

The logo for DStv Media Sales, featuring the word "DStv" in a stylized font above the words "Media Sales".

DStv
Media Sales

+

PAN AFRICA

Navigating the new normal

Contents

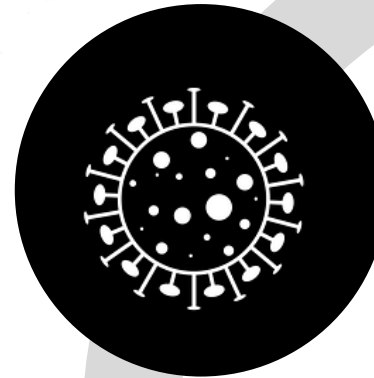
1. Current Impact
2. Multichoice response to Covid-19
3. Viewership Trends by Region
4. DSTV Now by Region





**Current
Impact**

Impacted Industry Sectors



#stayathome:
*confinements, curfews
and quarantines.*



More than half of the world's population has been mandated to stay at home, by their governments, to curb the spread of the Covid-19 virus

Organizations have accelerated their digital transformation



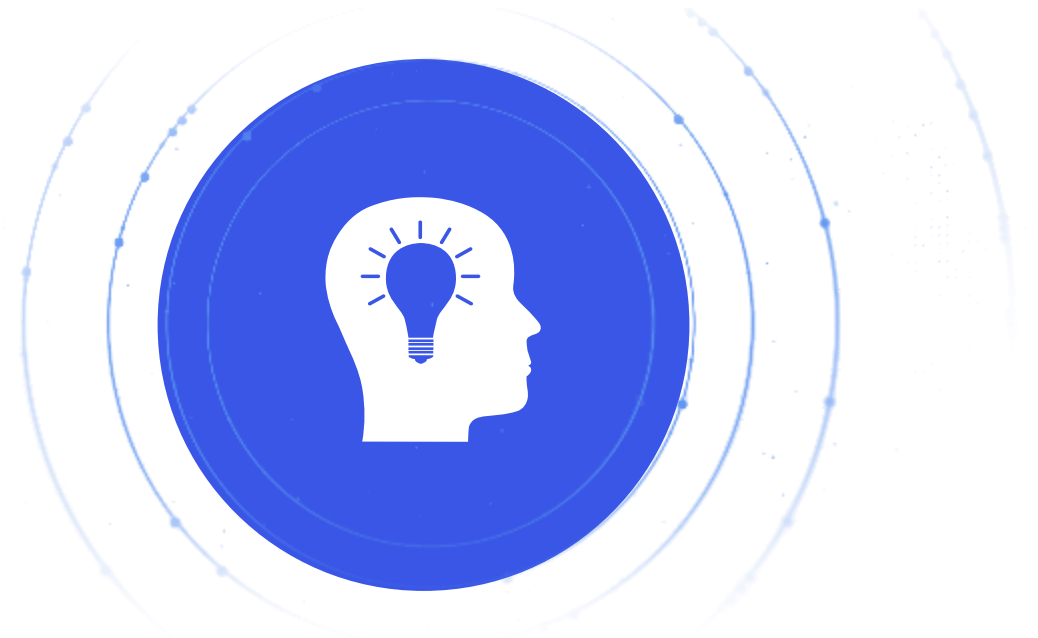
- As the Corona Virus continues to spread globally, African Governments have imposed sweeping measures to protect its citizens. Some of these measures have **boosted the use of digital technologies**
- Governments have been quick to encourage **mobile money** for local transactions and in response local networks have increased daily limits and waived fees on nominal transfers
- **Doubling internet speeds** for home fibre packages and deployment of **Google Loon** in some remote areas in Africa to boost 4G Network coverage as well as “work from home” data bundles have been offered
- Meanwhile broadcast media is increasingly being recognized as an essential service, as such DSTV is availing **24 hour News Channels to non-subscribers for free**

Life During Covid-19



Change in Consumer Behaviour

- Limited outdoor activities
- Shifts of media habits
- Move to online
- Brand switch



Change in Consumer Attitudes

- Cherish life and family
- Change in social value
- Enhanced consciousness towards health
- Anxiety about personal impact

And while there is uncertainty...

What we do know for sure is that consumption of video content has grown with the emergence of COVID-19. From the need to stay informed to watching entertaining content. Video content consumption has seen a rise across TV & Digital.



MultiChoice Response to Covid-19



Platform Update

1

Open Periods & Broader Access

SPORT CHANNELS OPEN WEEKS:

18 MAR – 11 JUN

- SuperSport 1 down to Compact
- SuperSport 4 down to Family
- SuperSport 7 down to Access
- Keep Fit Channel



20 MAR – 14 JUNE

- CNN

2

Free Access to News Channels

- CNN
- eNCA
- Sky News
- BBC World News
- Newzroom Afrika
- Africa News
- Euronews



The news channels are accessible to everyone, via the DStv Now App, regardless of whether they subscriber to MultiChoice or not

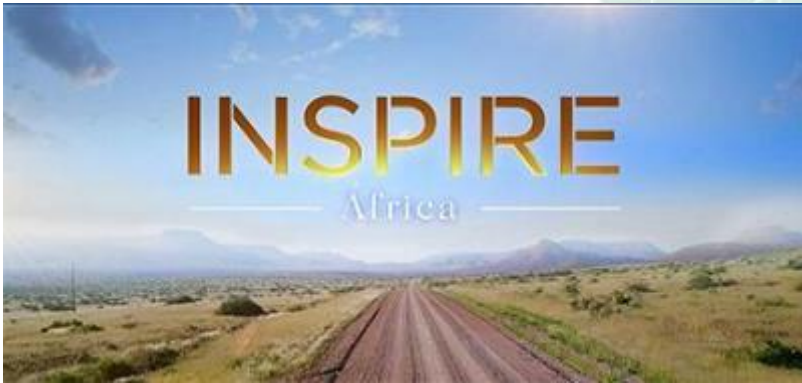
3

Pop Up Channels

ALL REGIONS

- Mindset: 1 Apr – 30 Jun
- M-Net Binge: 27 Mar – 31 Jul





africa
news.

Connect With Africa

The only Pan African multilingual news channel.

Launched on DStv, DStv Now and Gotv in March 2020, and will accept **advertising from end July 2020**.

With anchored shows, such as the daily bilingual breakfast show Morning Call, a team of **50 local correspondents**, **Africanews reports breaking news from the ground**, delivers unbiased reporting and showcases all the voices shaping the future of the continent

Covid-19 Viewership Trends

*TV Viewership Grows Across
the Africa*



WEST AFRICA



- **+65%** average viewers averaging 580,000 p/d
- **+31%** time spent viewing averaging **3h17** a viewing session
- Top 5 Genres being viewed
 - **General Ent.**
 - **Movies**
 - News

EAST AFRICA



- **+15%** average viewers averaging 52,500 p/d
- **+22%** time spent viewing averaging **2h40** a viewing session
- Top 5 Genres being viewed
 - **General Ent.**
 - **Movies**
 - News

SADC REGION



- **Stable** viewers averaging 44,000 p/d
- **+6%** time spent viewing averaging **< 4hrs** a viewing session
- Top 5 Genres being viewed
 - **General Ent.**
 - **Movies**
 - News

