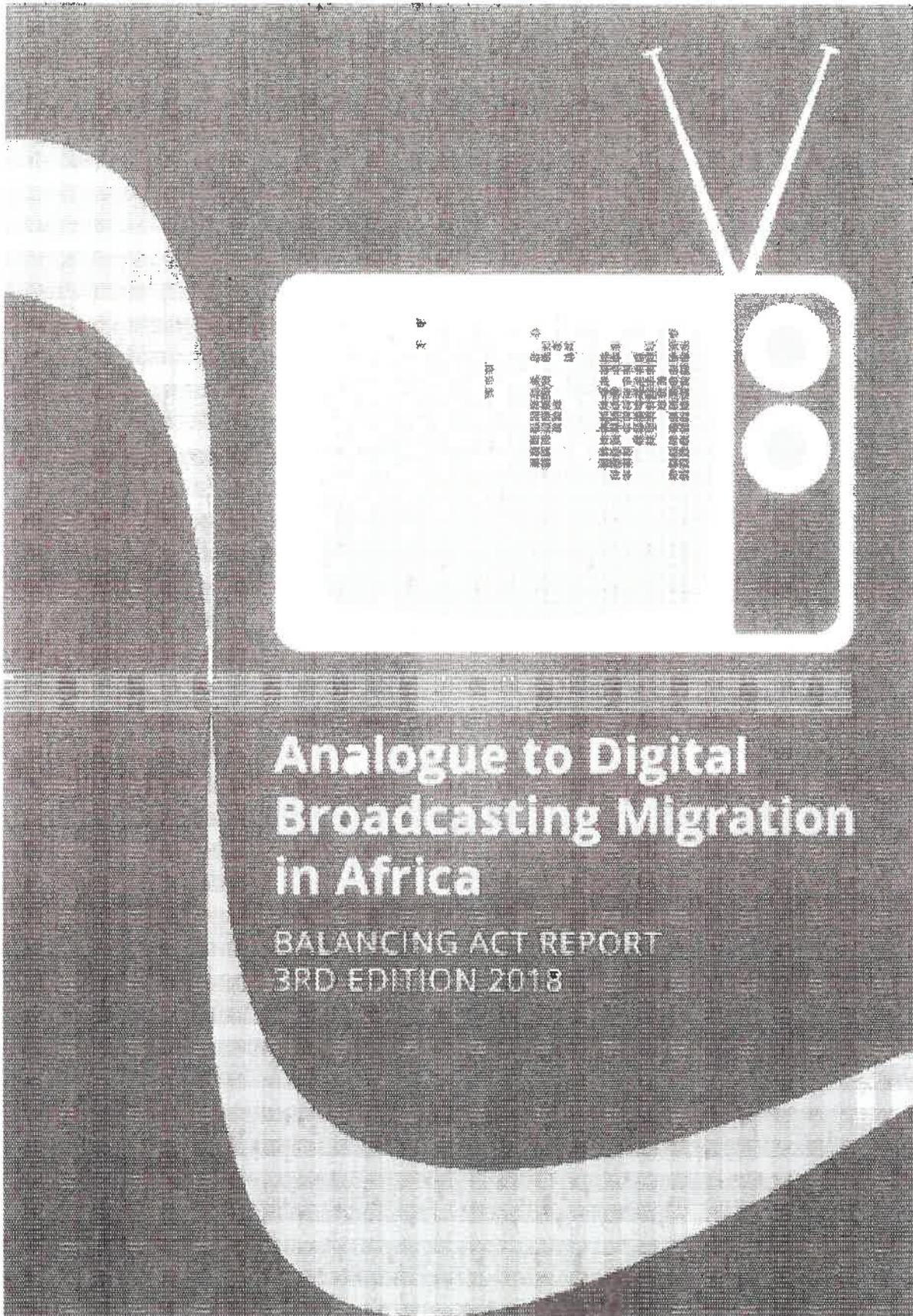
The ITU's 17th June 2015 deadline for the switchover from analogue to digital migration has long been passed by the vast majority of African Governments, but, a newly released report by Balancing Act does paint a much more positive picture for the digital switchover on the continent. Whilst progress has been slow, indeed for some non-existent, all being well 29 countries and territories out of 56 are expected to have completed their projects, by the end of 2020. That means two-thirds of African households who own a television will have the opportunity to view Free-To-Air broadcasted digital programmes in a few years' time. This is a massive improvement on the 14 million that currently can.

