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# Reframing African Media

EMPOWERING NARRATIVES AND NAVIGATING GEOPOLITICAL INFLUENCES

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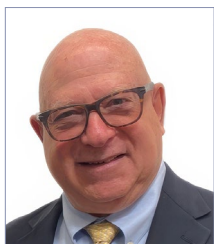
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# Contents

Introduction.....	1
Reframing Africa's Media.....	2
Why Africa Matters .....	3
The State of African Media.....	5
Geopolitical Dynamics: A Battle for Influence .....	6
The Changing Dynamics of African Media .....	6
The African Mediascape: Corporate Titans, State Broadcasters, and National Market Structures .....	8
Capital Currents: FDI, Geopolitics, and Shifting Investment Landscapes in Africa's Media.....	10
Consumption Currents & Content Contours: Shaping Africa's Information Diet.....	11
Africa's Linguistic Diversity.....	15
Navigating Headwinds: Press Freedom, Stability, and the Path to Media Prosperity .....	18
Conclusion .....	21

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## Introduction

We live in a world hungry for new areas of sustainable economic growth. Sustainable economic growth historically has been driven by the demands of a growing population. However, for most of the world, population growth has diminished substantially over previous generations.

Africa, however, is the standout exception. Population growth in Africa greatly outpaces that of the rest of the world, as this paper explores in depth. If one adds the economic acceleration that will come from the adoption of artificial intelligence, digital media and data-driven business strategies, Africa has the potential to significantly accelerate its growth in the world economy.

***by Marshall Toplansky***



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## Reframing Africa's Media

When people think about media, Africa is rarely the first thing that comes to mind. And when it does come up, it is often portrayed through a very narrow lens—poverty, conflict, or outdated stereotypes.

But African media is so much more than that. It is powerful, growing, and deeply influential across music, film, fashion, and even digital innovation. That is why it is important that we start paying attention.

Media serves as the backbone of any democratic society. It informs citizens, holds leaders accountable, and provides a platform for diverse voices. In Africa, media has played a pivotal role in shaping public opinion, influencing political outcomes, and driving social change. However, the media landscape across the continent is as diverse as its cultures, languages, and histories.

In many African countries, media outlets have been instrumental in exposing corruption, advocating for human rights, and promoting transparency. Investigative journalism has uncovered scandals that have led to governmental reforms and, in some cases, the resignation of public officials. Moreover, media has been a tool for education, raising awareness about health issues, environmental concerns, and social injustices.

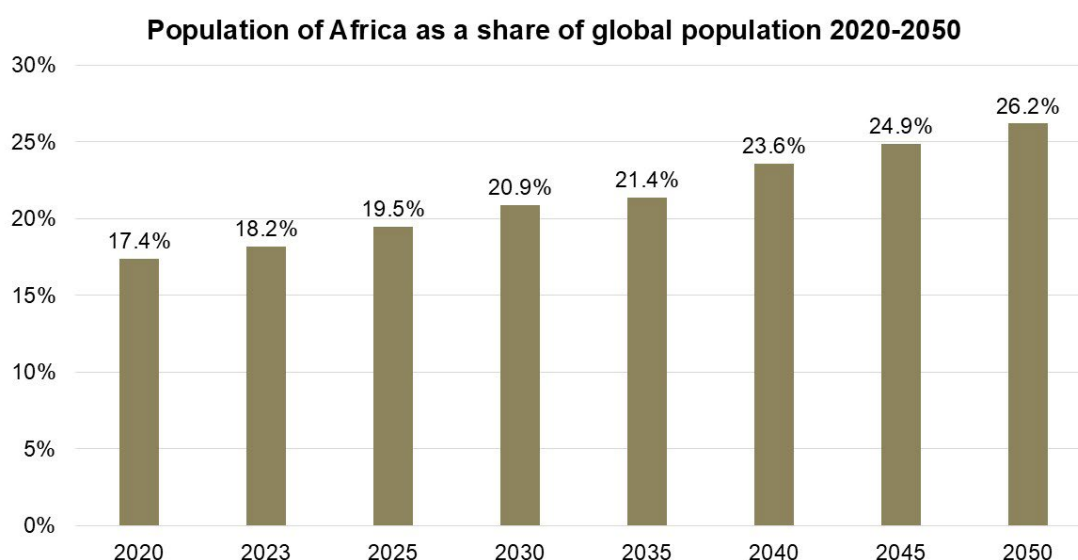
Yet, the media in Africa faces numerous challenges. Press freedom is often under threat, with journalists facing harassment, censorship, and even violence. Economic constraints limit the reach and quality of media outlets, especially in rural areas. Additionally, the dominance of foreign media narratives often overshadows local voices, leading to a misrepresentation of African realities.

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## Why Africa Matters

Africa stands at a pivotal juncture, its demographic trajectory presenting a striking contrast to global trends. While many regions grapple with ageing populations and shrinking workforces, Africa is characterised by a rapidly expanding, youthful population. The continent is projected to account for more than half of the world's population growth by 2050<sup>1</sup>, a demographic surge that will profoundly reshape global labor markets and consumer landscapes. This dynamism, often termed a “youth bulge”—with over 60% of the continent's population currently under the age of twenty-five<sup>2</sup>—signifies not merely a statistical curiosity but a fundamental force shaping Africa's economic future. Such a youthful demographic is particularly significant for the media sector, as younger populations are typically early and avid adopters of new media formats and digital technologies, thus driving consumption trends. The sheer scale of this demographic shift, with a population that could approach 4 billion by the end of the 21st century<sup>3</sup>, underscores both immense opportunities, such as a vast future workforce and burgeoning consumer markets, and significant challenges, particularly the imperative for rapid job creation and sustainable resource management. These population trends are central to understanding the potential scale and nature of future media consumption.

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*Population of Africa as a share of global population 2020-2050*

Africa's demographic trajectory presents a seismic shift in global population dynamics. Fuelled by sustained high fertility rates—averaging approximately 3.8 children per woman in 2024,

starkly contrasting with Europe's ~1.4-1.5, North America's 1.8, Russia's 1.5, Asia's 1.9, and South America's 1.9—and coupled with rapidly declining infant mortality (from 145 per 1,000 live births in 1960 to around 38 in 2024) and rising life expectancy (from 43 to 66 years in the same period), the continent's population is set to surge. Projections indicate a near doubling to approximately 2.5 billion people by 2050, at which point Africa will host over a quarter (see chart above) of humanity, with countries like Nigeria, DRC, Ethiopia, Egypt, and Tanzania leading this expansion.

