



Africa Entertainment and Media Outlook 2026-2030

Digital growth, human connection



Table of contents

**01**

Setting the scene

**02**

Market snapshots

**03**

Connectivity and audience growth

**04**

Advertising, measurement, and monetisation

**05**

Evolving patterns of consumer consumption

**06**

The enduring value of shared experiences

**07**

The next phase of value creation

**08**

Conclusion: Converting Africa's digital growth into lasting value

**09**

Contacts

**10**

Resources



01



Setting the scene

The global picture: An industry at a tipping point

Entertainment and media (E&M) are entering a new phase of growth. Across the industry, audiences are becoming more connected, advertising is becoming more digital, and value is shifting towards platforms that can reach and measure consumers at scale.

According to PwC's Global Entertainment & Media Outlook 2026–2030¹, global E&M revenue is forecast to increase from US\$3.5tn in 2025 to US\$4.2tn in 2030, representing a 3.4% compound annual growth rate (CAGR). Beneath that steady headline sits a series of structural shifts that are reshaping how value is created across the industry.

Globally

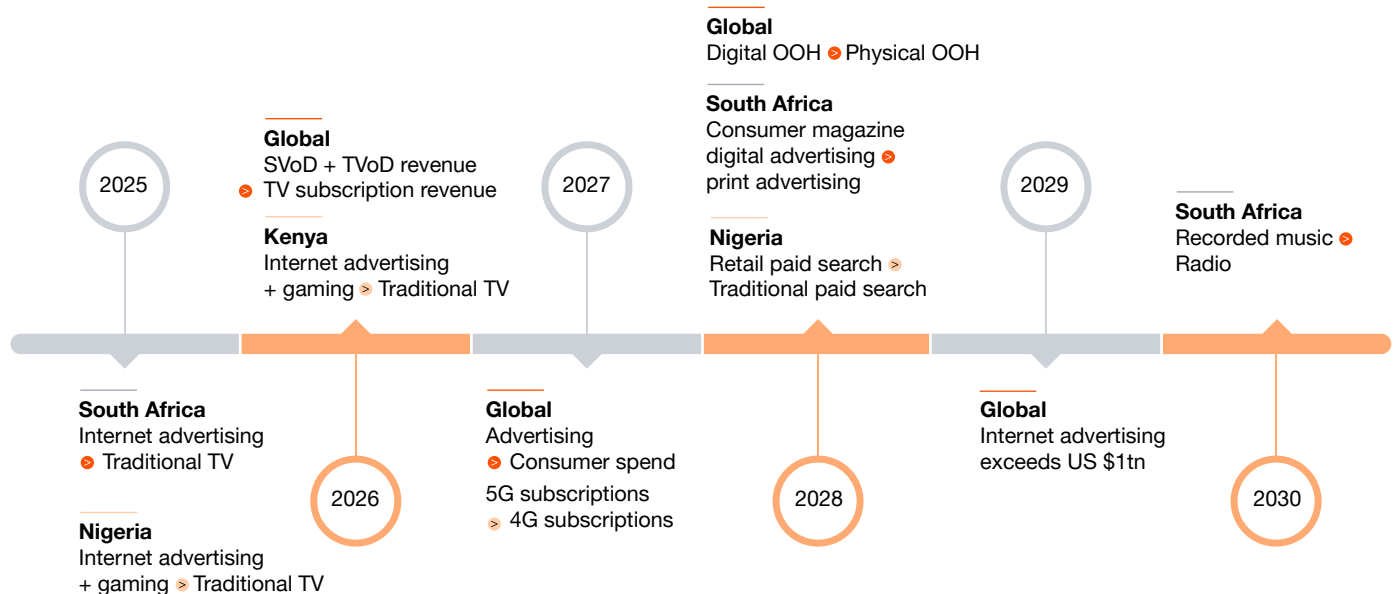
Internet advertising dominates the global E&M market and is the largest media segment

Advertising, having broken the US\$1tn barrier in 2025, is forecast to grow to US\$1.4tn by 2030, overtaking consumer spending as the industry's primary engine of revenue growth. Other tipping points are expected over the forecast period; subscription and transactional video on demand (SVoD and TVoD) revenue is projected to exceed traditional television subscription revenue in 2026, 5G subscriptions are expected to surpass 4G subscriptions in 2027, and digital out-of-home (OOH) is forecast to account for the majority of OOH revenue by 2028.

Together, these shifts point to an industry where connectivity, advertising, and changing consumer behaviour are becoming increasingly interconnected.



Tipping points: The global shift is mirrored selectively in Africa



What does this mean for Africa?

Africa reflects many of the same structural shifts reshaping the global industry, though the pace and starting point differ market to market.

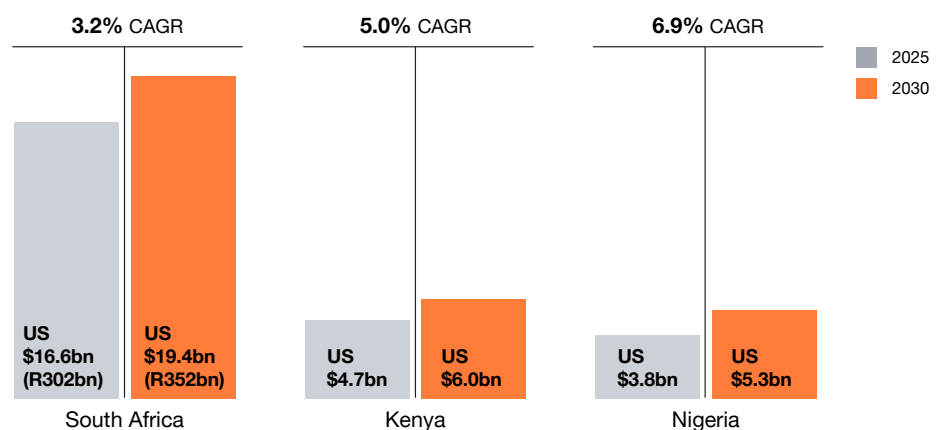
1. Connectivity underpins growth. More than in many mature markets, connectivity remains central to Africa's E&M industry. Connectivity accounts for a substantial share of revenue, particularly in Kenya and Nigeria, while also providing the foundation for growth across digital media, advertising, streaming, gaming, and other data-driven forms of content consumption.
2. Digital advertising continues to gain share across African markets. As connectivity expands and more consumer activity moves online, advertisers are increasing investment in digital channels that offer greater targeting, measurement, and performance tracking capabilities.
3. Human experiences continue to create value. As the industry digitises, audiences are not abandoning shared experiences. Across Africa, growth in live music, cinema, and other experience-led entertainment highlights the enduring importance of culture, community, and connection in shaping consumer engagement.

Three markets, three perspectives

Africa's E&M landscape spans markets at different stages of development.

1. **South Africa** is Africa's largest and most mature E&M market, supported by an advanced communications infrastructure, an established advertising ecosystem, and high levels of digital adoption.
2. **Kenya** is one of Africa's leading mobile-first digital economies, characterised by strong connectivity, widespread digital payments adoption, and high levels of online engagement.
3. **Nigeria** is one of the continent's most dynamic growth markets, combining a large and youthful population base with rapidly expanding digital audiences, advertising investment, and entertainment consumption.

