

# TV Broadcasting in Nigeria

A CLOSER LOOK AT THE FREE-TO-AIR MARKET

**Nigeria represents a diverse and rapidly growing TV market.**

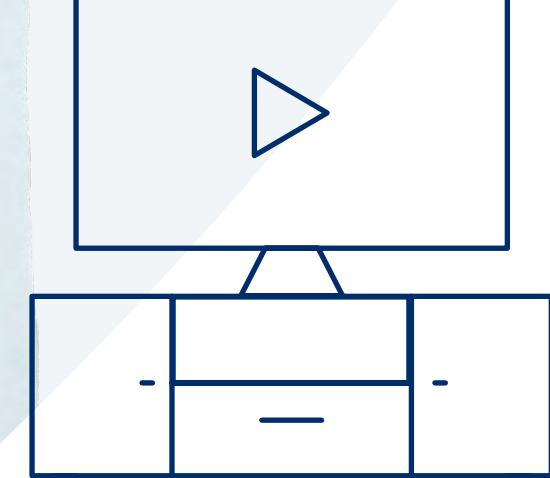
With a population of over 216 million people, viewers are watching a multitude of content in a variety of ways.

**216M**

Population of Nigeria



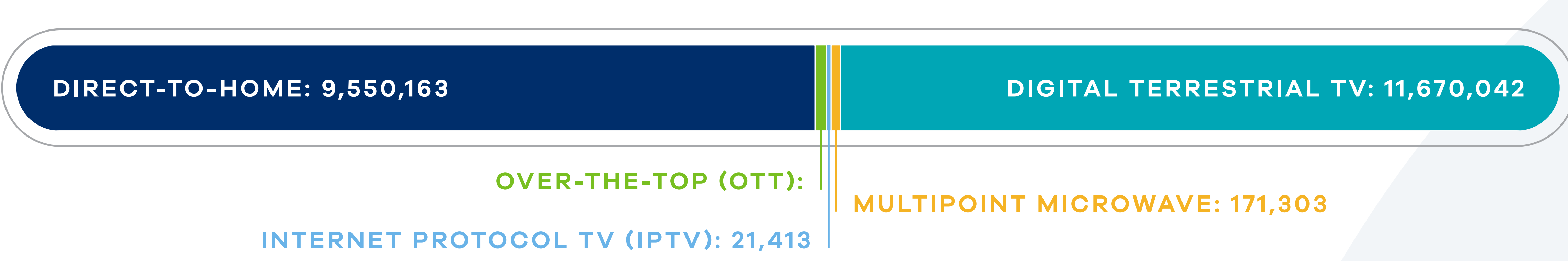
**42.7M**  
Number of Households



**21.4M**  
Number of TV Households

## Number of TV Households by TV Service

The market today is largely dominated by Digital Terrestrial Television (DTT) and Direct-to-Home (DTH) services.

