Content Delivery Platforms & Services in Africa

INDUSTRY SURVEY - OCT 2025

BRIEFING REPORT

INDUSTRY SURVEY CARRIED OUT AND PRESENTED BY

BROADCAST MEDIA AFRICA

EXECUTIVE SUMMARY

Broadcast Media Africa's 2025 survey on Content Delivery Platforms in Africa highlights a growing reliance on hybrid distribution models that combine Satellite and Fibre. Over half of respondents use both technologies, driven by the need to extend reach to remote areas and maintain service reliability.

While satisfaction with current systems is moderate, persistent technical and economic challenges remain, including high costs, complex vendor management, and uneven infrastructure. Looking ahead, fibre is positioned as the backbone of Africa's delivery networks, with satellite maintaining a complementary role.

Future growth is expected to be shaped by mobile-first and IP-centric innovations, particularly 5G, cloud distribution, AI-driven optimisation, and low-latency satellite technologies. Policy alignment—especially harmonised spectrum allocation, streamlined approvals, and public-private partnerships—is seen as essential to sustaining hybrid expansion and ensuring Africa's media ecosystem evolves to global standards.

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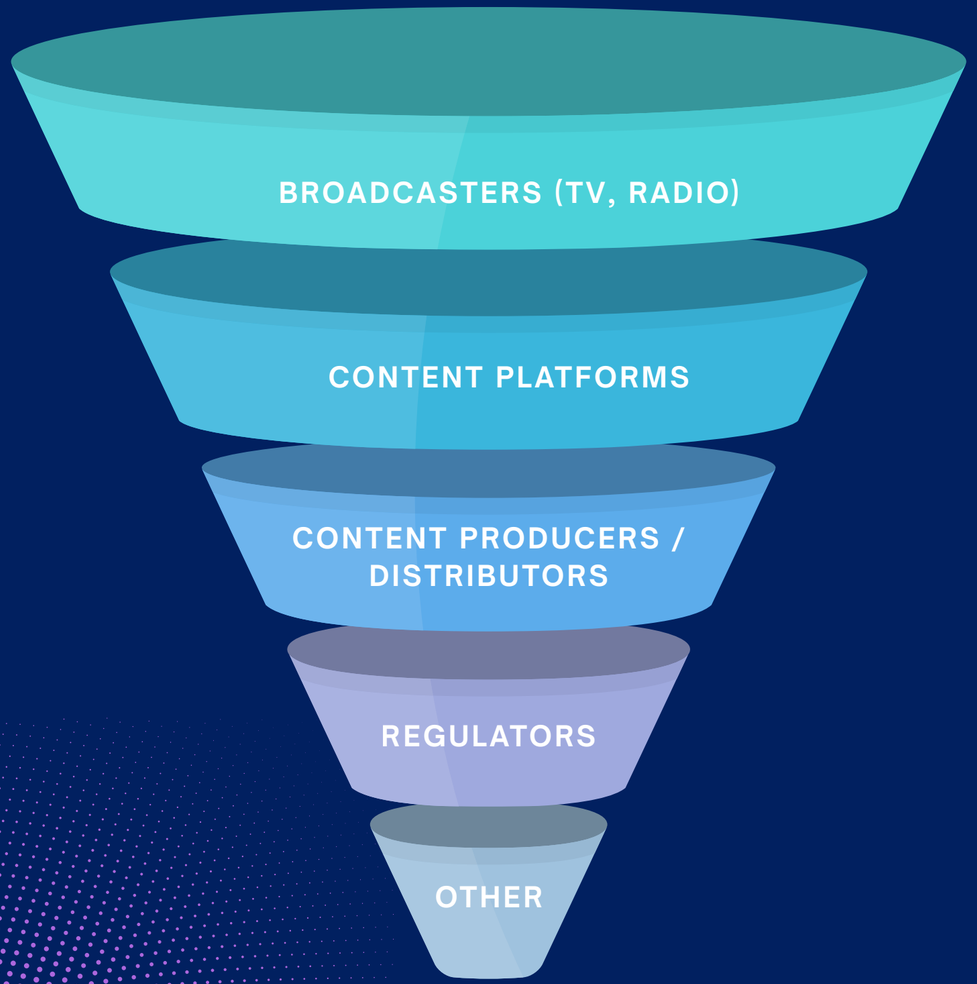
FINDINGS AND TAKEAWAYS