E&M overall market revenue and CAGR (%)



02

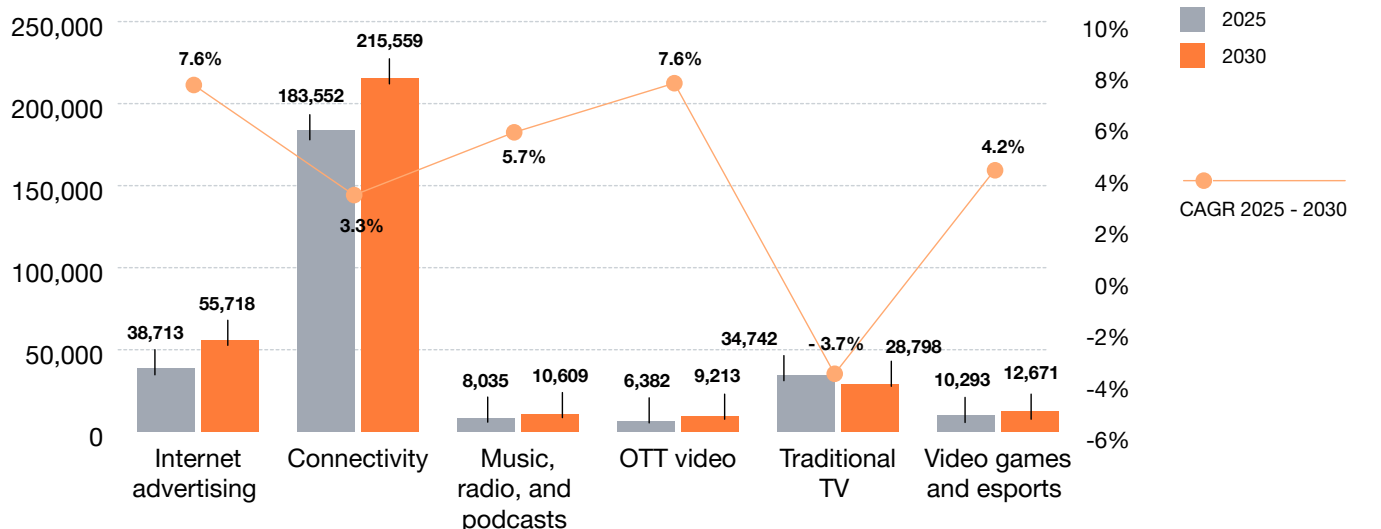


Market snapshots

South Africa at a glance

South Africa's E&M market is projected to expand from R301.8bn in 2025 to R352.4bn by 2030, representing an increase of R50.6bn over the forecast period. While this equates to a relatively modest CAGR of 3.2% (slightly below the global CAGR), the headline figure masks ongoing changes in the market's revenue mix. Growth is increasingly concentrated in digital and connectivity-driven segments, while several traditional media categories continue to face pressure from changing consumer behaviour and advertiser preferences.

Selected E&M sub-segments (R millions)



7.6%

CAGR for Internet
advertising and OTT video
— the fastest growing
segments in South Africa

3.2%

CAGR forecast for South
Africa's E&M industry
through 2030

Key highlights:

- Africa's largest and most mature E&M market.
- Most advanced advertising and communications ecosystem of the three markets.
- Internet advertising and OTT video are among the strongest growth segments, each recording a 7.6% CAGR.
- Music, radio, and podcasts are forecast to grow from R8.0bn to R10.6bn at a 5.7% CAGR, outpacing many international markets. Subscription music streaming is the primary growth driver, supported by strong demand for local music, with local artists accounting for 70% of the ten most-streamed artists in 2025. While radio remains a significant contributor to industry revenue, growth is expected to be more modest.
- Traditional television and print remain under pressure, with television revenue declining from R34.7bn to R28.8bn and publishing revenue falling from R7.8bn to R7.4bn.

Industry outlook

South Africa illustrates how value is being redistributed within a mature market. Growth is increasingly concentrated in digital categories, while established formats continue to lose share without disappearing entirely. The challenge for industry participants is less about audience growth and more about adapting to changing patterns of consumption and monetisation.



Total E&M revenue in South Africa (R millions)

	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	2025-2030 CAGR
Business-to-business	7,346	8,662	9,453	10,072	10,539	10,855	11,069	11,218	11,297	11,382	1.6%
Cinema	468	900	785	733	757	817	908	953	1,017	1,067	7.1%
Internet advertising	20,153	23,974	30,821	34,958	38,713	42,647	46,377	49,921	52,997	55,718	7.6%
Connectivity	154,565	155,364	157,779	176,550	183,552	188,398	195,283	202,058	208,603	215,559	3.3%
Music, radio, and podcasts	4,599	5,531	6,477	7,528	8,035	8,552	9,160	9,640	10,122	10,609	5.7%
Newspaper, consumer magazine, and books	9,049	8,597	8,169	7,951	7,780	7,649	7,553	7,487	7,445	7,399	-1.0%
OTT video	3,127	4,095	5,036	5,354	6,382	6,605	7,341	8,005	8,675	9,213	7.6%
Out-of-home advertising	2,587	2,756	2,991	3,151	3,282	3,400	3,509	3,616	3,720	3,825	3.1%
Traditional TV	43,778	42,756	40,976	39,064	34,742	32,831	31,228	30,117	29,325	28,798	-3.7%
Video games and esports	6,559	7,390	9,038	9,817	10,293	10,668	10,996	11,465	12,071	12,671	4.2%
Entertainment and Media in South Africa²	250,888	258,472	269,667	293,156	301,775	309,849	320,542	331,266	341,693	352,397	3.2%

Total E&M revenue in South Africa (US\$ millions)

	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	2025-30 CAGR
Business-to-business	405	477	521	555	581	598	610	618	623	627	1.6%
Cinema	26	50	43	40	42	45	50	53	56	59	7.1%
Internet advertising	1,111	1,321	1,699	1,927	2,134	2,350	2,556	2,751	2,921	3,071	7.6%
Connectivity	8,519	8,563	8,696	9,730	10,116	10,383	10,763	11,136	11,497	11,880	3.3%
Music, radio, and podcasts	253	305	357	415	443	471	505	531	558	585	5.7%
Newspaper, consumer magazine, and books	499	474	450	438	429	422	416	413	410	408	-1.0%
OTT video	172	226	278	295	352	364	405	441	478	508	7.6%
Out-of-home advertising	143	152	165	174	181	187	193	199	205	211	3.1%
Traditional TV	2,413	2,356	2,258	2,153	1,915	1,809	1,721	1,660	1,616	1,587	-3.7%
Video games and esports	362	407	498	541	567	588	606	632	665	698	4.2%
Entertainment and Media in South Africa²	13,828	14,246	14,863	16,157	16,632	17,077	17,666	18,258	18,832	19,422	3.2%