WEST AFRICA



AM AFRICA MAGIC

AM EPIC

AM FAMILY

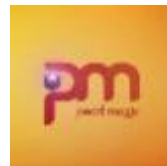
AM SHOWCASE

AM URBAN

AM HAUSA

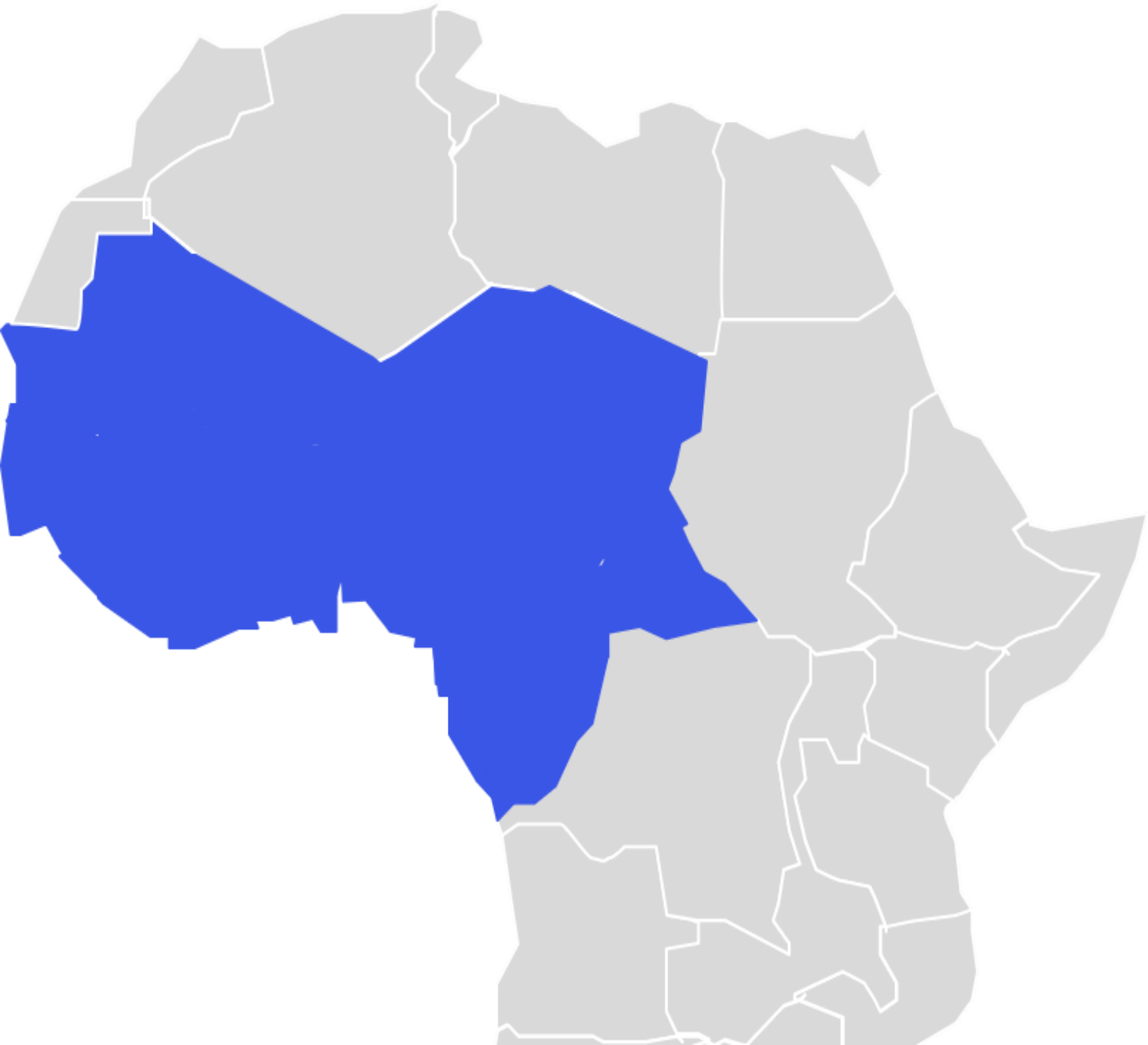
AM IGBO

EAST AFRICA



SADC REGION





West Africa



Viewership Trends

AFRICA MAGIC CHANNELS

*Ave. Weekly Reach in Mil (Unique):
20.5mil Collectively



+41% YoY



+27% YoY



+53% YoY



+31% YoY



+175% YoY



+18% YoY

MOVIE CHANNELS

*Ave. Weekly Reach in Mil (Unique):
4.8mil Collectively



+33% YoY



+67% YoY



+71% YoY



+47% YoY



+391% YoY



+310% YoY

INTERNATIONAL CHANNELS

*Ave. Weekly Reach in Mil (Unique):
3mil Collectively



+4% YoY



-2% YoY



+13% YoY



+163% YoY



+265% YoY



+3% YoY



DStv News Channels Viewership Trends

Ave. Weekly Reach in Mil (Unique): 4.3mil Collectively



+141% YoY
4.1mil Reach



+268% YoY
299k Reach

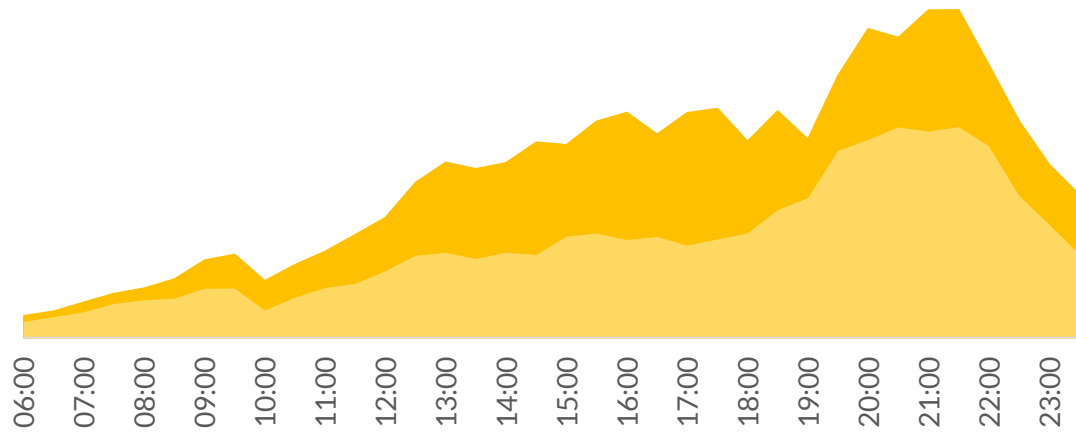


Source: DStv-i, April 2020 vs 2019, All Adults, 15+, Reach are March 2019 MPS Data

