

**BROADCAST
MEDIA**

AFRICA



BMA INDUSTRY REPORT ON

BROADCAST ADVERTISING – AUDIENCE MEASUREMENT & MONETISATION

MARKETPLACE SURVEY

2025

Executive Summary

Broadcast Media Africa (BMA) conducted an industry survey on broadcast advertising, audience measurement, and monetisation within the African landscape.

The survey aimed to investigate how African broadcasters, advertisers, digital platforms, and content creators are responding to new challenges in monetisation, advertising, and audience measurement.

As the industry is shifting from traditional broadcasting to a hybrid model, where digital platforms, technology, and data play an increasingly central role, advertising remains the dominant revenue source. However, growing market saturation and limited consumer willingness to pay for content underscore the need for diversification. Sponsorships, branded content, and hybrid models are emerging as key alternatives.

The findings, based on survey responses, reveal a dynamic industry grappling with evolving technologies, consumer behaviours, and regulatory pressures.

Key takeaways include the dominance of advertising-based revenue models, a strong reliance on data analytics, and a growing recognition of the need for standardised, cross-platform audience metrics.

Challenges such as market saturation and fragmented measurement continue to persist, while opportunities for growth are seen in digital advertising, new content formats, and the strategic use of AI.

Summary of Findings and Takeaways

The Industry Landscape: Who We Surveyed

The survey's participants represent a diverse cross-section of the media and advertising industry, offering a balanced perspective on the industry's challenges and opportunities.

The responses show that the largest single group is Broadcasters (TV/Radio) at 40%, highlighting their foundational role in the ecosystem. Following them are Advertisers/Advertising Agencies and Content Owners/Creators/Producers, each at 15%, while Streaming/Digital Media Platforms and Data Analytics Providers each represent 13%.

This distribution confirms the interconnected nature of these different industry players.



Broadcasters

40%



Advertisers/Agencies

15%



Content Owners/Creators

15%



Streaming/Digital Platforms

13%



Data/Tech Enablers

13%



AI-driven platforms

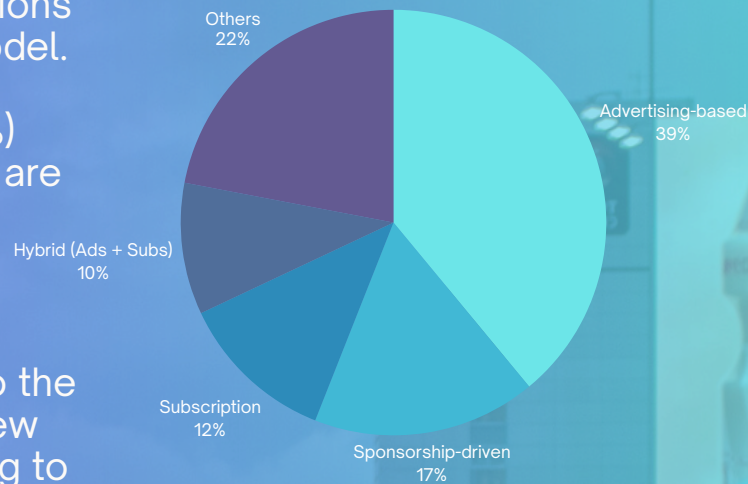
2%

What We Found

1. Revenue Model Reliance

Advertising continues to anchor the industry's revenue landscape, with 39% of organisations still operating on an advertising-based model. Yet, the findings also reveal a clear shift toward diversification. Hybrid models (10%) and sponsorship-driven approaches (17%) are carving out a meaningful space, while subscriptions account for 12% of reported strategies.

Interestingly, 22% of organisations fall into the "Other" category, pointing to a wave of new and niche monetisation methods beginning to take root. Together, these results highlight an industry balancing its dependence on advertising with the pursuit of more varied and innovative revenue streams.



2. Monetisation Challenges and Strategic Priorities

Monetising content remains a significant hurdle for many organisations. The most pressing challenge, reported by 32% of respondents, is declining advertising revenue, driven largely by market saturation. This is followed by limited consumer willingness to pay (15%) and the high costs of audience acquisition (14%).

Collectively, these challenges underscore the competitive pressures and regulatory barriers that continue to make revenue generation a complex and demanding pursuit for the industry.