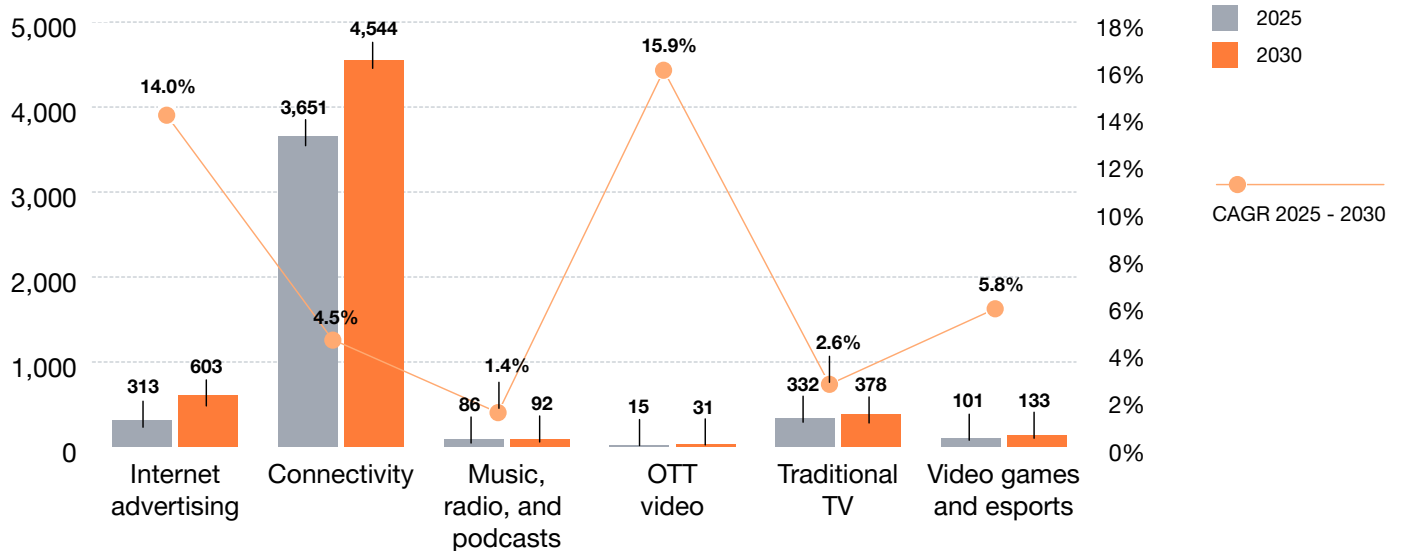
5.0%

projected CAGR for
Kenya's E&M industry
through 2030

Kenya at a glance

Kenya's E&M market is forecast to grow from US\$4.7bn in 2025 to US\$6.0bn in 2030, adding approximately US\$1.3bn in new revenue over the forecast period. With a CAGR of 5.0%, Kenya is expected to outperform South Africa on growth, reflecting its position as one of Africa's leading mobile-first digital economies. Growth is supported by expanding connectivity, widespread digital payments adoption, and increasing engagement with digital content and services.

Selected E&M sub-segments (US\$ millions)



Key highlights:

14%

Kenya's projected CAGR
for internet advertising—
the fastest globally

- Connectivity remains the defining feature of Kenya's E&M market, accounting for more than three-quarters of total industry revenue.
- With a CAGR of 14.0%, Kenya is the fastest-growing internet advertising market globally, just ahead of India. The expansion of social media platforms such as TikTok is expected to contribute significantly to this growth dynamic alongside the uptake in mobile penetration.

15.9%

projected CAGR for OTT
video—the fastest growing
segment in Kenya

- OTT video records the strongest segment growth at a 15.9% CAGR, increasing from US\$15m to US\$31m.
- Traditional television and publishing remain positive growth categories rather than contracting sectors. Interestingly, both segments are projected to grow at a faster rate than music, radio, and podcasts, in contrast to the other two African markets.

Industry outlook

Unlike many mature markets, Kenya continues to experience simultaneous growth across both traditional and digital media categories. Connectivity remains economically dominant, while digital advertising and OTT video are emerging as increasingly important sources of future value creation.

Total E&M revenue in Kenya (US\$ millions)

	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	2025-30 CAGR
Business-to-business	11	13	14	14	15	15	15	16	16	16	0.9%
Cinema	3	4	5	5	5	6	6	7	7	8	7.0%
Internet advertising	97	134	193	253	313	375	437	495	549	603	14.0%
Connectivity	2,609	2,748	2,987	3,233	3,651	4,002	4,141	4,275	4,408	4,544	4.5%
Music, radio, and podcasts	104	148	107	89	86	87	134	108	102	92	1.4%
Newspaper, consumer magazine, and books	129	134	138	141	144	148	152	156	161	165	2.7%
OTT video	4	5	6	10	15	19	23	27	29	31	15.9%
Out-of-home advertising	23	27	30	32	34	35	37	38	40	41	4.1%
Traditional TV	349	394	359	349	332	344	352	362	371	378	2.6%
Video games and esports	54	65	85	96	101	107	112	118	126	133	5.8%
Entertainment and Media in Kenya²	3,372	3,660	3,910	4,207	4,680	5,119	5,388	5,577	5,782	5,984	5.0%