AFRICA MAGIC YORUBA AUDIENCE FLOW APR 2019 VS APR 2020



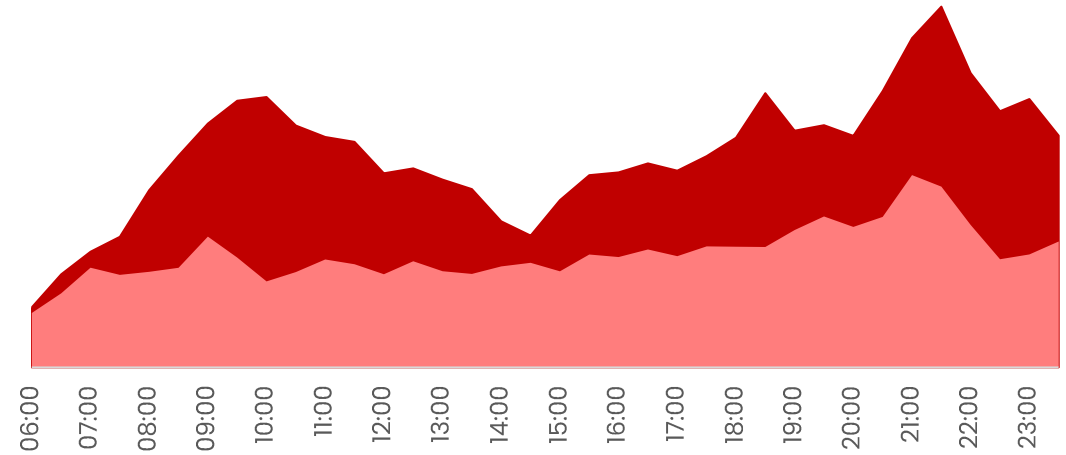
■ Apr-20 ■ Apr-19



CNN AUDIENCE FLOW APR 2019 VS APR 2020



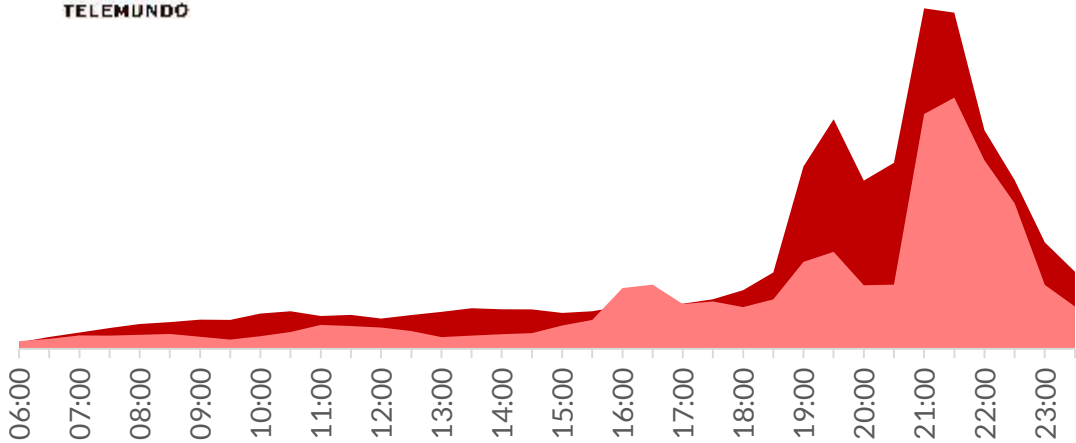
■ Apr-20 ■ Apr-19



TELEMUNDO AUDIENCE FLOW APR 2019 VS APR 2020



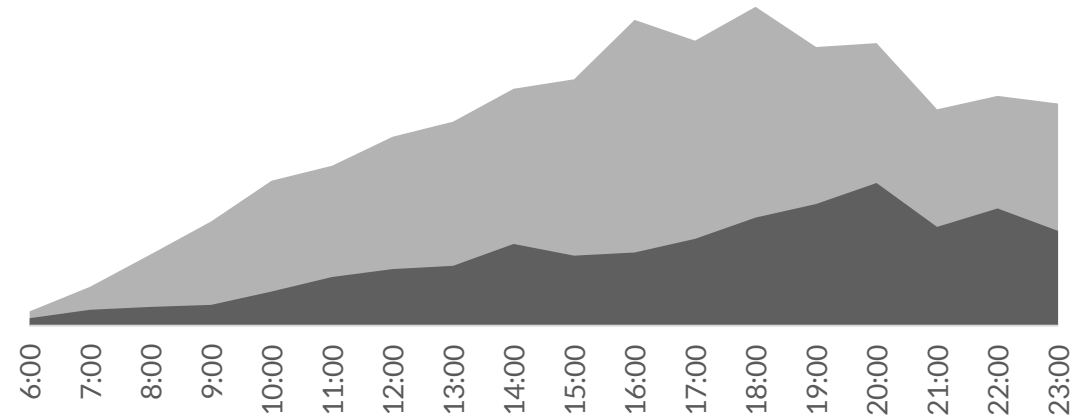
■ Apr-20 ■ Apr-19



STUDIO UNIVERSAL AUDIENCE FLOW APR 2019 VS APR 2020



■ Apr-20 ■ Apr-19

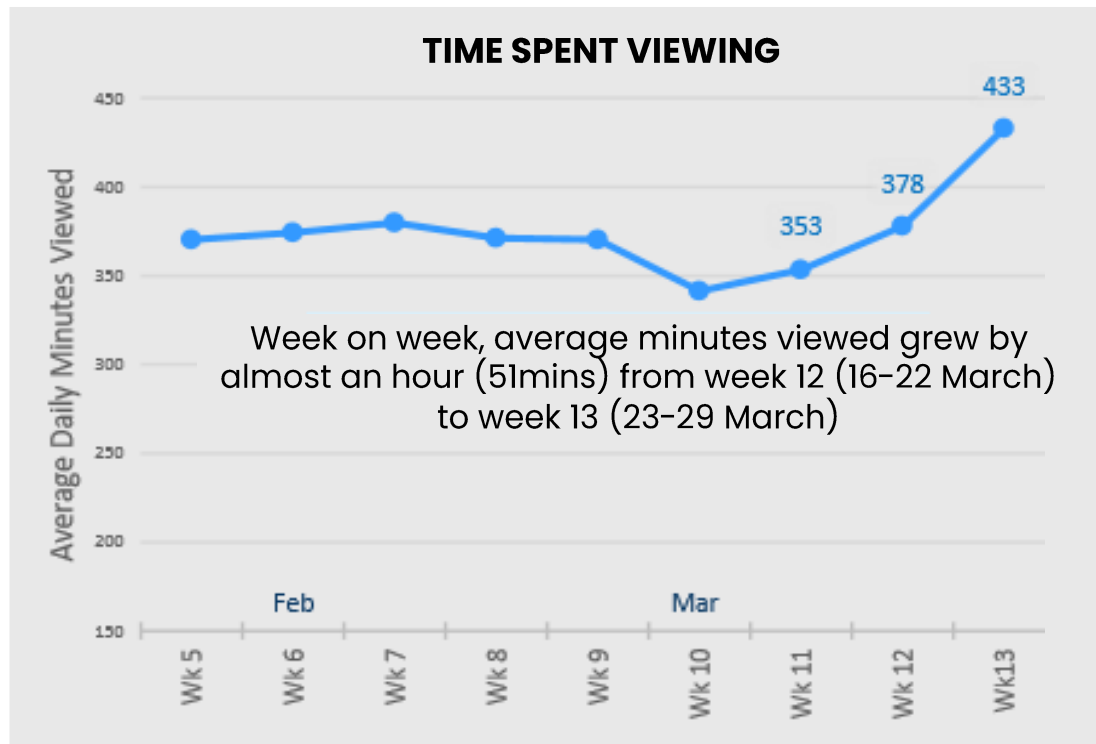


GOtv Viewership Overview: Nigeria



- **6 out of 10 viewers are GOtv** viewers on the MultiChoice platform.
- In line with global trends, the **time spent watching TV has grown** significantly as a result of the lockdown – to as high as **7hrs 13mins** by the middle of March 2020

- **General Entertainment** in the **local channels genre** delivers the highest proportion of viewership and the biggest share of audience on Gotv, followed by **movies**
- **Top performing DMS channels on Gotv include:**



- These channels deliver great across the week with the highest audience peaks on weekends and especially on Sundays.
- The only exception is Telemundo which, similar to other telenovela channels, performs best weekdays: Mon-Fri

Mercy & Ike

- Mercy & Ike has been a welcome addition to the line up enticing notable audiences across both channels its on:



Top watched show on the channel
(Sun 6.30pm)



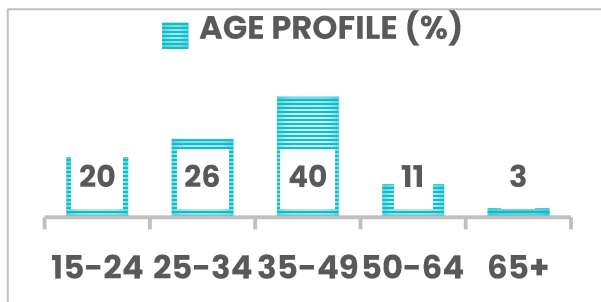
2nd watched show on AM Urban
(Mon 9.30pm)

AM SHOWCASE TOP 5 SHOWS: MAY '20 **AM URBAN TOP 5 SHOWS: MAY '20**

| # | TITLE | DAY | TX TIME |
|---|---------------|-----|---------|
| 1 | Mercy And Ike | Sun | 18:30 |
| 2 | Moms At War | Sun | 21:00 |
| 3 | She Devil | Sun | 19:00 |
| 4 | My Flatmates | Wed | 18:30 |
| 5 | The Johnsons | Mon | 19:01 |