Low Ad Revenue **32%**



Rising Data Costs **14%**



Limited Willingness To Pay **25%**



Regulatory Hurdles **14%**



High acquisition costs **14%**

3. Strategic Priorities for 2025/2026

In navigating the pressures, organisations are sharpening their focus on strategies that can unlock new opportunities. Leading the way is investment in new content formats, identified by 30% of respondents as their top priority for 2025/2026—underscoring the role of innovation as a catalyst for monetisation.

Expanding digital advertising revenue (22%) and strengthening audience data and analytics (22%) also emerge as key areas of focus, reflecting a strong commitment to leveraging digital platforms and data-driven insights to shape more resilient business models.

New content formats

30%

Audience data & analytics

22%

Digital ad revenue

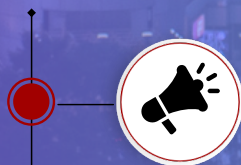
22%

Advertiser partnerships

19%

4. Revenue Stream Expansion

Digital Advertising



Branded/Sponsored Content



Content Syndication And Licensing



Looking ahead, organisations are clear about where they see the greatest opportunities for growth.

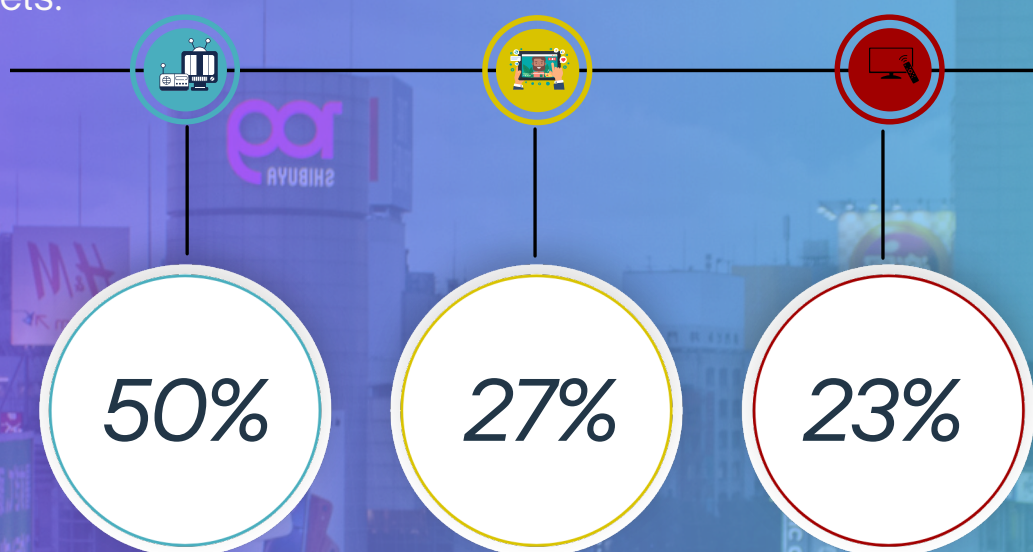
Digital advertising dominates as the top priority, with 67% of respondents planning to expand this revenue stream in the next 12 months. Branded and sponsored content follows at 24%, while content syndication and licensing are identified by 12% of participants.

These results highlight a deliberate shift toward digital-first and branded monetisation strategies, underscoring how organisations are positioning themselves to capture value in an increasingly competitive and connected marketplace.

5. Audience Consumption Habits

The data offers a clear view of shifting audience consumption habits, revealing a blend of traditional and digital behaviours. Half of respondents (50%) report that their audiences engage with content through a mix of both linear TV/Radio and digital/streaming platforms, underscoring the need for a holistic, cross-platform approach to delivery and measurement.

Meanwhile, 27% of audiences consume content exclusively via digital/streaming, compared to 23% who remain loyal to linear TV/Radio—further evidence of the ongoing migration toward digital channels.



6. Willingness to Pay: The Price of Premium Content

The findings also provide insight into audience attitudes toward paying for premium, ad-free content.

A large share of respondents believe their audiences are either neutral (31%) or unwilling (31%) to pay, signalling a reluctance to embrace direct payment models. Only 4% report that their audiences are “very willing” to pay, while 19% point to a preference for ad-supported freemium models.

These results reinforce the dominance of free, ad-supported content as the prevailing expectation, posing a critical consideration for how organisations shape their monetisation strategies.