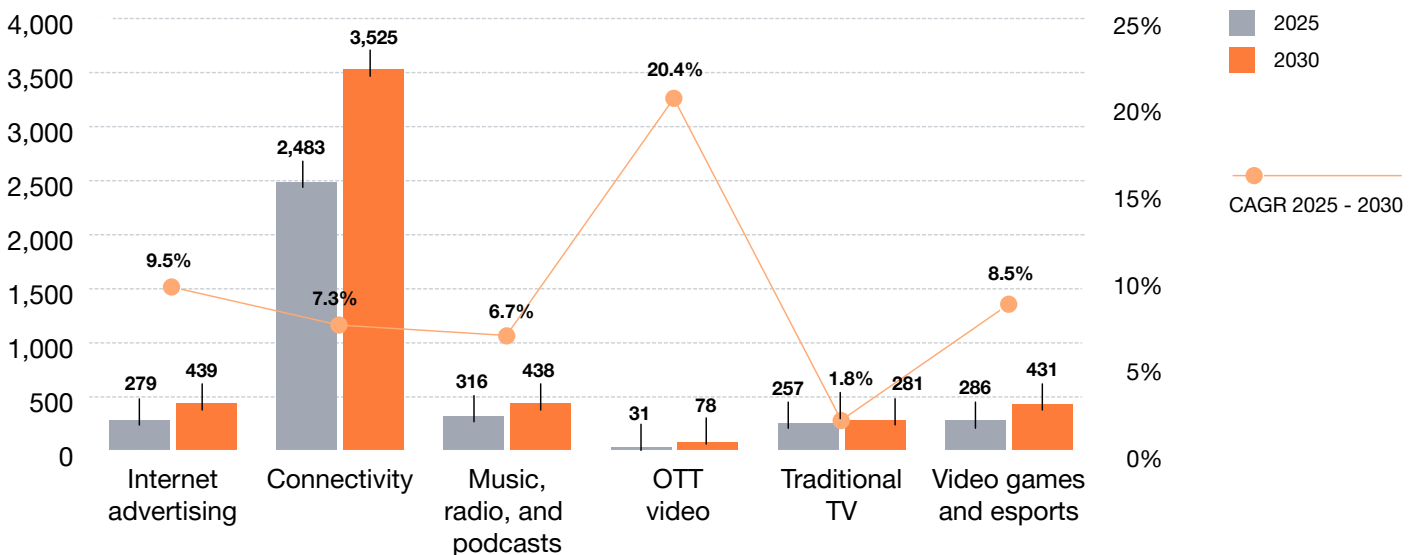
6.9%

projected CAGR for
Nigeria's E&M industry to
2030

Nigeria at a glance

Nigeria's E&M market is forecast to expand from US\$3.8bn in 2025 to US\$5.3bn in 2030, representing a CAGR of 6.9% and making it the fastest-growing market among the three countries analysed. Growth is supported by a large and youthful population, rapidly expanding digital audiences, and increasing demand for digital media and entertainment.

Selected E&M sub-segments (US\$ millions)



Key highlights:

- Fastest-growing E&M market of the three.
- Largest population base and rapidly expanding digital audiences.
- OTT video in Nigeria is one of the fastest growing E&M segments across Africa, at a 20.4% CAGR. Nigeria is the fastest-growing OTT market globally. Telecom partnerships make access more affordable, while light-touch regulation enables platforms to innovate for local audiences.
- Gaming expands from US\$286m to US\$431m (CAGR: 8.5%) and is forecast to approach internet advertising revenue by 2030. Gaming accounts for a substantially larger share of Nigeria's E&M market than it does in South Africa or Kenya.

20.4%

forecast CAGR for OTT
video in Nigeria—the
strongest OTT growth
globally

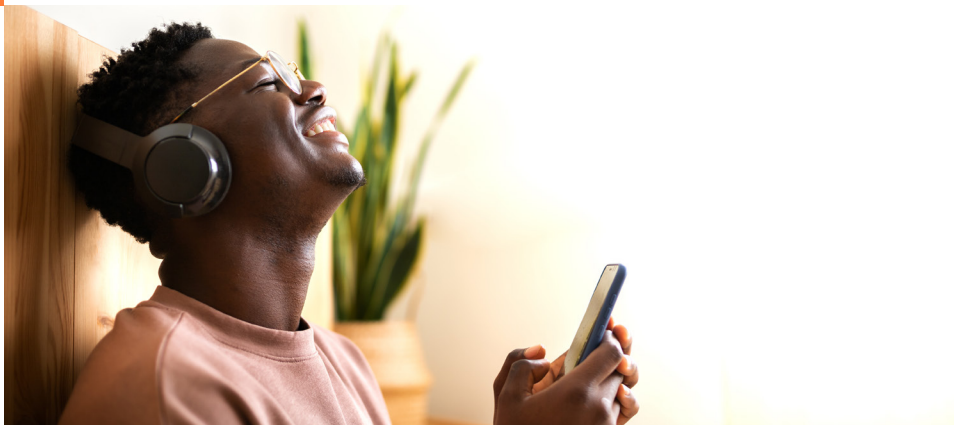
- Cinema records the strongest growth of any category, increasing from US\$10m to US\$29m. In a milestone for Nollywood, local films represented almost 50% of Nigeria's total box office revenue in 2025.
- Nigeria's influential music, radio and podcasts market is forecast to grow from US\$316m in 2025 to US\$438m in 2030 (6.7% CAGR), driven by the expanding local and global reach of Nigerian music.
- Traditional television and publishing remain positive growth sectors despite losing relative share.

Industry outlook

Nigeria combines strong demographic fundamentals with broad-based industry growth. Unlike South Africa, where value is being redistributed between segments, Nigeria continues to experience expansion across multiple categories simultaneously, highlighting the significant headroom that remains in the market.

Total E&M revenue in Nigeria (US\$ millions)

	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	2025-30 CAGR
Business-to-business	3	3	3	3	4	4	4	4	4	4	0.8%
Cinema	13	19	20	8	10	15	18	22	26	29	22.8%
Internet advertising	127	161	207	234	279	324	363	393	418	439	9.5%
Connectivity	1,990	2,312	2,791	2,641	2,483	2,719	2,923	3,118	3,307	3,525	7.3%
Music, radio, and podcasts	172	181	277	297	316	416	460	434	414	438	6.7%
Newspaper, consumer magazine, and books	110	113	113	91	87	87	89	90	92	94	1.5%
OTT video	9	12	16	22	31	42	51	62	71	78	20.4%
Out-of-home advertising	30	35	38	41	43	44	46	47	49	50	3.0%
Traditional TV	163	196	225	263	257	278	282	289	288	281	1.8%
Video games and esports	45	50	57	251	286	307	324	358	405	431	8.5%
Entertainment and Media in Nigeria²	2,658	3,077	3,738	3,838	3,775	4,204	4,514	4,759	5,000	5,282	6.9%



03

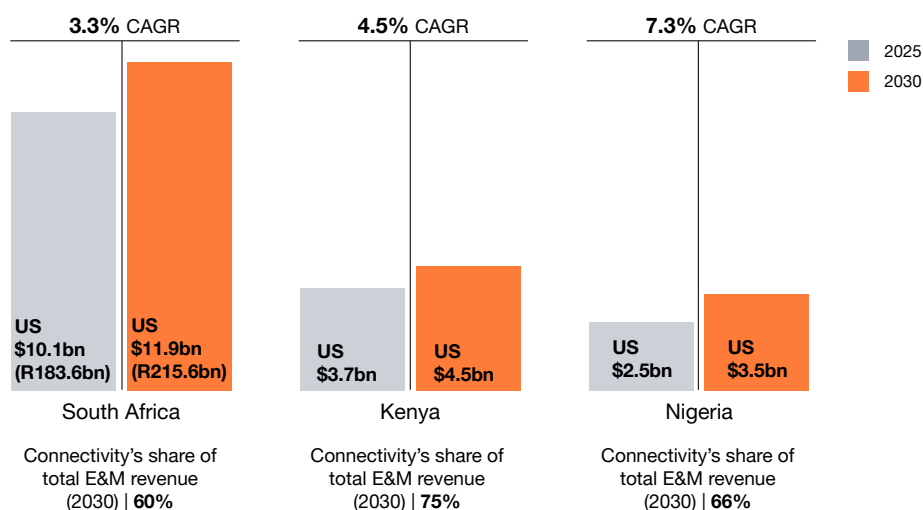
Connectivity and audience growth

What activates the audience?

Connectivity is both the largest revenue pool in Africa's E&M industry and the primary driver of future digital growth. Unlike many mature markets, where advertising is on track to overtake connectivity spend in the foreseeable future, access itself remains the dominant category of spend across Africa. The pace at which digital audiences and digital revenue streams expand continues to depend on how available, affordable, and reliable that access becomes.

