

Pay TV Distribution in Nigeria:

TRENDS, OPPORTUNITIES, AND CHALLENGES

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.

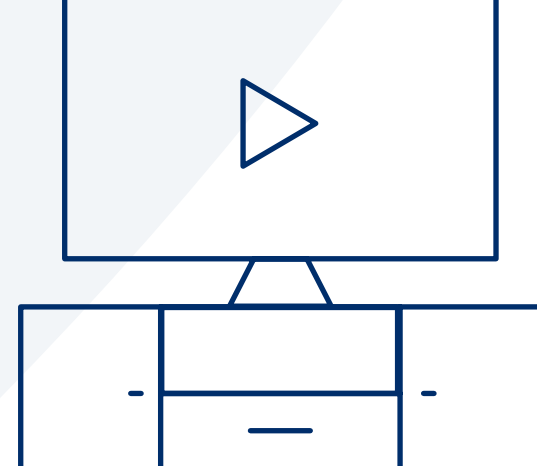
216M

Population of Nigeria



42.7M

Number of Households

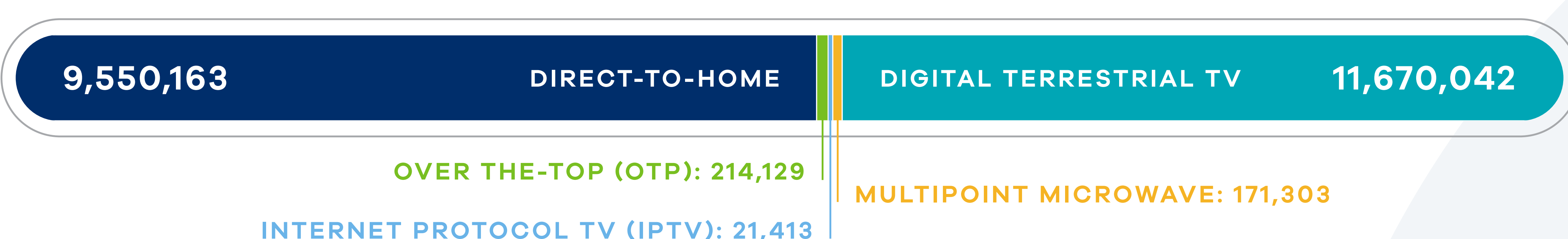


21.4M

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.

