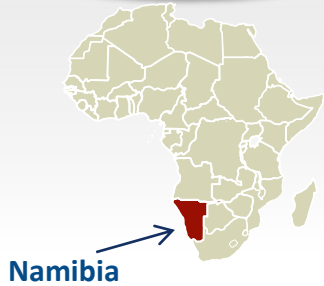




# The Role of Broadcaster within the OTT Environment; the case of NBC

07 October 2019

### Geographic Scope



### Customer Segment

- Corporate & SMEs
- Government
- Agencies
- Regions

### Product & Service Scope

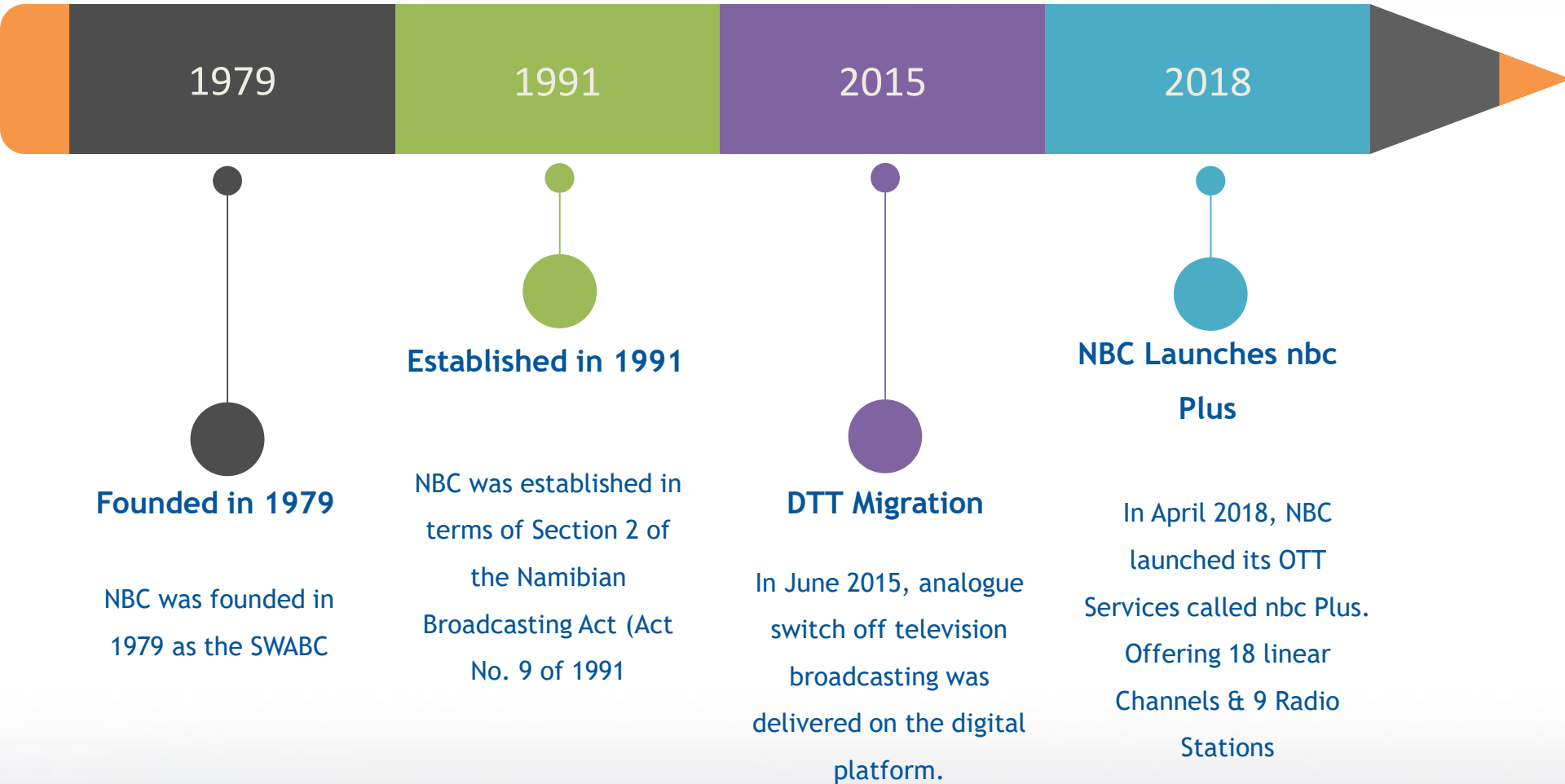
- **Television**
  - NBC 1
  - NBC 2
  - NBC 3
  - NBC 4
  - NBC 5
  - NBC 6
- **Radio Stations**
  - National, Oshiwambo, Silozi, Otjiherero, Damara/Nama, German, Ha!, Setswana, Rukavango & Afrikaans
- **Dubbings**
  - Radio
  - Television
- **In-house Production**
  - Television Adverts
  - Radio Adverts
  - Documentaries
  - Corporate Videos & infomercials
  - SMS Services/ Multimedia