Mobile and fixed services (connectivity) confirm this across all three markets:

Connectivity revenue and CAGR (%)





86.8%

5G penetration in
South Africa by 2030

The concentration of spending on connectivity also shapes the wider E&M ecosystem. As long as connectivity accounts for the majority of consumer expenditure, other E&M segments have a comparatively smaller share of wallet to draw on for near-term growth.

The nature of connectivity is also changing. By 2030, 5G penetration is forecast to reach 86.8% in South Africa, 51.6% in Kenya, and 35.3% in Nigeria, while 3G and older technologies fall to 6.2%, 3.1%, and 4.8% of subscriptions respectively. Network generation determines what a connection can support: video streaming, gaming, and social platforms all require greater bandwidth and consistency than older networks were built to deliver. Faster and more reliable networks enable richer digital experiences and provide the infrastructure required to support the continued growth of video, digital advertising, gaming, and other data-intensive forms of entertainment.

Across Africa, fixed broadband services are growing faster than mobile services, signalling rising demand for higher-capacity, more reliable connectivity, however Africa remains a strongly mobile first continent given challenges in navigating last mile infrastructure. For E&M, greater fixed broadband adoption expands the audience for data-intensive experiences such as streaming, gaming, and connected television, while creating stronger foundations for digital advertising, subscriptions and other forms of monetisation.

79.4%

Video's share of South
Africa's total data
consumption in 2025

South Africa provides an indication of what this transition looks like in practice. Video already accounts for 79.4% of the country's total data consumption, evidence that network demand is now driven primarily by entertainment and media use rather than basic communication.

The pace of this transition will vary across markets. Quality and affordability, not simply the number of people connected, will determine how quickly consumers increase their engagement with streaming, gaming, and other digital services.

Connectivity activates the audience. The next question is how that audience is converted into commercial value.



04

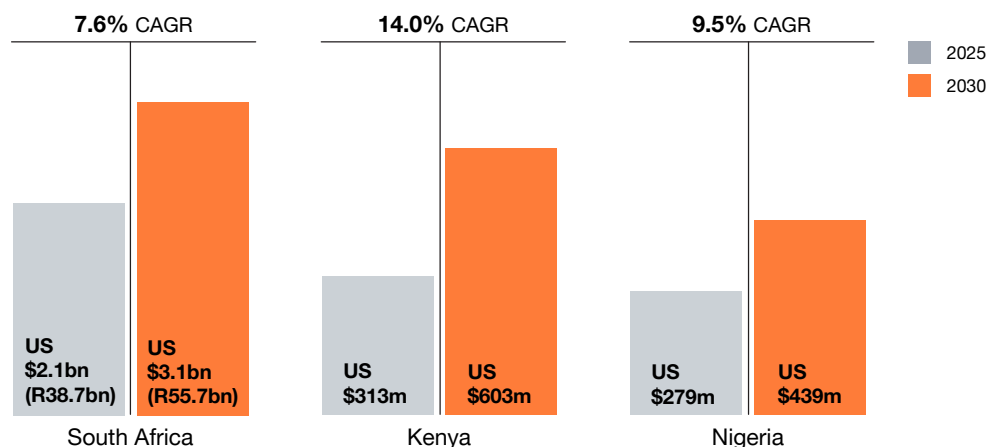
Advertising, measurement, and monetisation

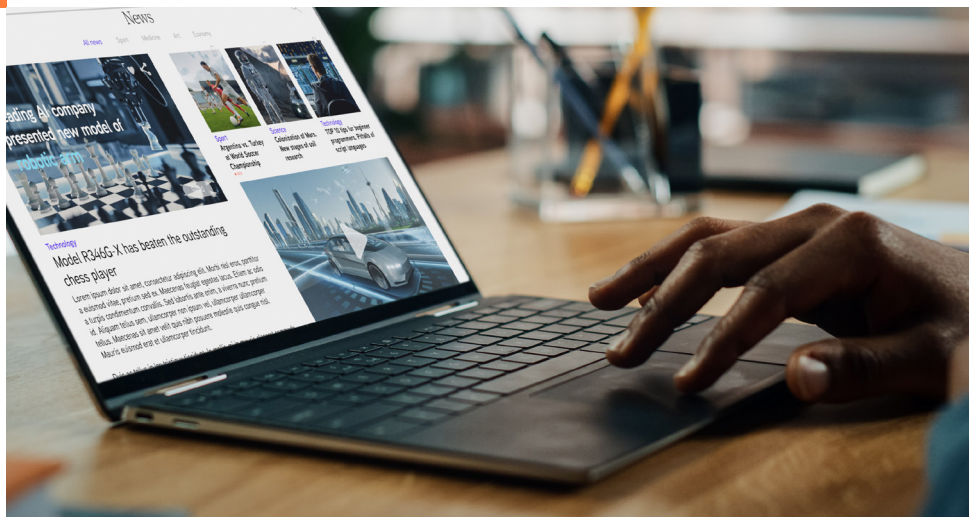
How is audience growth converted into commercial value?

Connectivity activates the audience. Advertising is increasingly the mechanism through which that audience is monetised.

Across South Africa, Kenya, and Nigeria, internet advertising is forecast to grow as follows:

Internet advertising revenue and CAGR (%)





South Africa remains by far the largest internet advertising market, forecast to grow from US\$2.1bn (R38.7bn) in 2025 to US\$3.1bn (R55.7bn) in 2030. Kenya records the fastest growth, with internet advertising revenue almost doubling from US\$313m to US\$603m over the same period.

Growth is being driven by different advertising categories across the three markets:

- **Kenya:** Video internet advertising is forecast to grow at a CAGR of 18.2%, making it one of the fastest-growing digital advertising categories and will overtake other display advertising in 2027. Growth is supported by increased video consumption across social media platforms and connected devices, highlighting the growing importance of video-led audience engagement.
- **Nigeria:** Forecast to grow at a CAGR of 17.2%, retail paid search is expected to overtake traditional paid search by 2028, reflecting advertisers' increasing focus on channels that can more directly influence purchasing decisions.
- **South Africa:** Connected TV is expected to play a more prominent role in internet advertising by 2030. As streaming adoption increases and smart-TV penetration expands, advertisers are gaining access to television-scale audiences combined with the targeting and measurement capabilities of digital advertising.

These trends illustrate how digital advertising is evolving across African markets. While the highest-growth categories differ by market, growth is increasingly concentrated in formats that offer stronger audience insights, improved measurement capabilities, and a closer link between advertising activity and commercial outcomes.

As a result, organisations are placing greater emphasis on first-party data, audience identity, and measurement frameworks. The focus is no longer solely on audience reach, but on understanding customer behaviour, evaluating campaign effectiveness, and demonstrating business outcomes.

As audience attention becomes increasingly fragmented across publishers, broadcasters, streaming platforms, retailers, creators, and social media platforms, the ability to connect audience engagement to measurable commercial value is becoming a more important source of competitive advantage. Organisations that can combine trusted customer data, effective activation, and credible measurement will be best positioned to capture future growth.