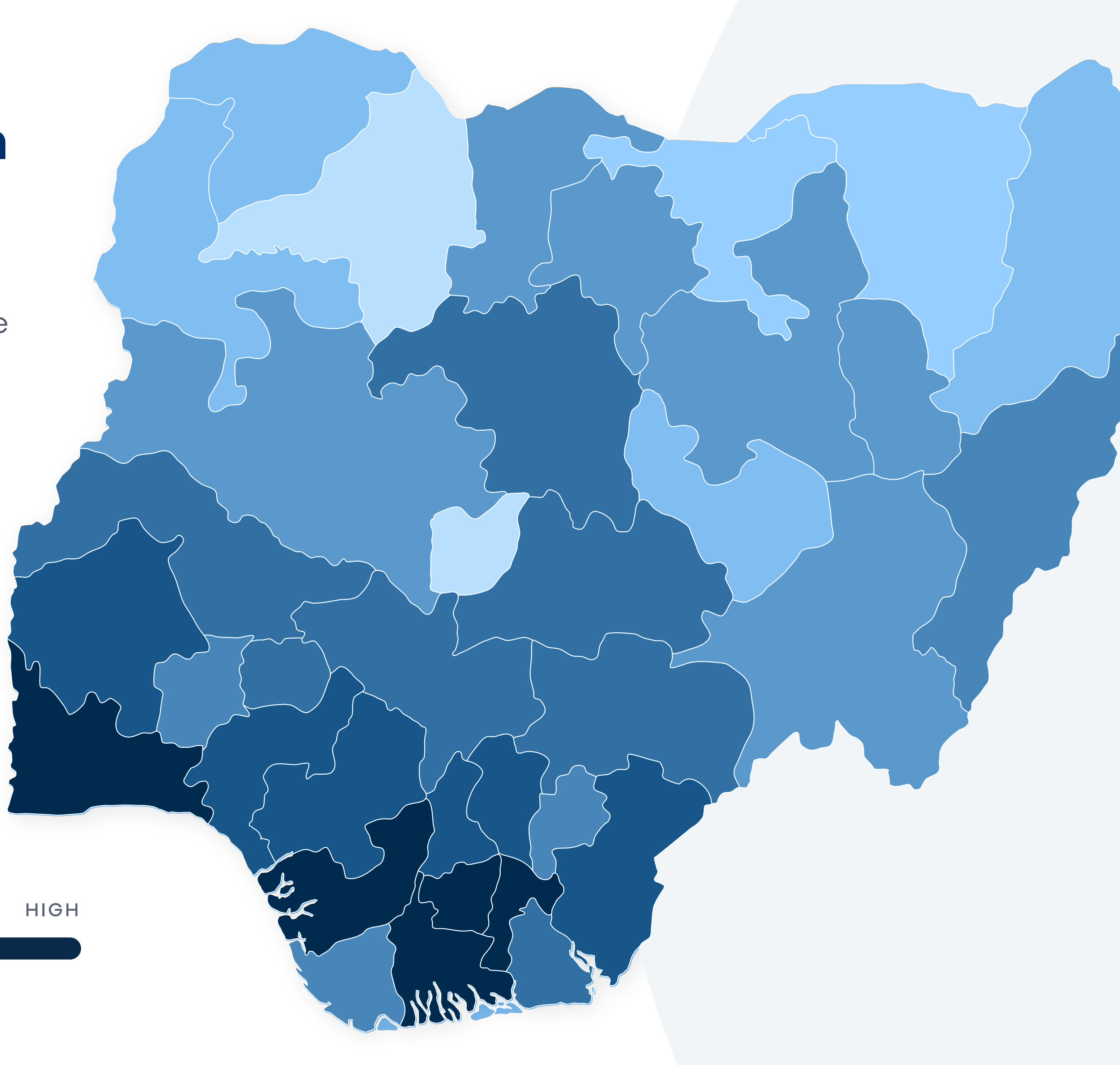


## Growth and Penetration

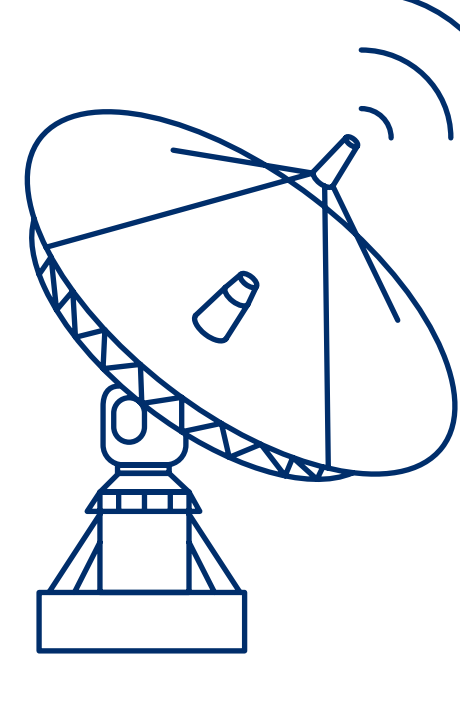
Like many countries in Africa, geography, population density, and distribution infrastructure play a large role in audience size and the type of programming they're interested in consuming.