This demographic momentum culminates in an exceptionally youthful continent; Africa's median age hovers around a mere 19.3 years, compared to Europe's 42.8 or North America's 38.7. Indeed, the data reveal a stark reality: each year, an estimated 10 to 12 million young Africans enter the continent's labour market. However, only about three million formal wage jobs are generated annually across Africa. This creates a formidable employment deficit, underscoring the immense challenge of productively absorbing this burgeoning human capital to drive sustained economic growth. This profound youthfulness offers the prospect of a "demographic dividend": a vast workforce and consumer base. However, without commensurate economic expansion to absorb these new workers, alongside substantial investment in infrastructure and human capital, this youth bulge risks becoming a significant socio-economic burden, straining resources and potentially fuelling instability. The continent's policy choices in the coming decade will determine which path it takes.



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## The State of African Media

To understand the media landscape, we examined the African Media Barometer (AMB), which assesses media environments across sub-Saharan Africa. The AMB provides a comprehensive analysis of media trends, challenges, and opportunities.

The media is particularly important for democracy. It helps by sharing news and keeping watch on people in power, encouraging people to take part in society and speak up, fighting for fairness, especially when people are treated unfairly, and working with leaders, but only to help the public, not to protect those in power.

But for the media to do all this well, the country needs to allow freedom of speech and support the media, especially during hard times like the COVID-19 pandemic. If not, the media can be blocked or controlled, which hurts democracy.

The AMB 11-year review looks at media trends in sub-Saharan Africa from 2011 to 2021. It shows that while many countries have laws supporting freedom of expression, there are still many restrictions. Access to information is limited in several countries, and state-run media often lack independence due to political control. Journalists are usually underpaid and sometimes practice self-censorship to keep their jobs. Countries with stable governments, like Namibia and South Africa, tend to have freer and more professional media, while countries in crisis face more media restrictions.

In many African countries, freedom of speech and the media are restricted, especially during elections or political crises. Governments sometimes use “public order” as an excuse to limit media freedom, even though a free media is important for democracy. Journalists in countries like the Republic of Congo and Madagascar avoid sensitive topics due to threats to their safety or possible legal trouble.

Although some countries have laws that protect freedom of expression, these laws are not always followed. Old laws from colonial times still exist, and they can be used to limit press freedom. This is particularly harmful during times when a free press is needed the most.

Print media tends to be freer than broadcast media. Many countries have laws that control radio and TV, often limiting diversity in what people can hear and see. For example, in Botswana, most the government and a few large companies control broadcasting.

The AMBs show that private media often ignore marginalized communities, focusing instead on profit. This commercialization leads to neglect of rural areas and minority groups, with media favouring elite audiences. Limited resources and poor working conditions for journalists also contribute to low standards, corruption, and self-censorship. Digital migration, while increasing media access, also raises costs, excluding poorer populations.

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## Geopolitical Dynamics: A Battle for Influence

The media landscape in Africa is not only shaped by internal factors but also by external influences. There is an ongoing battle between countries for influence over African narratives. Foreign powers often invest in media outlets, training programs, and content production to sway public opinion and promote their interests.

This geopolitical competition can have both positive and negative effects. On one hand, it can lead to increased investment in media infrastructure and capacity building. On the other hand, it can result in biased reporting, propaganda, and the erosion of local media independence.

To safeguard the integrity of African media, it is crucial to promote media literacy, support independent journalism, and encourage regional cooperation. By doing so, African countries can assert control over their narratives and resist undue external influence.

The media in Africa plays a vital role in shaping public discourse, promoting democracy, and driving social change. Despite facing numerous challenges, including censorship, economic constraints, and external influences, African media continues to demonstrate resilience and innovation.

As we continue to explore and engage with African media, let us remain committed to empowering local narratives and fostering a more inclusive and authentic portrayal of the continent.

### The Changing Dynamics of African Media

Amidst profound demographic and economic transformation, Africa's media landscape is evolving at a similarly rapid pace. However, this critical sector—encompassing everything from traditional print and broadcast to burgeoning digital platforms—often remains under-examined in mainstream global discourse. This analysis seeks to address this information gap by providing a clear-eyed description of media consumption patterns across the continent. It will identify the key corporate and state actors shaping the narrative, explore the inherent challenges (such as infrastructure deficits and threats to press freedom), and delineate the opportunities presented by new technologies and growing markets.

Crucially, the examination of Africa's media landscape, its economics, prevailing population trends, and the opportunities and threats it faces, is inextricably linked to the aspirations of ordinary Africans for jobs, upward mobility, and a transition to middle-income status. The efficiency, diversity, and freedom of the media are not peripheral concerns; they are intrinsically linked to governance, economic development, and Africa's capacity to realize its considerable potential.

The digital wave, particularly the mobile internet revolution, is a central feature of this evolving landscape. Unlike many developed economies with legacy fixed-line infrastructure, much of Africa has leapfrogged directly to mobile-centric connectivity, with mobile technologies now accounting for a significant share of internet connections.<sup>4</sup> This has democratized access to information to an unprecedented degree, directly impacting how media is consumed and by whom. However, it has also introduced new complexities, including the proliferation of disinformation and the heightened influence of external actors. Understanding these dynamics is paramount for forecasting consumption patterns, investment requirements, and the overall pathways for a media sector that can empower individuals and underpin market-driven growth.

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## The African Mediascape: Corporate Titans, State Broadcasters, and National Market Structures

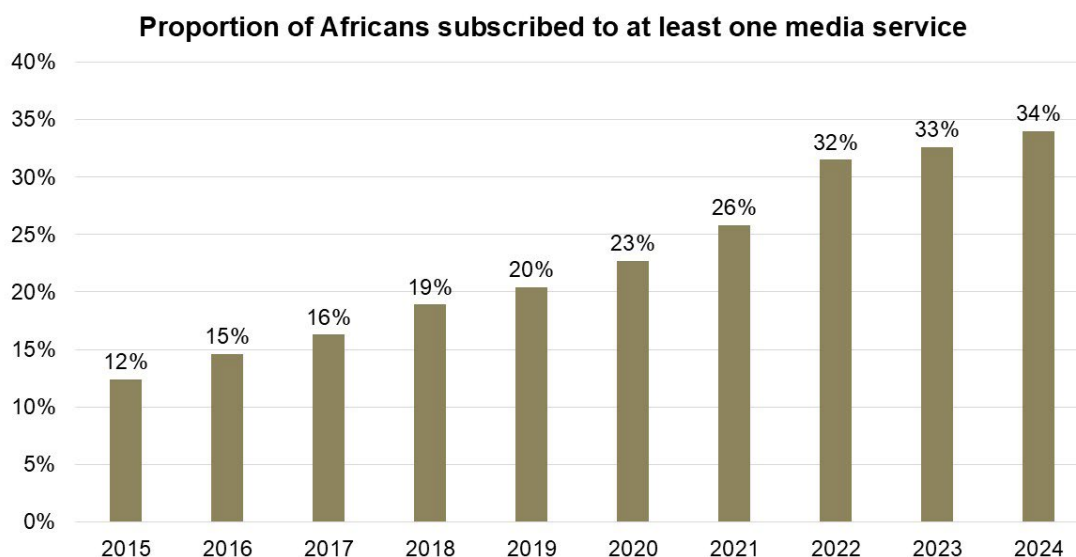
The architecture of Africa's media market is a result of historical legacies, state influence, and private enterprise. This structure raises pertinent questions about market concentration, competitive intensity, and the overall efficiency of information dissemination, all of which directly affect media consumption and the economic viability of the sector.