Advertising demonstrates how connected audiences are monetised. The next question is where consumers choose to spend their time and money.

Turning media investment into measurable value

As advertising becomes more digital and fragmented, organisations need greater transparency over where media budgets are spent and whether campaigns deliver against their objectives. PwC's Marketing and Media Review Services assess financial arrangements, campaign performance, and digital processes to identify inefficiencies, strengthen governance and improve the value generated from media investment.

[Explore PwC's Marketing and Media Review Services](#)





05

Evolving patterns of consumer consumption

How are consumers spending their time and money?

The next stage of growth depends not only on attracting audiences, but also on understanding how they choose to spend their time and money. Across Africa, video and gaming provide some of the clearest evidence of changing consumption patterns.

The growing influence of video

Consumers are increasingly accessing video content across multiple viewing environments. However, the relationship between OTT and traditional television differs significantly across the three markets.

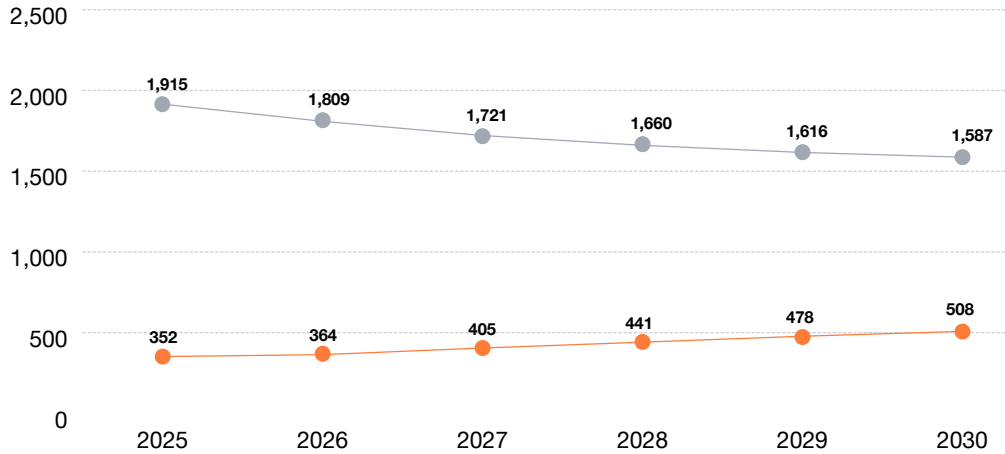


Market	Video market dynamic	OTT vs traditional TV CAGR	OTT revenues relative to traditional TV (by 2030)
South Africa	OTT growth is occurring alongside a decline in traditional television revenue.	7.6% vs -3.7%	32%
Kenya	OTT is set to grow strongly, but the segment remains small in comparison to traditional television.	15.9% vs 2.6%	8.2%
Nigeria	While traditional television remains the dominant video segment, OTT is recording significantly stronger growth.	20.4% vs 1.8%	27.8%

South Africa is experiencing the clearest redistribution of video revenue among the three markets. OTT video revenue is forecast to increase from US\$352m (R6.4bn) in 2025 to US\$508m (R9.2bn) in 2030, representing a 7.6% CAGR. Over the same period, traditional television revenue is forecast to decline from US\$1.9bn (R34.7bn) to US\$1.6bn (R28.8bn). Unlike Kenya and Nigeria, where OTT and traditional television both continue to grow (albeit at vastly different growth rates), South Africa is experiencing a clearer reallocation of value within the video market. Even so, the traditional television segment is forecast to remain more than three times larger than OTT in 2030.



Traditional TV vs OTT (US\$ millions)



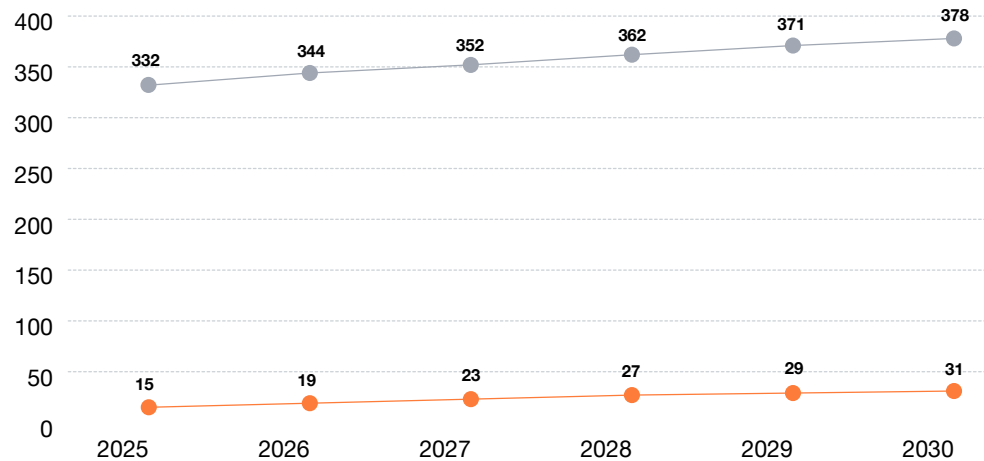
South Africa

Traditional TV
OTT video

-3.7%
CAGR

7.6%
CAGR

Traditional TV vs OTT (US\$ millions)



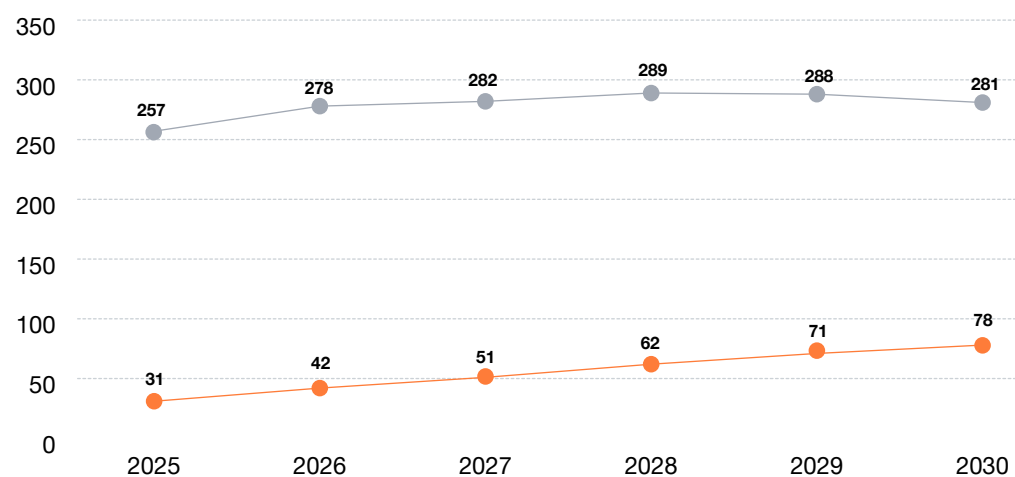
Kenya

Traditional TV
OTT video

2.6%
CAGR

15.9%
CAGR

Traditional TV vs OTT (US\$ millions)



Nigeria

Traditional TV
OTT video

1.8%
CAGR

20.4%
CAGR

South Africa's OTT market is entering a more mature phase. OTT subscriptions are forecast to decline slightly from 6.0m in 2025 to 5.8m in 2030. While subscriber growth is moderating, the market remains relatively underpenetrated by global standards. By 2030, South Africa is expected to have 0.30 OTT subscriptions per household, compared with 0.86 globally, indicating substantial room for further expansion. At the same time, OTT revenue continues to grow despite relatively stable subscription volumes, highlighting the increasing importance of pricing, advertising-supported models, bundling, and more flexible content propositions.

