



# DISCOVERY TOUR, DATA EDITION

Mapping out the present & future of African audio storytelling

An April 2022 Report







Melissa Mbugua (left) and Josephine Karianjahi (right) , Co-Founders of Africa Podfest.

(Image: Marcus Olang' / Stills by Marcus / Africa Podfest)



# acknowledgements



## The team:

- Allan Wasega - Data Analyst
- Peter Mwenda - Lead Data Analyst
- Rosa Nassivila - Lead Qualitative Analyst
- Pauline Bokea - Qualitative Analyst
- Melissa Mbugua - Research Director
- Josephine Karianjahi - Project Director
- Marcus Olang' - Storythreading, Report Design and Layout
- Sitati Kituyi - Technology Advisor
- Maurice Otieno - Executive Director, Baraza Media Lab
- Vanessa Gathecha - Head of Research, Baraza Media Lab

## The people who supported us by spreading the word:

- Naija Podhub
- Bizcommunity
- Jamlab
- Sisipho Skweyiya
- SemaBOX
- Afripods
- Podcast Sessions
- Mo Isu and Jill Achineku
- African podcaster community in Africa and African Diaspora



# contents



executive summary	1
research methodology	2
reviewing the literature	8
digging into Africa Podfest's independent research	37
summary and recommendations	71
bibliography	76







*Melissa Mbugua (left) and Josephine Karianjahi (right) , Co-Founders of Africa Podfest.*

Africa Podfest and Baraza Media Lab have partnered to launch a series of reports on podcasting in Africa in 2021. This collaborative project seeks to surface crucial information and insights to support investment in innovative business models within the podcasting industry, which is showing tremendous potential. Building on the 2021 Baseline Study "Is This Mic On?"

Our objective through this project is to develop a baseline understanding of the trends in African podcasting from which to frame further programming; and to use reliable data to map the potential of and make a strong case for further investment in African podcasting. The study has continued into 2022 with the **Discovery Tour: Data Edition**, a mixed methods research study combining a qualitative and quantitative approach to podcasting in Kenya, Nigeria and South Africa.

From our previous research, we have learned that one important missing piece which is needed to grow the podcasting industry is reliable information that aids podcasters and ecosystem supporters to make good decisions. The most frequently asked question by podcasters in our community and innovators who are seeking to expand the podcasting medium is about the potential sustainability of podcasting. Podcasting is a crucial growth opportunity for Africa's creative economy, potentially providing sustainable employment for millions of youth. .

The aim in this second phase of research was to better understand the growth and sustainability of African podcasting in three leading African podcasting markets. The research question being addressed is, "**What does growth and sustainability for African podcasting mean?**" During the project, we have been able to uncover podcast themes, needs and perceptions of podcasters, audience engagement and motivations driving podcast growth in three of Africa's largest podcast markets - Kenya, Nigeria and South Africa.

## research methodology



## objectives of the study

This study aimed to explore the opportunities for sustainable growth of podcasting in Africa and draw insight into the feasibility for investment into the industry.

We sought to explore these areas in the African podcasting industry: market demand, regulatory environment, technology access, business model and growth support for podcast producers.

### *Insights from our previous research*

In our 2021 research, we found that the key drivers motivating podcasters in Africa are:

1. A desire for building community through podcasting
2. The creative autonomy and experimentation that podcasting allows as a new medium
3. Inclusivity and accessibility of podcasts due to its relatively low barrier to entry in terms of resources and social structure
4. Opportunities that podcasting provides for marginalised communities to make their voices heard

We found that the key constraints facing podcasters are:

1. Difficulty of access to infrastructure needed to consistently produce high quality audio and connect to the internet
2. The high demands on time, effort and resources that podcasting demands
3. Lack of ready opportunities for monetization which would allow for growth and sustainability of podcasts

We also found that the countries with the highest podcasting activity in Africa are Kenya, Nigeria and South Africa.

## research questions

Drawing from the research objectives and taking into consideration insights gained from our previous research, our research questions are:

1. What are models for sustainability that have contributed to the growth of podcasting in Kenya, Nigeria and South Africa?
2. What are the opportunities for income generation that could lead to sustainable growth in podcasting?
3. What are the behaviours, demographic characteristics and demands of podcast audiences in Africa?





study design

The study adopted a mixed methods approach, collecting both qualitative and quantitative data, as well as using data from both secondary and primary sources. We conducted desk research, in-depth interviews and an audience survey.

**1. Desk research**

We conducted desk research to contextualize developments in African podcasting within the environment in which they are taking place. We examined the literature on these issues influencing the podcasting industry: market demand, regulatory environment, technology access, technological and business model innovation, growth support for podcast producers. We reviewed academic and grey literature that was available online. We selected literature published in journals, media publications, conference proceedings and blog posts highlighting the podcasting context in Kenya, Nigeria and South Africa.

**2. In-depth interviews**

Our in-depth interviews aimed to reach two groups. The first group is a sample of podcast producers who are generating income from their podcasting activities and have a strong audience base. The second group is stakeholders who are involved in the podcasting value chain such as: advertisers, media organisations, funders, ecosystem enablers, policymakers and distributors.

Our aim was to interview at least 12 stakeholders in total. We interviewed a total of 11 individuals distributed as shown in the table below. None of the respondents were policymakers as a result of time constraints.

Country	Podcast producers	Stakeholders
South Africa	2	1
Everyday African life	1	1
Kenya	3	1
Multiple	1	1



Criteria for selecting podcast producers to interview:

- Podcasts that represent marginalised communities or communities who would otherwise not have open access to a media spotlight
- Podcasts that highlight a new or fresh perspective such as taboo topics, new angles on current affairs, education on themes that are not covered in existing media etc
- They have a strong audience base that is consistent and are well known in their community
- They have been producing the podcast for 1 year or more and have generated income in support of their podcasting activities
- They can be either individual podcasters or podcast networks

Criteria for selecting industry stakeholders:

- Their activities or decisions have a direct impact on podcasts at scale
- They are in a high-level decision making role within their organisation and are able to provide perspective into the podcast industry, even if they are not actively participating in it yet
- They are actively involved in either Kenya, South Africa or Nigeria, or all three

Our interview analysis took a flexible approach using grounded theory. Emergent coding allowed the data to speak for itself. Codes and themes emerged from in-depth interview transcript analysis as well as framework structured analysis coding which allowed us to use codes from the interview questions. These codes were formulated to explore the areas of models of sustainability and opportunities for income generation within the podcasting industry. These codes and themes were then used to group and interpret the information found from the data. In this way, the findings and analysis serve to validate or extend existing knowledge on African podcasting, sustainability models and opportunities for income generation.

All the interviews were held in a controlled framework through semi-structured interview questions which are attached in the annex. The guiding theme for the discussion in this report is loosely based on the research question: "What are the opportunities for income generation that could lead to sustainable growth in podcasting?"





From the interviews, we were able to identify codes that repeatedly came up as indicators for income generation and sustainable growth. These are as follows:

Code	Description
Financial opportunities	What sources of income are available from podcasting?
Barriers to financial opportunities	What barriers are there to attaining financial income?
Audience number and behaviours	How do audience numbers and audience behaviour influence income generation and sustainable growth of the podcasts?
Opportunities for growth and scale	What are the opportunities for growth and scaling up within the podcasting industry?

### 3. Survey

The audience survey sought information on the demographic characteristics, behaviours and demands of podcast audiences in Africa. Our quantitative sampling approach considered the total populations of Kenya, Nigeria and South Africa, their urbanisation rates and internet penetration rates. It also factored in anecdotal evidence that podcast audiences in rural areas are negligible, therefore the study focused on urban centres. Details of the sample size calculation approach are in the appendix.

Our target sample size was 422 and we received 370 responses, representing an 87.6% response rate. Majority of the responses (238 (64.3%)) were from Kenya, followed by Nigeria and South Africa at 76 (20.5%) and 56 (15.1%), respectively.

## research methodology



## limitations of the study

The mixed methods approach which combined the use of in-depth interviews, desk research and a quantitative audience survey was a strength as this allowed for deeply rich and insightful data from interviewees which we were able to triangulate using the literature and survey data. However, as a result of time constraints, we were unable to interview all targeted respondents from the respective countries therefore, specifically those working in policymaking. Therefore, their inputs are missing from this study. We have relied on the literature to examine policymaking as it influences African podcasting. Though interviews and the survey were conducted from different regions of the continent, an additional limitation may be that results may not be generalizable to specific countries due to the sample size, and should this be the case would be an area of further study later down the line.





Left to right: Melissa Mbugua (Africa Podfest), Maurice Otieno (Baraza Media Lab), Doris Onyango (SemaBOX), and Josephine Karianjahi (Africa Podfest).

(Image: Marcus Olang' / Stills by Marcus / Africa Podfest)



# **REVIEWING THE LITERATURE, PART ONE:**

**Exploring market demand for digital content in Kenya,  
South Africa, and Nigeria**







The literature on media choice offers two perspectives to understand consumer demand for digital audiovisual content. The first is structural factors shaping demand and the second is individual preferences. Perspectives concerned with structural factors emphasise the importance of media structures like channel availability and programming, access to platforms, as well as social structures, such as patterns of work and commuting (Taneja, 2013). Second, the theories that focus on individual preferences describe audiences as active agents who consume media to gratify their needs and wants such as entertainment, information seeking, community building, past time, and escape (Taneja, 2013).

Therefore, we begin this section of the literature review by evaluating literature on the structural dimensions of demand for digital content in three African countries: Kenya, South Africa, and Nigeria. Next, the review zooms in on the demand for podcasting at a global level and within the African context to surface how individual preferences are propelling the growth of this medium.

### structural factors shaping demand for digital content

Couldry et al. (2010) argue that the gradual displacement of traditional forms of mass media (television and newspapers) by the internet, mobile and digital media, and the multiplication of media goods are key factors shaping the demand for digital audiovisual content. The internet is one of the most powerful distribution tools for audiovisual products, yet to be completely regulated it allows independent creators to disseminate their content freely to the public (La Torre, 2010).

Therefore, in the African context, the explosion of the mobile phone industry and growing internet penetration, especially in countries such as Kenya, Nigeria, and South Africa are key enabling factors in the increased distribution and demand for audiovisual products (Royston, 2021).



### ***Rise in consumer spending and mobile internet access***

In South Africa, consumer spending on entertainment and media has risen by 8.4% year on year between 2014 and 2018 set to increase by 6.4% per year on average between 2018 and 2023 (PwC, 2019).

Arguably, this growth is generated by and representative of the increase in consumer expenditure on Internet access which accounted for 64% of the overall rise in E&M revenue (PwC, 2019).

In Kenya, internet access and mobile phone penetration have increased considerably, with 8 in every 10 people in a national media establishment survey reporting access to the internet within the last 30 days, mainly through a mobile phone (GeoPoll, 2019).

The Nigerian media landscape demonstrates similar trends with mobile Internet access consisting of 69% of the country's E&M revenue (PwC, 2019). Moreover, mobile internet user penetration has increased significantly from 33.6% in 2019 to 50.0% of the adult population in 2021 (BBC, 2021). To this end, podcasts are oriented towards mobile technology, which aligns well with Africa's prevalent mobile technology usage (Van der Merwe, 2020).

As an 'empowered' type of radio listening, it has allowed listeners to time-shift and carry their radio content with them thanks to the portability of most digital audio devices such as iPods and smartphones (Sullivan, 2018).

Thus, podcasting's rise in popularity is at least partially due to its technological features: its availability, convenience and near-ubiquity thanks to increased smartphone access and internet penetration (Sullivan, 2018).

### ***African audience habits are shifting***

Another contributing factor to the demand for audiovisual content in Africa is changes in audience availability, which refers to the time people have for consuming media (Taneja, 2013). Dovey (2018) points out that perspectives in the development space have tended to view Africa through a Western, capitalist lens that denies that continent's particular styles of production and participation when it comes to leisure, pleasure and entertainment.

Therefore, it is important to evaluate how changes in routines of work, commute, leisure, and sleep could explain the increased demand for audiovisual content. For instance, young consumers in Nigeria have linked their media consumption to daily tasks and routines. Podcasting interweaves media into the daily lives of listeners, transforming the medium from a form of information to be consumed into media that functions as a daily ritual (van der Merwe, 2020).



### *Impact of COVID-19 on digital content consumption*

More recently, the COVID-19 lockdowns precipitated changes in media habits that accelerated the use of new digital tools and the demand for audiovisual content (Reuters, 2020). Consumers either forced or choosing to be at home led to an increase in the demand for media (WEF,2020).

In Nigeria, the shutdowns were associated with an increase in internet music subscribers (153.4 million as of December 2020), digital song sales and online streaming (ITA, 2021).

Showmax (a video-on-demand service) reportedly saw a 50% increase in daily unique users: and a 20% increase in-play events in South Africa during the lockdown in 2020 (MultiChoice, 2022).

Finally, in Kenya Netflix, traffic on Safaricom's mobile data and the home-fibre network was reported to rise fourfold between March to April of 2020 (Nendo, 2020).

Therefore, changes in the habits and routines of audiences are a key factor in expanding demand for digital audiovisual content; in this sense, being part of an audience has become just one of many activities in daily life (Couldry et. al, 2020).



A moment during the South Africa leg of the Discovery Tour.

(Image: Africa Podfest)



### why podcasts?

So far, this review has considered what factors contribute to market demand for digital audiovisual content in the African continent. We would like to understand to what extent podcasts are becoming the new frontier in the mediascape in Kenya, South Africa and Nigeria.