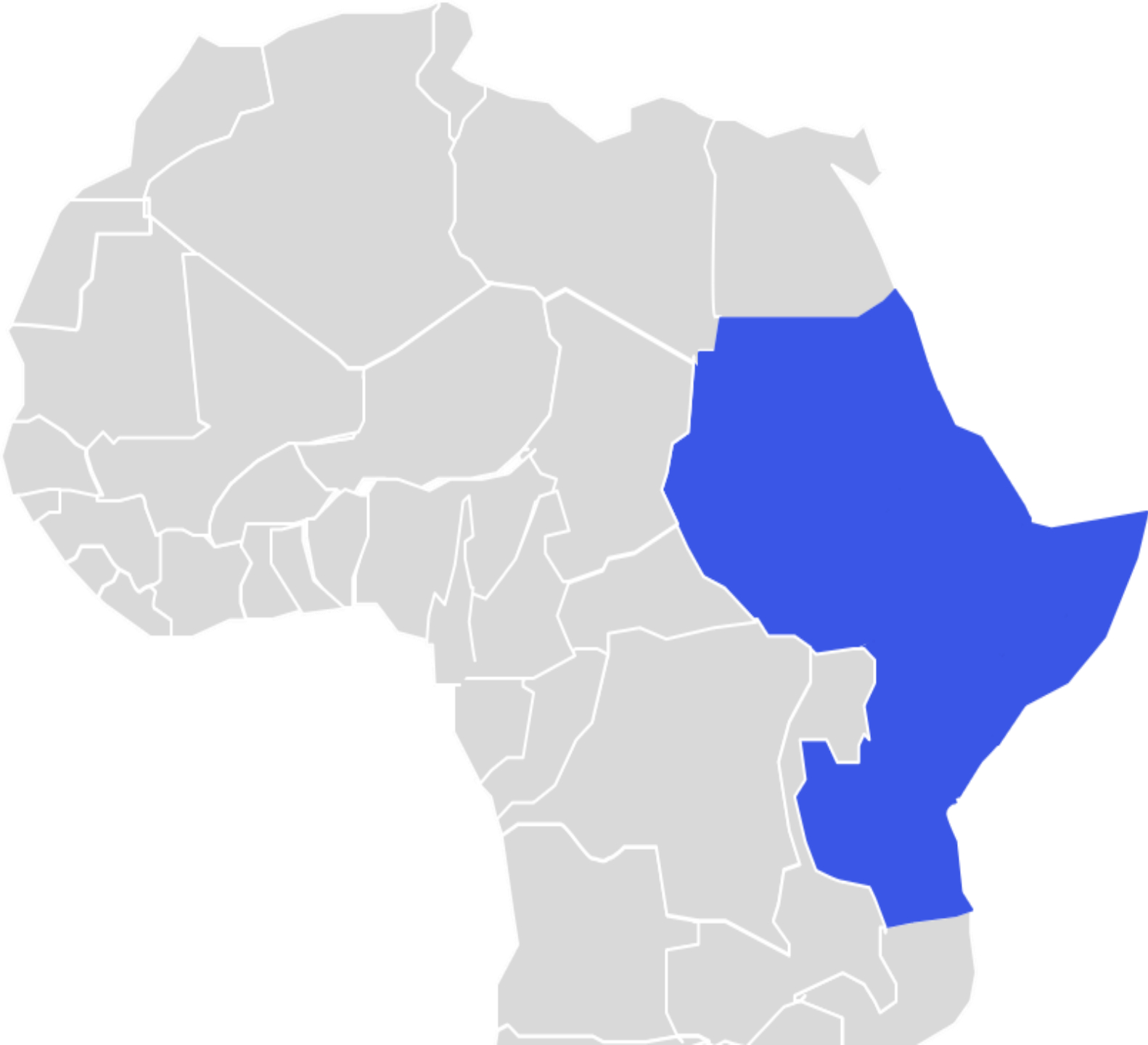
| # | TITLE | DAY | TX TIME |
|---|---------------|-----|---------|
| 1 | The Johnsons | Fri | 21:00 |
| 2 | Mercy And Ike | Mon | 21:30 |
| 3 | My Flatmates | Wed | 19:00 |
| 4 | Forbidden | Mon | 19:30 |
| 5 | Unbroken | Tue | 20:30 |

- Mercy & Ike resonates with both males and females (50/50) and across ages groups:



| Employment Status | Percentage |
|-------------------|------------|
| Work Full Time | 51% |
| Work Part Time | 17% |
| Student | 22% |
| Other | 7% |





East Africa

Viewership Trends



MAISHA MAGIC CHANNELS

Local Content channels remain the staple



Local Content channels remain the staple

+26% YoY

MOVIE CHANNELS

**Movie Channels experience growth*



+33% YoY



+67% YoY



+170% YoY



+53% YoY



+78% YoY



+45% YoY

INTERNATIONAL CHANNELS

**International GE Channels brings broad appeal*



+27% YoY



+11% YoY



+212% YoY



+58% YoY



+45% YoY



+36% YoY



DStv News Channels Viewership Trends

Ave. Weekly Reach has increased **+145%** driven by CNN!



+569% YoY



+231% YoY



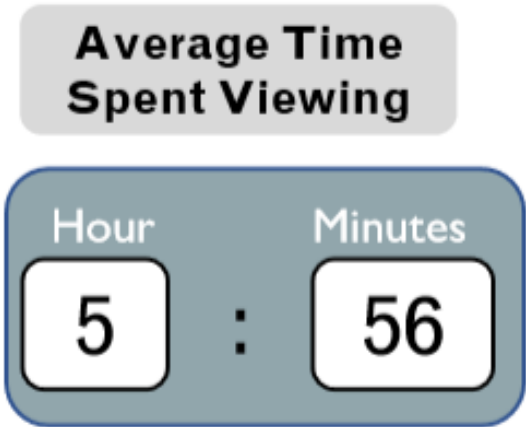
Source: DStv-i, April 2020 vs 2019, All Adults, 15+,

GOtv Viewership Overview: Kenya



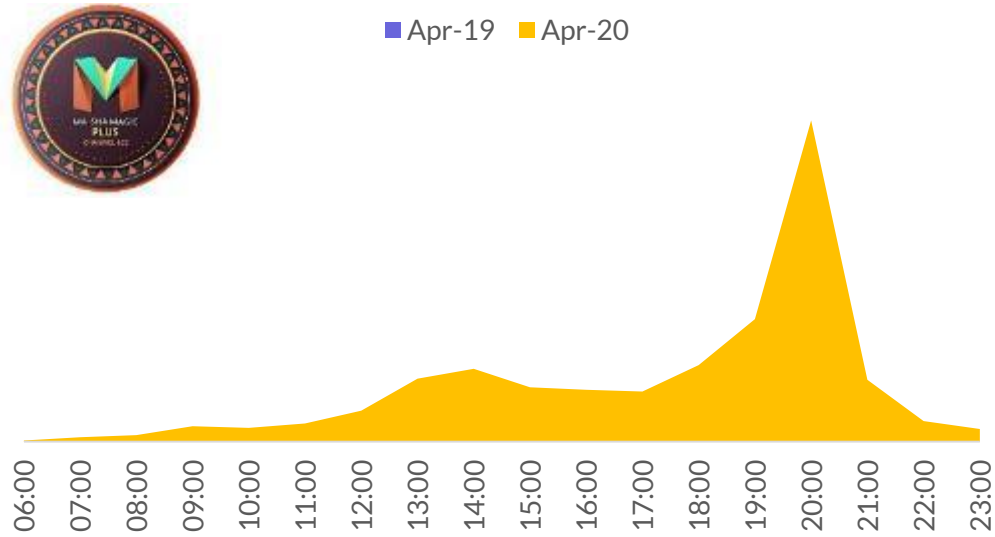
- **4 out of 10 viewers are GOtv** viewers on the MultiChoice platform.
- In line with global trends, the **time spent watching TV has grown** significantly as a result of the lockdown - to as high as **5hrs 56mins**

- **Local Movies, Music, News and Documentaries** delivers the highest proportion of viewership and the biggest share of audience on Gotv, followed by **Football/Soccer**
- **Top performing DMS channels on Gotv include:**