- A Summary

COMPOSITION OF SURVEY RESPONDENTS



The survey was overwhelmingly shaped by broadcasters, who made up 84% of respondents. The remaining participants comprised content suppliers, industry regulators and other stakeholders, reflecting the broader ecosystem that supports Africa's media and content delivery sector.

Geographically, responses were drawn from across the continent, led by Southern Africa (42%) and West Africa (23%). While these regions differ in pace and consistency of infrastructure development, both represent dynamic hubs of growth and innovation. Southern Africa is marked by advanced but uneven digital rollouts, while West Africa continues to push forward with new infrastructure investments, underscoring the diversity of Africa's media landscape and the opportunities for shared learning across regions.

A notable feature of the survey is the seniority of respondents: nearly 39% were C-suite executives. This strong leadership presence means the results reflect not only operational experiences but also high-level strategic priorities, investment intentions, and long-term visions for Africa's content delivery future.

The combination of operational insight and executive foresight provides a unique view of where the industry stands today and where it is heading, making the findings a valuable resource for broadcasters, policymakers, investors, and technology partners alike.

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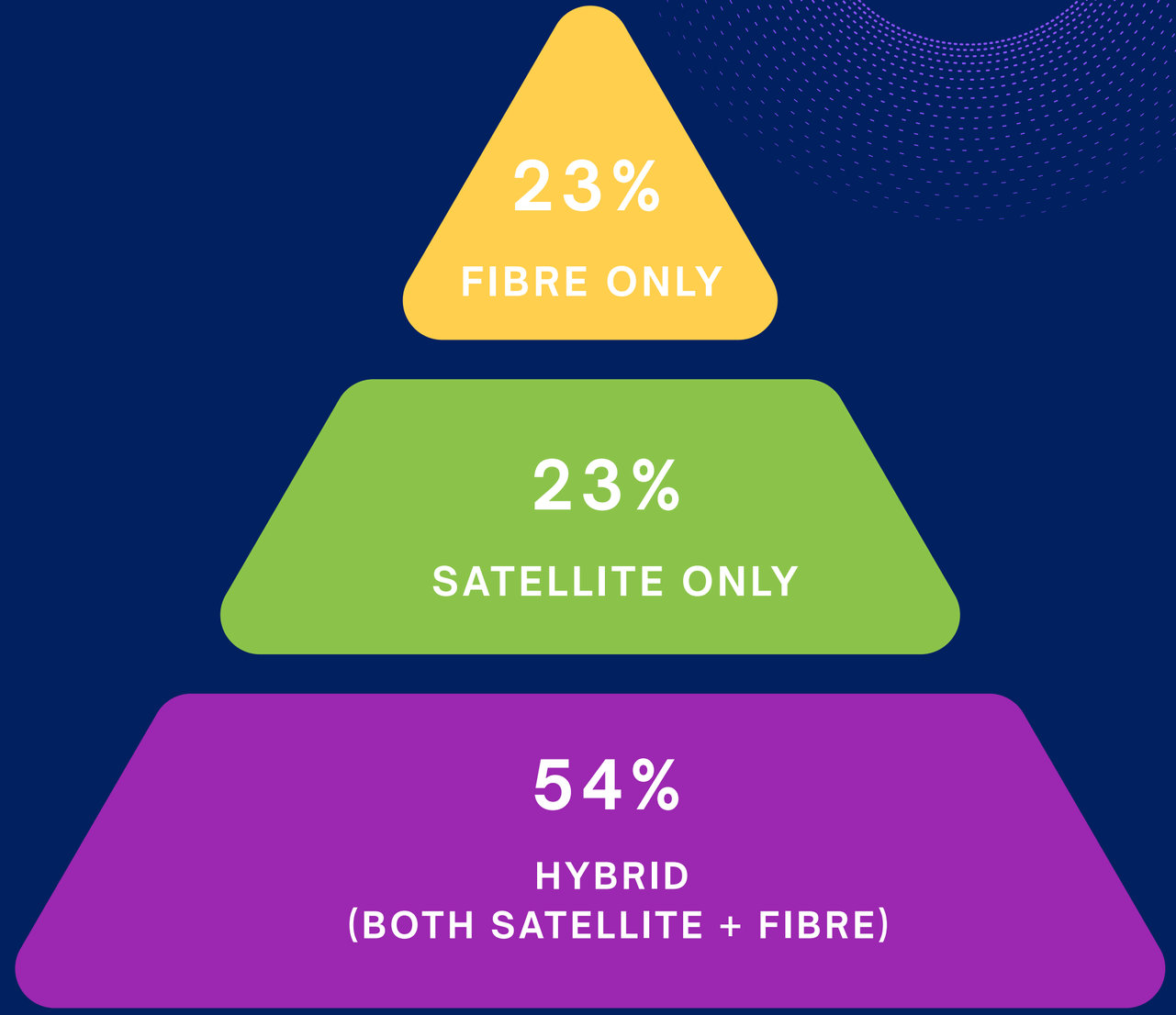
ADOPTED TECHNOLOGY IS HYBRID - MAINLY!