**Southern states in Nigeria have high TV penetration, averaging 75%.**

**Northern states are less penetrated, with an average of 23%.**

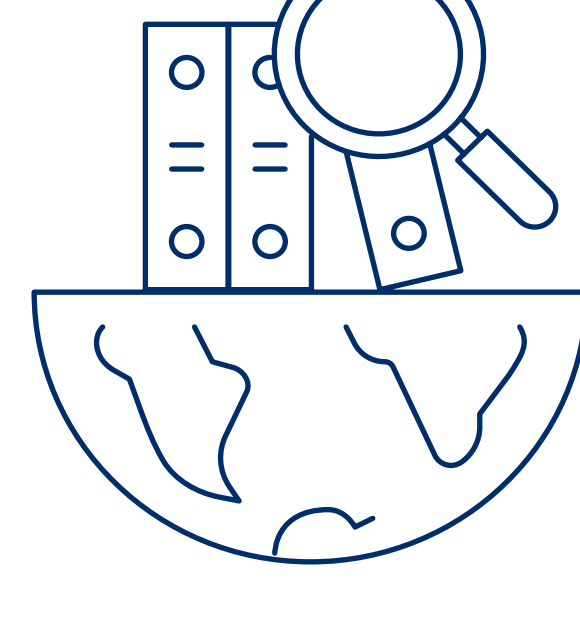


## Geography Makes a Difference



### Infrastructure

Southern states, especially major urban areas, often have established cable and satellite networks. Northern states typically have a digital and connectivity disparity.