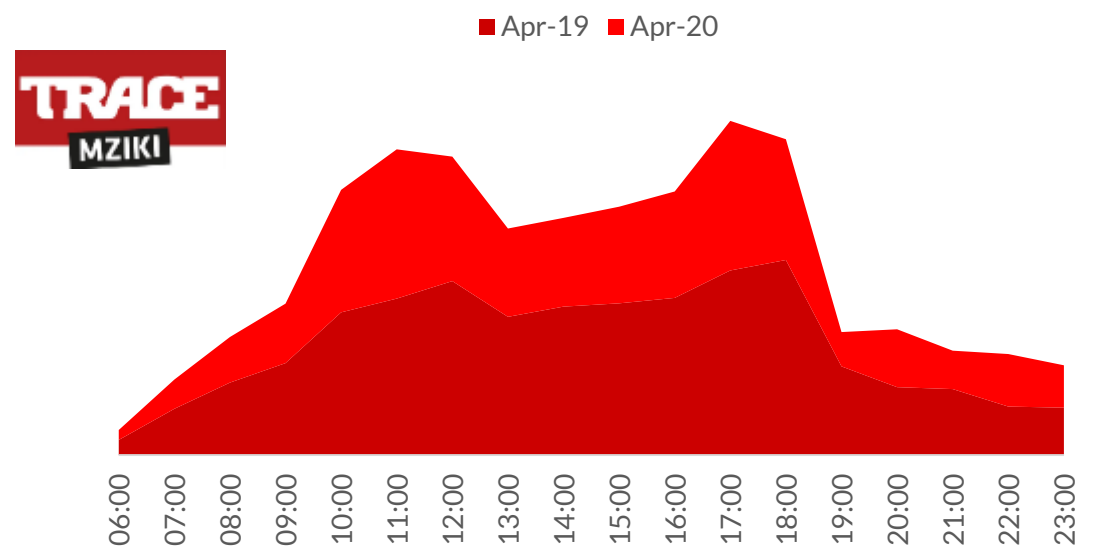


- Viewing peaks at 12h00–23h00 and is strongest at 18h00–23h00 during the week and on the weekend

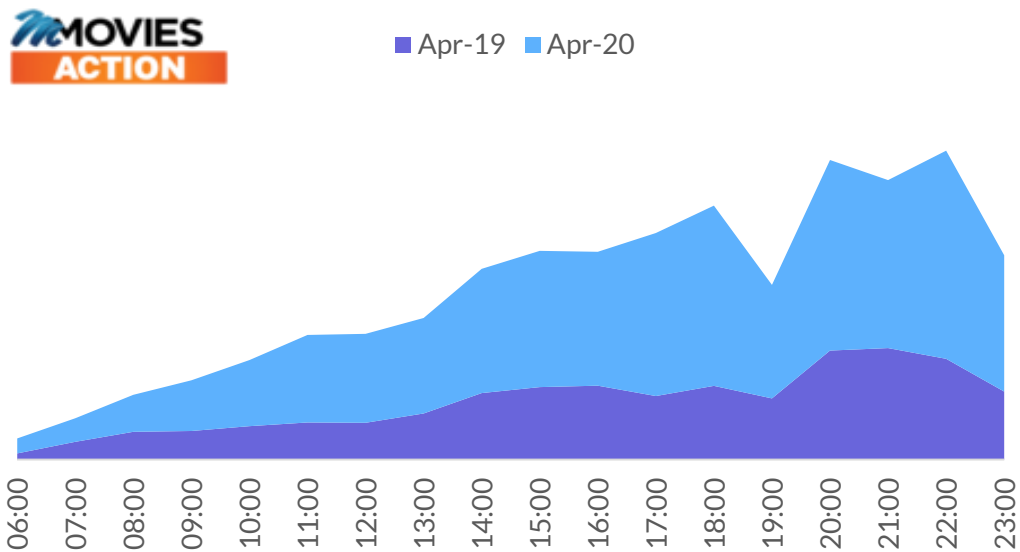
MAISHA MAGIC PLUS AUDIENCE FLOW APR 2019 VS APR 2020



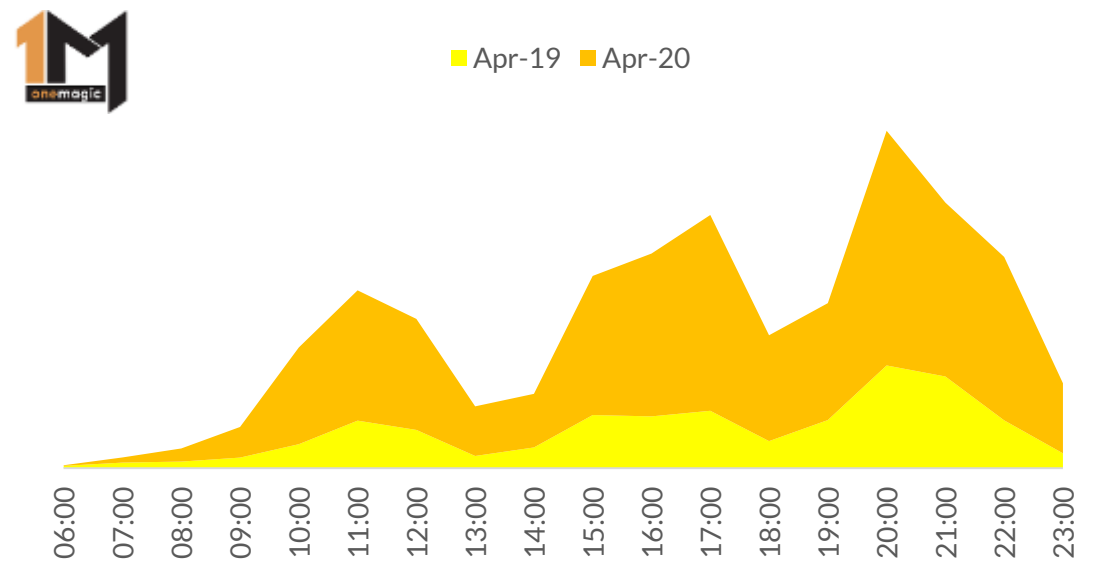
TRACE MZIKI AUDIENCE FLOW APR 2019 VS APR 2020



M-NET MOVIES ACTION AUDIENCE FLOW APR 2019 VS APR 2020



1MAGIC AUDIENCE FLOW APR 2019 VS APR 2020

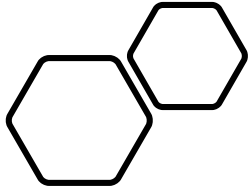


MAISHA MAGIC PLUS

**Caters to the
affluent audience**

This channel will be the home of new dramas, reality shows, telenovelas and music