The dominance of hybrid approaches suggests that no single technology can fully address Africa's broadcast distribution needs.

Satellite is still indispensable for its broad reach, particularly across rural and hard-to-reach geographies, while fibre is the preferred choice in urban and semi-urban areas due to performance.

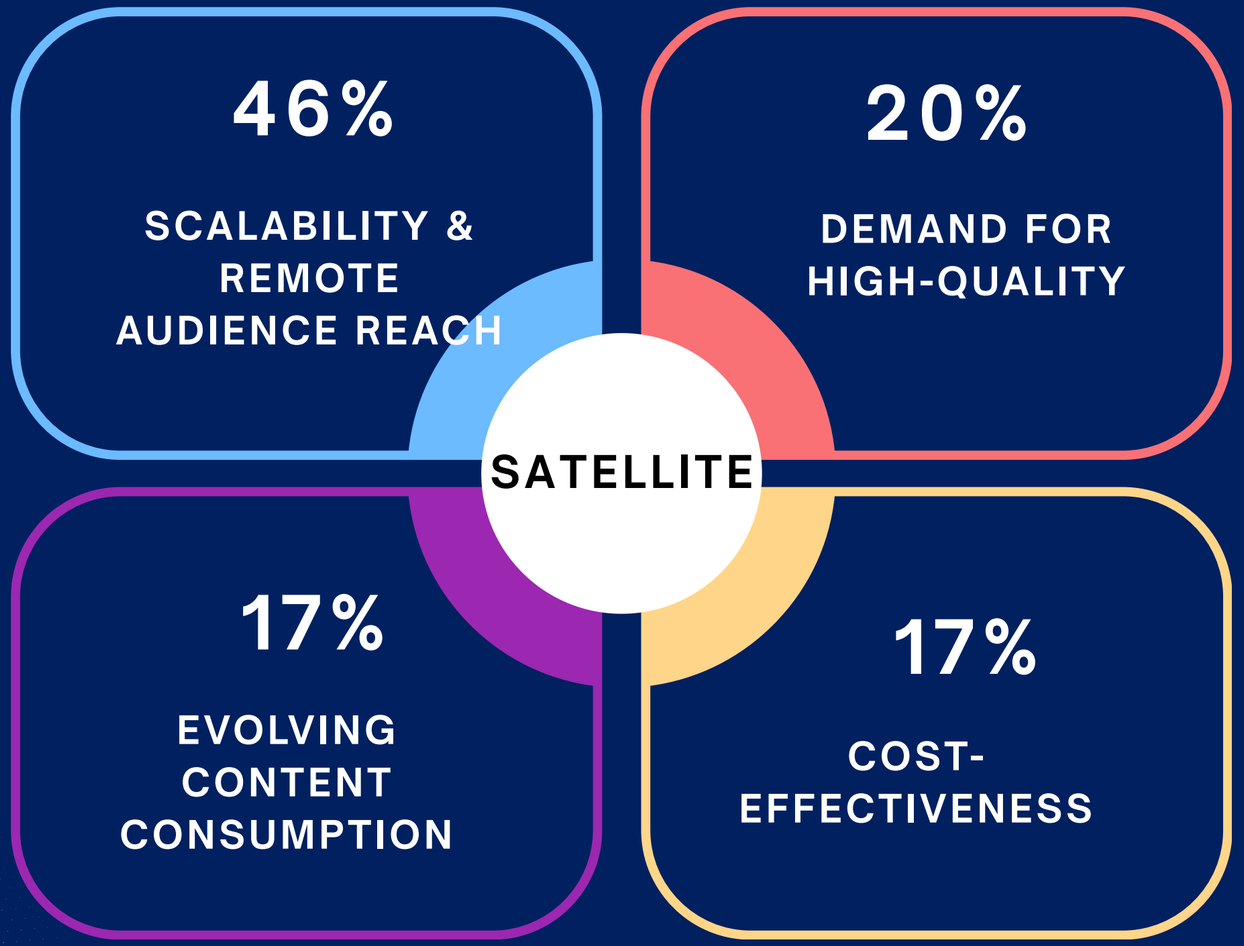
The fact that over half of respondents say they adopt both suggests industry players are hedging risk—balancing fibre's vulnerabilities (cable cuts, limited rural coverage) against satellite's latency and weather sensitivity.