Podcasting has become an integral part of the digital media landscape, both globally and in Africa. Insider Intelligence (2021) estimates that podcast listeners in select countries in Asia and Europe increased from 274.8 million in 2019 to 383.7 million in 2021.

However, the uptake and consumption of this sonic new media has been relatively slow in Africa (Royston, 2012).

In Kenya, podcasts are still niche, with only 25% of respondents saying they had listened to a podcast within the last 30 days (GeoPoll, 2021). Moreover, amongst the remaining 75%, close to 60% reported that they do not recognize what a podcast is.

South African consumers, however, have shown a greater awareness of and usage of podcasts. Edison Research's (2022) survey of digital media consumer behaviour in South Africa reports that 48% of consumers in major metro commercial areas were familiar with podcasts, and 36% reported having listened to a podcast before.

In Nigeria, the popularity of local podcasts 'I Said What I Said' (Jola Ayeye and Feyikemi Abudu) and 'Articulate One' (Adekunle Tolulope) suggests that audiences are slowly and steadily becoming familiar with the medium. D

Despite these low figures, the rapid growth of podcast usage in all these three countries suggests that podcasting is on an upward trajectory. Concurrently, improvements in the infrastructural access issues of digital media users and the entry of key players such as Spotify and YouTube Music suggest that audio consumption will become an increasingly important part of the media and entertainment landscape (PwC, 2019).

The next section of this review turns to how audience preferences are driving podcast consumption.





### *African representation in podcasting*

To begin with, podcasting affords listeners greater control and autonomy over what kind of content they listen to (Sullivan, 2018). For instance, in an interview with Pulse Nigeria, one audience member reported their dissatisfaction with the content available in the Nigerian podcast scene. He argues that "in Nigeria, the focus is on pop culture, and there's obviously an oversaturation of those topics. We need pods on sex education, parenting, leadership, life hacks, mental models, entrepreneurship, maybe even a serialized podcast of a play" (Tayo & Alake, 2019).

Moreover, literature on global media consumption draws attention to the perils of cultural imperialism. Global media flows are heavily imbalanced, with the majority of audiovisual content exported from the developed world (mainly the US) to the developing world, and this trend has the potential to homogenise media cultures (Taneja, 2013).

Thus, the importance of including and centring perspectives from beyond Euro-America is necessary for challenging representations of Africa and Africans (Dovey, 2018). Podcasts are well-positioned to challenge these homogenic narratives because they allow almost anyone to create and distribute content and are often designed with a niche audience in mind. Ayomide Tayo, a Nigerian journalist voices the desire that African audiences have for content that reflects their reality. 'I'm listening to a podcast currently, it's a breakdown of the Monica Lewinsky case; but why can't someone make a podcast about Madam Koi Koi or infamous Nigerian criminals?' (Tayo & Alake, 2019).

In short, audiences are drawn to podcasts because the openness of the medium caters to a diverse range of interests, hobbies, and ideological dispositions that allow them to feel visible, recognized and represented.



### ***Community building and inclusion***

African audiences are also attracted to podcasting because of the space it offers for community building, and the inclusion of marginalized and underrepresented voices and narratives. Podcasts tend to be audience-driven and crowd-sourced, and frequently make use of contributed anecdotes and participation in activities like reading the credits (van der Merwe, 2020).

In the African context, the importance of the oral tradition in music, storytelling and the exchange of cultural practices; is manifest in contemporary media culture, from talk radio to TV to blogging and online poetry (Royston, 2012).

Most importantly, the oral tradition is a communal activity; this perspective accounts for why media consumption is often a social activity. Throughout the continent family members and friends listen to the radio or watch television together as it facilitates interpersonal communication and provides opportunities to entertain guests (Taneja, 2013).

Fox & Ebada (2021) document how young Egyptian women are using podcasts to centre feminism and discuss central issues for Egyptian women such as sexual harassment, and how gender inequality negatively affects individuals and society.

Adelle Onyango, the host of the Kenyan Podcast Legally Clueless reflects on the ability of podcasts to serve African consumers who are out of the mainstream. 'Just look at the popularity of podcasts like Afroqueer, about queer Africans living loving and surviving and thriving on the African continent and in the diaspora, these are stories and topics that you couldn't even spell on traditional radio' (Chakanetsa, 2020).

Therefore, throughout the continent podcasts can be seen as a medium that allows for the constitution of virtual communities; they are essential for cyber advocacy, self-expression and contesting hegemonic representations. This is significant because state media in Africa tends to be at the forefront of shaping narratives about national identity; in this sense podcasting and radio are spaces within which consumers can share their stories and connect to local communities (van der Merwe, 2020). Podcasts can therefore be considered as a form of digital social capital for podcasters and their audiences, who could be considered as counter publics[1](Fox & Ebada 2021).

Finally, much of the literature on podcasting in Africa has focused on how consumers are driven by the need to access educational and cultural resources (Couldry et. al, 2013). Gachago et al. (2016) conclude that podcasts are a socially inclusive technology which contributes to deeper learning, especially for mature students whose home language is an African language.





### *Cultural expression and heritage*

Literature on podcast usage in Africa has evaluated how podcasting can be used to improve learning outcomes in higher education. Wentzel & Hart (2020) and Madiope & Makoe (2017) have highlighted how video casting and audio technologies can be used to support distance learning by enhancing students' interaction and providing guidance to understand more complex content.

Another key consideration in the literature is how audiences may be using podcasts for cultural preservation – for instance, learning or enhancing their native language skills; and identification- consolidating their heritage and ethnic identity.

Most African podcasts are broadcast in English, a language only spoken by half of a continent with 54 countries and over 1500 languages (Wangari, 2022). Wangari (2022) documents how the emergence of vernacular podcasters illustrates these pioneers' disinterest in the Western gaze and recognition of the potential of the medium to amplify the voices of everyday Africans.

In Eastern Africa, podcasts have emerged in national and colloquial languages such as Kiswahili and Sheng for instance *Until Everyone is Free* and *Shagz Chronicles*. As well as in indigenous languages such as Kikuyu and Kinyarwanda including *The Journey* and *Matiri Ngemi* (Wangari, 2022).

In West Africa, podcasts in Yoruba such as *Omoluabi* and *Ohun Anu*; *WolfTech*, a podcast that discusses IT and emerging technologies in Wolof; and podcasts in Pidgin are being utilised to reach a larger audience (Wangari, 2022).

In Southern Africa, podcasts recorded in Shona, isiZulu, Sesotho Afrikaans and other major languages are made available through IONO.FM , an audio hosting and distribution platform that provides solutions for radio stations and podcasters in South Africa (Wangari, 2022). By trading a broad global audience for the audience that matters to them most, podcasters are looking beyond the Western gaze and choosing to amplify the voices and narratives of everyday Africans. (Wangari,2022)

In essence, the demand for digital modes such as podcasts stems from the affordability and intimacy of this medium to produce and distribute African stories, fiction or fact and an opportunity to share complex content with the rest of the world, but also to build community and collaborations within Africa (van der Merwe, 126).

---

[1] publics that stand in opposition to dominant ideologies and subvert that ideologies construction in public discourse



A moment during a moderated discussion at Baraza Media Lab in Nairobi, Kenya.

(Image: Baraza Media Lab)



A moment during the South Africa leg of the Discovery Tour.

(Image: Africa Podfest)





# **REVIEWING THE LITERATURE, PART TWO:**

**Exploring the regulatory environment of digital content in  
Kenya, Nigeria and South Africa**





There is relatively little literature on the regulatory frameworks governing digital audiovisual sectors in Kenya, South Africa, and Nigeria. However, in the last few years, all these countries have taken initiatives to draft and formalise technical and legal frameworks for audiovisual content and services. These developments have been triggered by the rapid spread of a range of audiovisual content services online and thus beyond the borders of nation-states (RSA, 2020).

The enforcement of global treaties and protocols has also prompted many African states to begin constructing frameworks. The Beijing Treaty which entered into force in 2020 is an example of this; it makes provisions for the protection of the rights and revenues of performers and producers in audio-visual industries (Njoroge, 2020).

The South African Ministry of Communications and Digital Technologies published a draft White Paper in 2020 to reflect contemporary technological developments and create an enabling environment for the provision of inclusive audio and audiovisual services (RSA, 2020). In Nigeria, the National Broadcasting Commission's Code has recently been amended to provide for local content in the broadcast industry and establish codes of practice relating to content acquisition, and web and online broadcasting (Otur, Takur, 2020). Finally, the Kenyan Film Classification Board has recently proposed a Co-Regulation Framework aimed at equipping content broadcasters, VOD and OTT platform operators with the requisite knowledge and skills to enable them to classify audiovisual content meant for broadcast distribution and exhibition in the country (Business Desk, 2022).

In all three countries, regulation on podcasting is notably absent, but as this review will show, broader regulations on digital audiovisual content are likely to shape the growth of this medium.

### ***Limitations in the industry***

According to Black Camera some of the regulatory gaps and limitations facing the audiovisual sector include 1) distribution 2) production 3) exploitation and 4) promotion (Black Film Center, 2021). The absence of autonomous and efficient distribution circuits in African countries means that digital audiovisual content is distributed almost entirely by foreign interests (Black Film, 2021). Currently, while African-owned podcast platforms exist, a majority of the podcasts in Africa are created and distributed on non-African platforms. Within the podcasting industry, Spotify's Anchor is one of the main platforms for podcast creation and distribution on the continent. Moreover, Spotify has spent around \$600 million acquiring podcasting businesses, suggesting that it may be positioning podcasts more prominently in the future to grow revenue from non-licensed audio sources (WEF, 2020). In the absence of frameworks governing the distribution of revenues between publishers, artists, and platforms there are concerns about how much platforms like Spotify should pay rights holders. For instance, some have suggested that Spotify must pay rights holders a minimum proportion of its revenues for subscriptions regardless of whether this comes from music or podcast listening (WEF, 2020).





### *Regulation at present*

How does this square with the current private and public regulatory provisions for digital content creation in Kenya, Nigeria, and South Africa? The Kenya Copyright Board has recently published guidance on legal and intellectual property issues in podcasts. The Board states that 'whether executed physically or downloaded from an app store, a podcaster executes a contract with the owner of the software/ app' (KFCB, 2022). Moreover, the regulations stipulate that a podcast must be aired on platforms 'this may be a webpage or any other digital platform or channel. If the podcaster doesn't own the platform, they must execute a contract defining their terms of engagement' (KFCB, 2022).

Arguably, this guidance leaves little room for podcasters to renegotiate their relationships with podcast publishers and technology platforms. Moreover, it creates room for exploitation and undermines the rights of producers. In 2020, Nigeria's National Broadcasting Commission published amendments to the NBC Code aimed at making provisions for broadcasting online using Nigerian content (Ohuru & Takuro, 2020). Two key amendments are likely to affect producers in the digital audiovisual industries. First, all persons who wish to operate web/online broadcasting services are mandatorily required to register with the Commission and conform to the provisions of the NBC Code on programming standards (Ohuru & Takuro, 2020). In addition, any service providers who breach any provisions of the NBC Code on web/online broadcasting will be liable to sanctions including but not limited to a takedown order, blocking of its channel or a shutdown order (Ohuru & Takuro, 2020). It is likely that podcast production companies and podcast incubators will be subject to this regulation, however, it is unclear if individuals self-publishing content online will be required to comply. Finally, broadcasters are required to ensure that their conceptualization, production, and target audience- which should be Nigeria, satisfies certain conjunctive conditions such as that the director(s) and author(s) of the programme should be Nigerians. This signals that there is room to broaden the scope and nuance of current copyright and intellectual property provisions governing podcasting, and audiovisual industries in Africa.

A key challenge that surfaced in the literature is the lack of policies and structures to support the establishment of quality homegrown productions in the audiovisual industry (Black Film Center, 2021). National bodies and agencies established to regulate broadcasting industries are crippled by a lack of capacity, expertise, and investment.



### *Learning from Africa's film industry*

Filmmaking provides valuable insights on what the path for formalisation of supportive bodies nationally and continentally could look like. For instance, on 44% of African countries have established a film commission while just 55% of countries have a film policy and 35% offer financial support to filmmakers (Thomas, 2021).

It is apparent that the lack of enabling policies constitutes one of the most crucial impediments to the development and growth of the continent's audiovisual sectors (Thomas). Case in point, the Kenya Film Classification Board (KFCB) has recently proposed that they will classify 30% of the content meant for broadcast on traditional broadcasting and new media platforms (Business Desk, 2022).

Broadcasters, VOD and Online streaming service platforms are allowed to self-classify a predetermined proportion of audiovisual content intended to air on their respective platforms after their staff undergo training by the KFCB guidelines (Business Desk, 2022). This is an example of how some African governments are outsourcing their mandate to ensure industry compliance, which potentially signals an increased burden on audiovisual platforms as well as self-publishers of content.

### *Cultural policy support*

These developments illustrate how bi-lateral, regional, and multinational regulations on audiovisual sectors can be used to develop and transmit policy and regulation from one country to another at little cost. The administration of cultural policies in African countries are also 'fragmented' making it difficult to design short and long-term policies for strategies (UNESCO, 2021).