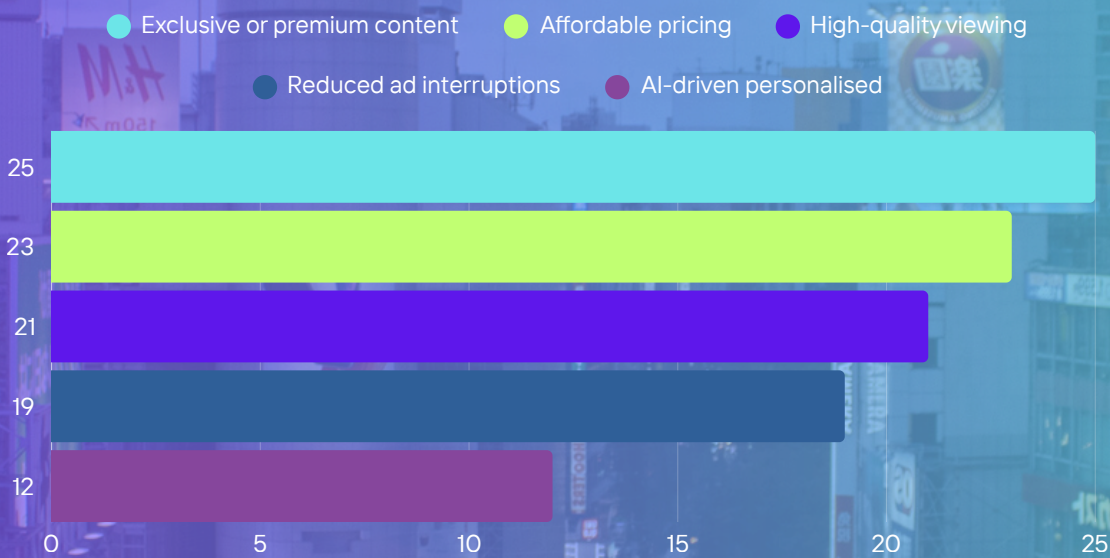


7. Factors Influencing Willingness to Pay

When exploring the factors that could influence audiences to pay for content in the future, two priorities stand out: access to exclusive or premium content (25%) and affordable, flexible pricing options (23%).

These findings point to the need for a strong value proposition that balances both quality and affordability. High-quality viewing or listening experiences (21%) and fewer ad interruptions (19%) are also seen as meaningful motivators.

However, with the majority of audiences still unwilling to pay and favouring ad-supported models, any successful paid offering will need to deliver exceptional value—either through distinctive content, more flexible pricing, or a combination of both.



8. Advertising Effectiveness



The survey also examined which advertising approaches are expected to deliver the strongest return on investment. Direct ad placements with media owners emerge as the leading choice, cited by 33% of respondents, followed closely by sponsorships and branded content at 27%.

These results highlight the continued effectiveness of a blended approach, combining both traditional and modern advertising strategies to maximise impact and revenue.

9. The Impact of AI

The survey also highlights the emerging role of AI in advertising. While 36% of organisations report that they are not currently using AI in this area, 28% indicate that its adoption has led to somewhat improved targeting.

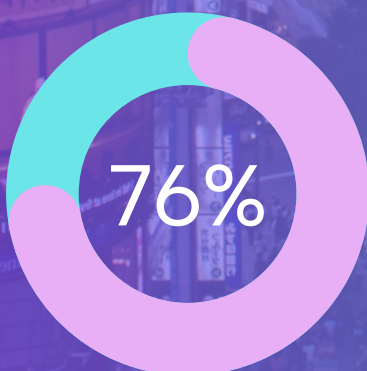
This suggests that, although AI is not yet universally implemented, those organisations leveraging it are beginning to see tangible benefits, particularly in enhancing targeting and overall advertising effectiveness.



10. The Central Role of Data Analytics

Data-driven decision-making is firmly entrenched in the industry, with 76% of respondents confirming that audience analytics play a major role in shaping their strategies.