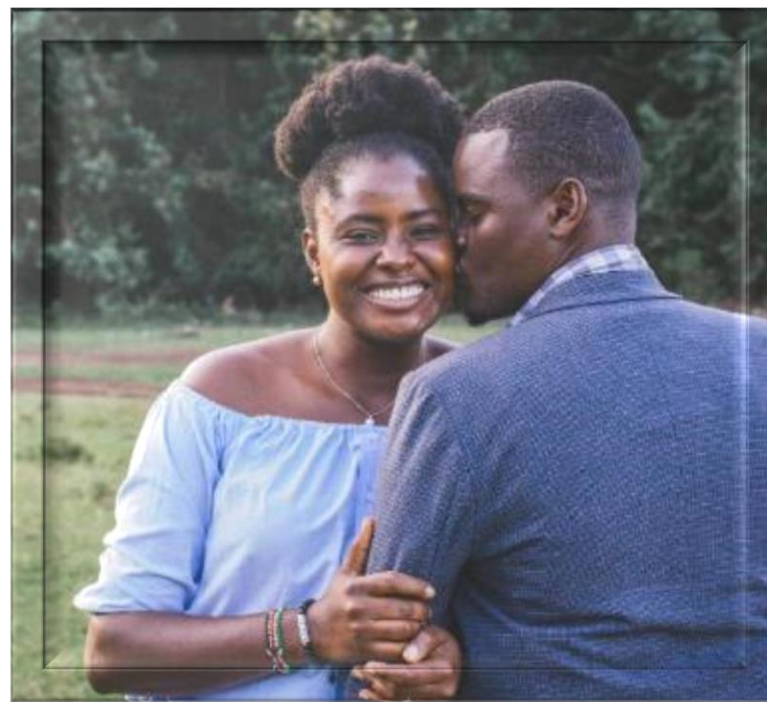
The best of both worlds

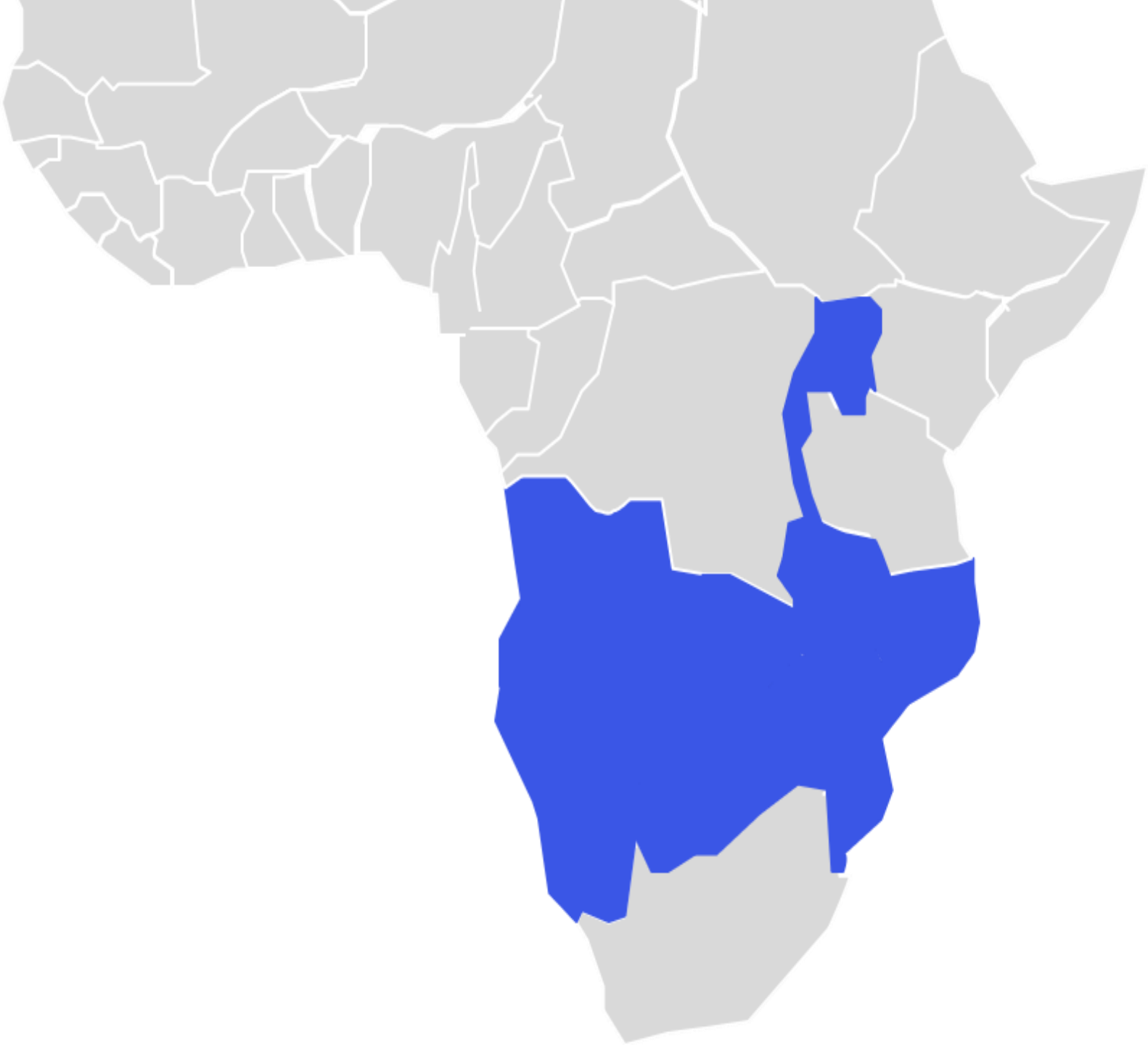
Maisha Magic East becomes the flagship channel for mass audiences.

In the future re-screenings of much loved stories will take place here.

Maisha Magic Plus caters to the affluent audience,

Brand new shows to be launched on this channel





SADC



Viewership Trends

LOCAL CHANNELS

**Ave. Weekly Reach in Mil:
38 mil Collectively*



+65% YoY



+27% YoY



+26% YoY



+25% YoY



+13% YoY

MOVIE CHANNELS

**Ave. Weekly Reach in Mil:
22 mil Collectively*



+42% YoY



+24% YoY



+24% YoY



+15% YoY



+10% YoY



+9% YoY

INTERNATIONAL CHANNELS

**Ave. Weekly Reach in Mil:
13 mil Collectively*



+217% YoY



+215% YoY



+27% YoY



+26% YoY



+21% YoY



+19% YoY



DStv News Channels Viewership Trends

News is growing rapidly **+86%** in the region, lead by CNN!



+223% YoY



+64% YoY



GOtv Viewership Overview: SADC



- **5 out of 10 viewers are GOtv** viewers on the MultiChoice platform.
- In line with global trends, the **time spent watching TV has grown** significantly as a result of the lockdown - to as high as **7hrs 33mins**

- **Telenovelas, local movies and general entertainment** delivers the highest proportion of viewership and the biggest share of audience on Gotv, followed by **Football/Soccer**
- **Top performing DMS channels on Gotv include:**

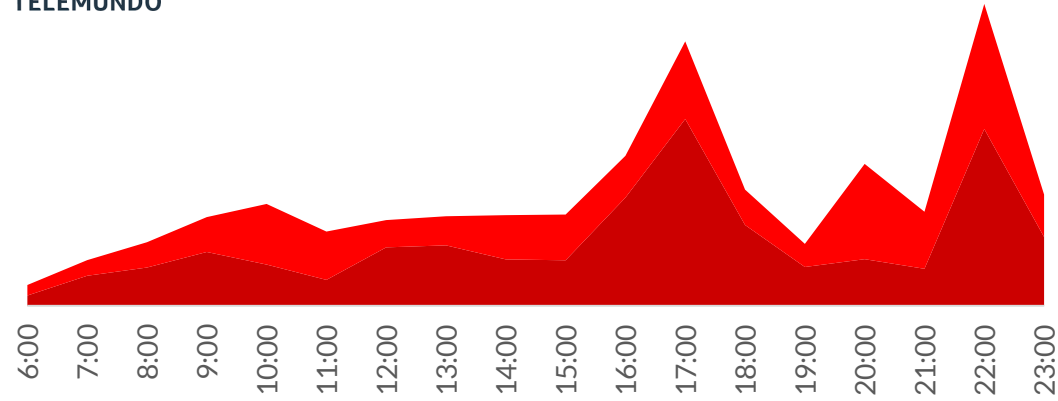


- Viewing peaks between 11h00-22h00 and is strongest at 17h00-22h00 during the week and on the weekend