### Strategic Intent

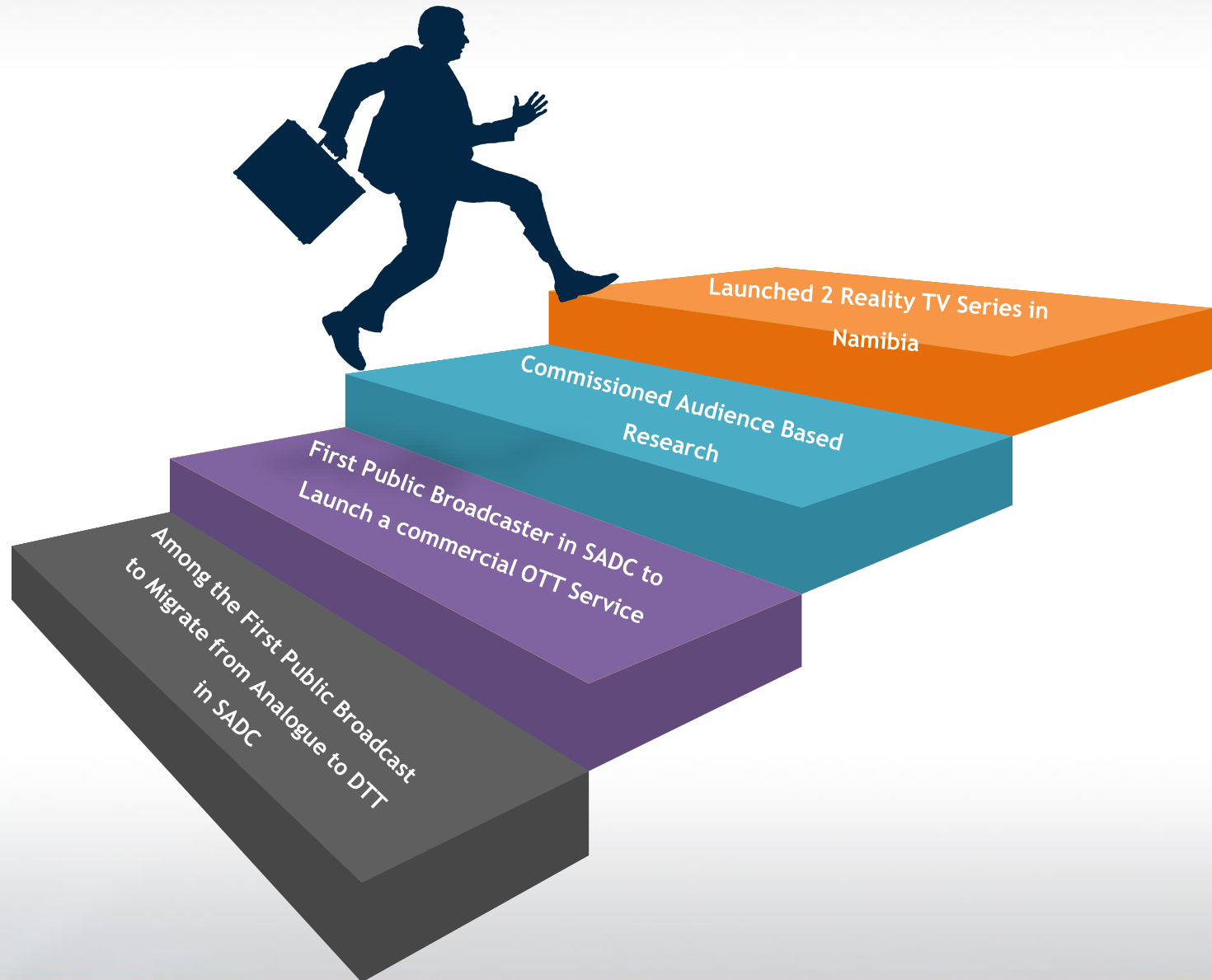
- To become the leading multimedia broadcaster of choice by 2020

### NBC Platforms

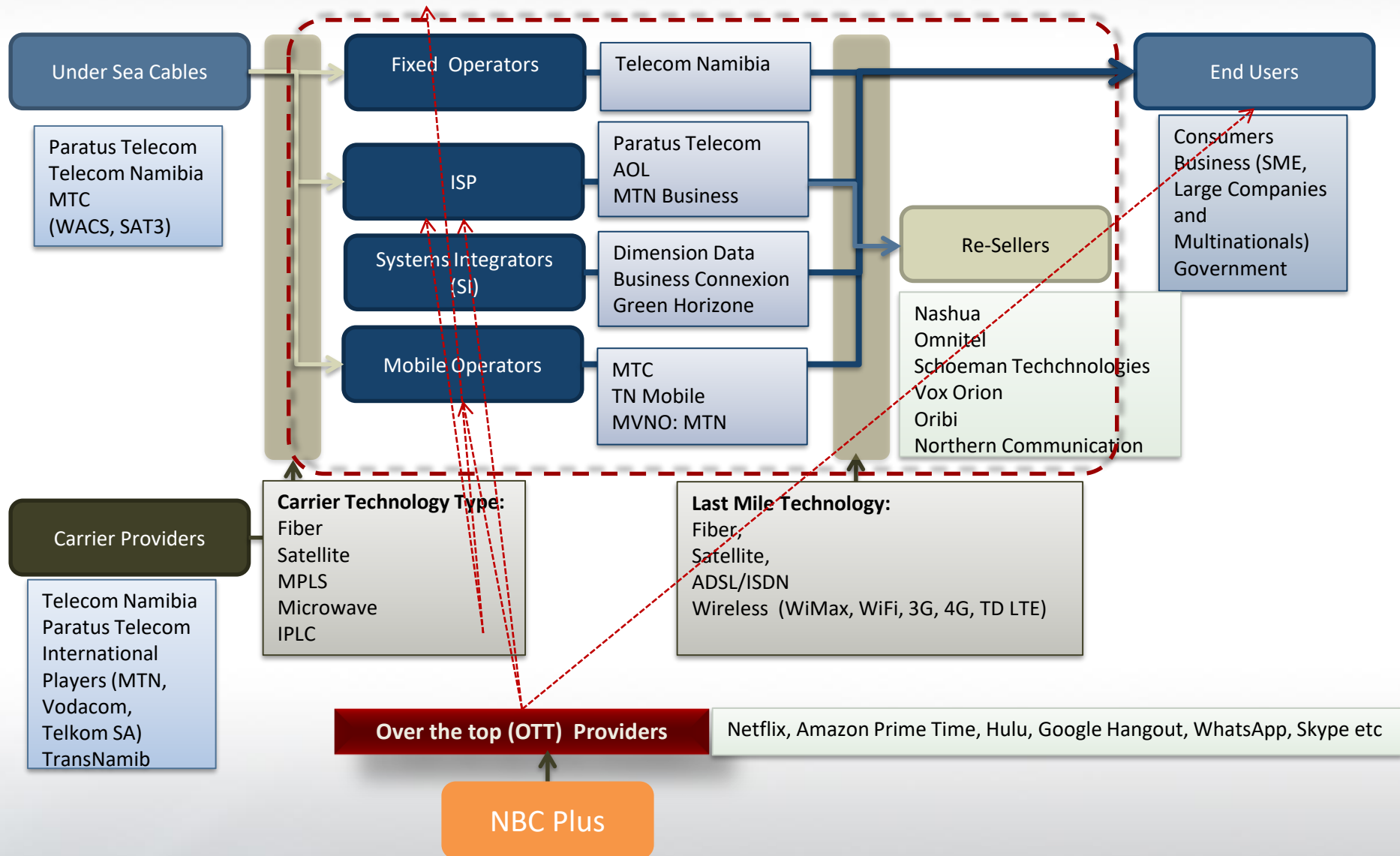
- Over the Top Services (nbc Plus)
- Television
- Radio
- Multimedia
- Print