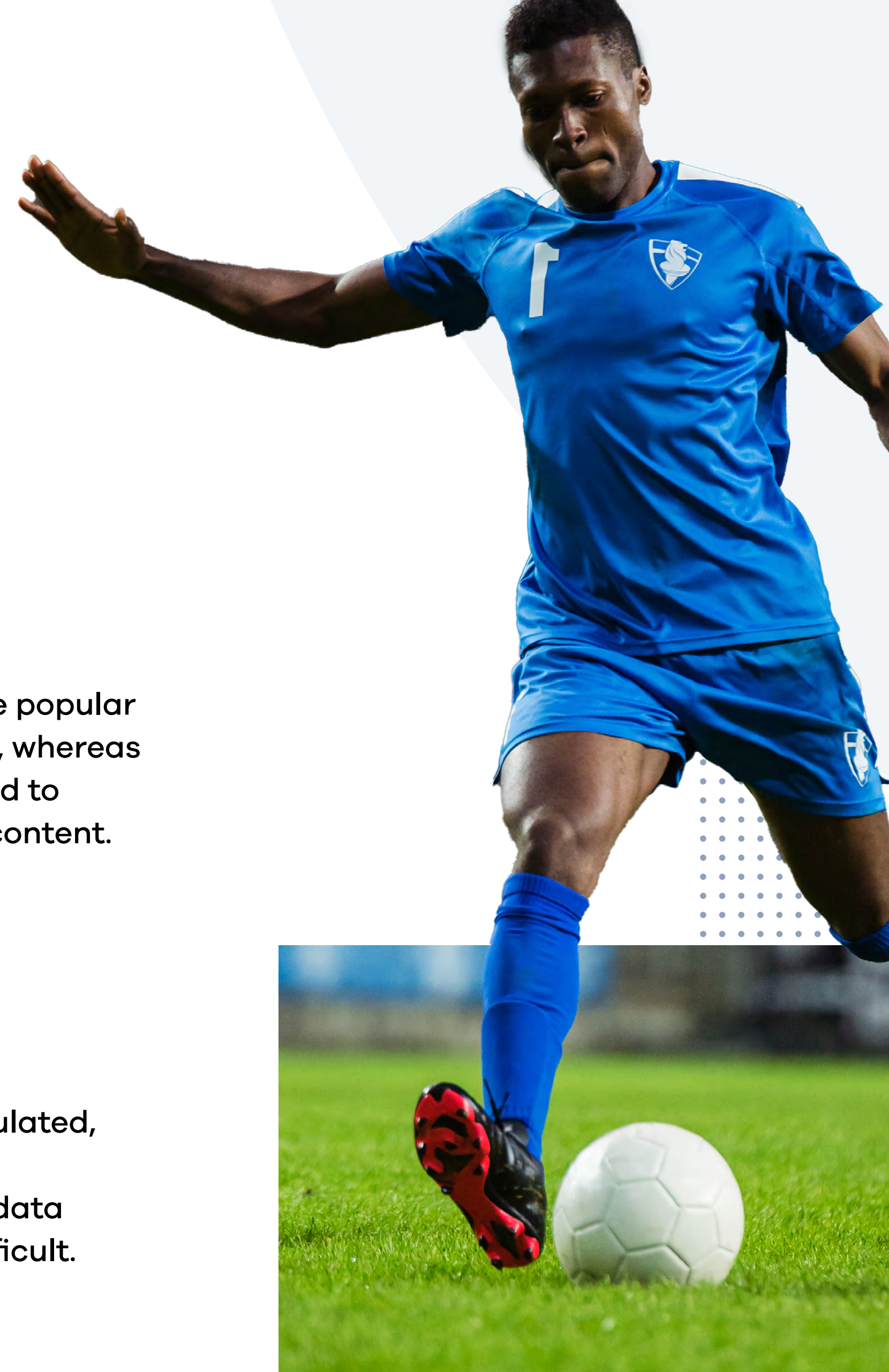
### Preference

Cultural programming is more popular in middle and northern states, whereas viewers in southern states tend to consume more international content.