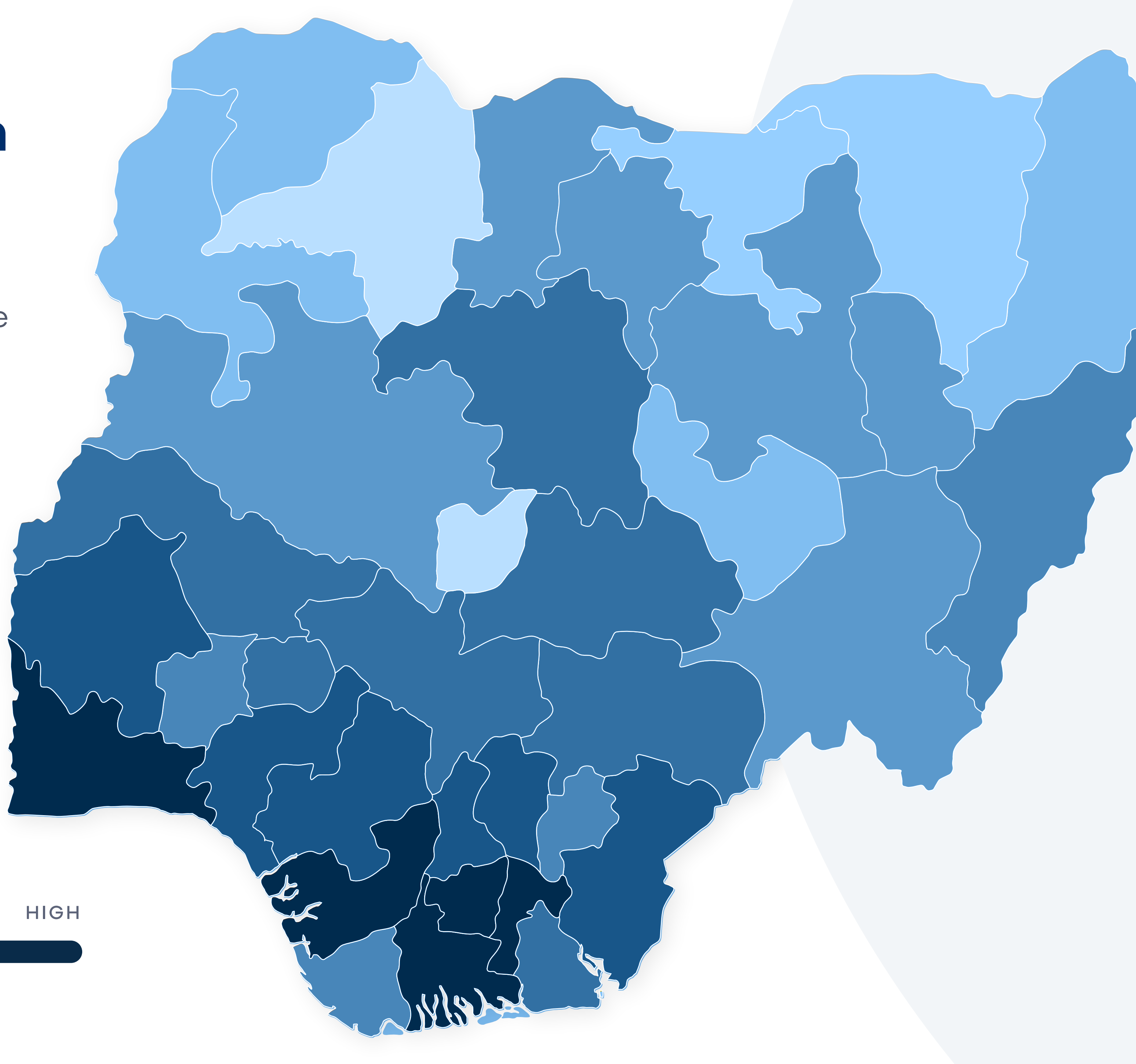


Growth and Penetration

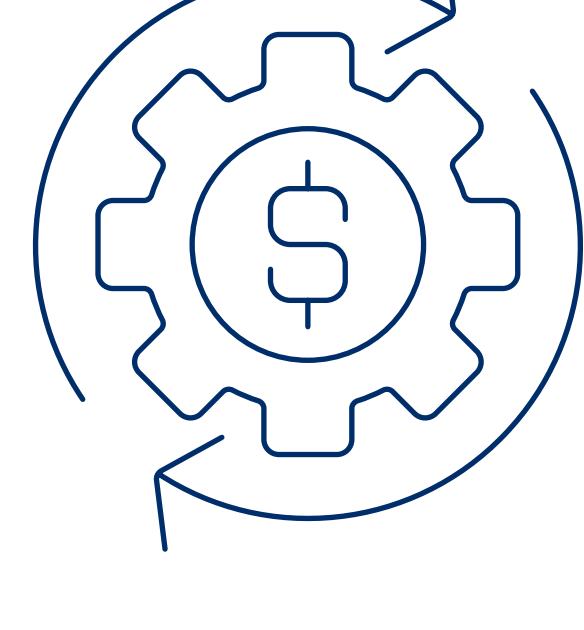
Like many countries in Africa, geography, population density, and distribution infrastructure play a large role in audience size and the type of programming they're interested in consuming.