## Overview: Key Milestones



## Overview: ICT Value Chain





# DTT-Television

- NBC has 74.5 percent coverage on DTT



## FM-Radio

- The radio network coverage stands at 78 percent of the households



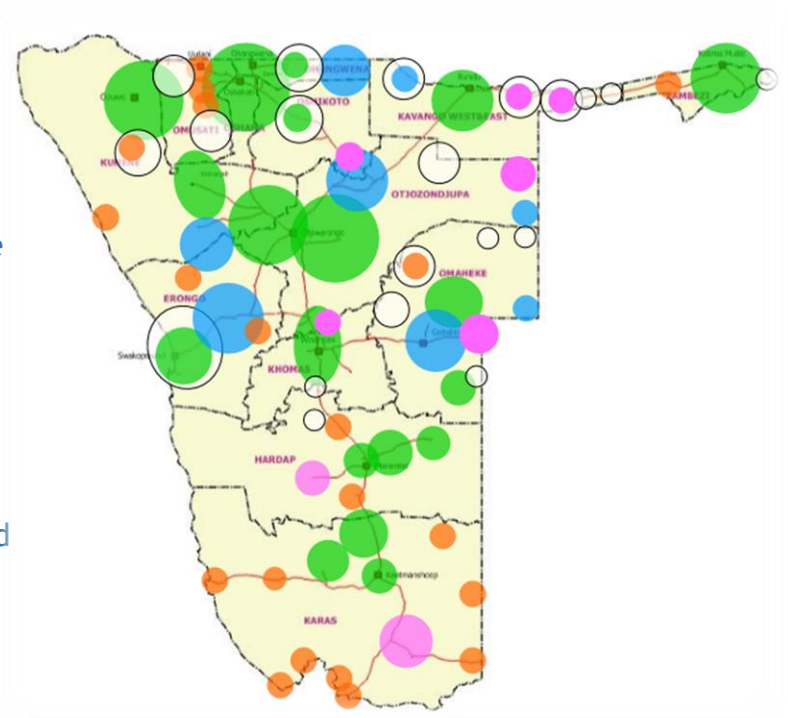
## OTT- nbc Plus

- nbc Plus is an Over the Top Service that streams Television and Radio within the borders of Namibia and Beyond



## Number of Householders

- House hold penetration on DTT- 16 percent
- DTH via Multichoice Smart Partnership-100 percent
- OTT- all Namibian with access to Internet connectivity



# DSO in Africa

World Stats

## Digital Switch Over



- 39 million Household in Africa



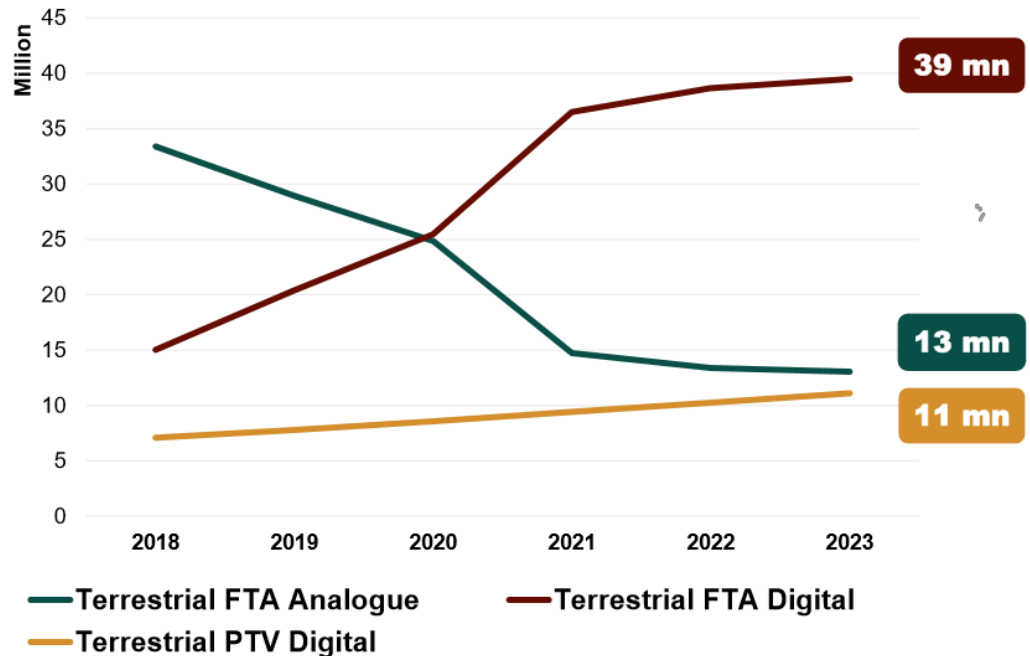
- 13 million Household on TFTA



- 11 million Household on TPTA

### DIGITAL SWITCHOVER

Number of households



Source: [www.dataaxis.com](http://www.dataaxis.com)