Hybrid is not just a transitional phase; it reflects a strategic balancing act. Organisations are deliberately building redundancy into their systems. This approach shows that Africa's delivery future is unlikely to be "either/or"—it will continue to be "both/and", with fibre growing as the backbone but satellite holding key relevance.



SURVEY INSIGHTS – NOTABLES

DRIVERS OF SATELLITE BROADCAST DISTRIBUTION IN AFRICA



Survey data confirms that coverage and redundancy are the most significant motivators for satellite use. This is reflected in the high combined score for Scalability & Remote Audience Reach (46%), which now stands as the top driver for satellite adoption.

This confirms the satellite's indispensable role as a backbone for inclusion in regions where terrestrial infrastructure is weak or non-existent.

Takeaway:
Satellite remains the essential coverage-first solution for Africa's broadcasters, ensuring no audience is left behind by bridging the gap to remote and hard-to-reach geographies.

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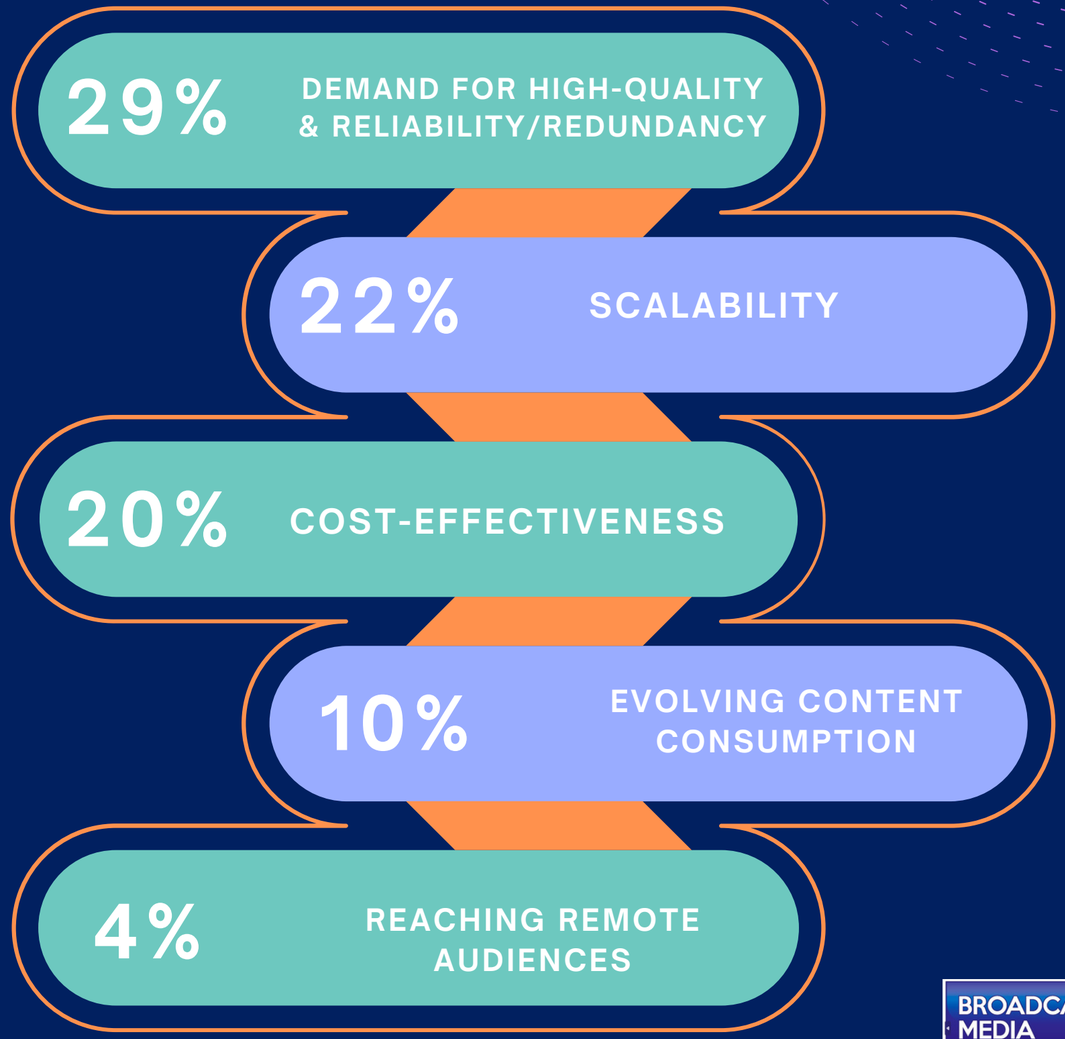
WHAT DRIVES ADOPTION OF FIBRE TO DISTRIBUTE BROADCAST CONTENT?

The strongest motivator for fibre adoption is the combined necessity of demand for high-quality & reliability/redundancy (29%), confirming its reputation as the most dependable and high-performance infrastructure for modern broadcasting needs. This reflects the industry's belief that fibre is the only sustainable, long-term solution for advanced services like cloud distribution, UHD, and interactive TV.

Scalability (22%) is also a high-ranking driver, closely followed by Cost-effectiveness (20%). This hierarchy confirms that the decision to adopt fibre is driven by a strategy focused on performance and future-proofing the network.

Takeaway:
Fibre is the medium of choice for next-generation, performance-intensive services. Its adoption is overwhelmingly driven by the need for superior reliability and the capacity to handle high-quality content, making it the backbone of future delivery networks



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WHY HYBRID ADOPTION IS KING - FOR NOW!

The overwhelming 54% adoption rate of the hybrid model underscores a single, clear strategic choice: the necessity of a "Best of Both Worlds" approach. The industry has intentionally deployed a hybrid system to address the multifaceted challenges of the African market, which requires both the superior performance and reliability of Fibre in urban centres and the unmatched ubiquity and reach of Satellite across rural areas.

Takeaway:

The hybrid solution is the strategic response to Africa's diverse markets and fragmented infrastructure. It is an intentional move to build systemic redundancy and ensure consistent service delivery across the entire geographical spectrum.