TELEMUNDO AUDIENCE FLOW APR 2019 VS APR 2020



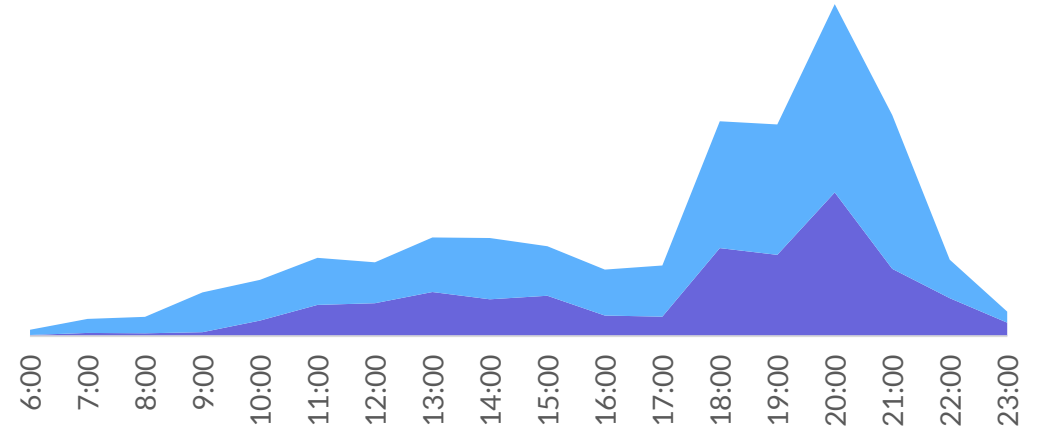
■ Apr-19 ■ Apr-20



MNET AFRICA AUDIENCE FLOW APR 2019 VS APR 2020



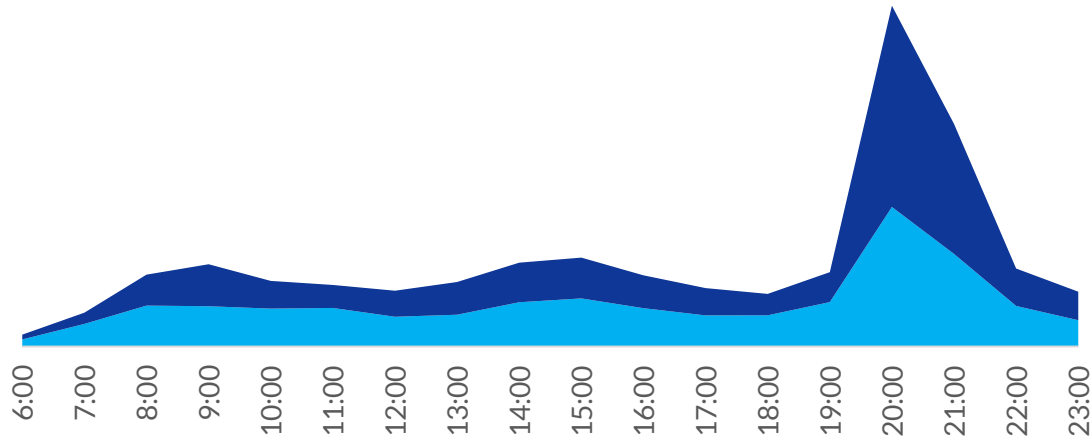
■ Apr-19 ■ Apr-20



ZAMBEZI MAGIC AUDIENCE FLOW APR 2019 VS APR 2020



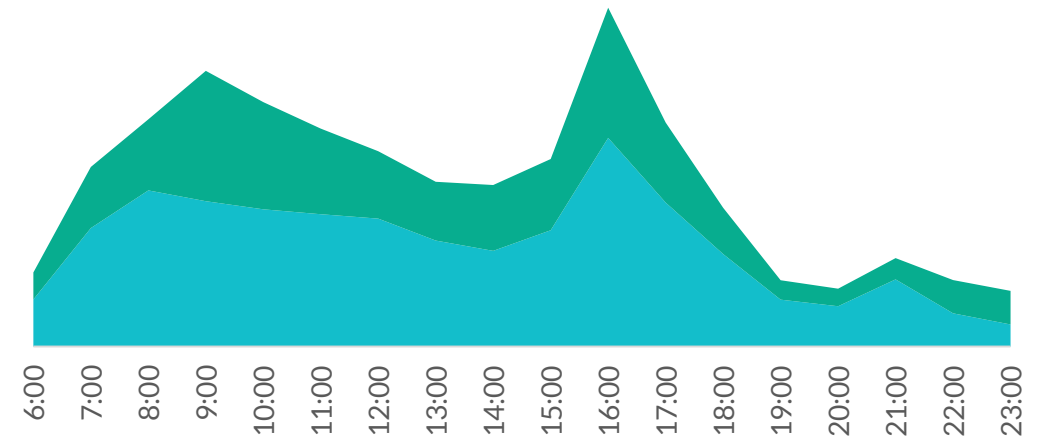
■ Apr-19 ■ Apr-20



TRACE AFRICA AUDIENCE FLOW APR 2019 VS APR 2020



■ Apr-19 ■ Apr-20





Zuba

MPALI

SNAKES & LADDERS

MON - THU
20:30
ON CHANNEL 160

www.zambezi.com.zw

ONE ZED 7

LUSAKA MAIDS

Zuba

TURN OF FORTUNE



GOMORA
I VILI LETA JIKA

THE QUEEN S4
MON - FRI | 21:00

THE REAL HOUSEWIVES OF JOHANNESBURG



Suidooster

GETROUD MET RUGBY
DIE SERIE

BINNELANDERS

DSTV Now

Trends

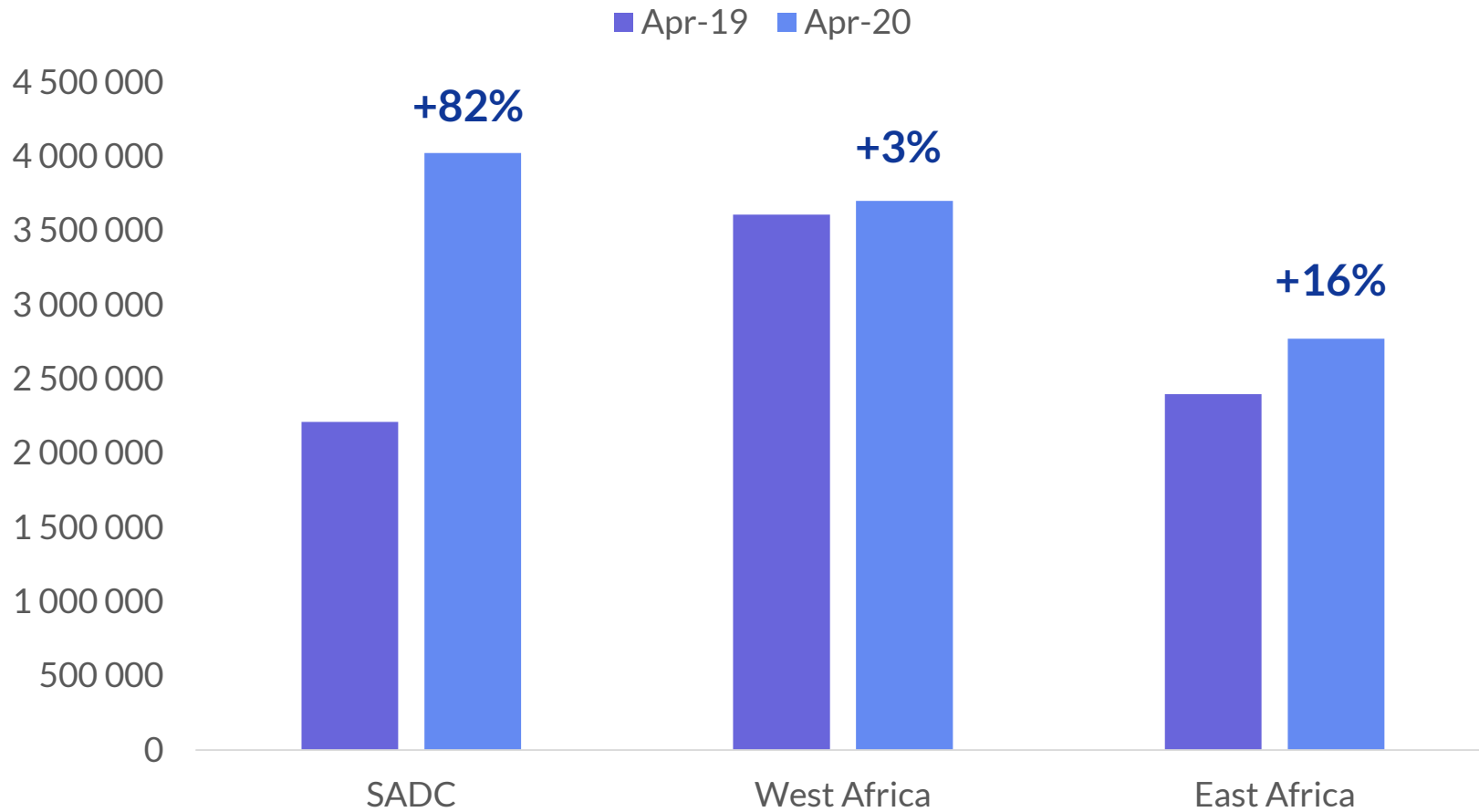
Critical need for smart digital technology & solutions

- Given the effects of the lock down in many countries, companies have enhanced their digital and technological capabilities to enable telecommuting, online transactions, online shopping, online education and telemedicine during this time, as well as broadcasters like Multichoice who allow for improved broadcast services in digital
- Broadcasting is also becoming the most trusted source of information and as digital transformation increases, so does the role of DSTV Now and TV Streaming services

The logo for DSTV Now is centered within a circular graphic. The graphic consists of a central purple circle with a white gradient, surrounded by two concentric blue circles. The outermost circle has small blue dots and arrows pointing clockwise, suggesting a digital or network theme. The text 'DSTV' is in a bold, blue, sans-serif font, and 'Now' is in a smaller, lighter blue font below it.