# DOS in Africa

Digital Migration Stage

## DSO STATUS BY COUNTRY

Digital migration stage - 2018



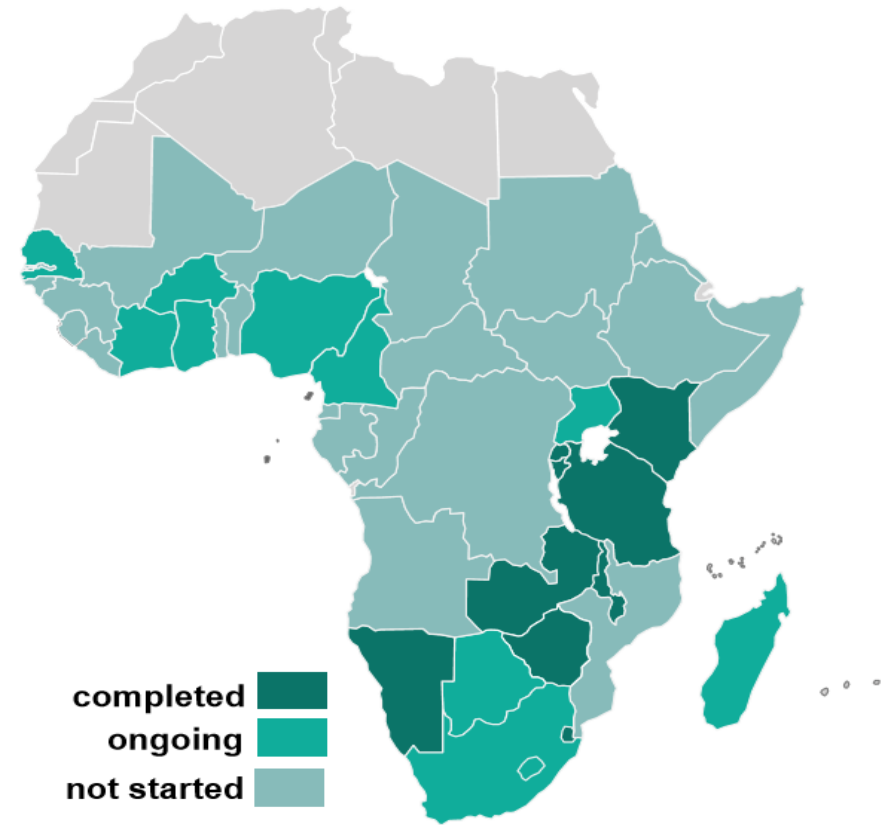
- Tanzania, Eswatini, Zambia, Zimbabwe, Malawi has successfully completed migration from analogue to Digital broadcasting



- SA, Botswana, Madagascar, etc. are still in the process of Migrating to DTT.



- Angola, Mozambique etc. are some of the countries that haven't started with their DTT Migration Process yet.

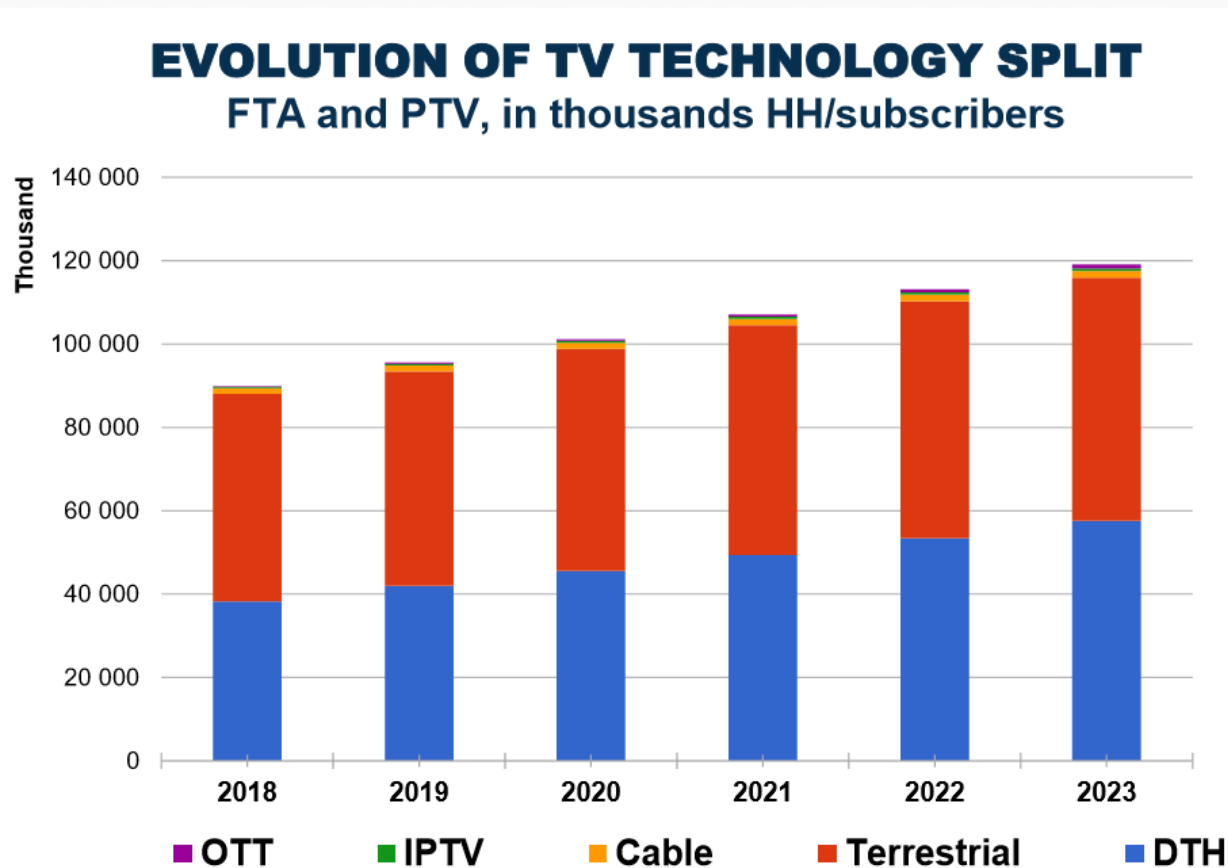


Source: [www.dataxis.com](http://www.dataxis.com)



# Evolution of TV Technology

DTH, Terrestrial, OTT, IPTV & Cable



- Terrestrial and DTH will continue to grow in Africa compared to the other Technologies like OTT, Cable and IPTV that depends on other access technologies like Fixed Broadband and Mobile Broadband.