Several major conglomerates wield considerable influence. **Naspers Limited**, originating in South Africa, has transitioned from a traditional print entity with historical ties to the apartheid regime into a global consumer internet group. Its Media24 division, a major publisher in South Africa, reported revenues of R3.5 billion (approximately US\$188 million as of mid-2024) for the fiscal year ending March 2024<sup>5</sup>. The **MultiChoice Group**, also South African, is a dominant pay-tv provider across the continent with platforms like DStv and GOtv, reporting revenues of ZAR 56 billion (approximately USD 2.96 billion) for the fiscal year 2024<sup>6</sup>. However, it also reported a 9% decline in its total active subscriber base to 21.7 million in the same period, signaling greater competition and shifting consumer preferences—a market reality even for established giants that impacts subscription-based media consumption trends<sup>7</sup>.

Foreign-based entities are also formidable. China's **StarTimes** has established a significant presence, reporting over thirteen million subscribers for its pay-tv services and twenty-seven million users for its Over-the-Top (OTT) streaming service across Africa by 2021<sup>8</sup>. It has been deeply involved in national digital migration projects (the crucial technological shift from analogue to digital broadcasting infrastructure), often supported by Chinese state financing, such as its role in the "Access to Satellite TV for 10,000 African Villages" project<sup>9</sup>.

This model facilitates rapid market penetration, expanding access to digital television for many. France's Canal+, part of Vivendi (now with the Bolloré Group as a major shareholder), is a leading subscription-TV operator in Francophone Africa (French-speaking African countries), with its international subscriber base (largely in Africa) reaching 8.1 million by the end of 2023<sup>10</sup>. **Canal+** has been aggressively expanding, notably increasing its stake in MultiChoice to 45.2% as of May 2024<sup>11</sup>, signalling a strategic push to consolidate market share and leverage local content. Such consolidation can impact consumer choice and pricing in the pay-tv market.





*Population by country in Africa Source: DataReportal, Digital Africa reports 2015-2025 (social-media users & population), Digital TV Research – Africa Pay-TV Forecasts 2024 (pay-TV households 2015-2025).*

Note: Estimates derived from DataReportal social-media user counts and Digital TV Research pay-TV households; assumes 4.5 persons per TV household and 60 % audience overlap. Margin of error  $\approx \pm 3$  percentage points.

Beyond these giants, national markets host significant entities. State-owned broadcasters like the **South African Broadcasting Corporation (SABC)**, the **Nigerian Television Authority (NTA)**, and the **Kenya Broadcasting Corporation (KBC)** remain major players, often with the widest reach, particularly in rural areas. Economically, such entities often face challenges of financial sustainability and political independence, potentially distorting the market and influencing the information landscape available to citizens. Many African governments maintain significant control over state media, influencing content and limiting independent journalism<sup>12</sup>. Private national players like Kenya's **Nation Media Group (NMG)** operate as commercial entities but still navigate political and economic terrains that can affect their editorial stance and operational freedom. The economic challenge for independent African media is acute. Declining traditional advertising revenues and the difficult transition to sustainable digital models mean many outlets struggle for financial viability<sup>13</sup>. This economic precarity can render them susceptible to capture by political or commercial interests, undermining editorial independence.

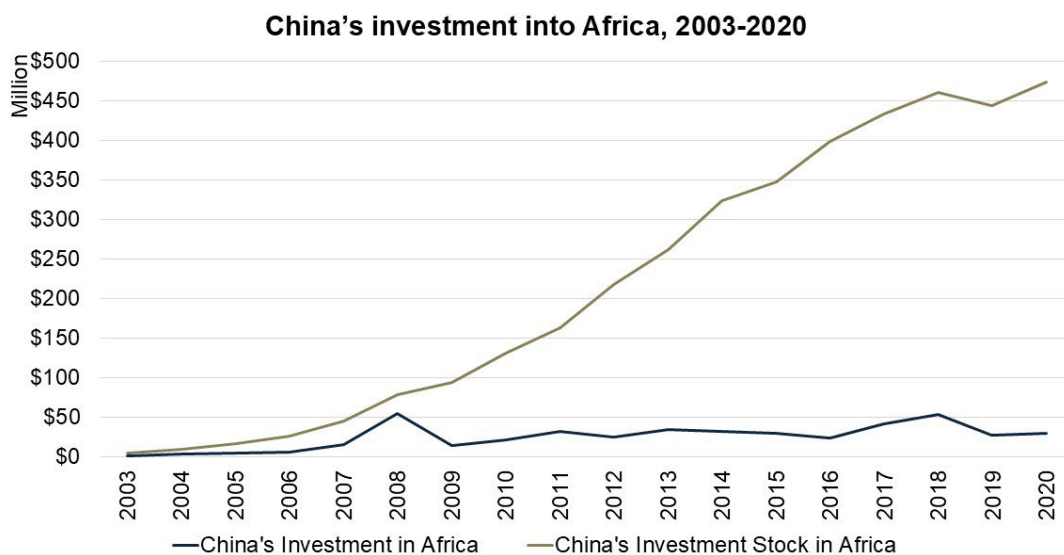
## Capital Currents: FDI, Geopolitics, and Shifting Investment Landscapes in Africa's Media

Traditionally media in Africa has been directly impacted by foreign interests, many of whom also have direct financial interest in the world's fastest growing demographic region.

Foreign Direct Investment (FDI) is a critical, yet multifaceted, component of the media sector's development, influencing infrastructure, content availability, and technological adoption, thereby shaping consumption patterns.

Besides its growth as a consumer market Africa's vast endowment of critical raw materials—essential for global manufacturing and green energy technologies, naturally draw foreign interests.