DSTV
Now

DStv Now Penetration: Africa

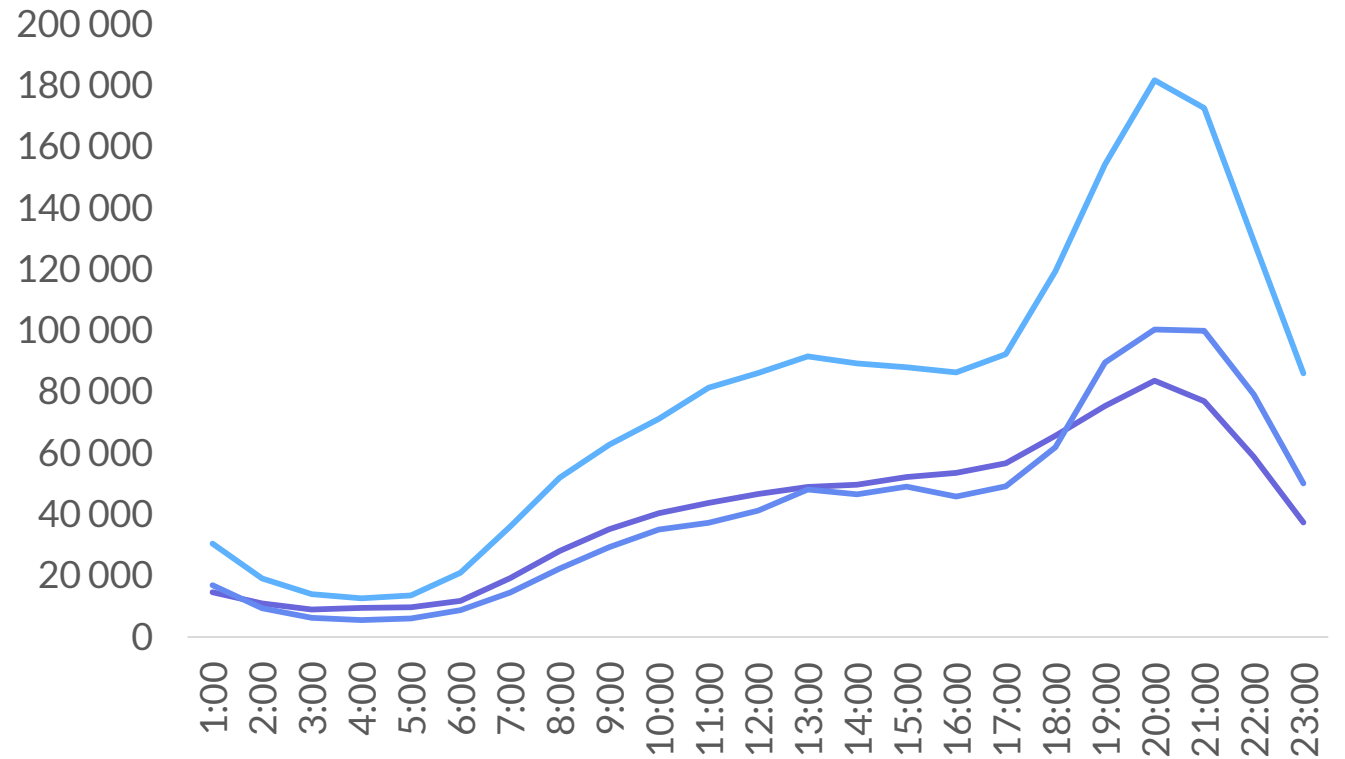




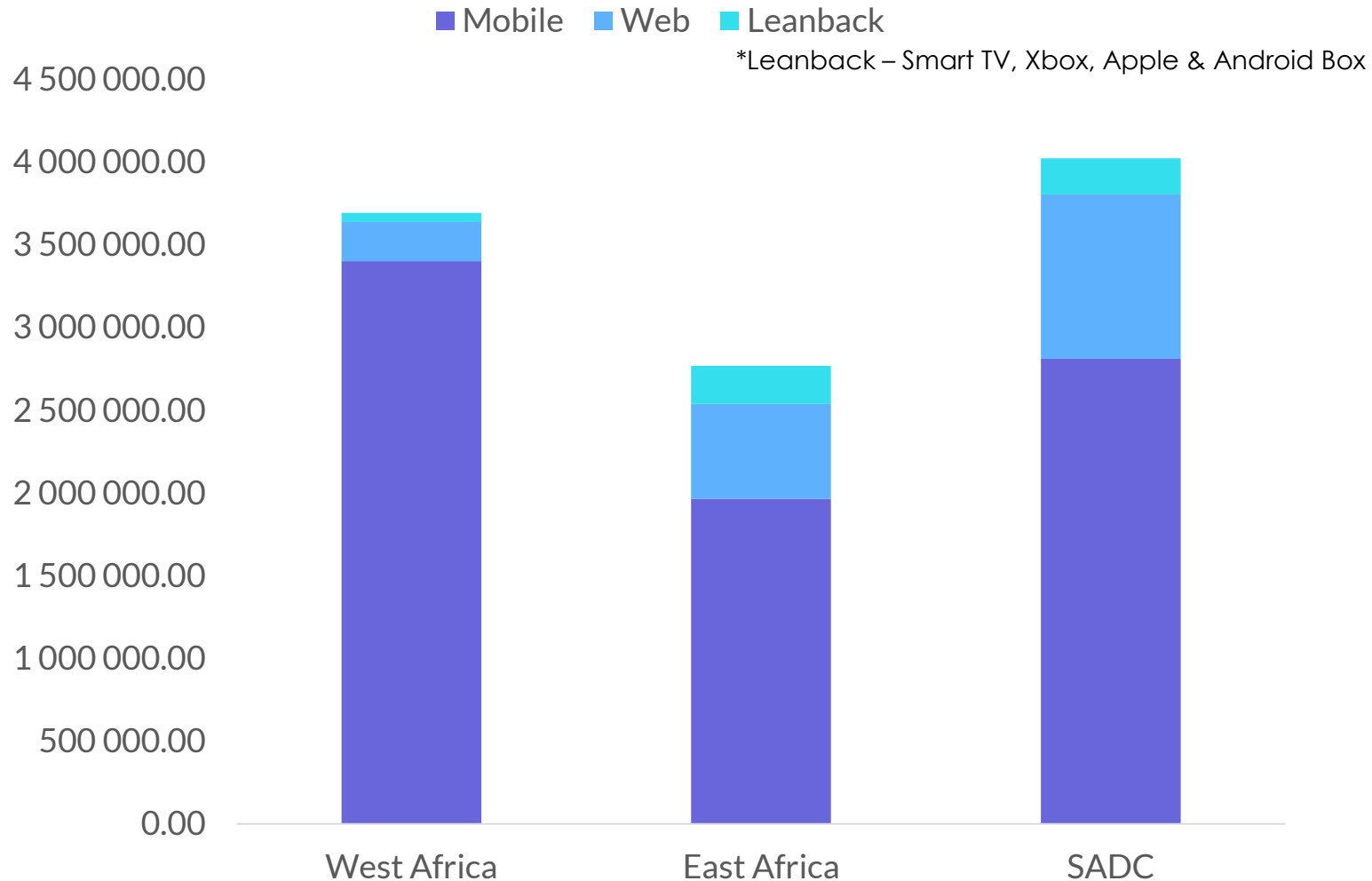
DStv Now Timeband Access Distribution Occurring as early at 6am and building to a peak at 9pm

DSTV Now Daypart Viewing

— West Africa — East Africa — SADC



DStv Now Penetration By Device



**Thank You
for Watching**

DStv
Media Sales