Source: [www.dataaxis.com](http://www.dataaxis.com)

# Households in Africa

TV HH & Pay TV HH



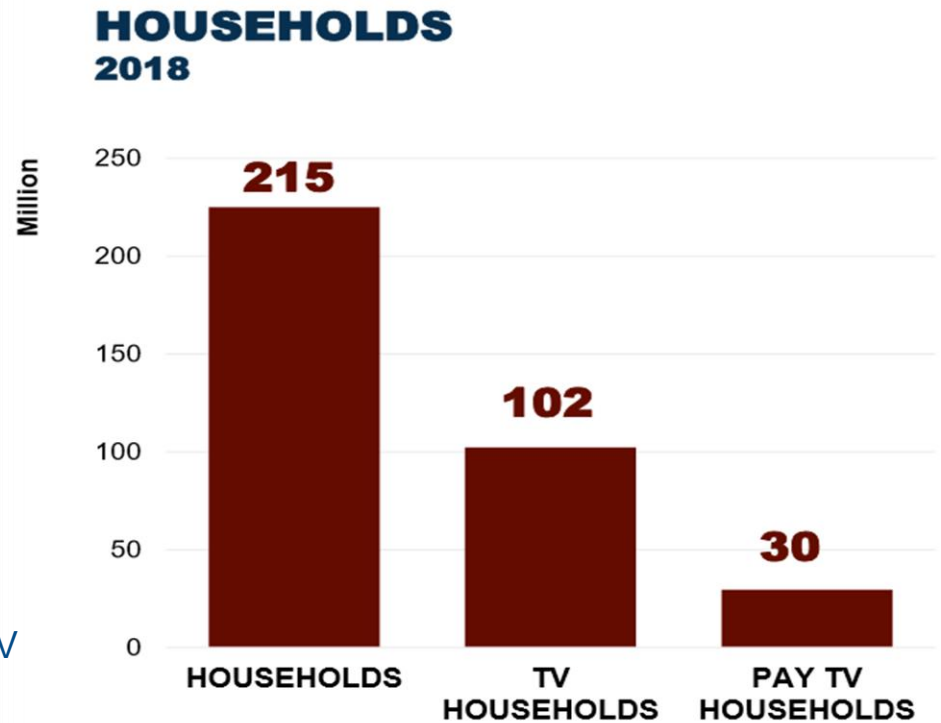
- 215 Million Households in Africa



- 102 Million Households with TV



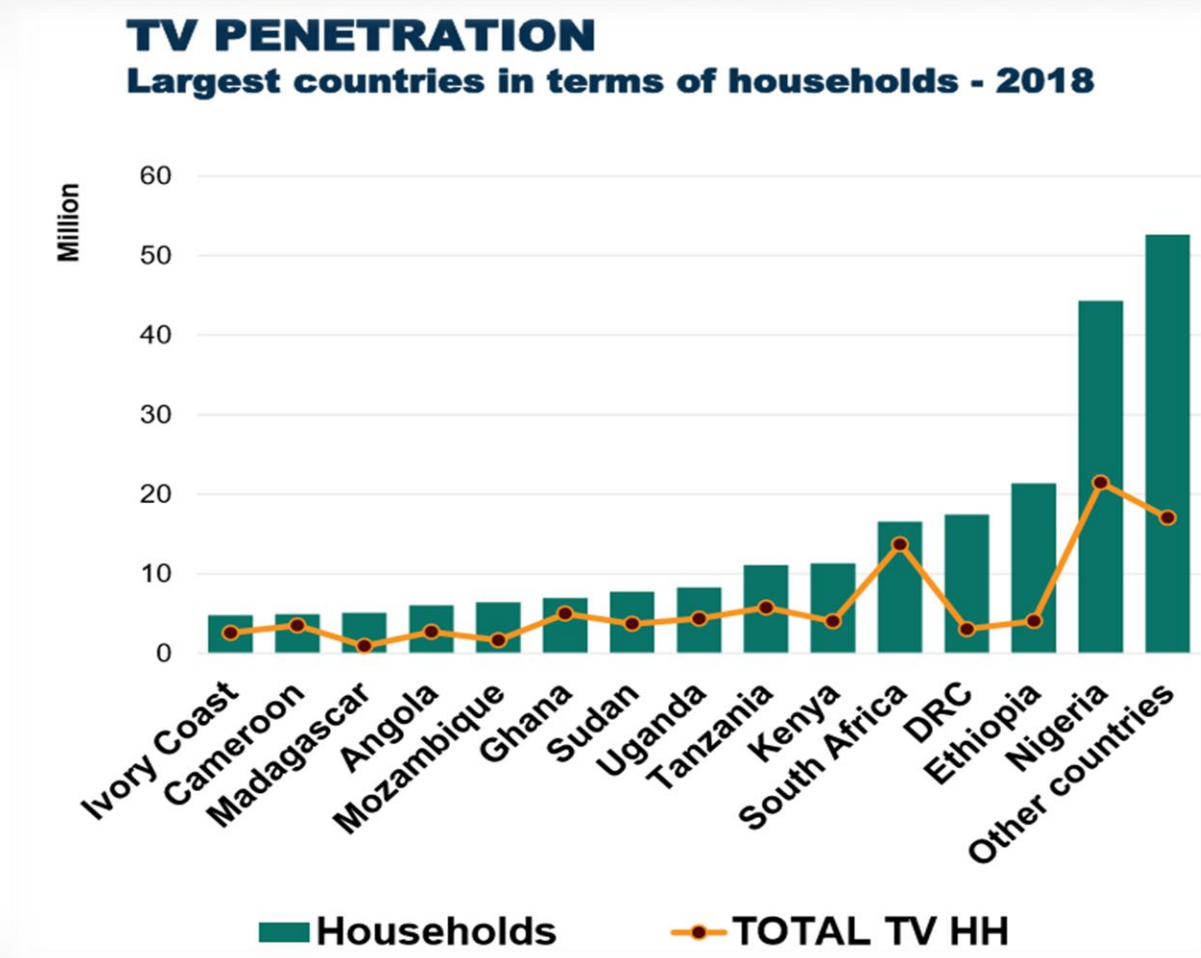
- 30 Million Households with Pay TV



Source: [www.dataxis.com](http://www.dataxis.com)

# TV Penetration Rate

Largest Countries



- Nigeria is one of the country with the highest population density in Africa. The TV penetration rate is just above 20 million.