Arguably, the recent commencement of Nigeria- South Africa audiovisual cooperation agreement represents the potential boom of audiovisual sectors due if states cooperate in the recognition and support of audiovisual industries. The agreement is aimed at enabling Nigeria and South Africa to cooperate, promote and develop the art and business of film and cinema through structured collaboration and partnerships between filmmakers and audio-visual production companies (The Sun, 2022).

A key part of this process is the establishment of streamlined procedures, requirements and processes for companies in both countries to access provisions of the agreement (The Sun, 2022). By providing critical support structures, including increasing access to financing, this agreement arguably has the potential to lead to increased employment and growth opportunities that should spill over to other audiovisual sectors.

The African Continental Free Trade Area (AfCTA) has also acknowledged the importance of Creative and Cultural Industries in Africa and highlighted the need for an African cultural renaissance as an important part of the Agenda 2063 (AU, 2021).





For instance, the EU's Audiovisual Media Services Directive governs the coordination of national legislation by providing rules to shape technological developments; creating a level playing field for emerging audiovisual media, guaranteeing the independence of national media regulators; preserving cultural diversity; protecting children and consumers amongst others (EC, 2020). Although the contexts are different, the EU case offers an example of how there is a need to go beyond the scope of national policies and structures to support audiovisual content and industries; and evaluate regional and continental provisions in the literature.

Another burning question is the extent to which media platforms should be held responsible for regulating subjective advertising. One application of significant advertising spend across Africa is, for example, from politicians standing for election (Reuters, 2020). Research by Reuters shows that 76% of respondents in Kenya and 72% of respondents in South Africa in a survey are concerned about what is real and fake on the internet when it comes to news (Reuters, 2020). In line with this, Rufaro Samanga, a South African journalist also points out that podcasting falls outside of the realm of current regulatory jurisdictions which govern the use of offensive and discriminatory language, displays of gratuitous violence, and hate speech (Samanga, 2022). Currently, only journalistic entities and people associated with those entities are subject to existing regulatory codes; and given that podcasts are published by members of the public this gap is potentially problematic. There is a concern that the reliance on user generated reviews and reports may allow subjective viewpoints to flourish.

Thus, a fine line between crowdsourced reporting and a misdirected online mob.

### **Accountability**

Podcasts are generally monitored through co-regulatory and voluntary mechanisms such as reporting content to the platform provider which ideally ensues in the de-platforming of an individual (Samanga, 2022). However, this has its limitations – Gareth Cliff, host of Burning Platform[1] lost his sponsorship with Nandos after he described a black politician's experience of racism as anecdotal and unimportant (Samanga, 2022). However, Samanga points out that it is difficult to hold hosts of inflammatory podcasts accountable. This is because communities who support their content are unlikely to boycott the platform, mostly because they have no issues with the kind of statements the host makes (Samanga, 2022).

In an interview with DW, Simon Kolwale, a Nigerian journalist argues that 'mob censorship presents another threat to media freedom in Nigeria. He argues that social media platforms have provided the biggest space for mobs to congregate and pontificate, 'when a mob seizes control of public discourse if you don't read the room and fall in line with them, you will become a subject of attack which could be physical.' (Bertram, 2021).



He goes on to add, ' what can be done? I have no idea. A mob is a mob, They do not have rules and regulations' (Bertram, 2021). In summary, questions about censorship and structures of accountability remain contentious within the podcasting industry, partly due to the absence of regulatory frameworks and bodies to enforce them and partly because they are audience-driven platforms.

The importance of accountability and regulation of inflammatory content in podcasting also highlights another key dilemma in African media industries in general but especially for the digital audiovisual industries, the problem of censorship. In an interview with Samanga, Candice Chirwa, menstruation activist and co-host of the podcast What the Relationship argues that there is a need to safeguard creative expression, especially for those who are already vulnerable and marginalised. 'As a podcaster, I believe that there is a bit of creativity that podcasters are meant to have when it comes to creating content. However, because the industry is not regulated, it allows problematic podcasters to have a free-for-all with their content' (Samanga, 2022).

Chirwa's account highlights the dilemma of media freedom vs censorship which is extremely salient in African contexts. Case in point, during the #EndSARS Movement against corruption and police brutality, Nigeria's National Broadcasting Commission released a set of guidelines that amounted to a media blackout. These guidelines stipulated that outlets which have a duty to promote the corporate existence of Nigeria should not embarrass individual organisations, or government, or cause disaffection, incite panic or rift in the society at large (Ani, 2020).

Ivie Ani (2020) writes that the eventual internet shutdown speaks to a history of the Nigerian media being targeted by military dictatorships intent on silencing imprisoning, torturing, and murdering journalists. Similarly, Dina Ligaga (2012) argues that the Internet provides an alternative route of expression of popular culture in Kenya; especially given a history of the suppression of media forms and art that existed in opposition to state-centric agendas.

Therefore, the literature suggests regulations around censorship in all three countries with a history of state interference in media and creative freedoms need to be delicately balanced and weighted to ensure that individuals do not become targets of the state.

---

[1] A South African podcast





A moment during the South Africa leg of the Discovery Tour.

(Image: Marcus Olang' / Stills by Marcus / Africa Podfest)



Josephine Karianjahi and Melissa Mbugua, during the proceedings of the 2022 edition of Africa Podcast Day, by Africa Podfest

(Image: Marcus Olang' / Stills by Marcus / Africa Podfest)



# **REVIEWING THE LITERATURE, PART THREE:**

**Exploring technology access for audiences, producers and stakeholders**







Technological innovation is instrumental in facilitating processes of diversification in the production and distribution of audio-visual narratives, especially in Sub-Saharan Africa (Overbergh, 2014). Indeed, the literature has emphasised how increased dependency on technology; particularly through smartphone adoption amongst Gen Z and Millennial Africans, has been integral to increasing consumers' access to media sites as tools for communication, entertainment and as a source of news and information (Wangari, 2017).

In the sphere of production, new assets in the form of improved infrastructure, technologies, knowledge networks and more affordable or user-friendly software are argued to have closed the 'digital divide' between industrialised and developing countries (Steinmueller, 2001).

Thus, these technological advancements have been posited as holding potential for increasing diversity in production formats and methods for delivery (Overbergh, 2014). From the perspective of stakeholders, technology access remains a central issue in the deployment of digital platforms in the audio-visual sector, especially regarding dissemination, monetisation, and the promotion of content (Bouquillion, 2019).

This section of the review evaluates the question of technology access from three perspectives; audiences, producers, and stakeholders; to understand how the growth of podcasting is being propelled or constrained by this factor.

### ***Technology access for audiences***

Arguably, the most significant enabling technological transformation within African media digital landscapes is the rapid growth in access to mobile phones, which has been accompanied by an increase in internet penetration. The literature points to the increasing accessibility of cheaper smartphone technology (Parry, 2017) with the entry of inexpensive Chinese smartphone brands such as Huawei and Infinix making higher broadband devices more accessible for lower-income segments of the population (Royston, 2012).

According to data from Pew Research (2018), large majorities in Kenya, Nigeria, and South Africa own mobile phones, with basic phones (such as flip phones or feature phones) being reported as the most common type of mobile device. As of 2018, 51% and 40% of South African adults reported owning a smartphone and a basic phone respectively. In Kenya, 30% of adults surveyed owned a smartphone with 50% owning a basic phone and 20% owning no phone. Similarly, 32% of Nigerians owned a smartphone with 48% reporting that they owned a basic mobile phone device (Pew Research, 2018).

Moreover, internet usage is reported to be increasing slowly but steadily across the continent – 59% of South Africans; 39% of Kenyans and 42% of Nigerians use the internet occasionally or own an internet-capable smartphone (Pew Research, 2018). Amongst African internet users, social and entertainment activities are the most reported. Despite these developments, there is evidence that there are key infrastructural, technological, and even social constraints hindering the growth of the audio-visual sector, and podcasting in particular.



### ***Constraints to the growth of podcast demand***

Royston (2012) points out that the scarcity of podcasting in audio cultures is because most African tech users connect to the Internet via feature phones that offer a limited number of applications for accessing content like podcasting. Furthermore, the question of internet accessibility is further complicated by the problem of cost and quality of internet access.

In the three countries, pre-paid mobile data plans dominate the subscription model which means that the cost of downloading 30 -120-minute-long podcasts optimised for iTunes or Stitcher rather than low bandwidth users can cost as much as \$1 dollar per episode (Royston, 2012). Nigerian podcaster Osagie Alonge parallels podcasting with music streaming; 'It costs you N900 to pay for Spotify or Apple Music. But it's going to cost you two or three times that amount to stream from those platforms because you must buy data, and data is expensive. You can always bring up the option of downloading, but then you must address questions like "What kind of phone do I have? How much space do I have on my phone?" (Adeleke, 2021). In line with this, Clar Ni Chonghaile, host of the Guardian podcast *The Tech Continent: Africa's Digital Renaissance* points out that cost is just one aspect of internet accessibility. "Just over 70% of Africans use 2G but most apps run on 3G, 4G and even 5G, so without this capacity, Africans are missing out on many of the benefits of transformative technologies" (Guardian, 2016).

Thus, the high cost of data and low quality of Internet provision in most African countries suggests that there is not simply a digital divide in Internet access, but a deepening inequality between rich and poor countries during recent decades.

Furthermore, findings from Reuters (2020) Digital News Report suggest that podcast listeners tend to be younger and mainly listen via headphones/mobile phones. These demographic factors mean that the cost and quality of data are particularly challenging for African youth, who may not have access to regular disposable income (Guardian, 2020). Thus, for many African users of the internet, the cost of consuming content is a visceral economic choice, and the practice has been outside the culture of audio media consumption until very recently (Royston, 2012).

### ***Digital divide***

Moreover, the literature supports the idea that there is an increasingly urban/rural digital divide in terms of technology access, which may potentially restrict the growth of audio-visual products and industries.

Divides in internet use are similar to those found for mobile and smartphone ownership with more educated, younger, and higher-income people being more likely to go online (Pew Research, 2018).

Podcasts in general are more dependent on low-cost internet accessibility found in a cyber cafe or at a college and thus tend to be within the reach of highly motivated consumers who can be called 'digital elites' (Royston,2012).





Constraints such as irregular or inadequate electricity supply and poor internet access and subscription affordability are more likely to affect rural rather than urban consumers. In the developed world, iPod and other digital audio players have raised the popularity of podcasts; but electricity is the main barrier to audio players penetrating remote areas (Nightingale, 2008).

In this regard, David Grimshaw, a director at Practical Action, an organisation carrying out research on audio access in developing countries, maintains that a key constraint to the growth of podcasting in the developing world is battery power. 'Battery devices need recharging, so you need electricity. And if a device is battery powered, they are expensive to replace when they wear out (Nightingale, 2018).

In South Africa, regular power outages significantly reduce mobile network coverage, as backup power sources are unable to recharge sufficiently (Daniel, 2021). Similarly, Nigeria's shortage of reliable power supply, means that citizens and industries are largely reliant on self-generated power using petrol and diesel generators (The Conversation, 2020).

Thus, another issue that comes to the fore in terms of technological access is the prohibitive cost and irregularity of energy in most African contexts. Given that most users of the Internet do so through mobile connections, the literature suggests that audio-visual content consumption decreases due to these disruptions. The average podcasting app such as Spotify uses a fraction of the amount of battery that Google Chrome, Facebook or other popular apps use; however, mobile data consumes more energy than Wi-Fi (Peters 2022).

Therefore, in an energy-scarce context consumers have to make a tough decision as to which apps they would use in order to save their costly data.

### ***Awareness of podcasts***

It has also been suggested that technological awareness and digital and media literacy go hand in hand with infrastructural capabilities. Norris & Inglehart (2009) point out that societal-level barriers to accessing ICTs remain substantial; digital audio-visual mediums have the highest demands for cognitive skills and literacy compared to other forms such as radio or even newspaper.

Nic Newman Senior Researcher at the Reuters Digital Institute points out that subscribing to podcasts doesn't necessarily equate to consumption. Mostly, people don't have a clear idea about what a podcast is, which affects the level of understanding in different countries (Gupta, 2020). Similarly, in a study of podcast consumption in Nairobi, Wambui found that the majority of respondents first heard about or discovered podcasts online; 72% discovered podcasts either through Google or other web search engines, and 57% heard or saw them on social media platforms (Wambui, 2020).



Nigerian journalist Justin Adeleke also highlights how platform design and the user interfaces of applications may have an impact on people's ability to access and consume audio-visual content. He states that 'podcasts have to compete with more accessible media and formats. If you observe phone usage data, you'll find that people spend most of their time on social media and messaging apps. They interact with videos, images and short-form text on these social media and messaging apps more than any other format.' Audiences' ability to discover podcasts may also be more difficult because most podcast apps tend to be standalone, especially for users of Android devices (Adeleke, 2018).

However, the launch of Google Podcasts as a native app for Android users, and Spotify's entry into the African market are argued to be two developments which significantly increase discoverability for users. Adeleke argues that Spotify's entry into the market signifies more than the entry of another streaming platform. 'Spotify's real game plan is owning your passive media experience via audio. It is gunning for the whole nine yards- music, podcasts audio, audiobook advertising and whatever else technology can conjure (Communique, 2021). Therefore, the emergence and expansion of music streaming platforms in Africa are seen to be a key entry point for the growth of podcasting in the literature on technology access.