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

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

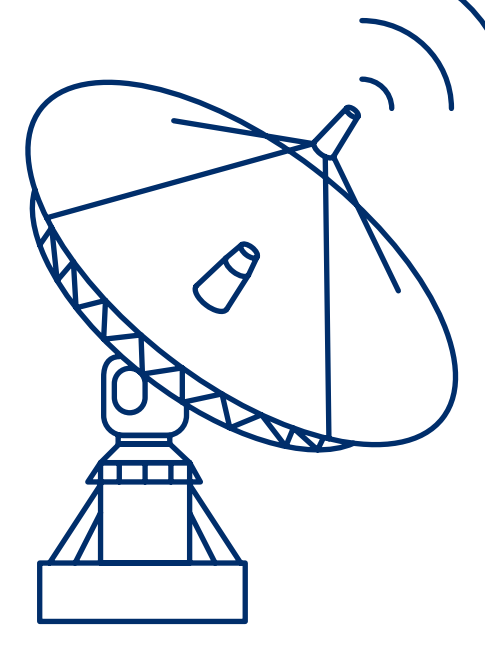


Geography Makes a Difference



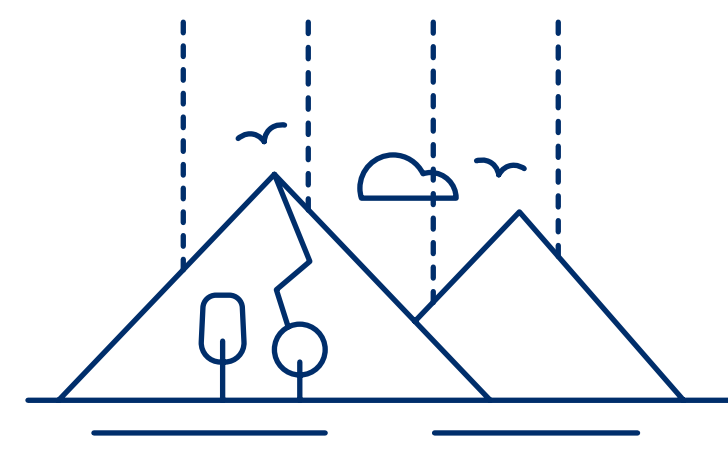
Economics

Southern states generally have higher income levels and greater purchasing power, making Pay TV subscriptions more feasible for viewers, and advertising more enticing for distributors.