# Pay TV Market

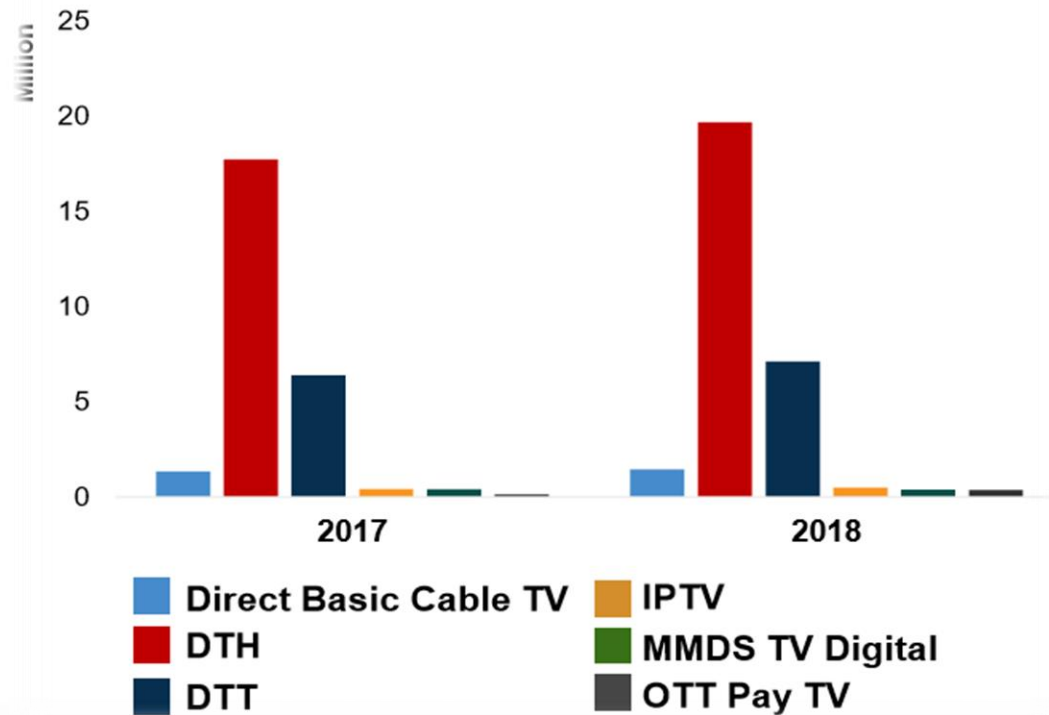
By Technology



- DTH has the highest TV Market Share followed by DTT compared to any other technologies.

## PAY TV MARKET BY TECHNOLOGY

Number of subscribers

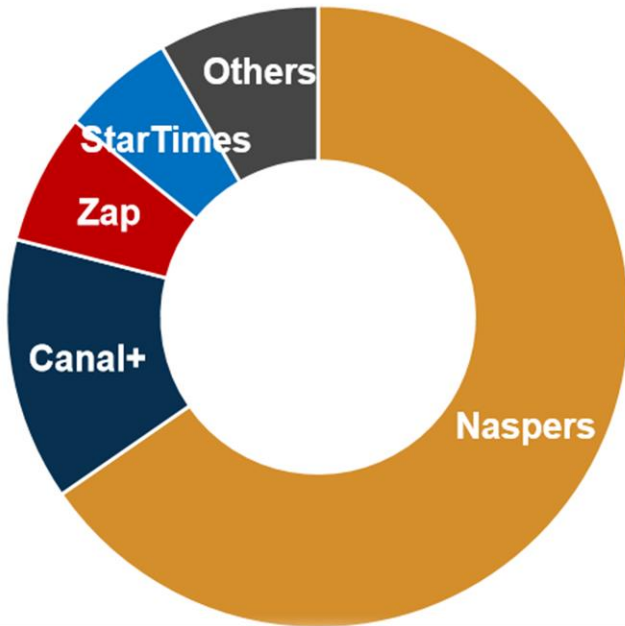


Source: [www.dataaxis.com](http://www.dataaxis.com)

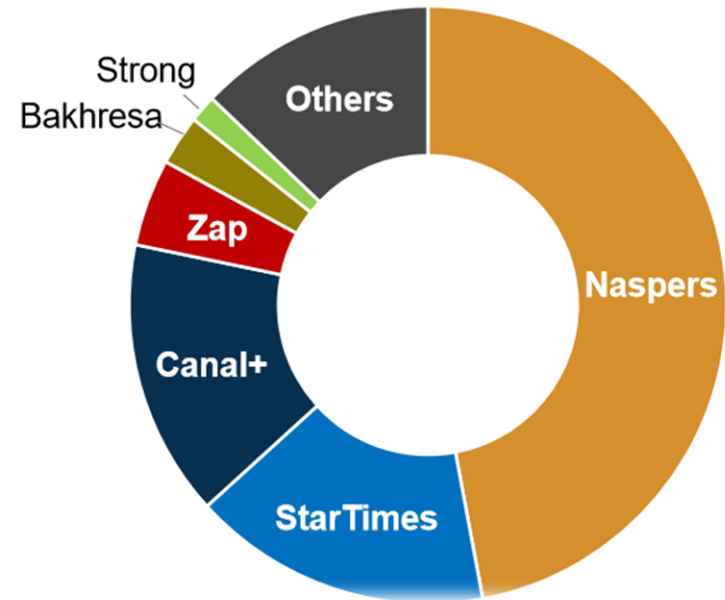
# Market Share

Revenues & Subscribers

**MARKET SHARE REVENUES  
2018**



**MARKET SHARE SUBSCRIBERS  
2018**



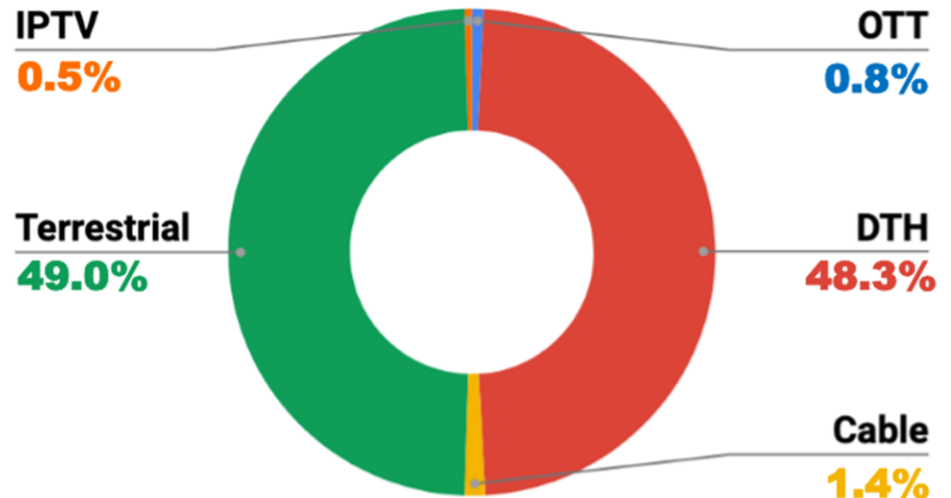
- Naspers has the highest Market Share within the Pay TV Market in Africa including the number of subscribers. Canal+ comes second and Zap, StarTimes and Others comes in the third, fourth and five place respectively.