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WE ASKED ABOUT TECHNICAL CHALLENGES AFFECTING CONTENT DELIVERY IN AFRICA

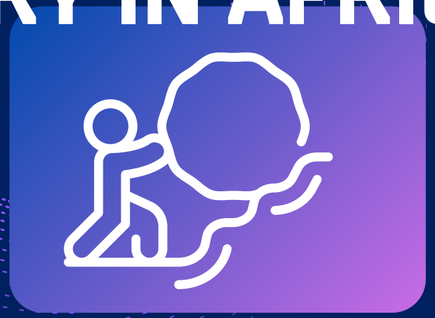
Primary pain points are operational control, followed closely by Spectrum interference and Limited bandwidth. These reflect the complexity of managing orbital infrastructure and spectrum-sharing issues.

For hybrid solutions, they are not “plug and play”, as 18% indicated that Vendor management and integration were a pain point, with a further 17% saying Staff training and upskilling.

Managing two infrastructures doubles the complexity of monitoring, vendor negotiations, and SLAs.

Training staff for dual expertise is also a hidden cost. Inconsistent SLAs across satellite and fibre vendors increase risk.

Takeaway:
Hybrid solutions deliver resilience but create operational strain. To make it viable at scale, broadcasters will need smarter orchestration platforms, AI monitoring tools, and consolidated vendor partnerships.



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SATISFACTION LEVELS WITH CONTENT CONTENT DELIVERY ARRANGEMENTS

Satisfaction data reveals a high level of acceptance for current content delivery arrangements, with a combined 74% of organisations reporting a positive experience. The results indicate that hybrid systems are successfully maintaining operational uptime and core service delivery, positioning the African market at a "good but stable" stage.

Takeaway:
The high satisfaction rate confirms that hybrid solutions are currently viable and delivering on the need for reliability. However, the gap between satisfaction and excellence creates clear market opportunities for next-generation technologies (like 5G, AI, and LEO satellites) to drive performance closer to global benchmarks.

