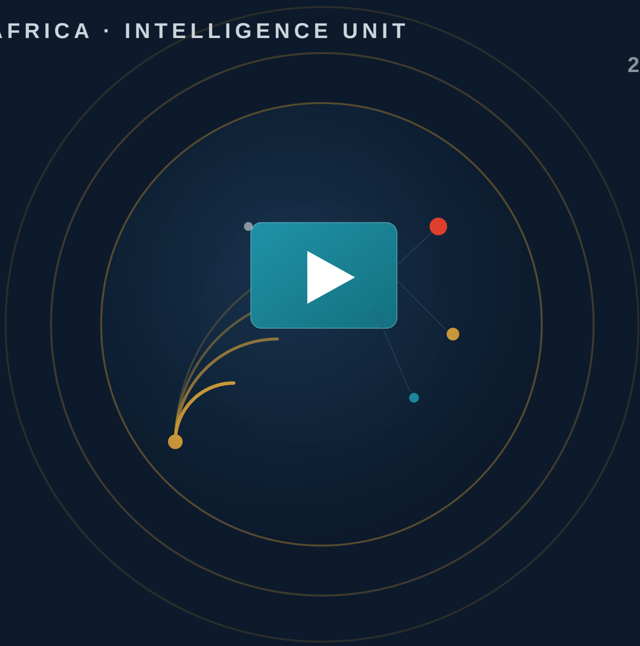

EXECUTIVE BRIEFING · HIGHLIGHTS · TEASER

From Spots to Streams

The three-page read for busy leaders — the one shift, the numbers and the six forces reshaping how African television makes money across linear, OTT and FAST.

THE ONE SHIFT
The future is linear + OTT + FAST — not either/or.

INSIDE THE FULL REPORT
11 sections · Six Forces · figures, quotes & market signals.

THE VOICES
Four leaders — public, content, OTT and free-to-air.

BROADCAST MEDIA AFRICA

To access the full *"From Spots to Streams"* report — with the complete data, quotes and notes — go to **resources.broadcastmediaafrica.com** or email **info@broadcastingandmedia.com**.

01 EXECUTIVE BRIEFING

The Future Is Linear + OTT + FAST.

African broadcasters aren't choosing between the spot and the stream — they're stacking both. From a public broadcaster to a pure-play OTT founder, the panel agreed: linear is evolving, not dying, and the winners own their content and sell it on every screen.

Prime time is now "whenever a viewer picks up their smartphone." Audiences move between linear, OTT apps, FAST channels and social in one evening, so no single platform wins. Broadcasters are responding not by abandoning linear — one Kenyan network reaches 18m monthly with penetration up from 25% to 74% in five years — but by layering digital revenue on top of it.

The strategic prize is one monetisation strategy across all three platforms, held together by **owned content**: if you own the IP, you have no fear whether it runs linear, SVOD, YouTube or FAST. The unresolved gap is **measurement** — OTT data is trusted, linear is a lagging paper diary — and until it's fixed, African channels stay mispriced.

The headline numbers

54%
of one public broadcaster's revenue is still TV & radio advertising — the ad model is eroding, not gone

~4m
users on one pan-African OTT platform — subscription + telco billing, now adding FAST and diaspora reach

18m
Kenyans reached monthly by one free-to-air network — TV penetration rose 25% → 74% in five years

THE ONE LINE

"The future is not linear. The future is not digital. The future is linear plus OTT plus FAST."

CELESTINE · CEO, WEST AFRICAN CONTENT & CHANNEL COMPANY

02 HIGHLIGHTS · THE SIX FORCES

The Forces Rewriting the Business of TV

FORCE ONE · THE OWNERSHIP DIVIDEND

Own the Content

If you own the IP, you have no fear whether it goes linear, OTT or FAST — you distribute and monetise on your terms.

Signal: a $70k drama amortises to ~$15k while earning ~$120k over its shelf life.

FORCE TWO · THE HYBRID MANDATE

Linear + OTT + FAST

Linear is evolving, not dying, in Africa — the future is a deliberate combination of all three platforms.

Signal: TV penetration 25% → 74% in five years; 90% of one network's revenue still airtime.

FORCE THREE · DISTRIBUTION IS QUEEN

Reach & Localisation

Owned content only pays if it's distributed cleverly — dubbing, telco billing, diaspora deals and syndication.

Signal: full dubbing (not subtitling) opens new markets; ~4m users via telco partners.

FORCE FOUR · THE REVENUE STACK

From Spot to Portfolio

The 30-second spot becomes a stack: ads, SVOD, TVOD, AVOD, FAST, in-app, brand integration and licences.

Signal: six revenue streams at one broadcaster; "2026 is the year of the bundle offer."

FORCE FIVE · THE MEASUREMENT RECKONING

Who's Afraid of Data?

OTT data is clean; linear measurement is a lagging paper diary — so channels are mispriced and advertisers hesitate.

Signal: in January the latest linear report covers November; who funds a credible third party?

FORCE SIX · AFFORDABILITY & THE AFRICAN PLATFORM

Cost & Consolidation

Data cost is the real ceiling, forcing mobile-first — and a growing call to build African-owned aggregation.

Signal: internet still "a luxury"; the call to consolidate "just like we did for CDN."

BOTTOM LINE

The broadcasters who thrive will **own their content**, run it across **linear, OTT and FAST**, stack diversified revenue, and fix measurement so advertisers pay what audiences are truly worth.

BROADCAST MEDIA AFRICA

READ THE FULL REPORT

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