# TV Technology

Technology Split in 2023

## TV TECHNOLOGY SPLIT in 2023

- ✓ Terrestrial has the highest TV technology with 49%
- ✓ DTH has the highest TV Technology access to 48.8%
- ✓ Cable TV is in the third place with 1.4%
- ✓ OTT services comes in the fourth place with 0.8%
- ✓ IPTV has the lowest TV Technology users with only 0.5%



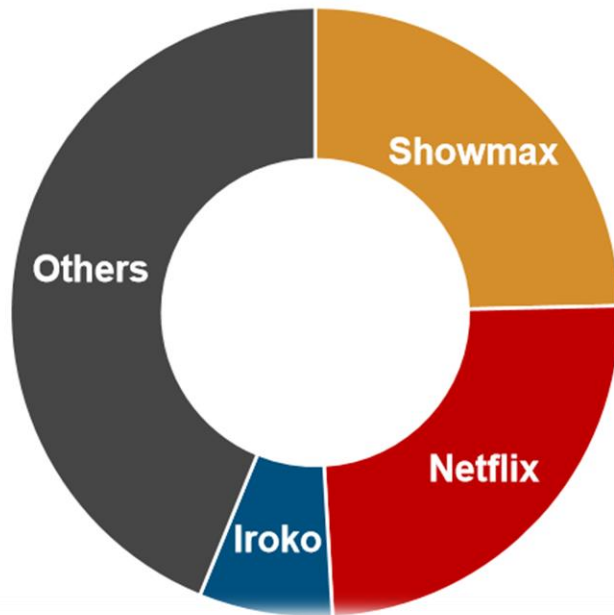
Source: [www.dataxis.com](http://www.dataxis.com)

# SVOD & PAY SS

Market Share & Expansion Issues

## SVOD AND PAY STREAMING SERVICES

% Market share by operator



- Showmax has the biggest market share within the Streaming Services in Africa. Last year, Showmax celebrated a milestone of reaching 1 million Showmax users in South Africa.

## OTT EXPANSION KEY ISSUES

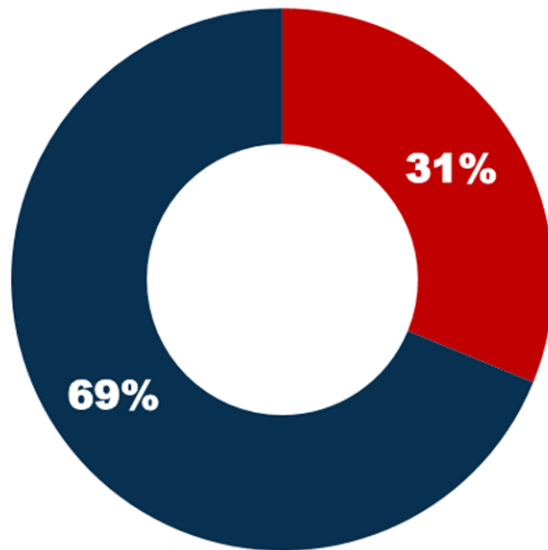
- DATA AFFORDABILITY AND AVAILABILITY
- PAYMENT METHODS
- QUALITY CONTENT
- LONG TERM FUNDING
- DISTRIBUTION
- PIRACY

Source: [www.dataxis.com](http://www.dataxis.com)