In this context, special attention needs to be made on the growing influence of China. Data from institutions like the U.S. Bureau of Economic Analysis and China's statistical bulletins show China's FDI into Africa has significantly risen, often outpacing U.S. investment in certain periods. For instance, Chinese lending commitments to Africa peaked at an estimated \$28.4 billion in 2016, and while declining to \$994.48 million in 2022 amidst concerns over debt sustainability and a shift towards “small is beautiful” projects, its cumulative infrastructure impact has been substantial.<sup>14 15</sup>



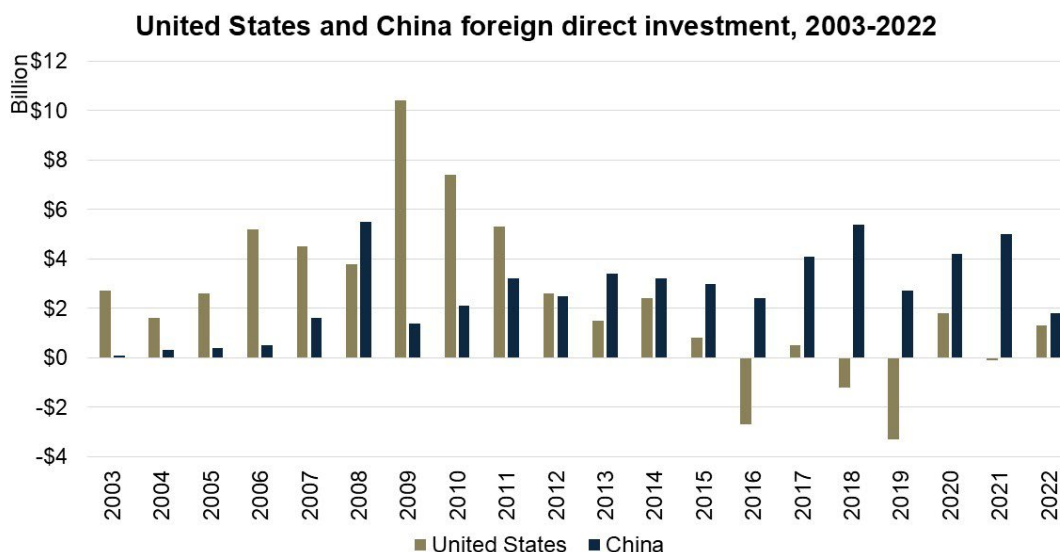
Source: Boston University Global Development Policy Center

*China's investment into Africa, 2003-2020. Source: Boston University Global Development Policy Center.*

Between 2000 and 2020, China reportedly helped African countries build over 13,000 km of roads and railways and more than 80 large-scale power facilities<sup>16</sup>. Historically, Western nations, including the U.S. and European countries, have been major aid donors. However, this

assistance—total official development assistance (ODA) from OECD Development Assistance Committee (DAC) members to Africa was \$65 billion in 2022<sup>17</sup>—has often been linked to conditionalities regarding six hundred million Africans lacking electricity access<sup>18</sup>, the urgent need for job creation for a rapidly growing youth population, and foundational infrastructure deficits often take precedence.

In this context, China has fewer qualms about such things as the use of fossil fuels, repression and the defence of women's rights. Consequently, the Western focus on green policies, now driven mainly by Brussels, covers measures such as the European Union Carbon Border Adjustment Mechanism, which from 2026 will levy border charges on steel, cement, aluminium, fertiliser and hydrogen produced with coal fired power; the European Investment Bank's blanket ban on funding any new fossil fuel projects, even gas plants that could stabilise fragile grids; and a sweeping corporate sustainability due diligence regime that allows officials to bar market access to exporters whose supply chains fall short of European climate or human rights tests. These rules shrink the pool of affordable energy and manufacturing options just as African governments race to light up six hundred million homes and create jobs for a surging youth population, leaving Beijing's less judgmental, coal-friendly finance looking like the more practical route to growth.



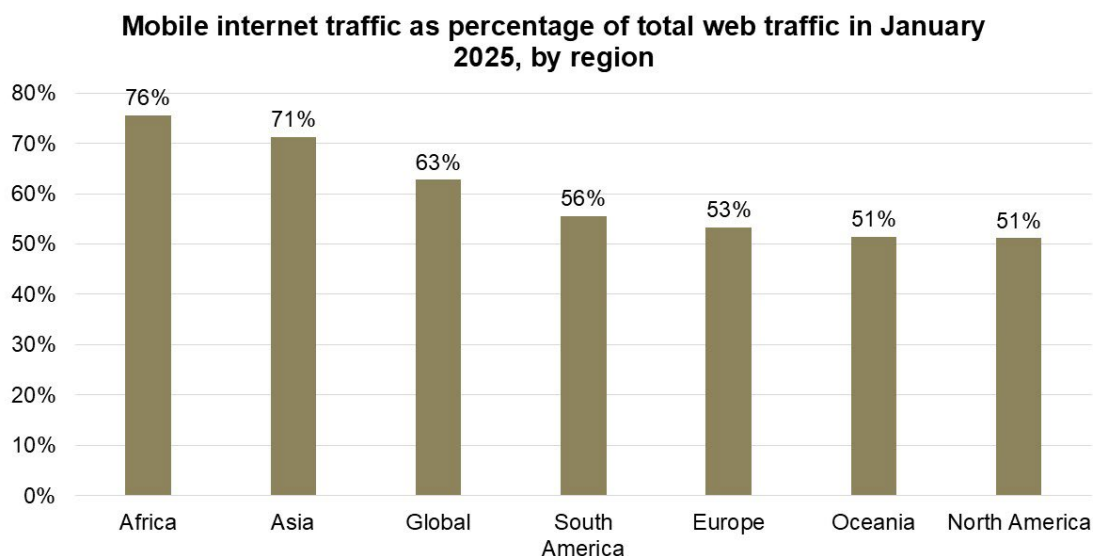
Source: The Statistical Bulletin of China's Outward Foreign Direct Investment, U.S. Bureau of Economic Analysis

Source: U.S. Bureau of Economic Analysis.

## Consumption Currents & Content Contours: Shaping Africa's Information Diet

Understanding how Africans consume media and the nature of the content they encounter is crucial for assessing the market's health and its socio-economic impact. The overwhelming

trend is the ascendancy of mobile as the primary gateway to information and entertainment.



