



African Broadcast and Film Markets



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African Broadcast and Film Markets

Country audience profiles

Algeria

Angola

Burundi

Egypt

Ghana

Kenya

Morocco

Mozambique

Nigeria

Rwanda

Senegal

South Africa

Tanzania

Togo

Tunisia

Uganda

Zimbabwe

Introduction

African Broadcast Markets is published by Balancing Act and InterMedia (www.intermedia.org). The report has two main sections: Part 1 that looks at Industry Trends and Part 2 that looks at Audience Trends.

Part 1 starts with an overview of the broadcast industry across the continent and looks at the impact of liberalisation. It also looks at: the battle for Pay-TV subscribers; MTV's continental reach; state broadcasters and the new media landscape; the costs of local and international programming; the digital switchover and high-definition; the African film industry; the potential market size for Pay TV; channels to reach the African diaspora; and the continent's mobile TV roll-out.

Part 2 is based on a series of sample surveys covering 17 countries: Algeria, Angola, Burundi, Egypt, Ghana, Kenya, Morocco, Mozambique, Nigeria, Rwanda, Senegal, South Africa, Tanzania, Togo, Tunisia, Uganda and Zimbabwe.

Each country profile in Part 2 has a common structure to enable comparisons to be made between countries. The structure is broadly as follows but some sections may not appear where information is not available:

Key statistics: A panel of summary data including: demographics of the country under examination; media equipment ownership (TV, radio, computer, cable/satellite TV and mobile phone), daily use (TV, radio and Internet), top radio channels - daily audience, top TV channels - daily audience, regulatory bodies, and number and type of radio and TV channels (private and state-run).

Media environment and trends: A short summary of the shape of the media landscape and the main issues affecting the country under examination.

Political and regulatory climate: A section describing how unrestricted the media is and issues that affect its operations.

Media markets: A look at how consumers use radio, TV, Internet and the press and how trustworthy they find them as carriers of news and information.

Media players: This summarises the main media players, identifying those companies that have cross-media ownership.

Media equipment ownership and use: A section that looks in detail at the ownership and use of different types of key media equipment including: TV, radio, computer, cable/satellite TV and mobile phones. It includes a table or tables that look at the pattern of radio and TV use across the day, identifying peak viewing and listening times.

Survey sample: Each country profile concludes with a box that identifies the size of sample, its geographic distribution and the variance of the results.

Part 1: Industry Trends

Key findings

The key findings from Part 1: Industry Trends are as follows:

- **Free-To-Air TV channels:** Out of 40 main markets¹ surveyed in Sub-Saharan Africa, just under half (18) have licensed Free-To-Air TV channels.
- **Pay-TV services:** These are dominated by two companies that control the majority of content rights in their respective language markets: DStv in Anglophone markets and Canal Plus in Francophone markets.
- **Explosion in number of radio stations:** The liberalisation of radio broadcasting has led to an explosion in the number of radio stations, particularly those broadcasting in local languages. These are known in East Africa as the “vernaculars” and they have been one of the growth areas of the last five years. The most vivid example of this trend is Uganda where there are now over 150 radio stations, 69% of which cater for audiences in the 38 different languages of the country.
- **Success of Free-To-Air TV channels:** Countries where the privately owned FTA TV channels have taken the majority of both audience and advertising revenues tend to be where fuller competition exists. Kenya, Tanzania and Uganda are all countries where the existence of several FTA companies means that both audiences and advertising are much more fragmented and the state broadcaster no longer necessarily has the dominant position in terms of either audience share or advertising revenues.
- **TV advertising spend:** Based on countries where more detailed statistics are available, overall advertising spend on television has increased slightly in some countries but declined in others. The report identifies 15 markets which have significant volumes of TV advertising.

¹ Angola, Benin, Botswana, Burkina Faso, Burundi, Cameroon, Cape Verde, Central African Republic, Chad, Congo-Brazzaville, Cote d'Ivoire, Djibouti, DRC, Equatorial Guinea, Gabon, Gambia, Ghana, Guinea Bissau, Kenya, Lesotho, Liberia, Malawi, Mali, Mauritania, Mozambique, Namibia, Niger, Nigeria, Sao Tome, Senegal, Sierra Leone, Somalia, South Africa, Swaziland, Tanzania, Togo, Uganda, Zambia and Zimbabwe.