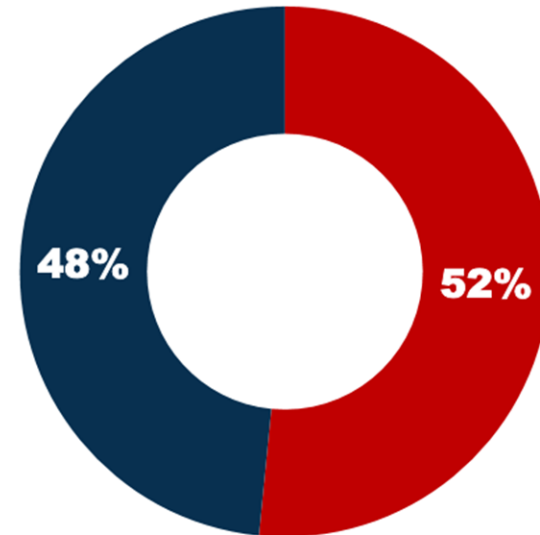
# Internet Access

3G/4G Access

2018



2023 FORECAST



■ 3G/4G

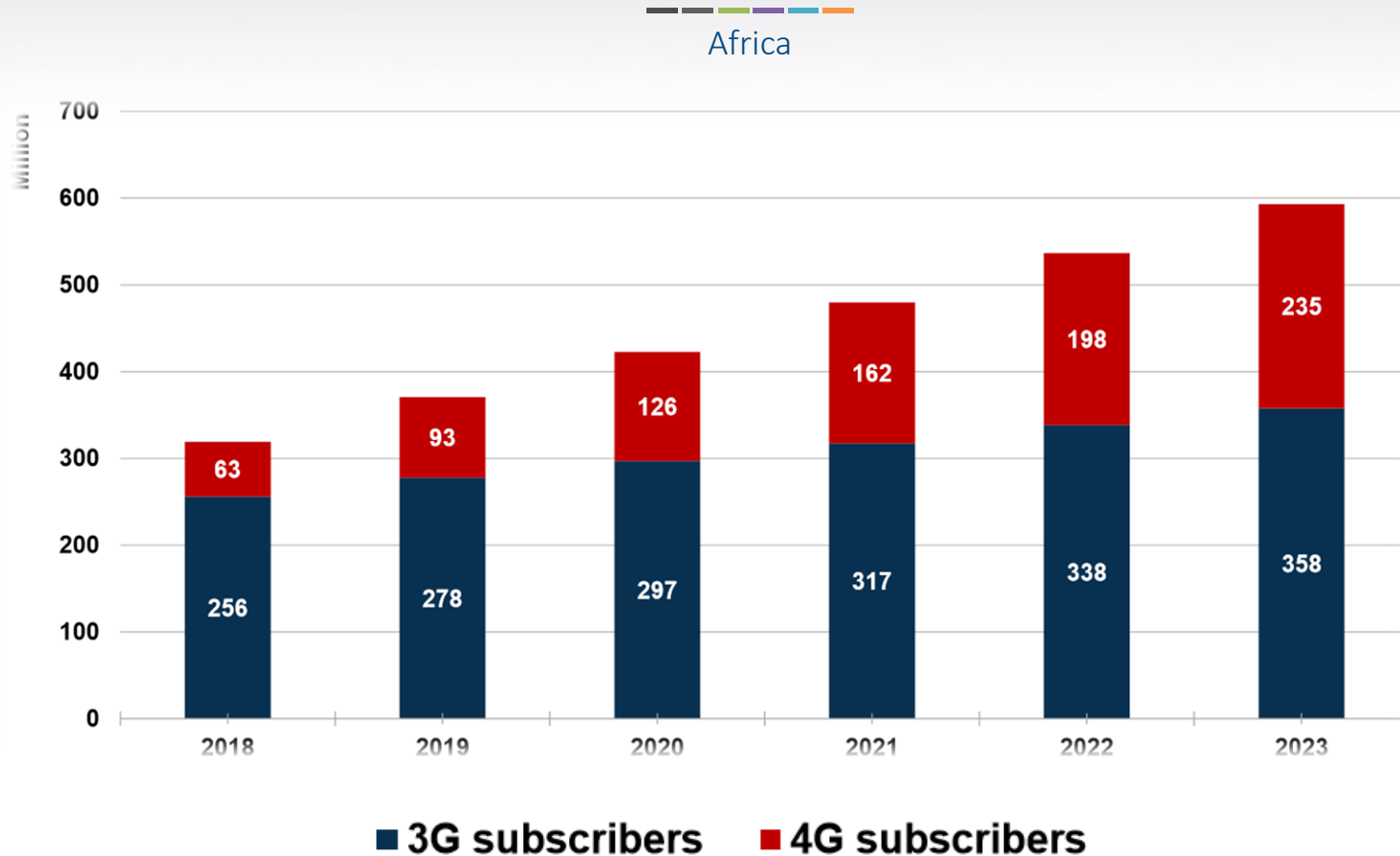
■ < 3G or no access

- In 2018, 31 percent of Africans had access to 3G and 4G. It is estimated that by 2023, 52 percent of Africans will be connect to both 3G and 4G.

Source: [www.dataaxis.com](http://www.dataaxis.com)



# Evolution of Mobile BB Split Generation



- By 2023, 235 million subscribers will be on 4G and 358 Million subscribers will be on the 3G Network

Source:

# OTT Services



OTT Services (Streaming Services) have ease of entry in any market



- OTT Services are leveraging on the existing broadband infrastructure



- The target market is the subscribers with access to both internet and banking institutions (Credit Cards & Debit Cards)



- Willing to enter in strategic partnership with Telcos and leverage on the Telcos subscribers



- OTT Services are not regulated in most markets

# OTT Services



## OTT Services Subscribers



- YouTube globally has 192 million subscribers



- Netflix comes in the second place with a global subscription of 147.5 million



- Amazon Prime Time comes in the third place with 88.7 million subscribers



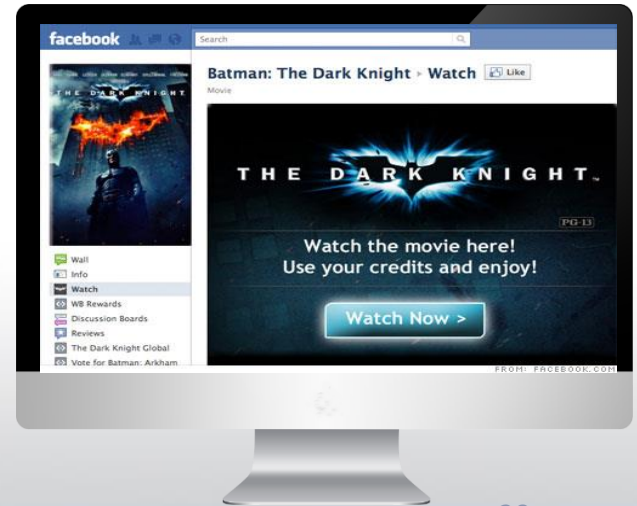
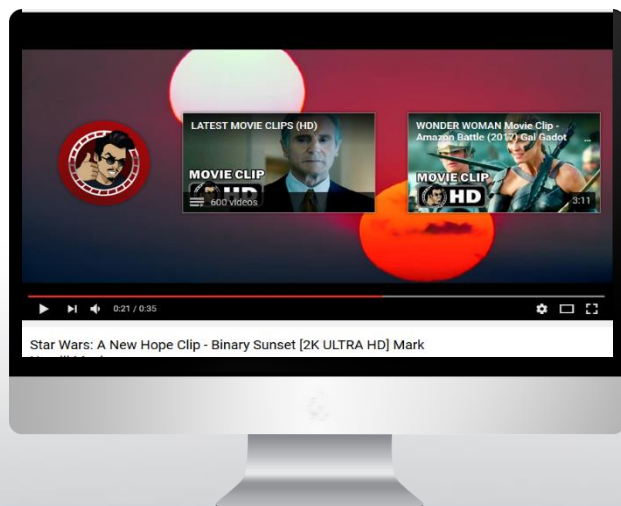
- Hulu has a total number of subscribers of 55 million

Source: Internet World Stats, 2019.

# OTT Services

Available in Namibia

## OTT Services (Streaming Services)



# In Conclusion

Namibia Broadcasting Corporation

## OTT Services (nbc Plus)

- ✓ Currently nbc Plus is still under construction
- ✓ The new platform will host both Radio and Tv Channel
- ✓ Nbc Plus is going to be a Commercial App
- ✓ New platform will be launched in this month -October 2019





**END OF TRANSMISSION**