The range of levels at which users from different backgrounds can access ICTs is another theme that emerges strongly in the literature on technological access. Edison Research's (2019) study on podcasting uncovers a gendered dimension to podcasting, as well as listening, although data in recent years suggests that gaps between men and women are closing in terms of listening. In developing countries, gendered disparities in accessibility and availability are even more significant, GSMA reports that women in low- and middle-income countries are 10% less likely than men to own a mobile phone and 23% less likely to use mobile internet on average (GSMA, 2019).

In line with this, Grimshaw points out that in many African countries women and girls are often engaged in unpaid domestic and care work which means they have little, or no leisure time (Nightingale, 2008). Moreover, African women are less likely to own mobile phones, or even access the internet due to factors such as illiteracy, lack of internet knowledge and social restrictions which may see smartphone ownership as inappropriate for women (DW, 2019).

Nevertheless, these gendered divisions in labour and technological access may not be entirely negative for the growth of audio-visual industries and podcasting especially. Practical Action has carried out research into how audio access can be used to deliver education to girls kept away from school because they are involved in care work and domestic labour such as collecting water and feeding cattle (Nightingale, 2018). Additionally, a study by Edison Research finds that women podcast listeners tend to listen more and for longer – for 7.3 hours per week on average compared to 5.9 hours for men (Inside Radio, 2019). This suggests that the elimination of technological barriers for women should usher in an even greater uptake of digital audio-visual content.





### *Technology access for podcasters and stakeholders*

To begin with, most discourse on the growth of audio-visual sectors in Africa tends to describe developments in digital content industries as nascent but fast-growing. The presence of major global players as well as the emergence of technology incubators and labs in Nigeria, Kenya and South Africa contribute to the sense of these countries as ICT hubs (Overbergh, 2014). Therefore, this section of the review presents the literature on technological access and audio-visual production regarding three main themes: production, distribution, and promotion.

In the literature, African popular cinema is often considered the most conspicuous emanation of how technological advancement has enabled the radical democratisation of Africa's audio-visual industries (McCall, 2007). The entry of global streaming platforms such as YouTube and Netflix, as well as local video streaming platforms like Showmax and irokotv, allows audiences to access films at little to no cost from mobile devices (Mureithi, 2021).

Simultaneously, cheap digital recording equipment, and more user-friendly and affordable hardware and software mean that anyone who can borrow a digital video camera is a potential filmmaker (Bischoff & Overbergh, 2012). The gains from more readily and cheaply available digital technologies are even greater in audio production compared to visual alternatives. On the level of production, high-quality audio recording and mixing equipment is much cheaper than high-quality video equipment (van der Merwe, 2020). In this sense, anyone with access to a computer, a microphone or a mobile phone and Internet can download free or cheap software to record and edit their first story though perhaps at a lower level of technology (van der Merwe, 2020).

Whilst the barriers to entry in podcasting are relatively low and the audio format relatively purist in the digital field, content and technical production quality should not be underestimated as these factors are crucial in determining the popularity of audio-visual content (Schutz, 2018). Skills and capacity can be deal-breakers or makers in the growth of audio-visual content and industries of the effectiveness of technological innovation in audio-visual industries. Even for amateur podcasters, an understanding of project management, market research, content creation, audio editing and online marketing skills are necessary to engage with the medium fully and exploit its maximum potential (Marcocci, 2020).



### ***Digital media skills for producers***

Platforms such as YouTube, Skillshare and Google's Digital Skills for Africa; as well as tech forums, discussion, and messaging boards such as Reddit and TechSpot have allowed for the diffusion of digital media skills often with little to no cost to producers. However, the literature suggests that a massive skills gap in the digital and media industries risks jeopardising the continent's ability to create the workforce of the future and develop a truly vibrant African digital media ecosystem (Burdin, 2021).

In an interview with the Guardian, Tomi Davies a Nigerian angel investor argues that the lack of education restricts the potential of the technology sector. 'I don't believe that our current educational systems are fit for purpose and there's a general agreement and consensus on that' (Guardian,2016) Viola Llewlyn Cofounder of Ovamba, also points out that 'you can't get a degree in computer science in the majority of West Africa. You'll probably have to go to Sierra Leone or Nigeria. You can't get a degree in animation, despite the vast progress in animation in Nigeria, South Africa, Cameroon, and other African countries(Guardian, 2016). Therefore, the education and skills gap in audio-visual sectors in most African countries limits both filmmakers' ability to tackle creatively ambitious projects and the industry's growth potential (UNESCO, 2019).

Beyond this, infrastructural constraints are also posited as a significant barrier to audio-visual production in all three countries. Africa Podfest documents how technical issues such as server errors, unsteady internet data and bandwidth restrictions (which are also tied to infrastructural constraints) also inform podcaster's production capacities (Africa Podfest,2021). Production costs which can range anywhere from USD 60–to 100 per episode are still prohibitive in most African countries, not to mention unreliable electricity supplies (Wangari, 2022). In Nigeria, the impact of unreliable electricity supply has been linked to at least half a reduction in turnover, according to an interview with a stakeholder in the entertainment industry. "Being a musician and music record producer in the digital era means that everything in music's creative and distribution process is online." (The Conversation, 2020).





A moment during the Zambian leg of the Discovery Tour.

(Image: Africa Podfest)



The LAM Sisterhood with Josephine Karianjahi and Melissa Mbugua, during the proceedings of the 2022 edition of Africa Podcast Day, by Africa Podfest

(Image: Paul Otieno / Africa Podfest)



# **REVIEWING THE LITERATURE, PART FOUR:**

**Exploring innovation capacity and support for podcast producers**







According to the literature, technological innovation is facilitating processes of diversification in the production and distribution of audio-visual narratives in Kenya, Nigeria and South Africa (Overbergh, 2014).

Lobato (2012) points out that a key aspect of understanding contemporary media analysis is the importance of informal media production and distribution networks in emerging patterns of innovation and transformation. Informal media economies are situated partly or wholly outside regulated, consolidated and policy-governed audio-visual industries and they relate in unpredictable ways with formal screen and entertainment industries (Lobato, 2012).

The podcast medium in the three African countries is arguably the exemplar of this criteria; as most podcasts are produced without the benefit of state funding, studio infrastructure or festival support (Lobato, 2012).

This section of the review presents the literature on innovation capacity and growth support for podcast producers to evaluate the potentiality for growth of the medium.

### ***Africa's opportunity for innovation***

To begin, one of the key opportunities for innovation capacity in informal media economies is what Pertierra (2012) describes as a parallel distribution structure that exists alongside large-scale regulated industries. Vast quantities of foreign audio-visual content – including telenovelas, dramas and anime, circulate on digital channels (Lobato, 2012). This illustrates how the existence of a decentralised distribution network in most African countries presents an opportunity for the growth and innovative capacity of the medium.

African producers are also pushing the boundaries of how content can be delivered through digital media platforms that were intended for other purposes. For instance, Uk'shona Kwelanga, a South African Whatsapp drama allows subscribers to be a 'fly on the wall' as a fictional family's funeral arrangements unfold via text, notes, and video (News24, 2017). Thus, the adaptation of digital content to different platforms to optimise distribution is a key aspect of technological innovation for African creatives.

For instance, David Adeleke points out that African podcasters can draw from the inventiveness of Uk'shona Kwelanga and create WhatsApp or instant messaging groups around their podcasts as short audio clips as voice notes. Additionally, Telegram Channels have emerged as a useful tool for broadcasting public messages and an unlimited number of subscribers and allows creators to generate revenue through paid subscription services (Telegram, 2022).

Moreover, the application has been optimised for the dissemination of podcasts; as the app remembers the listener's last position when resuming the playback of long audio files (Telegram, 2022). For instance, In Kenya, Telegram channels have been used by gossip and entertainment pages that have been de-platformed from other social media websites.



Another potential means of addressing distribution challenges can be through building on successful radio programmes with massive local audiences by turning them into podcasts (Adeleke, 2021). Bubu Naylor, Ceo of AF Radio, an Android App that allows anyone to stream Ghana radio stations live, discovered that there is a huge demand from the Ghanaian diaspora for online radios (Quartey, 2020).

In line with this, Adeleke (2020) maintains that building on successful radio programmes with massive local audiences by converting shows into podcasts which listeners can access on their websites is another method of tackling the problem of distribution.

Alternatively, another way of building on organic distribution systems could be setting up kiosks in markets where people could walk in to have podcast audio files transferred on their phones (Quartey, 2020). In essence, the literature suggests that looking beyond traditional podcast infrastructure is the linchpin to delivering content to audiences; and will be central to the business models of podcasters, who tend to be under-resourced and under-supported.

### ***Innovation support***

With regards to growth support, evidence from other regions in the world demonstrates how the rapid rise in the revenue potential of podcasting is driving more marketing money to the medium (Sutcliffe, 2022). Taking advantage of that rapid rise in revenue potential, however, requires significant investment – from the creator and platform (Sutcliffe, 2022).

In recognition of this, Acast, a company that provides hosting, monetisation, and growth support to podcasts has launched Acast Amplifier in the UK. The podcast incubator seeks to discover new talent who have not podcasted before and will see three aspiring UK-based creators produce and launch new podcasts, as well as receive benefits including a 2500 grant (Sutcliffe, 2022).

In Kenya, SemaBOX is a start-up conceived as the first specialist podcasting studio. Their vision is to activate, incubate or otherwise get 10,000 new Kenyan podcasters to join the podcasting space and democratise media creation and storytelling (Sema BOX, 2022).

On a global level, Google PRX also runs a Google Podcasts creator program geared to opening the medium to new audio producers around the globe (Inside Radio, 2022). Imriell Morgan, CEO of Content is Queen, points out that podcasting incubators are essential for talent development in the industry.

For podcasting to grow, 'there is a need to create risk-free environments for creators from all backgrounds to innovate and pivot' (Sutcliffe, 2022). Therefore, the literature suggests that both for profit and nonprofit media companies will be integral to shaping the future of audio by producing and distributing content, building technology and training talent (McHugh, 2022).





Commercial enterprises are not the only entities looking to grab a piece of the podcasting pie. Increasing competition within the podcasting space is primarily driven by the prospects of generating revenue, especially among younger audiences who are spending less time with commercial radio (Sutcliffe, 2022). Nonprofit organisations have also become aware of the power of podcasting to captivate specific audiences. In the US, Atlas Network, a libertarian non-governmental organisation also launched The Podcast Accelerator Program as an incubator for new podcasts in the liberty movement (Atlas Network, 2021).

The incubator has been developed to allow the voices of young people in the movement to be heard by supporting them with extensive training in podcast development as well as the necessary equipment (Atlas Network, 2021). In the African context, Volume is an example of an end-to-end podcast production service that produces podcast series for the NGO sector as well as big brands. The firm has positioned itself to provide concept development, production, and distribution. This illustrates how growth opportunities do not solely emanate from traditional media entities, and podcasters need to look at how political organisations, NGOs and even government entities will be looking to engage with the medium.



Baraza Media Lab, as located on the second floor of Keystone Park in Nairobi.

(Image: Baraza Media Lab)





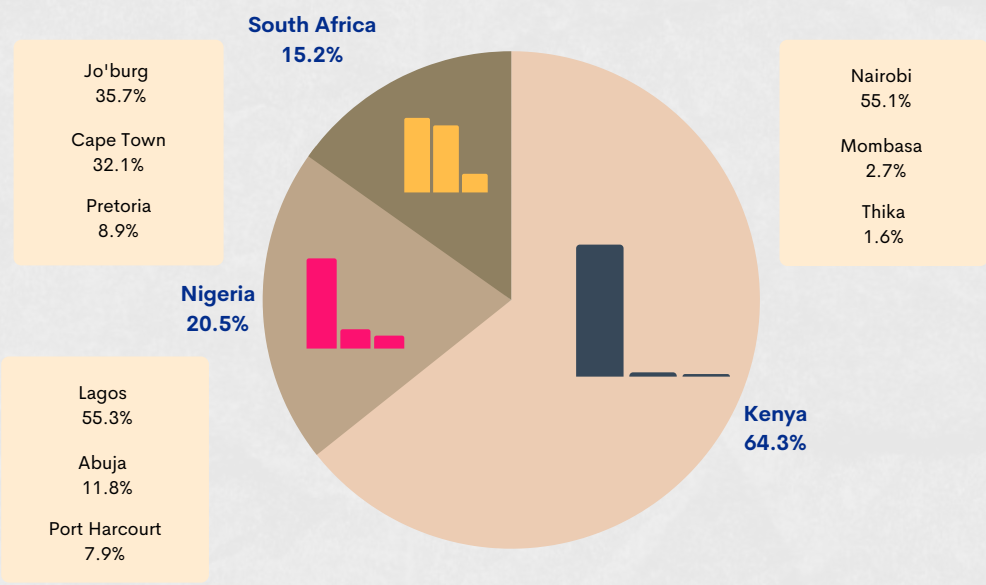
## **DIGGING INTO AFRICA PODFEST'S INDEPENDENT RESEARCH, PART ONE:**

**What are the demographic characteristics, behaviours and demands of podcast audiences in Africa?**





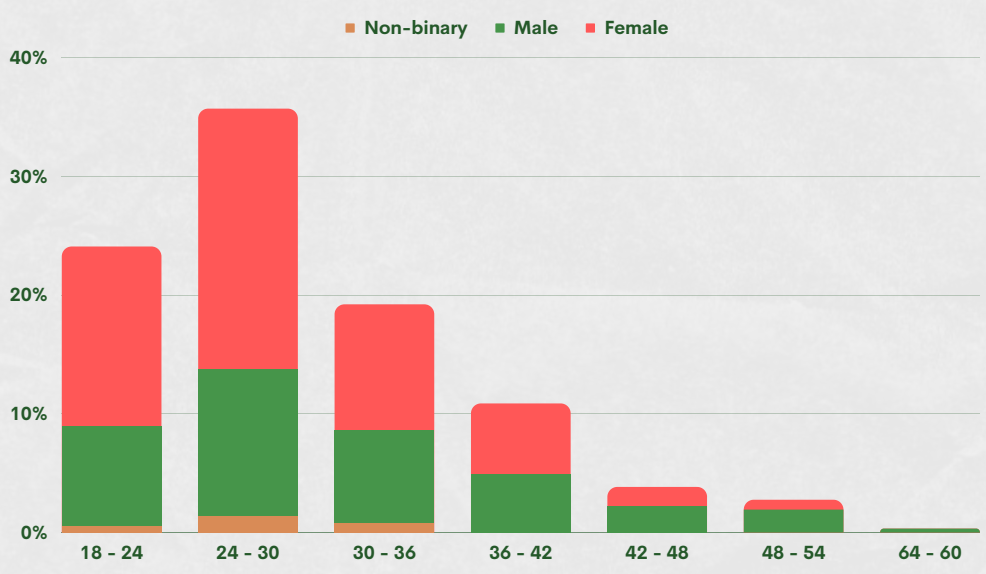
country & cities of respondents



**Our take:**

Although podcast audiences are largely concentrated in the capital cities of the three countries, there is an audience growing in other major urban centres in all countries and these are not to be ignored as the industry grows.

overall age & gender of respondents



**Our take:**

Most of the podcast audience is between 18-24. This is correlated with the average age of internet consumers in the three countries, where youth are the majority. The proportion of female audiences is significantly higher than male, perhaps indicating the representation that podcasts offer marginalised audiences. Non binary audiences are significant and likely to increase as podcasts grow that offer representation for them.