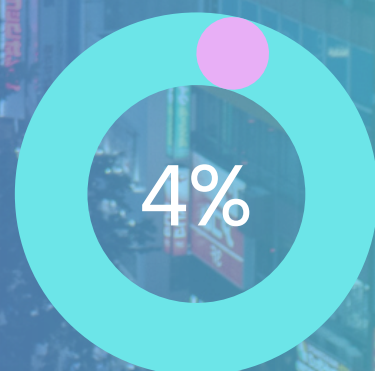
This highlights the sector's strong reliance on data to inform both content creation and monetisation decisions, enabling organisations to better understand audience behaviour, optimise engagement, and target revenue opportunities more effectively. At the same time, the survey reveals that challenges remain in fully harnessing these insights, including gaps in analytics capabilities, integration across platforms, and translating data into actionable strategies that drive sustained growth.



decisions are data-driven



Somewhat important



Limited role

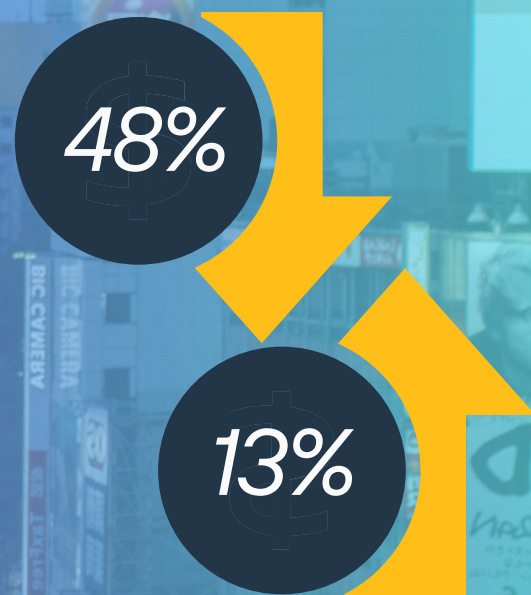
11. Measurement Challenges

- The survey also highlights the persistent challenges organisations face in measuring audiences accurately.
- Fragmented measurement across platforms and the absence of a standardised measurement currency are each cited by 24% of respondents, underscoring the need for a more unified and consistent approach across the increasingly complex digital landscape.
- Other notable obstacles include limited access to first-party data (17%) and the high cost of reliable third-party measurement tools (21%), which further complicate efforts to gain a comprehensive understanding of audience behaviour and engagement.

12. The Pursuit of a Standardised Audience Currency

The concept of a standardised audience currency for trading advertising inventory remains a key focus for the industry. According to the survey, 48% of organisations rely on an industry-wide recognised currency, while a smaller share (13%) use a custom or private currency.

Additionally, 17% operate on fixed pricing models, and 22% consider the concept not applicable to their operations. These findings highlight both the progress made toward standardisation and the diversity of approaches still present in the market.



13. Pan-African Currency Adoption

- The survey also explored the potential adoption of a pan-African standardised audience currency, revealing significant interest among organisations.
- A majority of 57% responded “Maybe—if it aligns with our model,” while 30% answered “Yes—it would improve trust and consistency.”
- These results suggest a cautious yet open-minded approach, with most organisations willing to consider a unified currency if it delivers tangible benefits for their business models.

Recommendations

- **Embrace a Hybrid Strategy:** Given the mixed consumption habits of audiences, organisations should invest in a hybrid content strategy that caters to both linear and digital platforms.
- **Prioritise First-Party Data:** With limited access to first-party data being a challenge, organisations should focus on building direct relationships with their audiences to collect valuable data for better targeting and monetisation.
- **Invest in Cross-Platform Measurement Solutions:** The industry needs to move beyond siloed measurement systems. Investing in or collaborating on cross-platform measurement solutions is crucial for gaining a holistic view of audience behaviour.
- **Leverage AI for Personalisation:** While AI adoption is still in development, organisations should explore how AI can be used to enhance content recommendations and advertising targeting, which the survey identified as a key influencing factor in audience willingness to pay.
- **Advocate for Standardisation:** Industry leaders should work together to establish common standards for audience measurement. This could involve supporting a pan-African currency or developing shared frameworks to improve trust and consistency in the market.

Conclusion: A Data-Driven Future

The survey findings paint a clear picture of an industry in transition. While traditional broadcast media continues to play a significant role, the future of monetisation and audience measurement is undeniably digital and data-driven.

The shift towards digital advertising, new content formats, and interactive ad experiences is evident.

The industry's reliance on data analytics is strong, yet it is also a source of significant challenges, particularly the fragmentation and lack of standardisation.

The cautious optimism toward a pan-African standardised currency suggests a collective desire for a more transparent and consistent marketplace.

To achieve this, stakeholders must address the fundamental challenges of data fragmentation and the high cost of reliable measurement tools.