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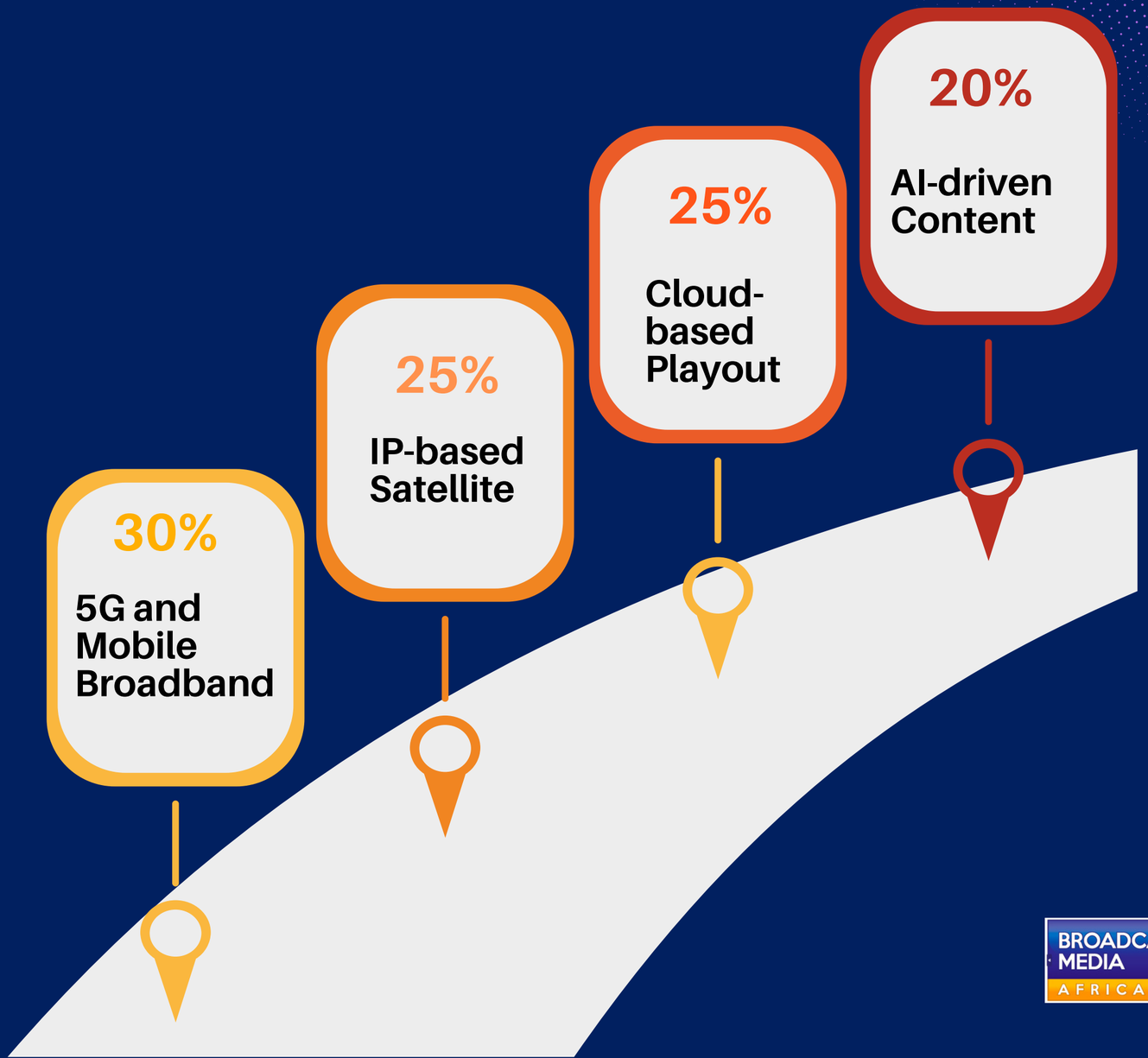
INNOVATION THAT WILL SHAPE THE NEXT 5 YEARS

Future growth will be defined not merely by bandwidth but by smart, efficient, and mobile-centric delivery systems. 5G and mobile expansion reflect the "mobile-first" reality of media consumption in Africa. The high ranking of AI indicates that broadcasters recognise its value for optimisation, automation, and predictive delivery as key competitive differentiators. For satellite to remain viable, it must align with this innovation wave through

IP protocols and low-latency architectures, leading to the high priority for IP-based satellite technologies.

Takeaway:
The future content delivery network will be IP-centric and intelligent, with mobile devices driving the majority of consumption. Investment must focus on
AI, cloud, and 5G to push performance levels to global standards.



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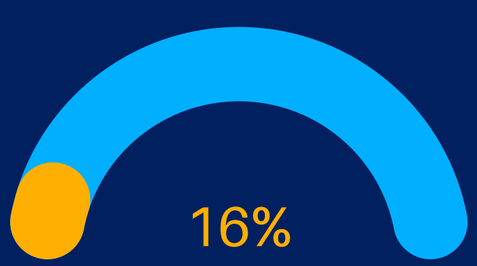
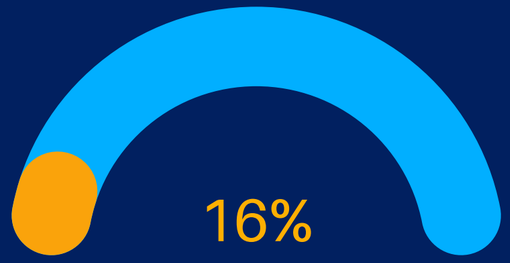
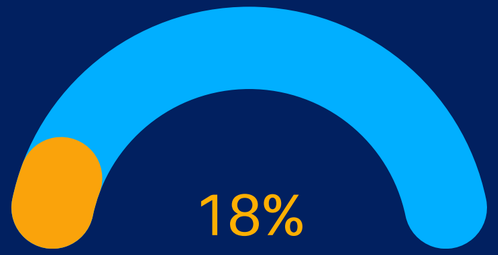
IDENTIFIED POLICIES & REGULATORY NEEDS