- **Growth of radio and TV ownership:** On a fairly conservative projection, television ownership in the selected 40 countries surveyed will grow by an average of 17%. This growth will vary from country to country with the higher rates being found in those countries where economic growth is above the global average. Radio growth is equally strong and geographically more widespread.
- **International investment:** The absence of international players (except in the Pay TV market) has meant that Africa has not been viewed as a single potential market. Whilst there is an increasing level of international interest, the likely players remain regional or even sub-regional. Restrictions on foreign ownership mean that in most cases multinational investors are unable to buy direct control of these entities and are therefore unwilling to invest.
- **State broadcast weakness:** Where the state broadcaster competes in a more liberalised FTA TV channel environment with 4-5 competitors, the state broadcaster usually sinks to the bottom position in terms of advertising share over time or simply stays one ahead of the last new market entrant.
- **Digital transition:** The vast majority of African countries have not even started writing plans for how they will tackle the digital transition, let alone scheduled a deliverable timetable. Unsurprisingly, the private sector has already started the process in two countries: Mauritius and Namibia. Trials have also been conducted in Algeria (ENTV), Burundi, Cameroon (Global TV) and Rwanda.
- **Arrival of triple play:** Despite continuing problems about offering legal VoIP calling, an increasing number of operators have started to offer triple-play service bundles that include voice, Internet and television programming. For African telecoms companies stepping into the television space, this has involved being able to deliver IP-TV.
- **Diaspora channel services:** As African global diaspora communities grow in size, they are increasingly attracting broadcasters who want to reach them with content from “back home”. These broadcasters either deliver using satellite or IP-TV but vary enormously in scale. Early results seem to show a significant preference for IP-TV as a delivery mechanism, particularly amongst younger users.

- **Pioneering mobile TV:** Mobile TV has been slow to take off across the world. Ideally, it needs a special technology (for example, DVB-H) and therefore phones that have SIM cards that can use this technology. Despite these inauspicious circumstances, Africa has become a testing ground for this new technology and the company pushing for its use is a content provider (DStv) rather than a mobile operator.

Part 2: Audience trends

Key Findings

- **Radio the dominant media in most countries:** The realities of economic development in Sub-Saharan Africa mean that whilst television and radio are widely distributed in main cities, radio is the main medium for rural areas. In most of the countries surveyed, the majority of the population listen daily to the radio. That said, some countries have limited terrestrial television and as described in Part 1 of the report, there is a strong correlation between access to electricity and television ownership.
- **High proportion of young people:** A key demographic is the very young average age of these populations; for example, 38 per cent of Ghanaians are under 14 years old, 42 per cent of Nigerians and 45 per cent of Mozambiquans, as contrasted with an average of 16 per cent across the European Union. The young are often more open to new ideas and it is this part of the market that drives content preferences for things like sport, music and action movies.
- **State interference or control of media:** This is still prevalent in some markets. This can range from Togo, where content is dictated by the government, to Kenya, where journalists are indirectly pressured to self-censor. State ownership also ranges from the relatively benign but ubiquitous public service SABC in South Africa, to ownership of media companies by the ruling party, as is the case in Angola and a number of other countries.
- **More control, less trust:** Wherever Government exerts tight control over the public broadcaster or all media, the audiences trust the resulting news output far less than they might otherwise. For example, in Egypt, the domestic media is less trusted than international outlets. The most trusted source of information is Al Jazeera. As a pan-Arab satellite giant founded by the Qatari emir, the channel is technically international or foreign. Yet Egyptians, like viewers in most Arab societies, have appropriated Al Jazeera as their own, considering it akin to a local channel.
- **Popularity of imported content:** Much of the most popular content tends to be music on the radio, or largely imported soaps on television. For example, in Mozambique's main cities, private channels feature a regular diet of

Portuguese and Brazilian soap material. But these are not just a feature of Portuguese-speaking markets for both Portuguese and Spanish soaps are a central programming element in Kenya.

- **Hunger for music and entertainment:** There is a huge appetite for FM music radio. Africans, both sub-Saharan and North African, surround themselves with music in cars, public transportation, shops and homes. Wherever deregulation has taken place, multiple FM channels have emerged. Consumers also hunger for entertainment television.

About the authors

Industry Trends

Russell Southwood

The overall editor of African Broadcast Markets is Russell Southwood who also wrote the Industry Trends section of the report.

He is the Chief Executive of Balancing Act and the Editor of its weekly e-letter on telecoms, Internet and computing News Update. As a consultant, he has worked for a variety of clients looking at: the development of Free-To-Air broadcasting; the demand for Pay-TV in selected African countries; the demand for fibre infrastructure in Africa over the next five years; an investment appraisal of a wireless broadband operator; and a study to develop Open Access models for internet and telecoms in developing countries (infoDev).