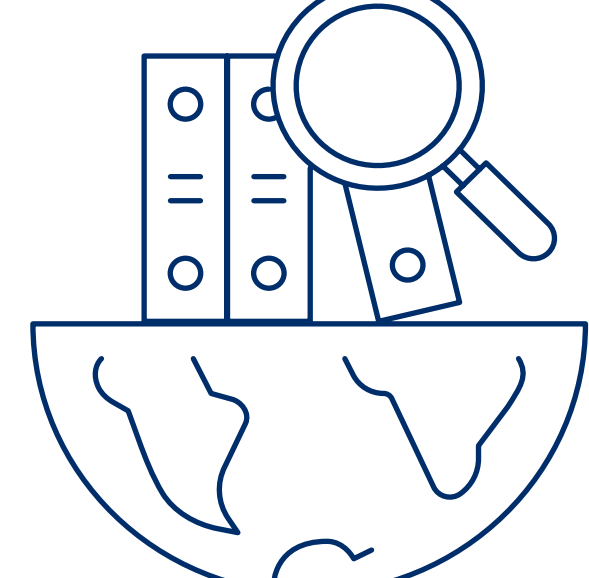
Infrastructure

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



Density

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



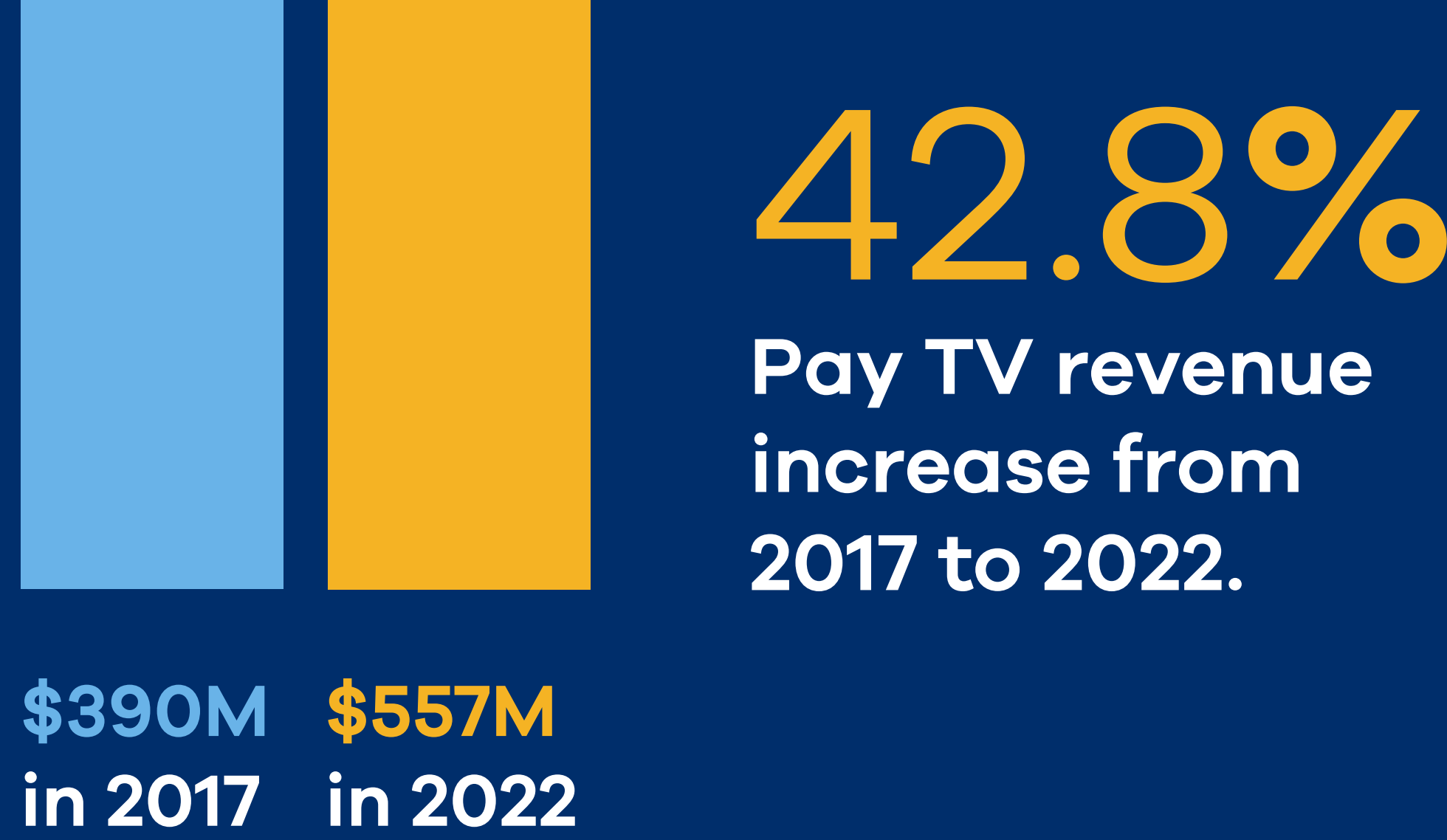
Preference

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



Pay TV Subscribers are Growing. Revenue is Keeping Pace.