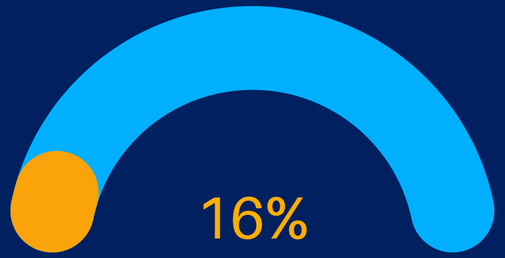
Harmonised spectrum allocation and licensing



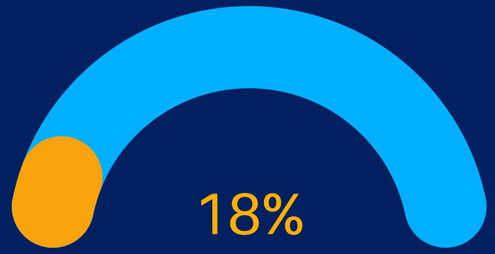
Streamlined cross-border infrastructure approvals



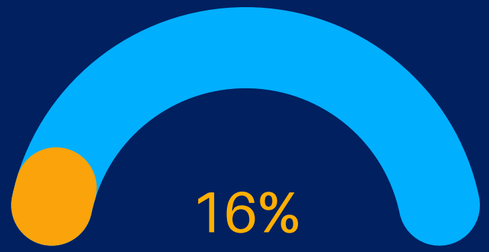
Reduced tariffs for digital equipment



Incentives for private sector infrastructure investment



National broadband policy reforms



Public-private partnerships in digital infrastructure

Governments play a decisive role in shaping Africa's future content delivery. Without harmonised spectrum, streamlined approvals, and incentives, the private sector will continue to view hybrid expansion as too costly and risky.

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RECOMMENDATIONS

Prioritise Fibre Expansion: Focus on extending fibre beyond urban cores, supported by innovative financing (PPP models, regional funds).

Reimagine Satellite's Role: Invest in IP-based and LEO satellite tech to reduce latency and improve integration with fibre systems.

Secure Financing Models: Develop incentive schemes, subsidies, and shared infrastructure initiatives to make hybrid models sustainable.

Simplify Hybrid Operations: Adopt AI-driven orchestration platforms and push vendors toward integrated SLA frameworks.

Accelerate Policy Reform: Advocate for harmonised spectrum, faster approvals, and reduced tariffs on digital equipment.

Prepare for Mobile-First Delivery: Invest in 5G readiness, edge computing, and AI tools to meet rising mobile consumption demand.

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Conclusion

Africa’s content delivery landscape is at a critical inflexion point, shaped by the tension between legacy infrastructure constraints and the opportunities presented by next-generation technologies. The survey re-confirms the clear direction of travel: fibre is viewed as the backbone of the future, driven by its superior reliability, scalability, and performance, while satellite remains indispensable for reaching audiences beyond fibre’s physical limits.

Hybrid delivery has emerged as the practical reality, reflecting the continent’s vast geographic diversity, uneven infrastructure, and fragmented regulatory environment. Yet, the hybrid approach is weighed down by high upfront costs, operational complexity, and uncertain ROI. These barriers risk slowing progress unless addressed by collaborative strategies involving broadcasters, governments, regulators, and private investors.

The next five years will be decisive. With fibre investment accelerating, the industry must simultaneously reimagine the role of satellite through IP-based systems and LEO constellations, which can reduce latency and integrate seamlessly with terrestrial networks. Equally, mobile-first delivery powered by 5G and cloud-enabled content workflows will redefine how African audiences consume media — from live broadcasting to on-demand streaming.

Thank You

info@broadcastingandmedia.com

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