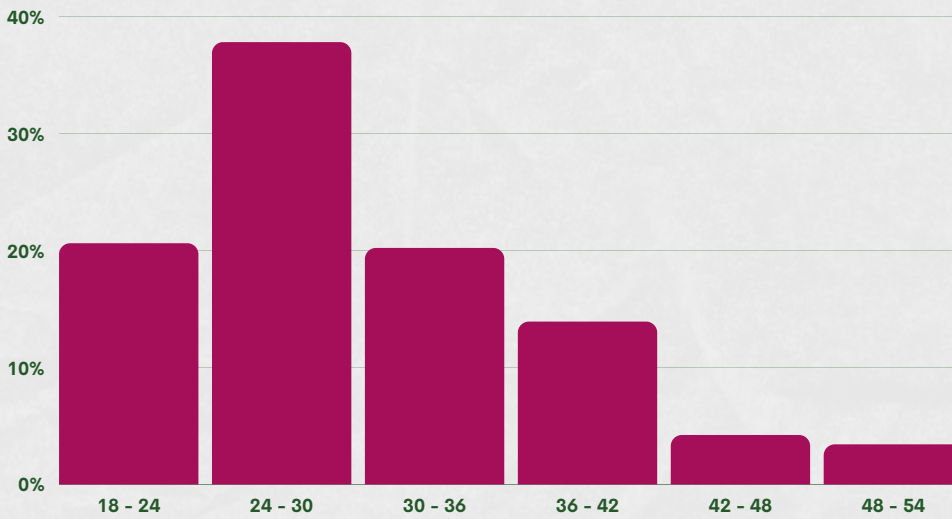




## africa podfest's research, part one



### age of respondents: Kenya



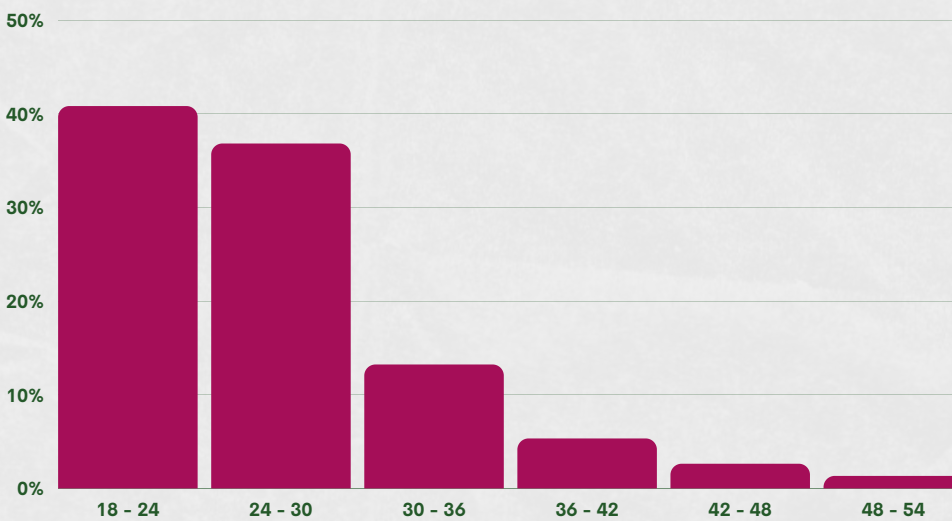
“

#### Our take:

Podcasts appeal to audiences across all ages, while the bulk are between 18-30. This correlates with general internet content consumption.

”

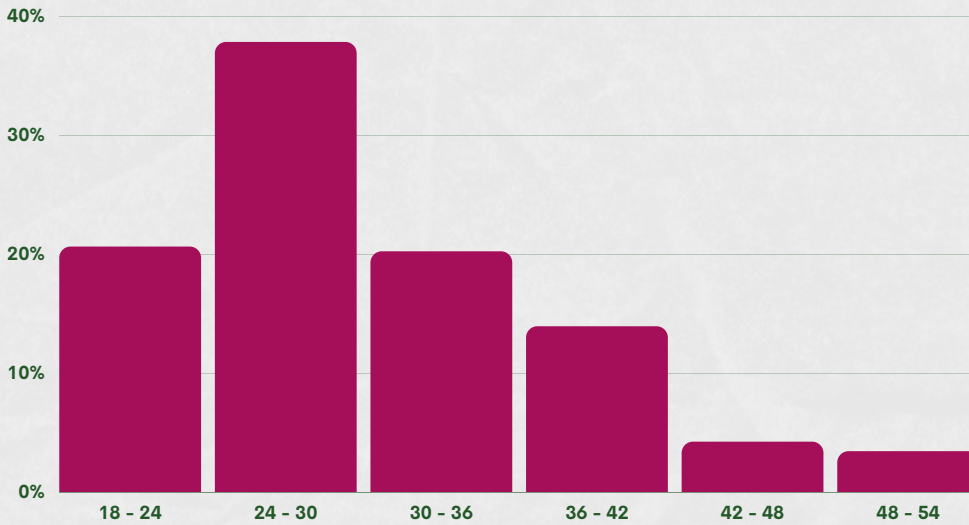
### age of respondents: Nigeria



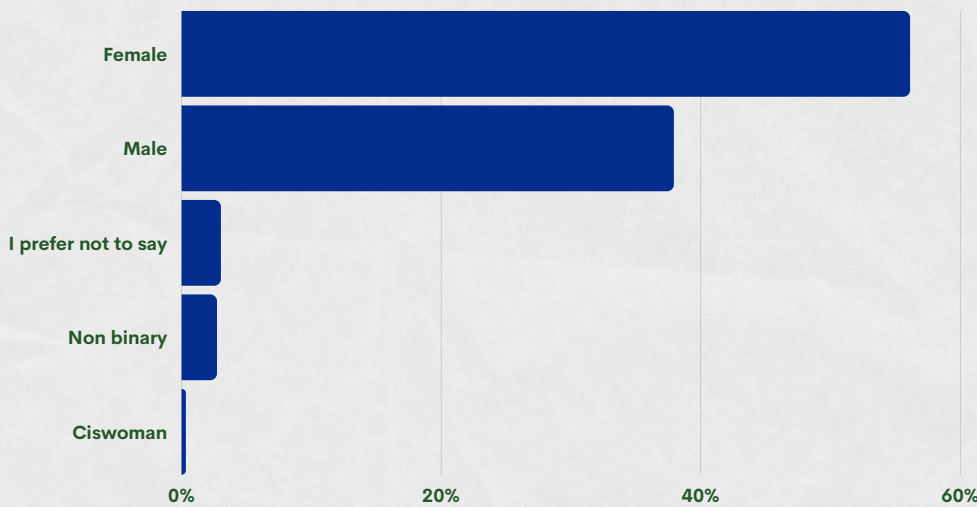
# africa podfest's research, part one



## age of respondents: South Africa



## gender of respondents: overall



### Our take:

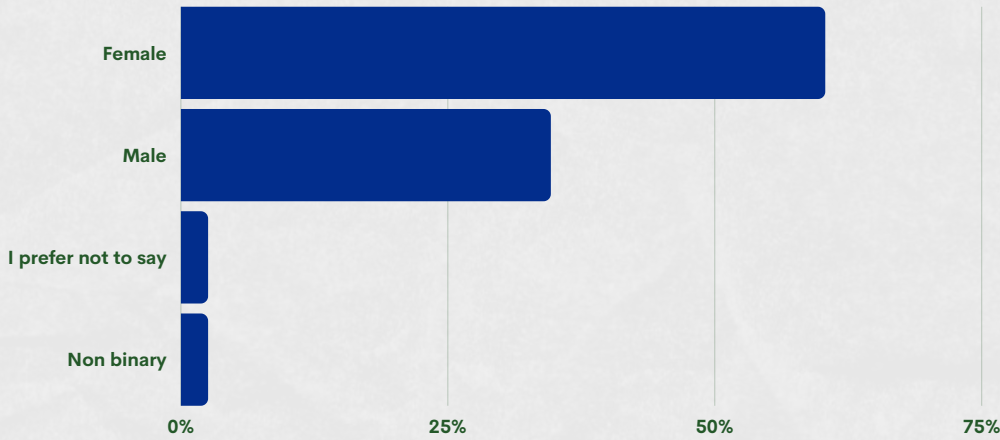
Overall and within the individual countries, the proportion of female audiences is significantly higher than male, perhaps indicating the representation that podcasts offer marginalised audiences. Non-binary audiences are significant and likely to increase as podcasts grow that offer representation for them.