### Density

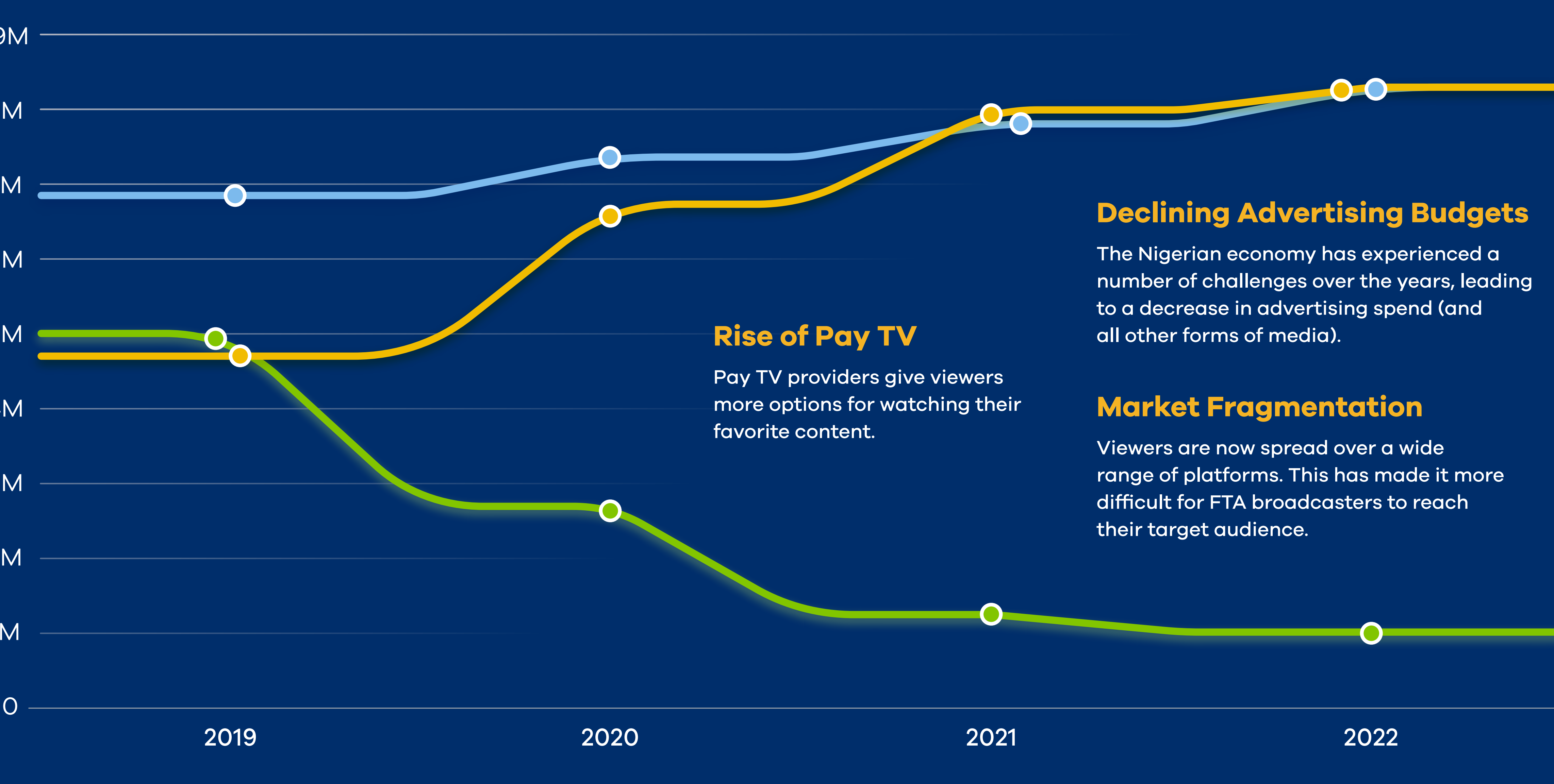
Northern states are sparsely populated, making reaching viewers more challenging. Gathering accurate data on viewing habits is also more difficult.