While SVOD remains the dominant spend category, Advertising VOD (AVOD) is the market's fastest-growing revenue stream, increasing from US\$19m (R345m) in 2025 to US\$52m (R950m) by 2030, at a CAGR of 22.4%. This reflects growing consumer demand for lower-cost streaming options as households balance entertainment spending against economic pressures. The shift towards hybrid subscription and advertising-supported models is reshaping streaming economics globally, with South Africa following this trend. AVOD's share of OTT video revenue rises from approximately 5% in 2025 to more than 10% by 2030, highlighting the increasing importance of advertising-funded consumption.

Connected screens are reinforcing this transition. South African smart-TV households are forecast to increase from 9.7m in 2025 to 11.0m in 2030, while penetration rises from 52.4% to 56.8%. This places South Africa well ahead of the global average of 38.8%. The television screen remains central to video consumption, but the range of services available through it continues to expand.

Kenya and Nigeria are following a different trajectory. By 2030, OTT subscriptions are forecast to reach approximately 528,000 in Kenya and 1.6m in Nigeria. OTT video revenue is expected to reach approximately US\$31m in Kenya and US\$78m in Nigeria by 2030. Although both markets are embracing on-demand and mobile-centric viewing experiences, OTT has not yet exerted the same level of pressure on traditional television revenues as seen in South Africa. Traditional television revenue is also forecast to grow, reaching US\$378m in Kenya and US\$281m in Nigeria.

Industry consolidation reflects long-term confidence: Despite ongoing shifts in the traditional television market, investment activity suggests continued confidence in the sector's long-term potential. Recent transaction activity underscores the strategic value that major international media players continue to see in African television audiences. The transaction highlights opportunities to leverage scale, strengthen local content offerings and expand digital video services across the continent, providing a positive counterpoint to other challenges facing the pay-TV market.

Market	Average OTT revenue per subscription (2030)
South Africa	US\$76
Kenya	US\$54
Nigeria	US\$42
Global average	>US\$100

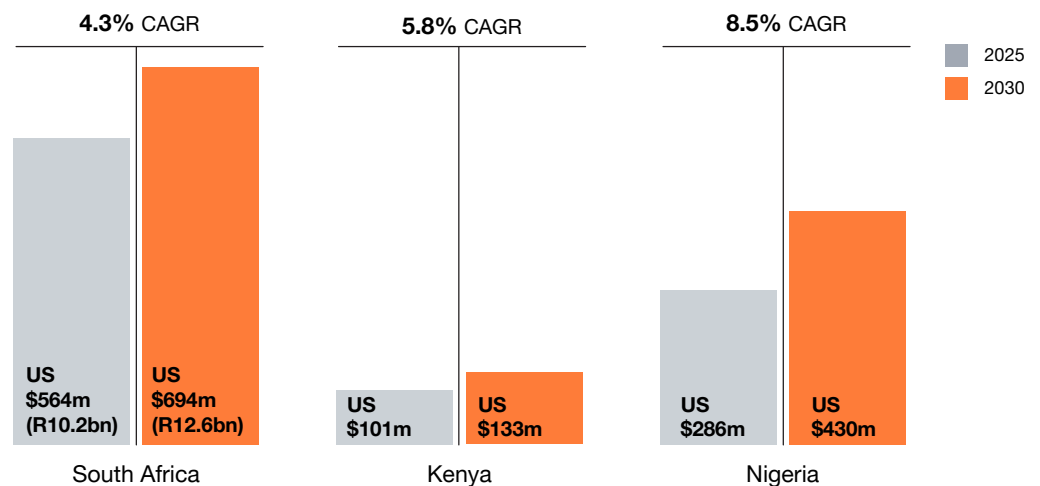
Affordability remains a competitive advantage for OTT services across Africa. Average OTT revenue per subscription is forecast to remain well below the global average, reflecting the earlier stage of market development and the continued importance of subscriber growth as a driver of revenue expansion.



Mobile puts gaming within reach of more consumers

Gaming's growth is being powered by mobile: affordable, accessible and built for everyday use. Video game revenue worldwide is forecast to increase from US\$256.1bn in 2025 to US\$306.3bn in 2030, representing a CAGR of 3.6%. South Africa therefore grows slightly faster than the global market, while Kenya and particularly Nigeria materially outperform it. Esports revenue remains negligible in all three markets.

Video games revenue and CAGR (%)



Several themes emerge from the data:

- South Africa remains the most established gaming market of the three, supported by a larger installed base and more mature ecosystem.
- All three markets are forecast to grow faster than the global gaming industry.
- Nigeria records the strongest growth, with video games revenue forecast to reach US\$430m by 2030.

Mobile access remains central to this story. For South Africa, Kenya, and Nigeria, smartphones represent more than a distribution channel. They are the primary mechanism through which gaming reaches audiences who may never own a console or dedicated gaming computer.

Mobile gaming is particularly important because it:

- Lowers barriers to participation.
- Supports short, frequent, and socially connected forms of play.
- Expands gaming's addressable market without requiring specialised hardware.
- Integrates gaming with social interaction, payments, commerce, and media consumption.

This is especially relevant in Kenya and Nigeria, where gaming can expand without following the hardware-intensive development path historically associated with mature gaming markets. Social/casual gaming³ revenues represented 77% of the gaming segment in Nigeria in 2025.

Mobile and casual gaming thrive because they are affordable, accessible and easy to fit into daily life—turning smartphones into social, interactive entertainment platforms. As audiences spend more time within gaming environments, in-app advertising is becoming an increasingly important revenue driver which complements app-based consumer spending. In all three markets, app-based consumer spending remains the largest revenue segment but in-app advertising is forecast to grow faster through to 2030.



06

The enduring value of shared experiences

Why do live experiences continue to matter?

Digital channels are changing how audiences discover and engage with content, but they are not replacing live experiences. Rather, they are strengthening them.

Streaming platforms, social media, short-form video, and audio services increasingly function as discovery and amplification channels, extending audience reach before, during, and after events. Entertainment businesses are consequently using digital touchpoints to deepen audience relationships and create additional monetisation opportunities.

Successful entertainment properties can generate value that extends well beyond direct media revenues. Sponsorship, tourism, hospitality, retail, and transportation can all benefit from strong audience engagement, highlighting the wider economic impact of live experiences.