*Mobile internet traffic as percentage of total web traffic in January 2025, by region*

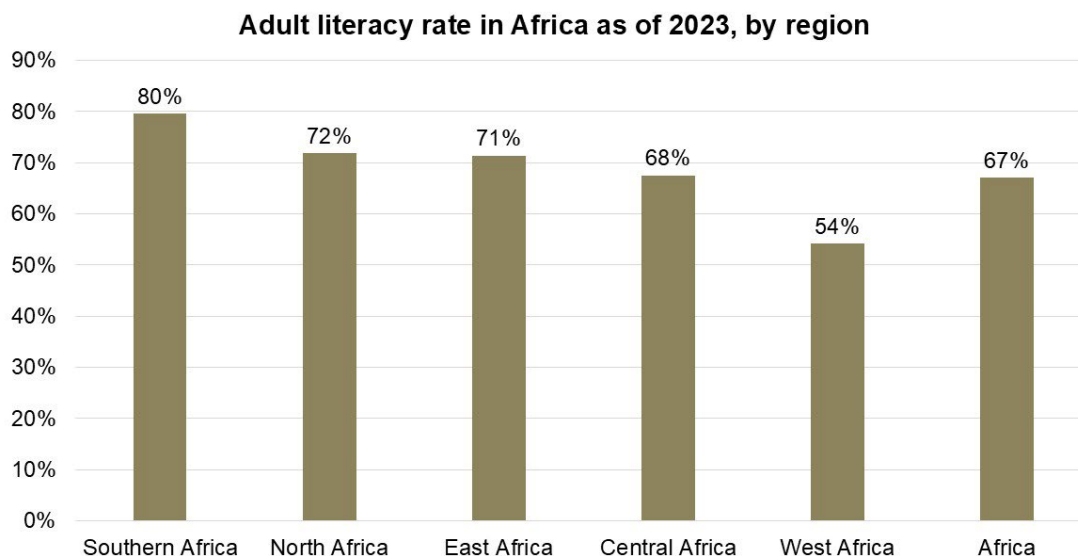
Africa leads the world in mobile internet traffic as a percentage of total web traffic, reaching 76% in early 2025, significantly higher than the global average of 63%<sup>19</sup>. This “mobile-first” reality, with a vast majority of African internet users accessing the web via mobile devices, is a direct consequence of several intertwined factors.

Firstly, there is the relatively low penetration of fixed broadband infrastructure across much of the continent; many countries effectively bypassed widespread landline development and moved directly to mobile networks as the primary mode of connectivity. Secondly, the rapid adoption of increasingly affordable smartphones has put internet access, and therefore media, into the hands of millions. Thirdly, the utility of mobile phones extends far beyond media consumption, serving as crucial tools for communication, mobile banking, and payments (a significant feature in many African economies), and accessing other essential services, making them indispensable.

From an economic perspective, this has enabled a leapfrog in connectivity, creating vast new audiences and markets for digital content and services, thereby directly influencing media consumption habits. Internet advertising is booming in key African markets, with PricewaterhouseCoopers (PwC) projecting significant growth in entertainment and media revenue for countries like Nigeria, South Africa, and Kenya, largely driven by this digital expansion<sup>20</sup>. Over-the-Top (OTT) streaming services are also witnessing significant growth, offering new avenues for content consumption.



However, this digital transformation is not without its complexities. Literacy rates, while improving, vary significantly across the continent, impacting the consumption of text-based media, whether print or digital.

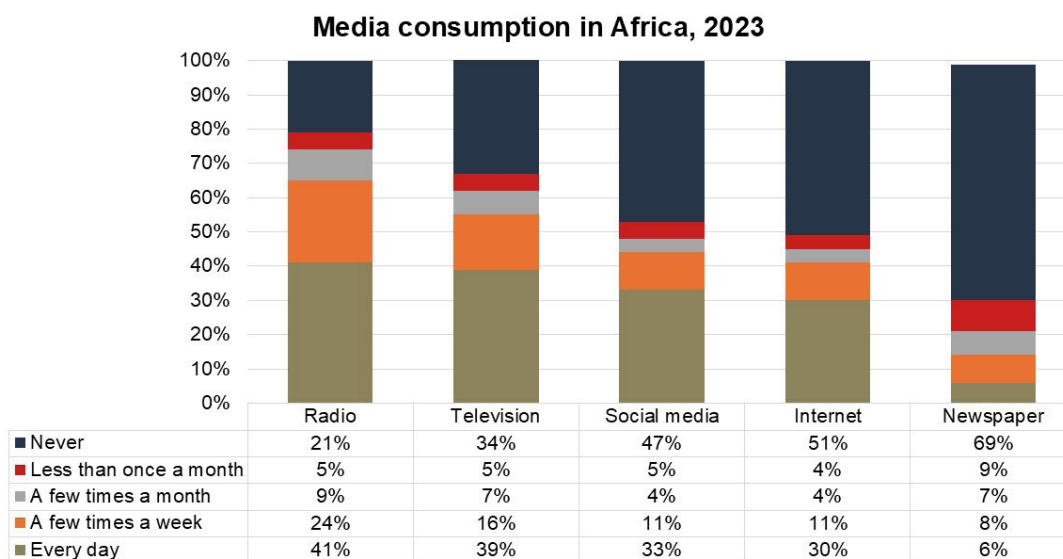


*Adult literacy rate in Africa as of 2023, by region Source: UNESCO*

In 2023, the average adult literacy rate in Africa was approximately 67%, with Southern Africa exhibiting higher rates (around 80%) and regions like West and Central Africa lagging (around 54% and 68% respectively), according to UNESCO. This directly influences the reach of text-based media and often pushes consumption towards audio-visual formats.

Persistently low literacy levels are rooted in contemporary, multifaceted challenges. Despite increased school enrolment figures in recent decades—UNESCO reported 75 million more children enrolled in 2023 than in 2015—the number of out-of-school children paradoxically rose by over 13 million in the same period, exceeding 100 million. This points to significant issues with retention and completion. Critically, learning outcomes for those *in* school are often alarmingly poor; estimates suggest that approximately four out of five 10-year-olds in Africa cannot comprehend a simple text, a condition termed “learning poverty.”

This legacy of low literacy can be seen in the preponderance of radio and television, media that does not require reading. At the same time, the educated part of the population, which tends to be young, is heavily oriented to social media. Newspapers have not shared such success.