However, the phrases and words to focus on are "have access" and "the opportunity", because having access and the opportunity does not necessarily mean that those 83 million TV households will actually be consuming digital broadcasting content. Unfortunately, one of the significant consequences of the delays in the migration is that it has coincided with the growth of smartphone usage, the arrival of Free-To-Air satellite platforms (particularly in Ghana and Nigeria) and video-on-demand services across the continent.

For many TV households in North Africa, the digital migration passed them by because direct-to-home satellite broadcasts have long been the main way of watching television programmes. That, and the growth of private digital platforms, the rise in video streaming services (in this article we referenced how Netflix is already taking chunks out of DSTV's subscriber base in South Africa) and you can see why these delays may well result in a fair dose of "opportunity loss" for public African broadcasters. There are 2 other factors that, also, need to be considered in this increasingly complex web of changes.



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The first goes back to one of the key challenges that migration project teams are facing all over the continent – getting the public prepared and equipped for the switchover : By 2020, 83



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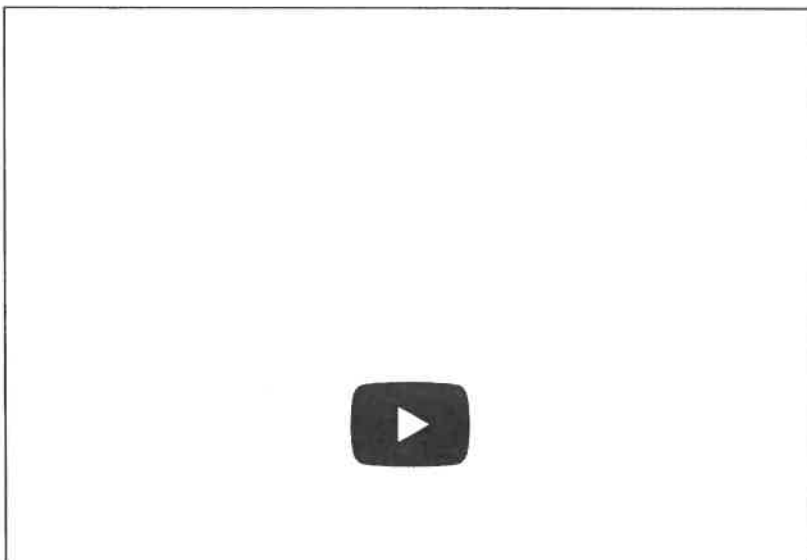
million households are going to need to equip themselves with the right kit to receive digital signals – a new digitally enabled television, a set top box or decoder and quite possibly a new antenna or dish as well. That is a major undertaking and one that is worth a considerable amount of money. Each country is going to have to invest in a widescale communications strategy, they're going to have to source the kit, manage the logistics around supplying it, organise and manage subsidies so people can afford to upgrade. Bearing this in mind the more pertinent question may well be "Will 83 million African households have the right set-up to receive digital broadcasting by 2020?".

The second factor is on the face of it a simpler one: there are only so many hours in a day that a consumer has available to view actual content. Along with the coincidental growth of video-on-demand there has also been a massive rise in other competing content that users may well chose to consume over television. Social media has obviously seen a huge rise in growth since that 2015 ITU deadline. The number of ways that you can now listen to music, play games, shop and read the news will all ultimately eat away at those precious viewing hours.

The irony of the situation for broadcasters is that the bigger picture, the driving force behind the switchover was the freeing up of spectrum that could then be allocated to 4G and 5G mobile telephony networks. Increased connectivity and increased competition, which will in turn drive usage on smartphones is just going to make the user experience of those devices even more attractive. On the plus side, whilst the migration from analogue to digital broadcasting may not deliver the benefits to Free-To-Air broadcasters that were hoped, all in all it will create a much improvement and varied content consumption landscape for citizens across the continent. Watching a publicly broadcast HD programme with excellent audio, through a set top box, connected to a widescreen television, with an upgraded antenna on the roof will just be one of the options available to them.

However, the bigger challenge remains. In each of the countries where the migration has been completed there are now significantly more channels: who is going to pay for the content that will need to fill these channels?

What Russell Southwood and Matthew Dawes discuss Africa's migration from analogue to digital broadcasting below.