Isabelle Gross

Research for the Industry Trends section was carried out by Isabelle Gross. She is Balancing Act's Research Manager and has worked on a number of research projects including: investigating public sector ICT contracts in francophone Africa; researching wireless licences; and examining attitudes to the proposed Abuja Digital Village. Born in France, she moved to the UK ten years ago and has worked in the film and communications industry. Previously she was Business Development Manager for Africa for international VoIP retailer, Callserve.

Audience Trends

InterMedia (www.intermedia.org; +1.202.434.9332) is a leading international media research, evaluation and consulting organization creatively equipping clients to understand their audiences, gauge their effectiveness and target their communications in transitional and developing societies worldwide.

Based in London and Washington, D.C., and active year-round in more than 60 countries, since 2001 InterMedia has directed a regular, comprehensive program of media surveys across Africa (the company's worldwide databank includes some 600 media surveys). InterMedia analysts draw on this rich, single source for data to

explore how Africans are interacting with traditional and emerging broadcasters and platforms, new technologies and modes of mass and inter-personal communication. The analysis provided is not based on numbers alone. It is informed by InterMedia's parallel program of African qualitative research, programme evaluation, as well as the on-the-ground experience and area skills of our people.

The authors of the Audience Trends section are:

Allen Cooper

Allen Cooper has some 30 years' experience in international media research, most of which was gained with the BBC World Service in London. Since leaving the BBC, he has advised the Namibian Broadcasting Corporation on how best to organize its research function, and managed on behalf of the BBC World Service Trust and other clients a wide range of audience and media research projects in Africa (Ethiopia, Kenya and Nigeria) and elsewhere. He has been working with InterMedia since 2001 with a responsibility for African media research, as well as directing the company's overall research strategy and approach.

Hugh Hope-Stone

Hugh Hope-Stone is an analyst and research project manager with over 12 years of experience in International media research and evaluation. Hugh has conducted projects for a number of international broadcasters including BBC, VOA and Radio China, with direct field management oversight and group moderation experience in Africa, Asia and the UK. Example of recent projects include an ethnographic study on media use in Pakistan for the BBC WS; a multi-country qualitative programme evaluation for BBC English in West Africa; and media environment and use reports for the BBC WS on Africa, Europe and Latin America. Hugh has previously worked for Oxfam, BBC World Service and Plus Four Market Research.

Aylin Talgar Pietz

Aylin specializes in research and program evaluation in sub-Saharan Africa and the Middle East. Since 2000 she has worked in Ghana, Kenya, Malawi, Mali, Nigeria, Senegal, Sierra Leone, and Uganda. Aylin's clients at InterMedia have included international broadcasters such as the BBC, as well as other media organizations, including the Panos Institute and Common Ground Productions. Aylin's professional background encompasses programmatic and research experience; she has worked

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A Middle East and North Africa (MENA) specialist, Haleh's management and research experience concentrates on international cultural and media production. She oversees a media research program active annually in 14 countries across the region, designing new market research strategies and adapts best practices to balance methodological rigor with sensitivity to local realities. Prior to joining InterMedia, Haleh earned a Ph.D. from Georgetown University's Department of Government and was awarded a postdoctoral research fellowship at Harvard University's Center for Middle East Studies. She has published book chapters and articles in academic and professional journals and presented papers on media and strategic communications issues at various forums. She is competent in Persian and French and speaks basic Arabic and Spanish.

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As a member of the MENA analytical team, Dunia works on various media related projects, supervising fieldwork and conducting analysis on the media and communication environments. Before joining InterMedia, Dunia worked as consultant and co-coordinator for the Program for the Reconstruction and Redevelopment of South Lebanon. Dunia is a doctoral candidate in American Politics and International Relations at Texas A&M University. Her dissertation focuses on the effects of media and elite discourse on foreign policy public opinion in the United States. She received her Bachelor's degree in International Affairs and Economic Development from the Lebanese American University in Beirut. Dunia is fluent in Arabic.

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Sajid is responsible for the implementation, field supervision and analysis of media surveys in 10 Arab countries and Afghanistan for clients in the international broadcasting industry and in the NGO community. Previously, Sajid served as a project manager for Middle East programs at the Atlas Economic Research Foundation in Arlington, Va., and as director of fundraising and marketing at the Al-Hussein Society. He has a Master's of Public Affairs from Indiana University and a



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