*Media consumption in Africa, 2023 Source: Afrobarometer*

According to Afrobarometer surveys across 39 African countries (2021/2023), Radio remains by far the most common source of news. The 2023 data shows that 41% of Africans listen to the radio for news every day, and an additional 24% do so a few times a week, totalling 65% who are regular radio news consumers. Television is the next most accessed medium, with 39% watching for news daily and 16% a few times a week, making for 55% regular viewers. These traditional broadcast media maintain their dominance due to factors such as lower cost of access (radio receivers are inexpensive and often battery-powered, crucial in areas with limited electricity), their ability to transcend literacy barriers through oral delivery, and their wide signal coverage, especially for radio, reaching remote rural populations.<sup>21</sup>

Digital media, encompassing social media and the internet, are rapidly growing news sources. In 2023, 33% of Africans reported getting news from social media every day, with another 11% doing so a few times a week (totalling 44% regular users). For the internet more broadly (excluding social media as a distinct category for this data point), 30% used it daily for news, and 11% a few times a week (totalling 41% regular users). While this represents roughly a doubling in regular digital media use for news in less than a decade, the pace of uptake has slowed somewhat compared to earlier explosive growth.<sup>22</sup> Print media (newspapers) have the lowest regular reach; only 6% reported reading a newspaper daily and 8% a few times a week in 2023, for a total of 14% regular readers, a figure that has continued to decline.<sup>23</sup> This hierarchy of media consumption—radio first, followed by television, then digital platforms, and lastly print—has significant economic implications for media houses in terms of advertising revenue allocation, content production strategies, and investment in different platforms. The enduring strength of radio, for instance, suggests its continued viability for mass communication and advertising, particularly for reaching diverse demographic groups more evenly than digital

media, which exhibit significant access divides based on gender, education, age, urban/rural location, and income.<sup>24</sup>

## Africa's Linguistic Diversity

The continent's immense linguistic diversity, with estimates of over 2,000 distinct languages, profoundly shapes media consumption and production<sup>25</sup>. While this rich tapestry is a cultural asset, it has historically presented considerable challenges for creating economically viable, wide-reaching media markets, as producing content in numerous languages can be costly for smaller linguistic groups. The interplay between Indigenous African languages, major regional languages used commonly for communication between groups speaking different mother tongues a unique auditory, visual, and textual media environment.

However, the advent of Artificial Intelligence (AI) and sophisticated machine translation (MT) technologies is beginning to reshape this landscape. These tools offer new pathways to bridge linguistic divides and unlock market potential, even as challenges related to data scarcity for low-resource languages (languages for which fewer digital data is available for training AI models) and cultural nuance persist<sup>26</sup>. AI-driven tools are increasingly capable of translating text and speech, localizing content, and even generating new content in multiple African languages, potentially lowering production costs and expanding audience reach for media houses<sup>27</sup>.

Initiatives like Masakhane, a grassroots organization focused on Natural Language Processing (NLP) for African languages, and projects by major tech companies aim to improve the digital representation and technological support for these languages<sup>28</sup>. For instance, AI models are being developed to support hundreds of African languages, facilitating the creation of educational materials, news, and entertainment content accessible to previously underserved linguistic communities<sup>29</sup>. This technological shift holds the promise of making media more inclusive and economically sustainable across diverse linguistic groups, though realizing this potential fully will require continued investment in data collection, model training for low-resource languages, and ensuring culturally appropriate outputs<sup>30</sup>.

Several Indigenous African languages boast tens of millions of speakers. **Swahili**, with estimates of up to 200 million speakers (many as a second language), is a dominant force in East and Central Africa, serving as an official language of the African Union and increasingly used in media, education, and commerce in countries like Tanzania, Kenya, Uganda, and parts of the DRC<sup>31</sup>. International broadcasters like BBC Swahili and Voice of America (VOA) Swahili have large audiences, and numerous local radio stations, television channels, and newspapers operate in Swahili, fostering a vibrant media ecosystem in the language that caters to a vast swathe of the population<sup>32</sup>.

In West Africa, **Hausa** is a major lingua franca, spoken by an estimated 80-95 million people (L1 and L2 speakers combined) across northern Nigeria, southern Niger, and in communities across Chad, Cameroon, Benin, Ghana, and Sudan<sup>33</sup>. Standard Hausa, largely based on the Kano dialect, is widely used in print and broadcast media, including international services from the BBC, VOA, Deutsche Welle, and Radio France Internationale, alongside numerous Nigerian and Nigerien media outlets<sup>34</sup>. Other prominent West African languages with significant media presence include **Yoruba**, spoken by roughly fifty million people primarily in southwestern Nigeria and Benin, with a substantial body of literature, newspapers, and use in radio and television<sup>35</sup>. **Igbo**, with an estimated 30-35 million speakers mainly in southeastern Nigeria, also has a growing media presence, particularly in radio and online platforms, despite historical challenges in standardization<sup>36</sup>. The availability of media in these widely spoken languages directly impacts consumption by providing content in familiar tongues.

In Ethiopia, **Amharic** serves as the working language of the federal government and is spoken by tens of millions as a first or second language. It has a long literary tradition and is extensively used in Ethiopian media<sup>37</sup>. **Oromo**, the most widely spoken Cushitic language with over 40 million speakers in Ethiopia and parts of Kenya, has gained significant prominence in media and education since the 1990s, particularly with the adoption of the Latin script; Oromia Broadcasting Network (OBN) is a major player<sup>38</sup>. Southern Africa sees languages like **Zulu** and **Xhosa** having a strong media presence in South Africa, both being official languages with millions of speakers. Zulu is the most widely spoken home language in South Africa (around 24% of the population) and is understood by over 50% of its population; it features prominently on SABC television and radio, and in newspapers like *Idolize*<sup>39</sup>. Xhosa also has dedicated media channels and publications<sup>40</sup>.

Despite the vitality of these and other Indigenous languages, former colonial languages continue to hold significant sway, often serving as the primary languages of government, higher education, and national media in many countries. English, French, and Portuguese are official languages across vast swathes of the continent and dominate much of the print media, formal television broadcasting, and the burgeoning digital news space<sup>41</sup>.

This creates a tiered media system where access to certain types of information and economic opportunities can be linked to proficiency in these European languages, potentially marginalizing those literates only in indigenous tongues. However, digital platforms, community radio, and now AI-powered translation and content generation tools, have shown considerable potential for expanding media in local languages, offering more accessible and culturally relevant content, and enabling citizen journalism in vernaculars<sup>42</sup>. The economic calculus for media producers often involves balancing the wide reach of colonial languages against the deeper engagement achievable through indigenous language content—a dynamic that AI is poised to further transform, potentially reducing the trade-offs and fostering greater linguistic inclusivity in Africa's evolving mediascape, thereby broadening media consumption possibilities.



Foreign state media, particularly from China (China Global Television Network - CGTN, Xinhua News Agency) and Russia (RT, Sputnik), are increasingly active in shaping content. Chinese entities often provide free or subsidized content to African media houses and have expanded training programs for African journalists.<sup>43</sup> StarTimes has been noted for including Chinese state channels in its affordable bouquets. Russian outlets have been identified as sources of disinformation in certain African regions.<sup>44</sup> This influx of state-sponsored content, often presenting alternative narratives to Western media, influences the choices available to African consumers and impacts the overall information environment, making media literacy and access to diverse, independent sources even more critical.