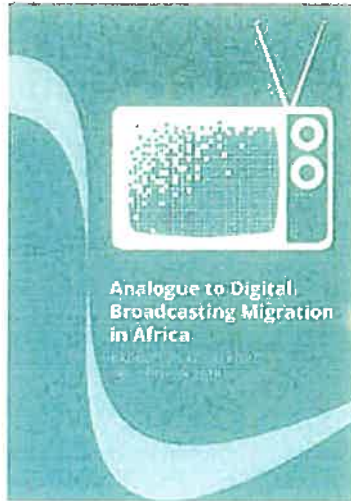
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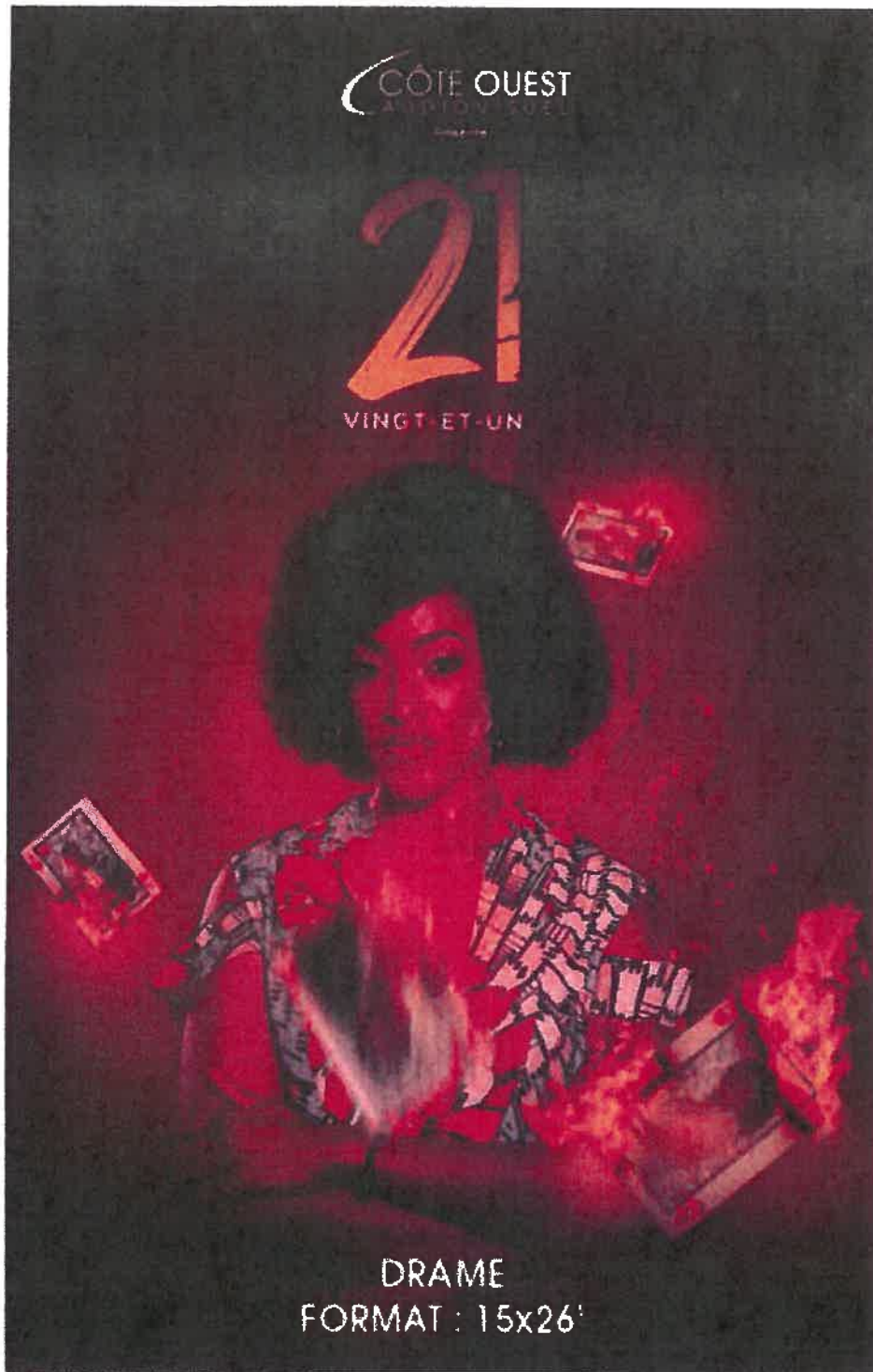
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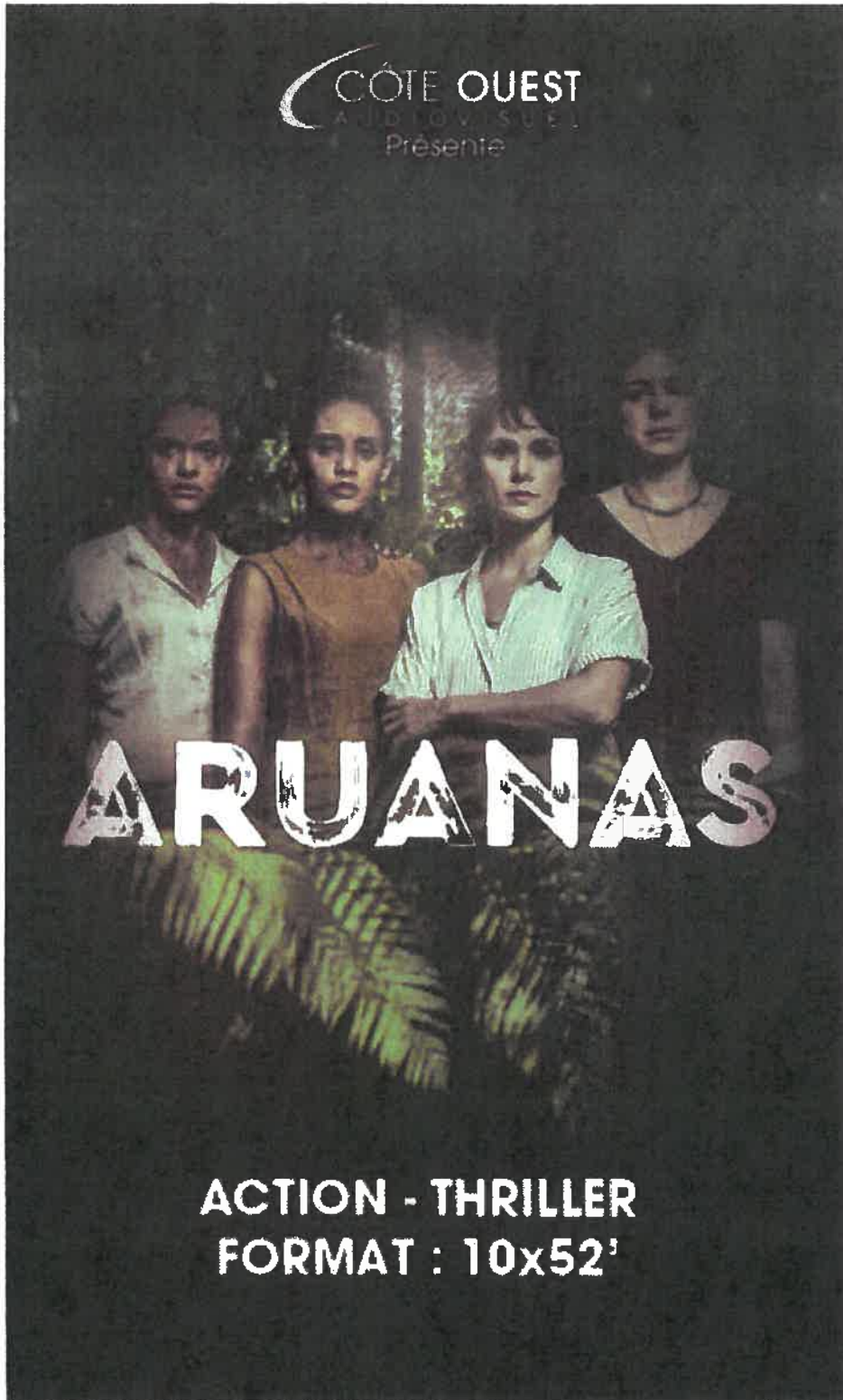
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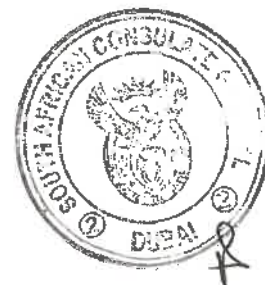
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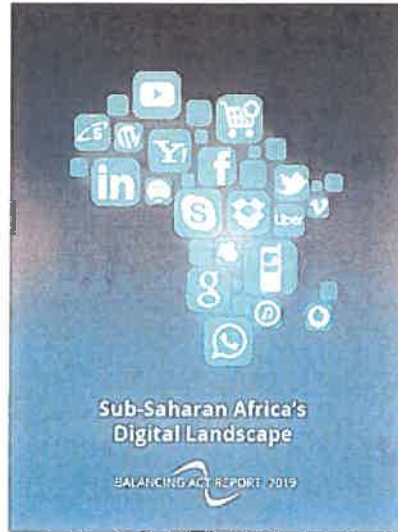
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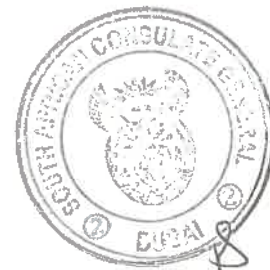
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