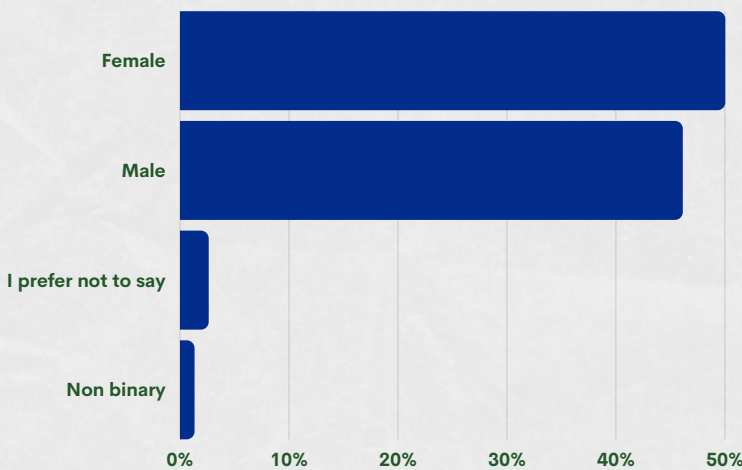




gender of respondents: Kenya



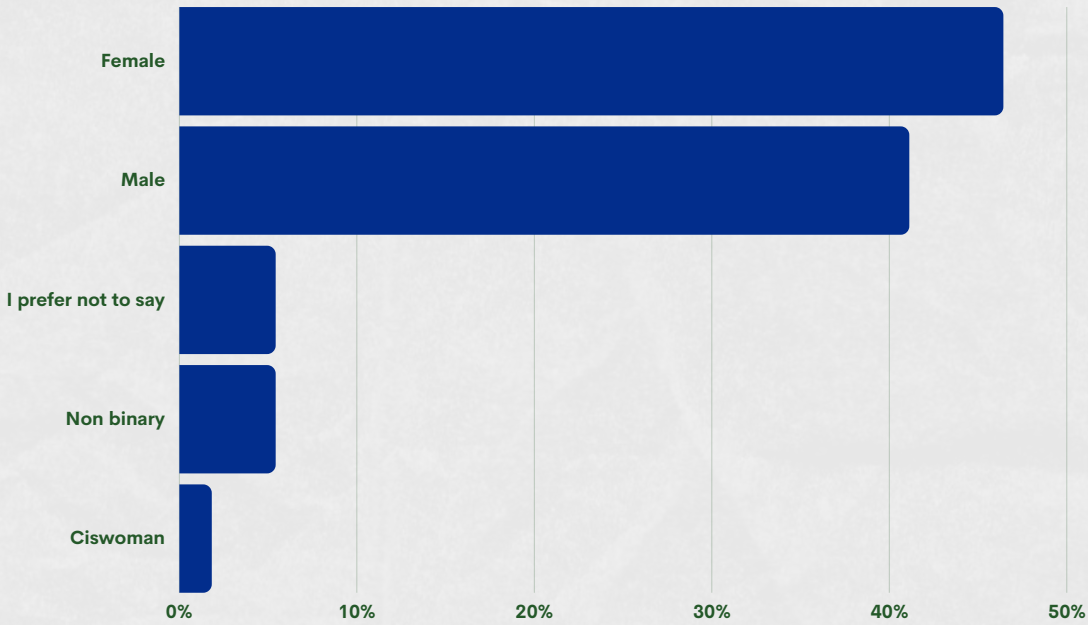
gender of respondents: Nigeria



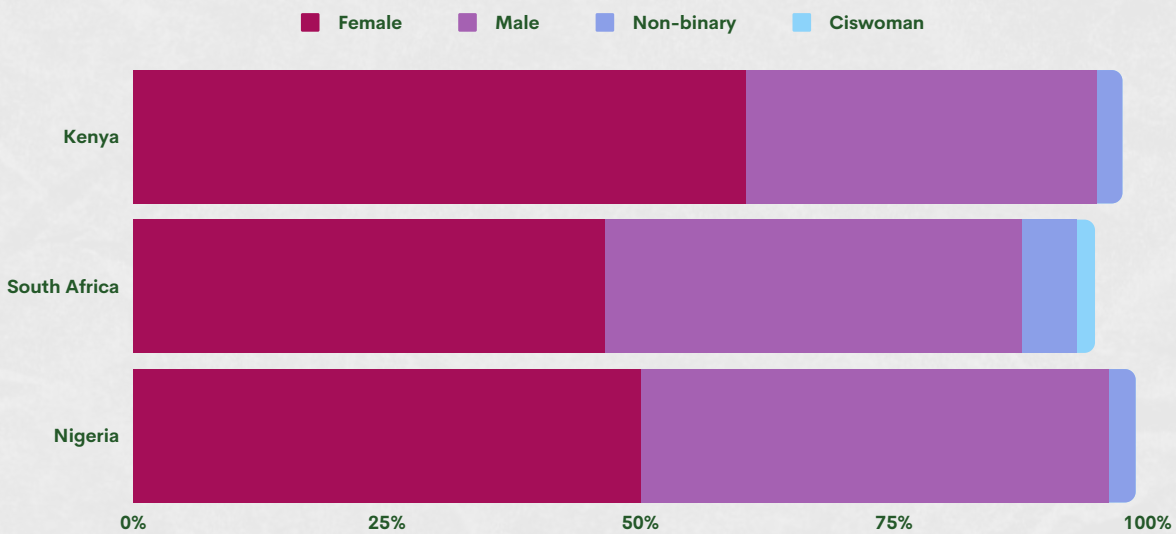
“  
**Our take:**  
Overall and within the individual countries, non-binary audiences are significant and likely to increase as podcasts grow that offer representation for them.  
”



gender of respondents: South Africa



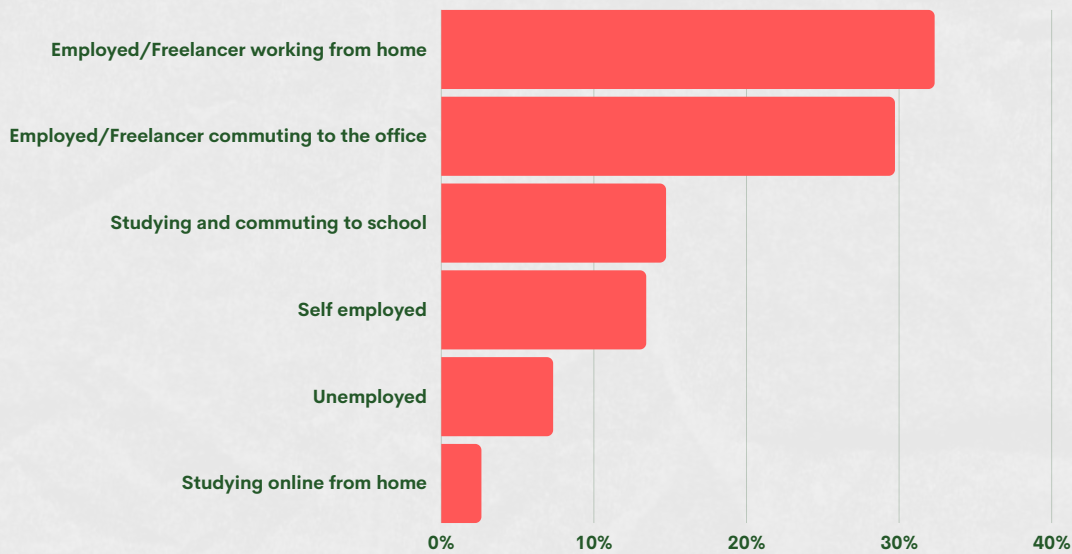
gender of respondents: combined



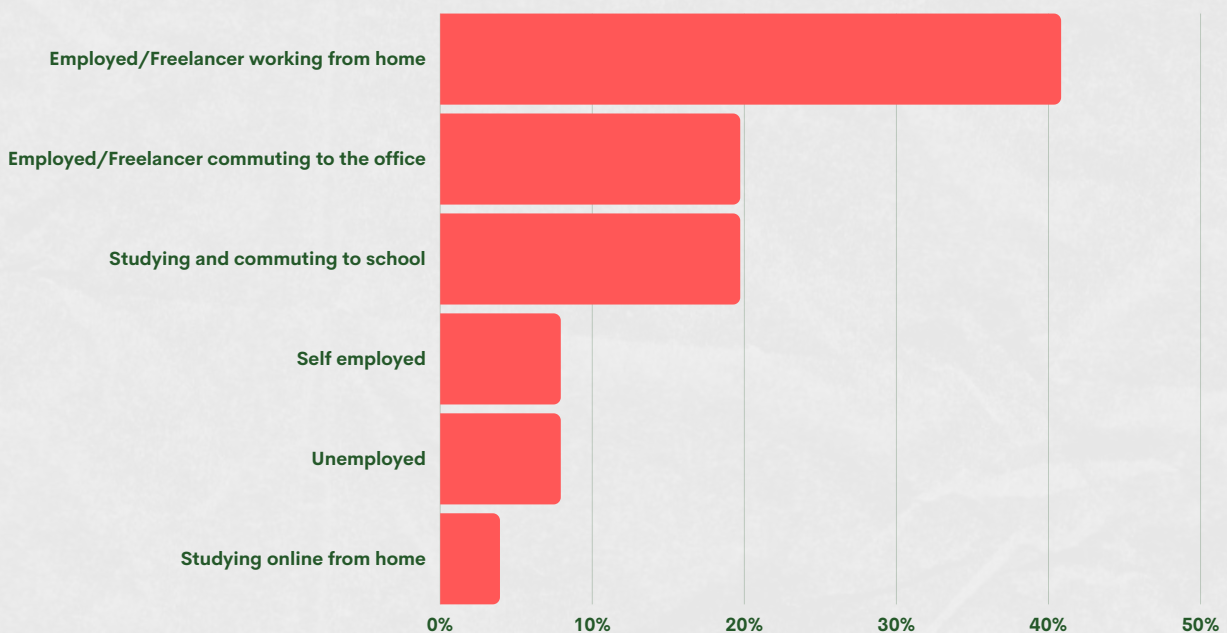




day to day engagement: Kenya

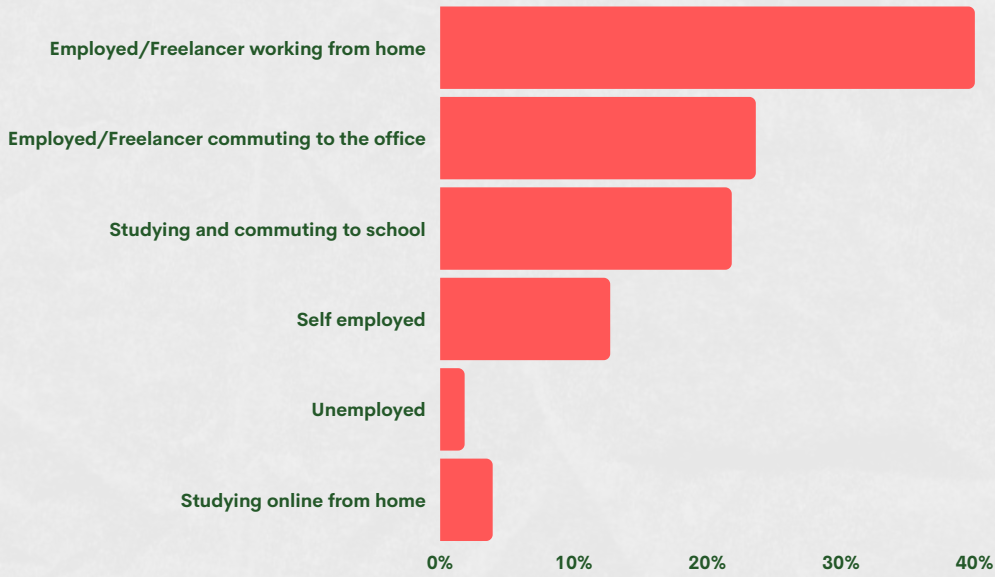


day to day engagement: Nigeria

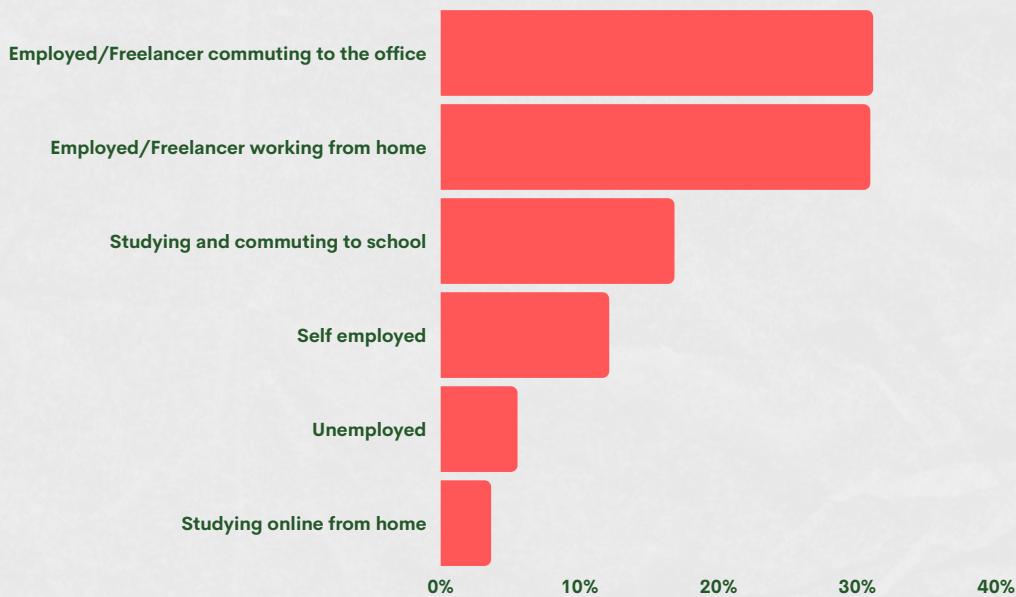




day to day engagement: South Africa



day to day engagement: overall







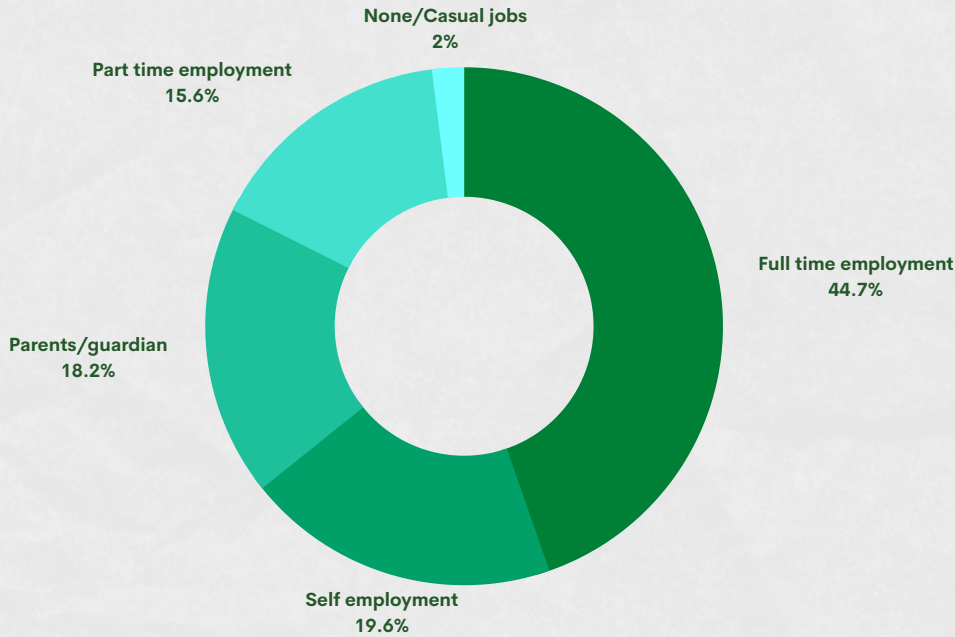
Melissa Mbugua (left) and Josephine Karianjahi (right) , Co-Founders of Africa Podfest, during the proceedings of Africa Podcast Day 2022

(Image: Marcus Olang' / Stills by Marcus / Africa Podfest)