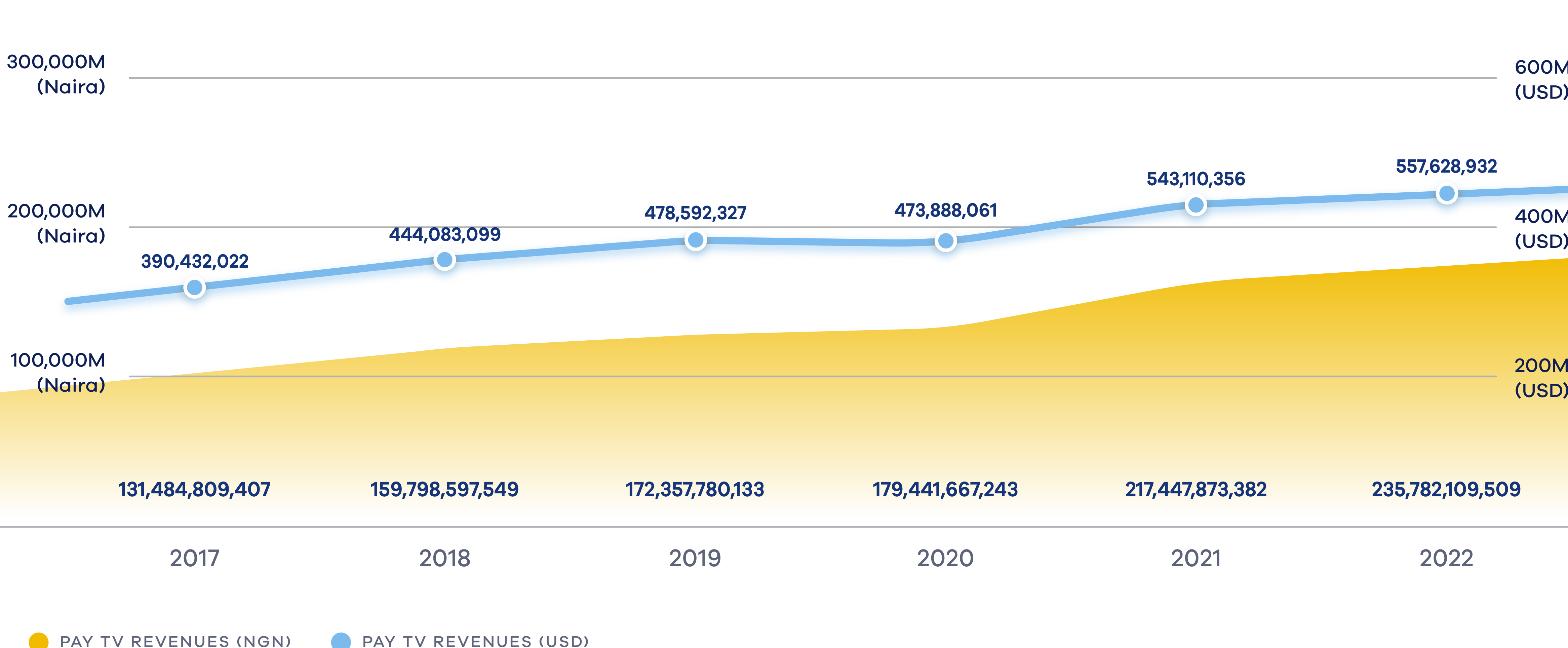
The decline in viewership of traditional TV can be attributed to the rise of digital streaming services, which have become increasingly popular due to flexible viewing options and a wider variety of content. But due to a volatile exchange rate, digital streaming services are having difficulties maintaining a pricing structure, pushing viewers back to traditional options.



Pay TV Revenue by Type of Service



Total Pay TV Network Revenues



Moving Media Forward With Satellite

Satellite plays a key role in distributing Pay TV packages to viewers in Nigeria. Three satellite Pay TV services are currently available for subscription, including one from the largest Pay TV broadcaster in the region.



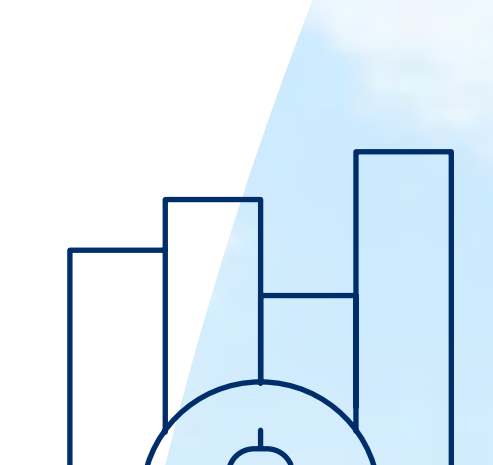
More Coverage

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.



Expand Your Reach. Build Your Viewership.

Intelsat connects content providers to over 500 million households across six continents. Our video neighborhoods, global network, and managed media services can help you deliver an exceptional viewing experience to anyone, anywhere.

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