BMA Industry Survey On:

OTT Streaming in Africa – State of Play 2025

Executive Summary

The survey, conducted by Broadcast Media Africa (BMA), provides insights into the evolving OTT landscape in Africa, highlighting key trends, challenges, and opportunities. While the market is growing, high costs, global competition, and monetisation challenges remain significant hurdles.

The 'OTT Content Streaming And Distribution Africa - State Of Play 2025' survey conducted by Broadcast Media Africa captured emerging trends, challenges, and opportunities within Africa's OTT ecosystem whilst shedding light on the dynamics driving the adoption, distribution, and consumption of OTT content streaming on the continent.

In Africa, the increased penetration of access to high-speed internet and smart devices means that OTT Streaming is fast becoming a preferred medium for accessing content, even as the burgeoning industry faces challenges such as infrastructure limitations, content affordability, and a lack of localised offerings.

This survey highlighted that content variety, ease of access, and increasing internet penetration drive growth, with subscription-based models being the preferred monetisation strategy. Furthermore, collaboration between broadcasters and OTT platforms is essential for scaling content and revenue.

Looking ahead, industry players aim to expand content libraries, enhance user experience, and adopt advanced technologies like 5G and AI-driven personalisation. African OTT platforms can achieve significant growth with the right mix of content, technology, and strategic partnerships.

Summary of Findings and Takeaways

1. Market Overview

The African OTT market is expanding, with a diverse range of players, including broadcasters, telecom companies, and independent platform providers. While some operators have a country-specific focus, others are working on a global scale. Despite the growing interest in OTT services, only a small portion of respondents currently operate their own streaming platforms, with high setup and operational costs being a major barrier.

2. Content and Engagement

OTT platforms in Africa primarily focus on delivering news, movies, and TV series, with a strong preference for a balanced mix of local and international content. However, some platforms prefer local programming to cater to regional audiences. Engagement is highest for original programming and live events, while licensed content performs well. This suggests that investment in unique, regionally relevant content could be a significant growth driver.

3. User Experience Priorities

High-quality streaming (4.00/5) and personalised recommendations (3.86/5) are the top user experience priorities. Viewers expect high-quality streaming and personalised recommendations, making these the most critical factors for user experience. Seamless navigation and compatibility across multiple devices are also seen as essential for user retention. Platforms that prioritise intuitive design and accessibility are more likely to maintain engagement and grow their user base.

4. Monetisation Strategies

The majority of OTT platforms in Africa rely on subscription-based models (60%), with some incorporating advertising-supported revenue streams. Industry stakeholders believe that a combination of programmatic and direct advertising sales can help maximise revenue potential. However, monetisation remains a challenge, with many struggling due to unclear advertising strategies, limited audience reach, and inadequate technological integration.

Summary of Findings and Takeaways

5. Competitive Landscape

Global platforms such as Netflix and Amazon Prime currently dominate the African OTT space at 66.67%, making it difficult for local platforms to compete. However, there is strong belief that African broadcasters and telecom operators have the potential to gain a stronger foothold in the market if they leverage their existing audience bases and infrastructure. Key challenges include competition from international players, high bandwidth costs, difficulties in securing content rights, and low consumer awareness.

6. Technology and Future Growth

50% of respondents are fully prepared for 5G integration, while 45% are partially prepared. The adoption of emerging technologies such as 5G is expected to play a key role in enhancing OTT services, with some organisations already ready for this transition. AI-driven personalisation and advanced video compression are seen as critical tools for improving content delivery and user experience. Despite these advancements, high development costs, fragmentation across different platforms, and a lack of skilled technical talent continue to pose challenges.

7. Industry Outlook

Looking ahead, the focus for most industry players is on expanding content libraries, growing market reach, and adopting advanced technologies to improve service delivery. There is widespread agreement that collaboration between broadcasters and OTT platforms is essential for scaling content distribution and improving monetisation efforts. By investing in original content, forging strategic partnerships, and adopting innovative monetisation models, African OTT platforms can position themselves for long-term success.