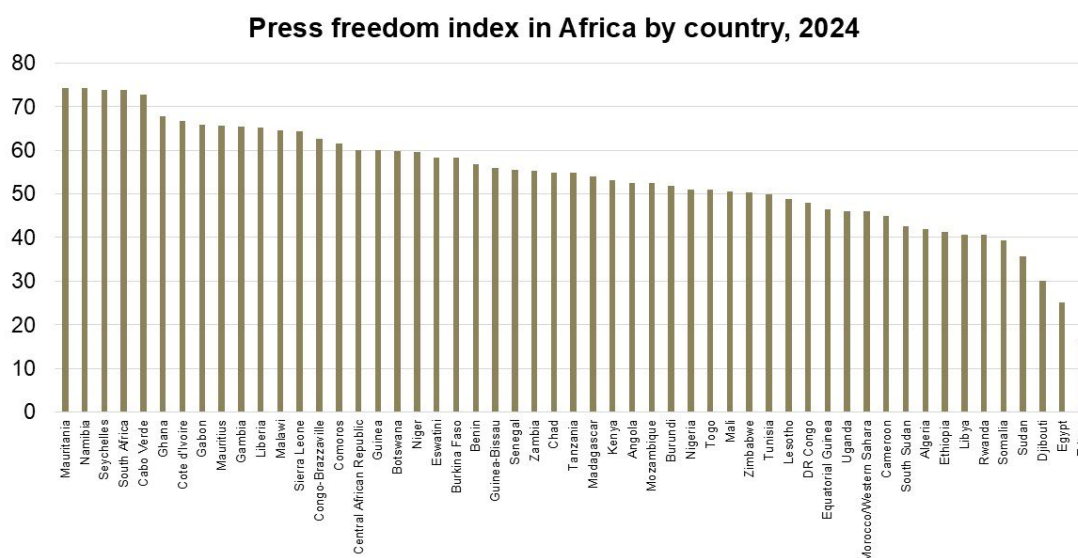
The content landscape itself is a battleground of narratives. Global media reporting on Africa has historically, and often still does, gravitate towards themes of crisis, conflict, disease, and poverty.<sup>45</sup> This “prejudice premium,” as identified by research from organizations like Africa No Filter, can have tangible economic costs, potentially impacting investment and borrowing costs due to negative perceptions.<sup>46</sup> Local African media also dedicate significant space to politics, a legacy of state-led media and persistent audience interest. The challenge lies in fostering a media environment that produces and disseminates a broader range of content reflecting Africa’s dynamism, innovation, and diverse economic activities, which could in turn attract different forms of media consumption.

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## Navigating Headwinds: Press Freedom, Stability, and the Path to Media Prosperity

Despite the dynamism, significant structural challenges impede the development of an absolutely free, competitive, and economically robust media sector across much of Africa. These challenges have profound economic implications, directly affecting investment, governance, and the continent's ability to harness its demographic dividend for widespread prosperity, all of which influence media consumption.

Perhaps the most fundamental challenge is the state of press freedom. Restrictions on media, whether through overt censorship, restrictive laws, or economic and physical intimidation of journalists, are prevalent.



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*Press freedom index in Africa by country, 2024 Source Reporters Without Borders (RSF)*

As the Reporters Without Borders (RSF) 2024 World Press Freedom Index indicates, many African countries rank poorly, with nations like Eritrea and Egypt near the bottom globally<sup>47</sup>. Even in nations with constitutional guarantees, vaguely worded laws (cybercrime, anti-terrorism, “false news”) are frequently used to silence critical voices and investigative journalism<sup>48</sup>. This creates a climate of self-censorship and uncertainty. A constrained press is a significant impediment to economic development. It undermines transparency and accountability, obscures corruption (which the UN Economic Commission for Africa estimates cost the

continent around \$148 billion annually<sup>49</sup>), and erodes investor confidence by increasing political risk. Without a free press acting as a watchdog and a conduit for reliable information, market inefficiencies fester, and the transaction costs of doing business rise, ultimately affecting the economic health of media organizations and the quality of information available to consumers.

The proliferation of misinformation and disinformation represents another severe economic threat. Fuelled by social media, it can incite violence, disrupt markets, erode public trust in institutions, and undermine legitimate economic activity.<sup>50</sup> State actors are sometimes implicated in these campaigns, further complicating mitigation efforts. The economic cost of instability and division sown by disinformation can be substantial, diverting resources, deterring investment, and directly impacting how and what media citizens trust and consume.

Persistent infrastructure gaps also significantly curtail media access and consumption, creating a deep digital divide. Reliable electricity is far from universal; as of 2023, around six hundred million people in Africa lacked access, with only about 43% of the total population having a consistent supply.<sup>51</sup> This energy poverty directly limits the ability to power devices essential for consuming digital or even most broadcast media. This is compounded by challenges in digital connectivity. While mobile broadband networks cover approximately 86% of the population, actual internet usage across Africa was only about 38% in 2024, far below the global average of 68%.<sup>52</sup> This “usage gap”—the difference between network coverage and actual use—is driven by the high cost of internet-enabled devices (an entry-level smartphone can cost as much as 99% of the average monthly income for the poorest 20% in Sub-Saharan Africa<sup>53</sup>) and expensive data plans, with a basic 2GB mobile plan costing 4.2% of Gross National Income (GNI) per capita in 2024, more than double the UN’s 2% affordability target.<sup>54</sup> Fixed broadband is even less accessible. The urban-rural divide in internet usage (57% urban vs. 23% rural in 2024) further marginalizes large populations.<sup>55</sup> Africa’s underdeveloped data Chacon capacity (less than 1% of global capacity despite 18% of the world’s population) also limits local content hosting and digital media growth.<sup>56, 57</sup> These multifaceted infrastructure deficits function as a severe brake on media consumption and the growth of digital media enterprises, limiting audience reach and the diversity of available content.

A particularly grave challenge, with profound implications for both societal stability and the media environment, is the escalating threat of Jihadi terrorism, especially across North Africa and the Sahel/West Africa regions. Over the past decade, Jihadi violence on the continent has experienced a “meteoric rise,” as observed by Warner and Bacon (2021), reaching historically unprecedented levels and positioning Africa as a leading epicentre of such terrorism globally.<sup>58</sup> These Jihadi groups actively seek to control the narrative, often resorting to direct censorship and violence against journalists to suppress unfavourable reporting in areas where they exert influence (International Centre for Counter-Terrorism, Andrew Glazzard, 2021). Simultaneously, some African governments, in their efforts to combat terrorism or control information, also contribute to a climate of media restriction, further complicating the ability of the press to operate freely (Amnesty International, 2024; IFJ, 2024).