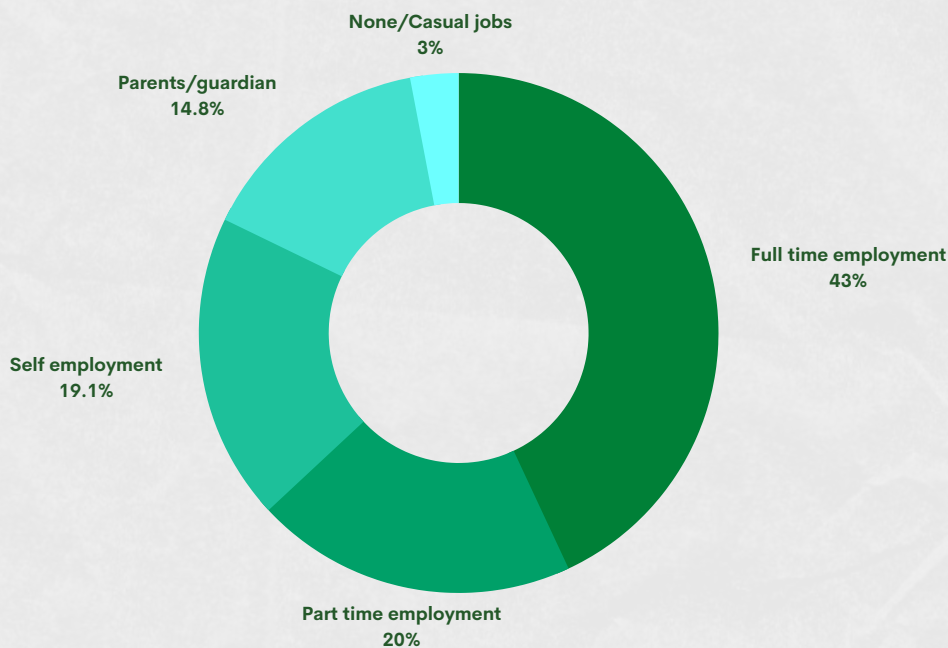


main source of income: overall



“  
**Our take:**  
Majority of podcast audiences are income-earning. This indicates a possibility of commercial opportunities in the industry.  
”

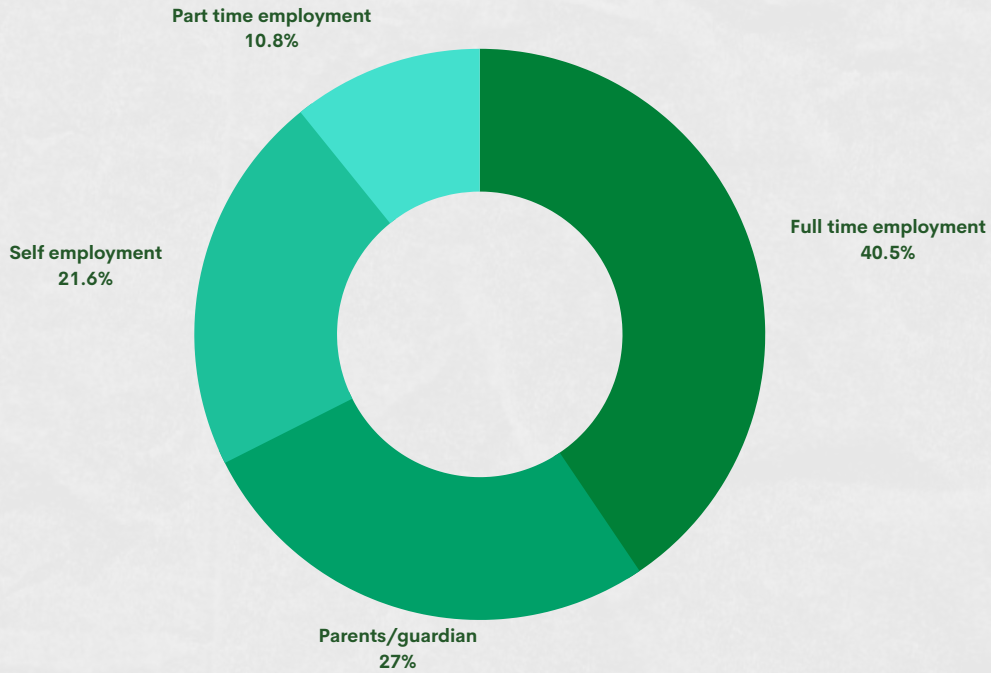
main source of income: Kenya



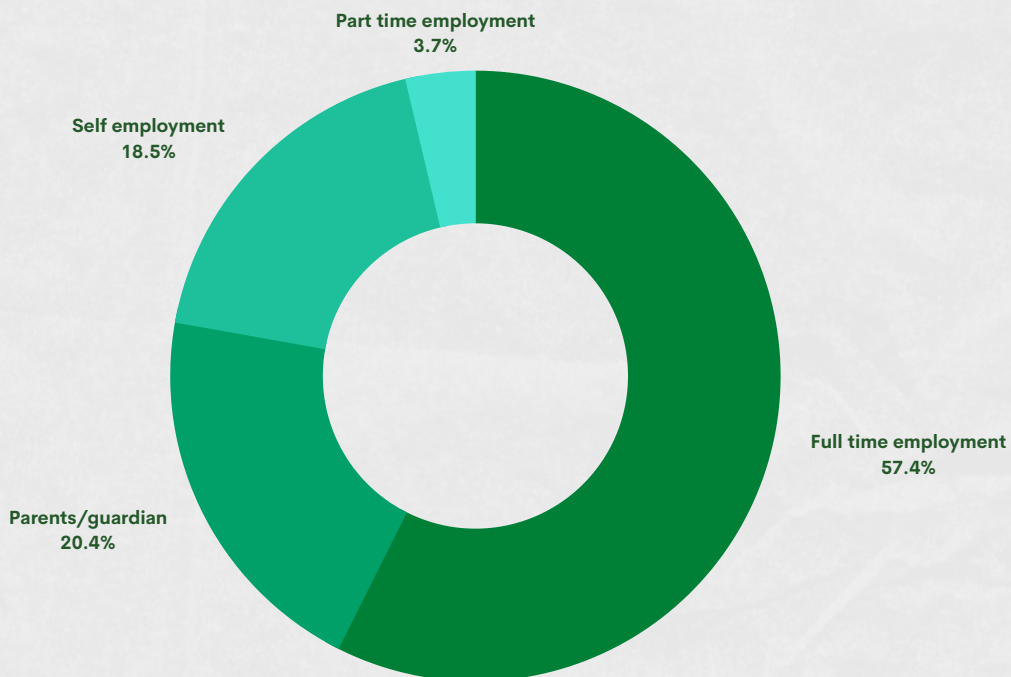




main source of income: Nigeria



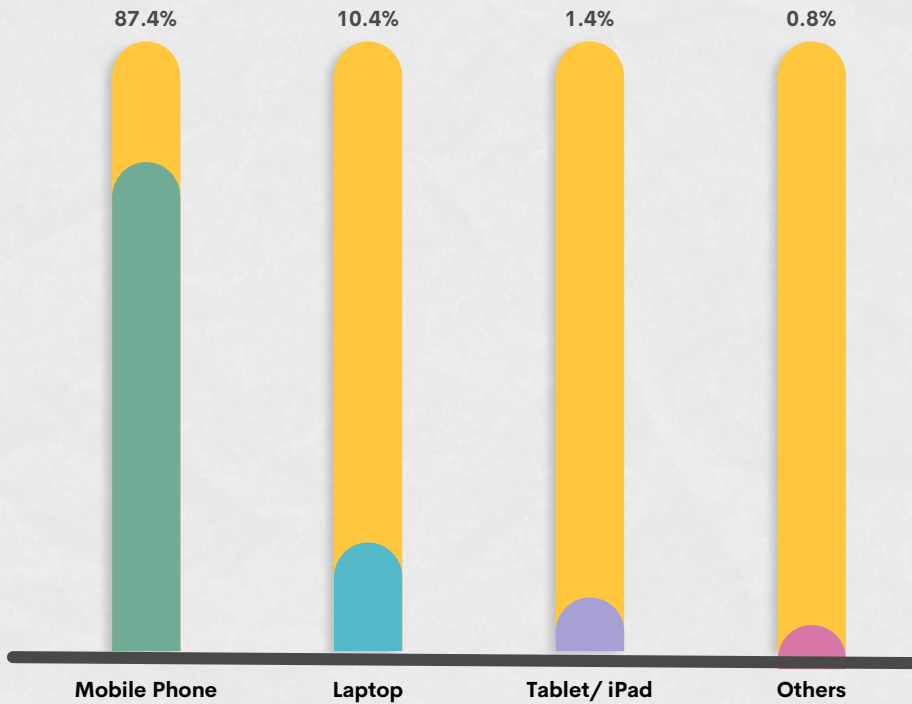
main source of income: South Africa



# africa podfest's research, part one



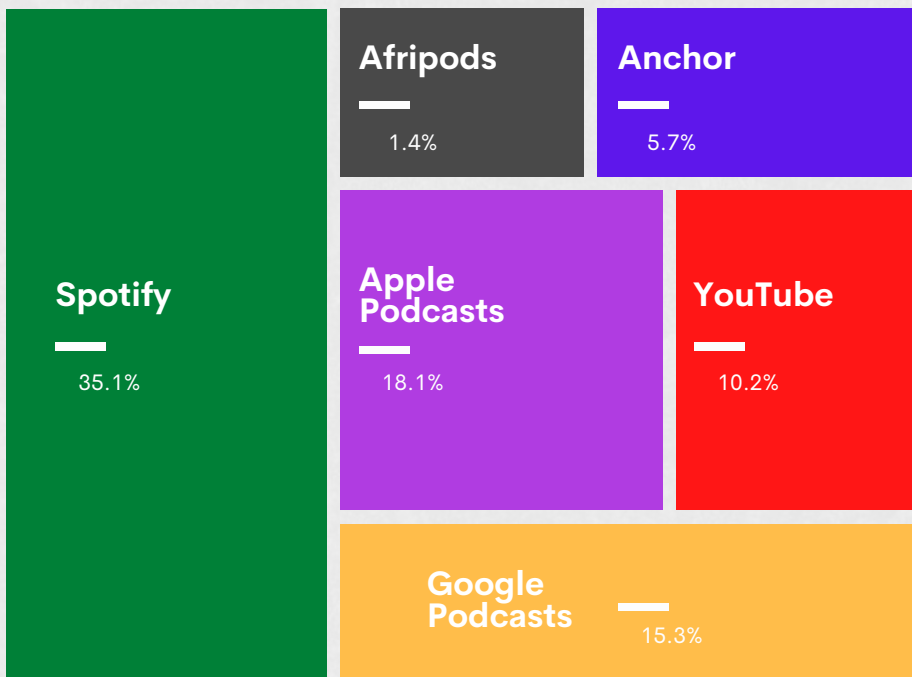
## device used to listen to podcasts: overall



**Our take:**

Mobile phones are the major device used to access podcasts. This aligns with Africa's high mobile internet penetration and usage patterns.

## app most used to listen to podcasts



**Our take:**

This is a snapshot of the current state of play. As media technology players continue to make moves in Africa, this is set to be highly dynamic.

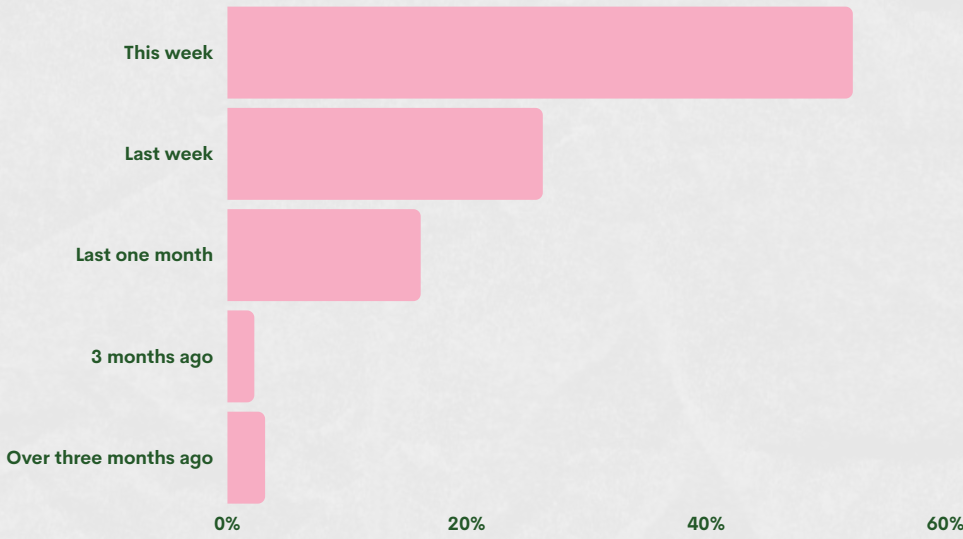




# africa podfest's research, part one



## last time listened to podcast: overall



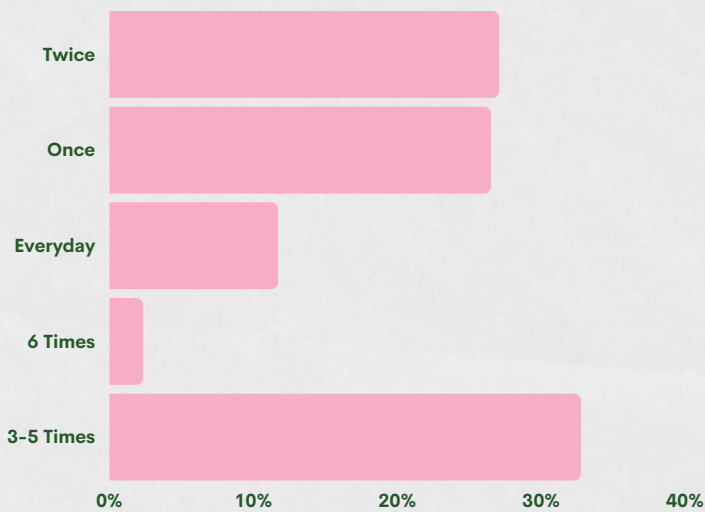
“

### Our take:

Audiences are highly engaged with podcasts, as most are listening frequently.