5.7%

projected CAGR for
South Africa's live music
market, compared with
2.1% globally

South Africa's music, radio, and podcasts market is forecast to increase from US\$443m (R8.0bn) in 2025 to US\$585m (R10.6bn) in 2030, representing a 5.7% CAGR. Growth in audio consumption serves as an entry point into broader entertainment ecosystems that include live events, sponsorship, social media engagement, creator communities, and commerce. And African audiences are certainly tuned in with our markets growing at a faster rate than the global trend.



Cinema provides a similar illustration of the continued demand for shared out-of-home entertainment. Revenue is forecast to increase from US\$42m (R757m) to US\$59m (R1.1bn) in South Africa, from US\$5m to US\$8m in Kenya, and from US\$10m to US\$29m in Nigeria. Nigeria records the strongest growth, with a CAGR of 22.8%, although the category remains relatively small in absolute terms.

Cinemas, venues, and event organisers are placing increased emphasis on:

- Premium screens and enhanced viewing experiences.
- Exclusive releases and experience-led entertainment.
- Convenience and atmosphere.
- The social dimension of shared experiences.

As digital content becomes more abundant and personalised, live experiences offer what screens cannot fully replicate: presence, participation and a shared sense of belonging. Technology can extend their reach, but it is human connection that makes them distinctive—and valuable.





07

The next phase of value creation

Who captures the next wave of growth?

The next phase of E&M growth will increasingly be determined by who owns and understands the audience relationship. Technology is lowering barriers to content creation, allowing more creators, publishers, podcasters, and independent production companies to participate. More content can be produced, localised, and distributed than ever before.

Distribution, however, remains concentrated. A relatively small number of platforms continue to shape how content is discovered, how audiences are reached, how advertising is delivered, and how creators generate revenue. For media businesses and creators, the challenge is therefore not simply reaching audiences, but building assets they can control, including intellectual property, trusted brands, direct customer relationships, first-party data, and multiple routes to market.

AI can help African stories travel further

AI is accelerating change across content creation, discovery, personalisation, and monetisation. This shift is taking place alongside the expansion of Africa's digital infrastructure⁴, creating greater scope for digital services and AI-enabled applications to reach African audiences.



From translation, subtitling, and localisation to audience segmentation, campaign optimisation, and production workflows, AI is helping organisations improve both efficiency and reach. These applications are particularly relevant in African markets, where linguistic diversity and fragmented audiences can limit content discovery and distribution. AI-assisted localisation can extend content to wider audiences, while recommendation engines and search tools can improve discoverability. For advertisers, AI can strengthen audience analysis, creative delivery, and campaign performance.

The central question is not how much content AI can produce, but whether it makes content more relevant, more discoverable, and more commercially valuable. The long-term opportunity lies in combining global technology with local languages, local context, trusted brands, and distinctive creative voices.

Trust will ultimately determine whether that value is sustained. Copyright, licensing, attribution, source verification, misinformation, privacy, bias, and brand safety all require clear accountability and human oversight. Responsible governance is therefore not separate from the commercial opportunity; it is a fundamental part of it.

From AI potential to practical application

For E&M leaders, the priority is to identify where AI can add relevance and reach without weakening rights, creative distinctiveness or audience trust. PwC can help organisations optimise their AI vision, prioritise opportunities across content, localisation, discovery, personalisation and advertising, and build the workflows, data, technology and governance needed to maximise AI impact responsibly.

Explore PwC's AI services





08

Conclusion

Converting Africa's digital growth into lasting value

Africa's E&M industry is entering a new phase of development. Connectivity continues to expand digital audiences, advertising is becoming more sophisticated, and consumers are engaging with content across an increasingly diverse mix of platforms, formats, and experiences. Connectivity, technology, creativity and culture are coming together to create richer experiences, stronger businesses and more sustainable growth.

The three markets examined in this report illustrate different stages of that journey. South Africa reflects the increasing redistribution of value within a more mature digital ecosystem. Kenya demonstrates the opportunities created by a highly connected mobile-first economy. Nigeria highlights the scale of growth that remains possible as digital participation continues to expand. Africa's distinctive advantage remains the creativity, diversity and dynamism of its markets.

Technology will continue to reshape how content is created, distributed, discovered, and monetised. At the same time, audience attention will become more fragmented, competition for engagement will intensify, and the importance of trusted relationships will increase. The organisations that lead will use technology to deepen human connection and data to strengthen trust. Organisations that can combine strong audience understanding, effective monetisation models, trusted data, relevant content, and multiple routes to market will be best positioned for future growth.



Africa's opportunity is therefore not simply to follow global industry trends, but to shape them by translating expanding digital participation into enduring audience relationships and lasting commercial value.

Ultimately, the future of African entertainment and media is not a story of traditional versus digital, nor of local versus global. It is a story of convergence. Connectivity, technology, creativity and culture are increasingly working together to create richer experiences, stronger businesses and more sustainable growth. The organisations best positioned for the years ahead will be those that recognise that technology is most powerful when it strengthens human connection, that data is most valuable when it builds trust, and that Africa's greatest competitive advantage lies not in replicating global models, but in harnessing the creativity, diversity and dynamism that make its markets unique. The next chapter of African entertainment and media will belong to those who can turn that potential into lasting value.



09

Contact us



Charles Stuart

Africa Entertainment and Media Leader
PwC South Africa
charles.stuart@pwc.com
+27 (0) 11 797 4223



Udochi Muogilim

Partner
PwC Nigeria
udochi.muogilim@pwc.com
+234 (0) 1271 1700



Michael Mugasa

Partner
PwC Kenya
michael.mugasa@pwc.com
+254 (20) 285 5688



Nana Madikane

Africa Technology, Media and
Telecommunications Industry Leader
PwC South Africa
nana.madikane@pwc.com
+27 (0) 11 797 5490

Bring the Outlook to your leadership team

Contact our E&M experts to arrange a tailored Executive or Board presentation exploring the Outlook findings and the trends shaping the future of entertainment and media in Africa, with insights focused on your organisation's priorities and strategic questions.





 Click for quick view

10

Resources

PwC Global Entertainment & Media Outlook 2026–2030



Methodology



Subscribe to the Outlook

Get 12 months of access to data and commentary for segments across 53 countries and territories, and access to dashboards and visualisations, including heat maps and comparisons of GDP and growth rates.

Find out more:



Permission to cite

No part of this publication may be excerpted, reproduced, stored in a retrieval system, or distributed or transmitted in any form or by any means—including electronic, mechanical, photocopying, recording, or scanning—without the prior written permission of PwC.

Please cite the Outlook as follows: “PwC Africa Entertainment and Media Outlook 2026–2030” in your article.





At PwC, we help clients build trust and reinvent so they can turn complexity into competitive advantage. We're a tech-forward, people-empowered network with more than 364,000 people in 136 countries and 137 territories. Across audit and assurance, tax and legal, deals and consulting, we help clients build, accelerate, and sustain momentum. Find out more at www.pwc.com.

PwC refers to the PwC network and/or one or more of its member firms, each of which is a separate legal entity. Please see www.pwc.com/structure for further details.