ISGS has also targeted schools and government representatives. This has had a devastating impact on the movement of information and freedom of religion, thereby directly shaping media consumption. Extremist groups, which tend to have contempt for free speech, actively seek to impose their radical interpretation of Islam, persecuting those who dissent, including Muslims of different traditions (particularly Sufis), Christians, and adherents of indigenous beliefs. Religious sites are often attacked, leaders are assassinated or kidnapped, and traditional religious practices are suppressed in areas under their control, forcing communities to adopt extremist norms or flee.<sup>59, 60</sup> This creates an environment of profound fear where freedom of worship, religious association, and access to diverse religious media are severely curtailed.

The direct targeting of journalists, media houses, and communication infrastructure by terrorist groups further silences critical voices and creates information vacuums. Journalists often face extreme risks, including abduction and murder, leading to widespread self-censorship or an exodus from conflict-affected areas.<sup>61</sup> For instance, Reporters Without Borders (RSF) has documented numerous cases of journalists being threatened, attacked, or forced to flee in the Sahel due to their reporting on the conflict or extremist groups.<sup>62</sup> This pervasive insecurity not only endangers lives but also creates an information vacuum by silencing journalists, restricting access for others, and allowing extremist narratives to fill the void, directly impacting what media citizens can safely create, access, and consume. Furthermore, governments responding to insurgencies may impose their own restrictions on media, including internet shutdowns, blocking of websites, or censorship, under the guise of national security, further limiting access to independent information and hampering humanitarian communication.<sup>63, 64</sup>

The displacement of millions (over 2.5 million Internally Displaced Persons - IDPs in Burkina Faso, Mali, and Niger alone, and millions more in the Lake Chad Basin<sup>65, 66</sup>) also disrupts community information networks and access to any form of media. Extremist groups also heavily utilize their own propaganda, often through encrypted messaging apps, social media, and local radio stations they co-opt or establish, to recruit, intimidate, and disseminate their ideology, further distorting the information landscape and challenging credible news sources.<sup>67, 68</sup> The fear and instability engendered by terrorism make open reporting, free discussion, and the simple act of consuming diverse media exceptionally dangerous, directly impacting media consumption by limiting what information is available, what can be safely accessed, and what individuals feel safe to consume or share. This constrained information environment not only affects citizens' awareness but also hampers economic activity and development by restricting access to vital market and public service information.



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## Conclusion

Given the growing demographic and economic importance of Africa, more attention needs to be played --- particularly in the West --- to the continent's information infrastructure. The overarching goal should be to create a media landscape where a diversity of voices can be heard, where facts and credible analysis drive public discourse, and where media enterprises can operate as sustainable, profitable businesses contributing to job creation and economic value.

The aspirations of Africa's burgeoning youth for economic advancement are deeply intertwined with their access to information, their ability to hold power accountable, and their participation in a dynamic, market-driven economy. A media sector that is free, competitive, and economically sound is not a luxury, but an essential component of the institutional framework required for Africa to truly capitalize on its demographic dividend and secure a more prosperous future for its people. The choices made today regarding the governance and economic structure of Africa's media, and the response to security threats that impinge upon fundamental freedoms, will have long-term implications for its developmental trajectory and the nature of media consumption across the continent.\*

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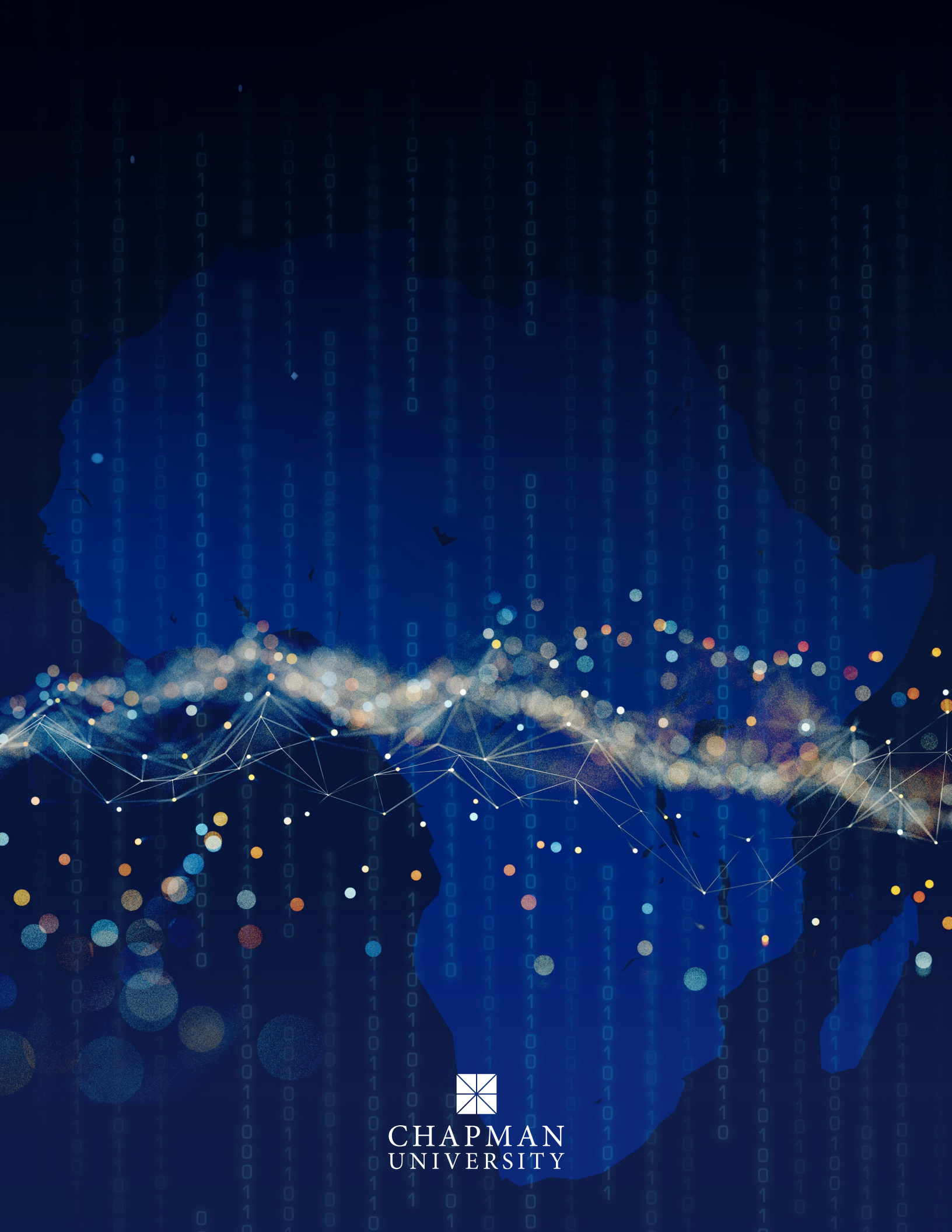
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