## Free-to-Air Shows Losses, but Remains Viable

The Free-to-Air (FTA) market has been under pressure, with revenues declining by 4% between 2017 and 2022. However, FTA services are still competitive when compared to Pay TV options largely due to it being affordable and accessible. The pressure seen can be attributed to a few different factors.

### FTA Households by Delivery Type



### Declining Advertising Budgets

The Nigerian economy has experienced a number of challenges over the years, leading to a decrease in advertising spend (and all other forms of media).

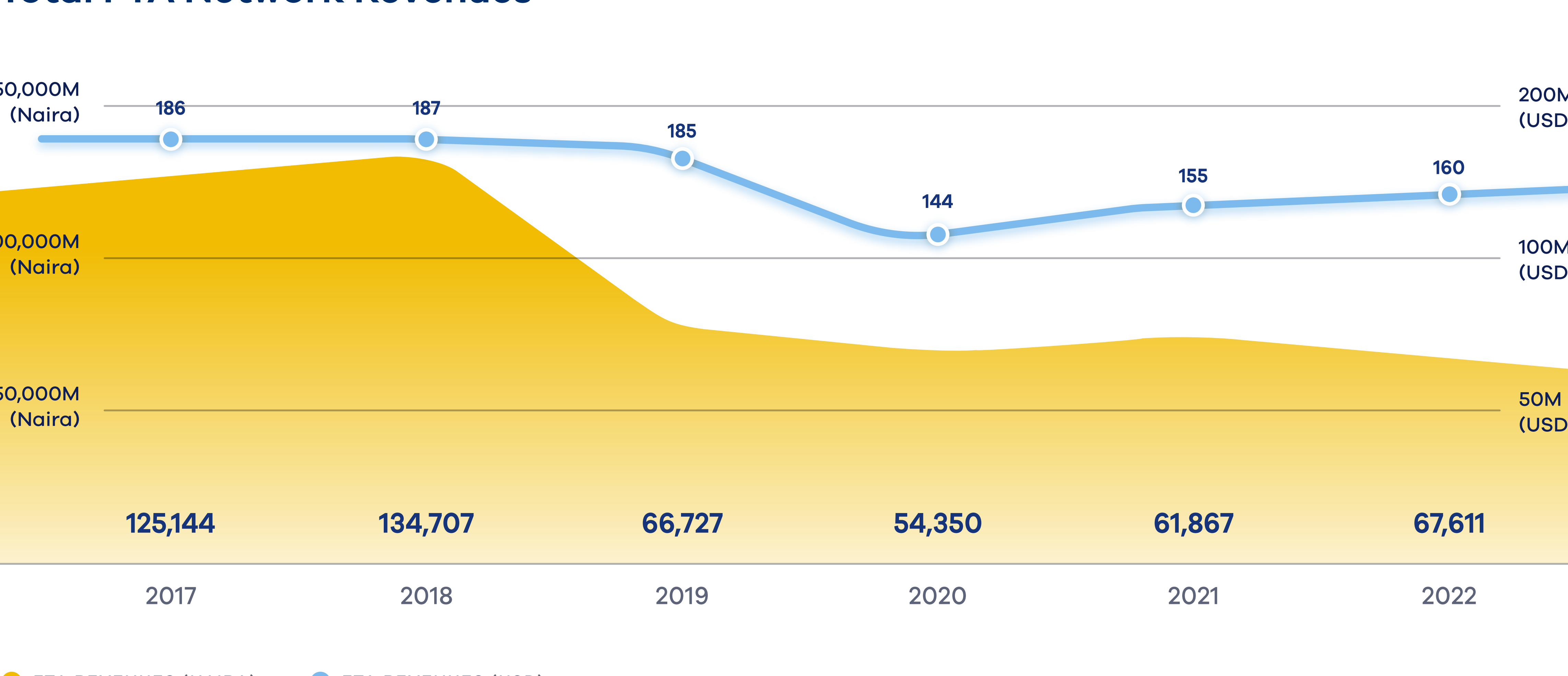
### Rise of Pay TV

Pay TV providers give viewers more options for watching their favorite content.

### Market Fragmentation

Viewers are now spread over a wide range of platforms. This has made it more difficult for FTA broadcasters to reach their target audience.

## Total FTA Network Revenues



## Moving Media Forward With Satellite

Satellite plays a key role in distributing TV channels in Nigeria. In fact, Nigeria is one of the largest recipients of satellite TV channels in Africa. About 79% of FTA TV broadcasters in Nigeria use satellites from five of the biggest operators in the country.



### More Coverage

Covers a larger expanse of the region than other methods—with more reliability.



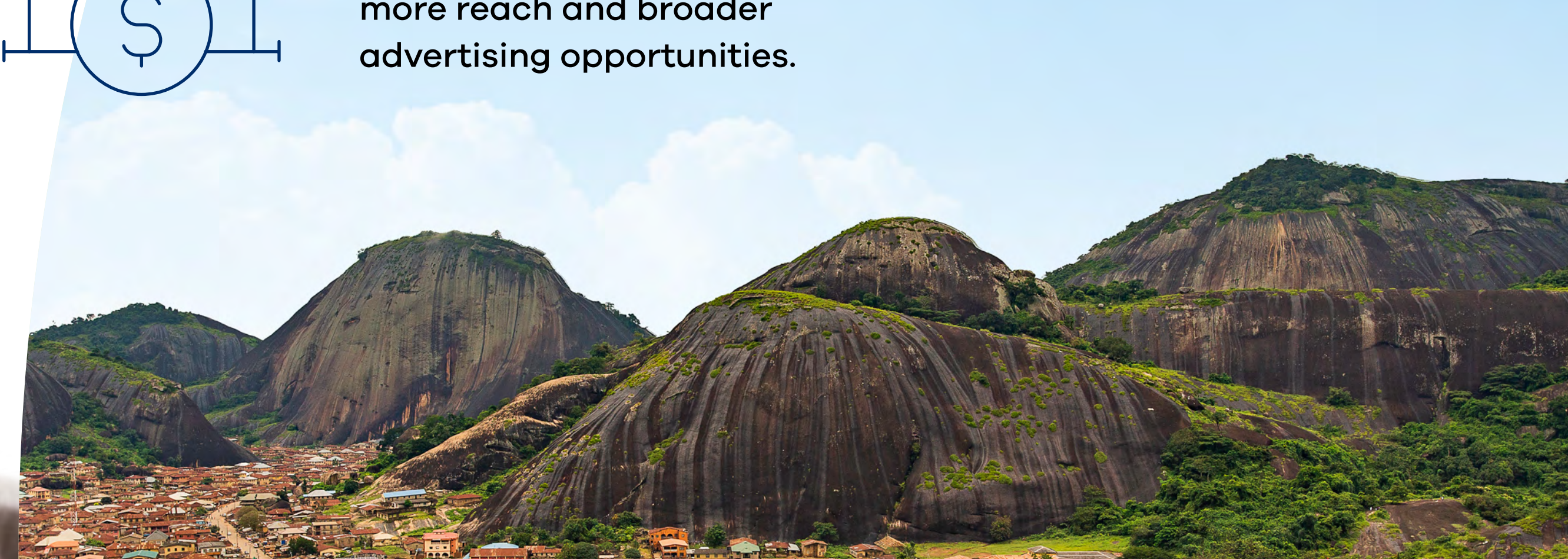
### More Content

Offers viewers access to more premium and regional channels.



### More Revenue

Gives broadcasters more reach and broader advertising opportunities.



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