”

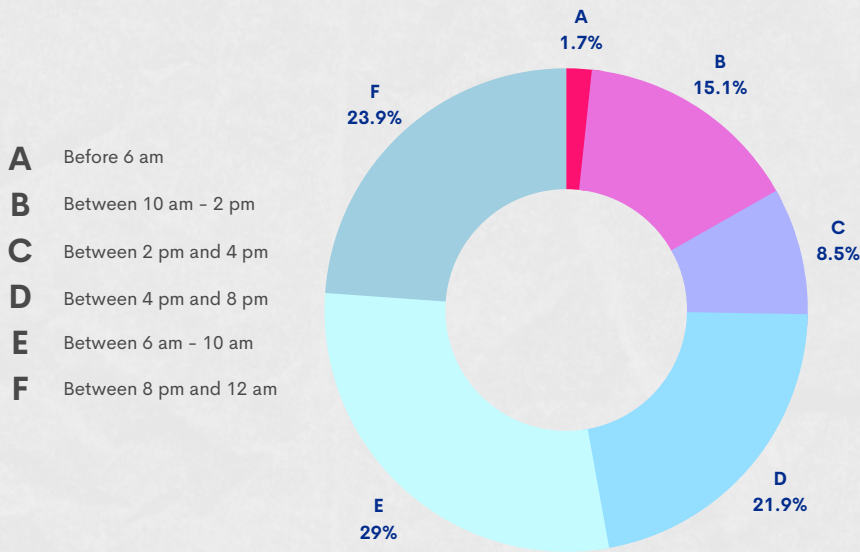
## frequency



# africa podfest's research, part one



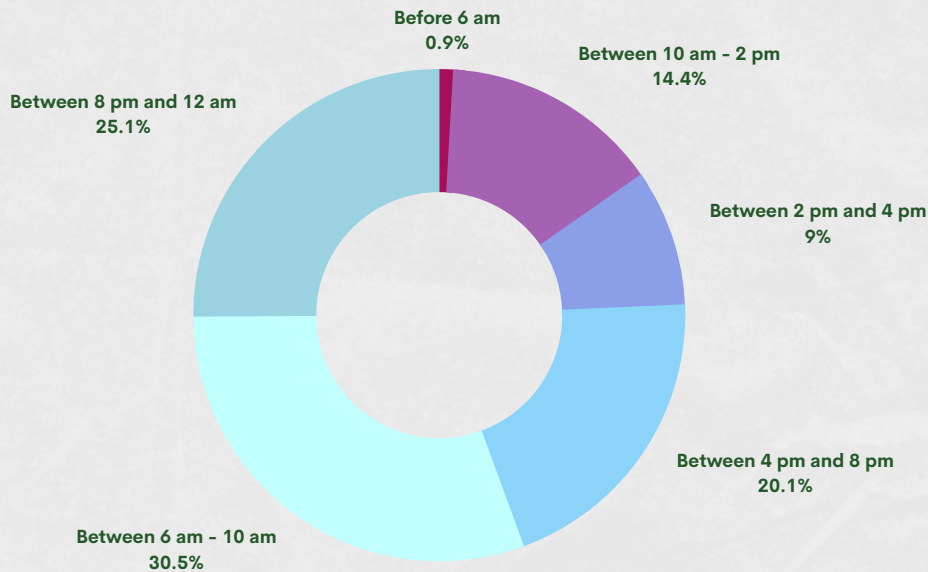
## time of day listening to podcasts: overall



**Our take:**

For podcast producers, time of day when podcasts are most listened to is informative for designing content that fits with audience preferences. The distribution shows that podcasts have unique 'peak' and 'off peak' times compared to radio which tends to follow commuter patterns, and this is a significant consideration for all podcast producers across the media industry.

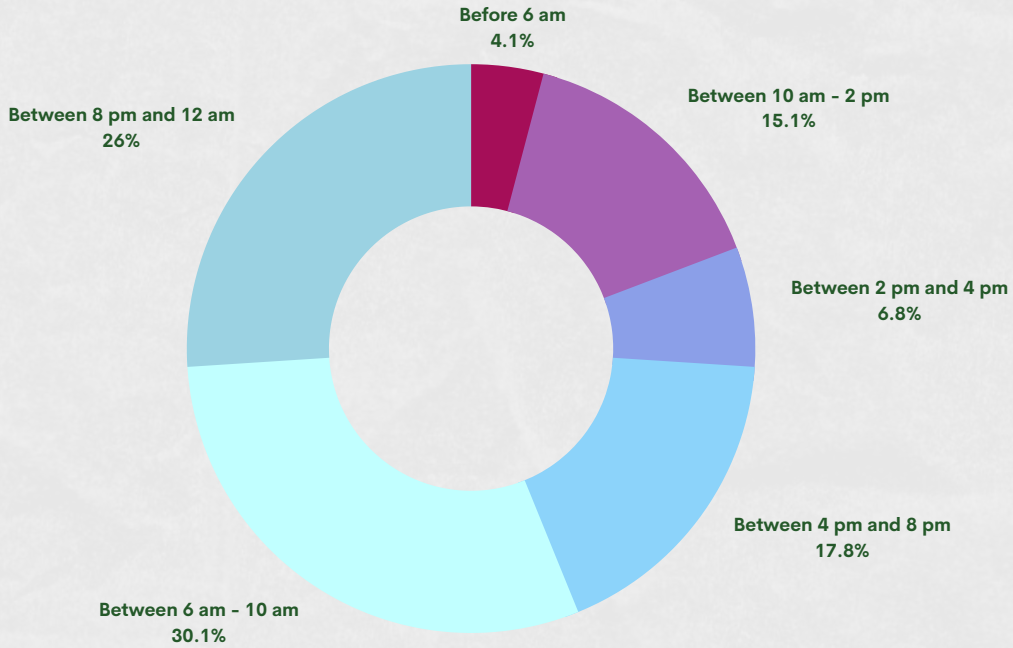
## time of day listening to podcasts: Kenya



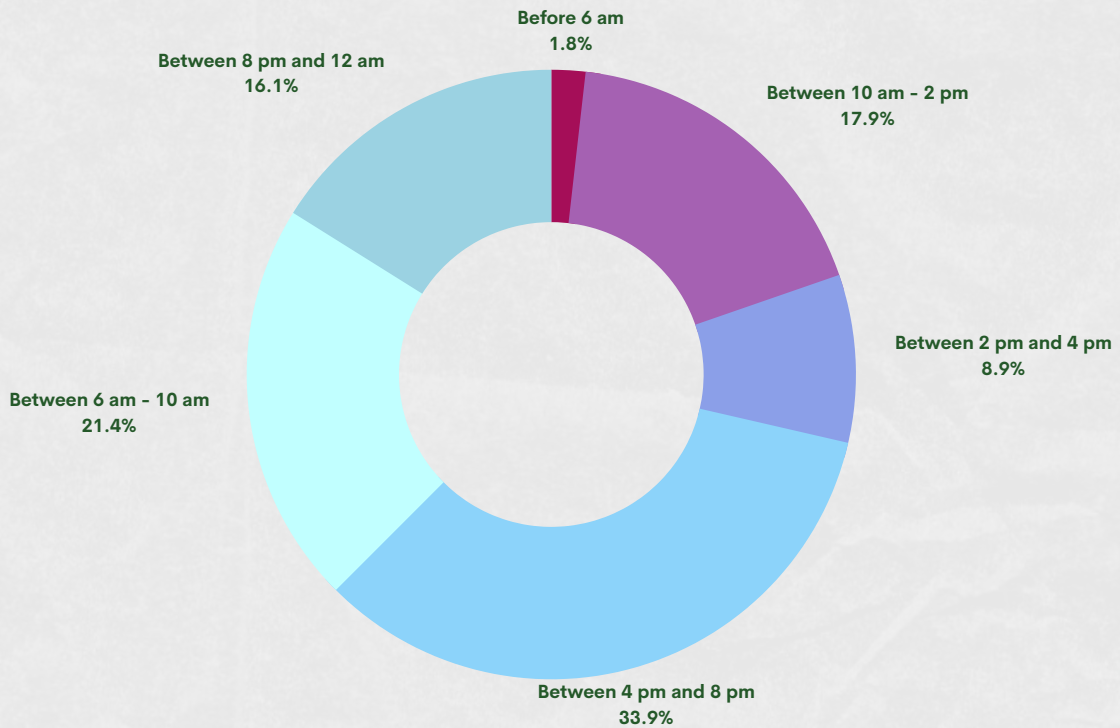




time of day listening to podcasts: Nigeria



time of day listening to podcasts: South Africa





A moment during the South Africa leg of the Discovery Tour.

(Image: Marcus Olang' / Stills by Marcus / Africa Podfest)



Josephine Karianjahi and Melissa Mbugua, during the proceedings of the 2022 edition of Africa Podcast Day, by Africa Podfest

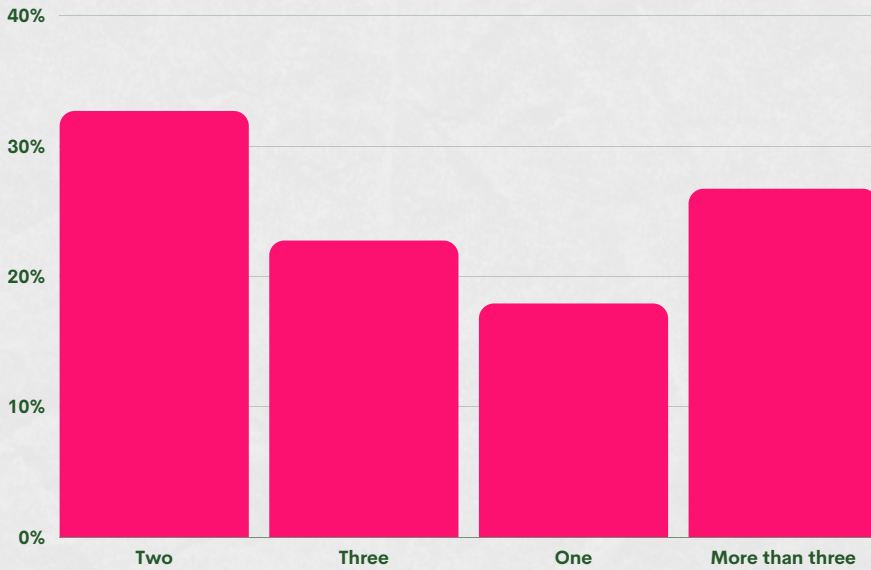
(Image: Kathomi Maorwe / Africa Podfest)



# africa podfest's research, part one



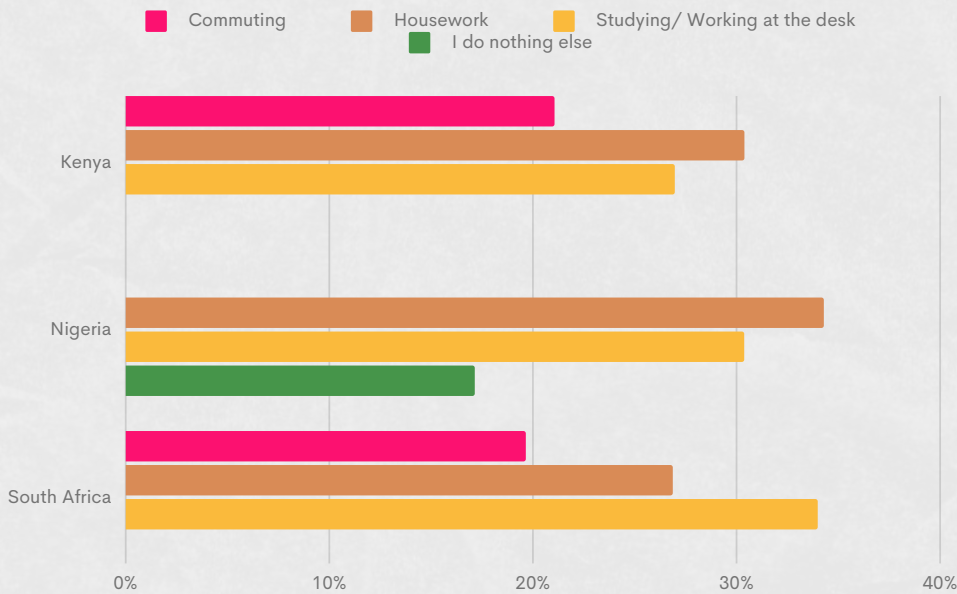
## number of podcasts listened to regularly: general



**Our take:**

The distribution indicates that audience appetite for podcasts is significant and there is room for diverse kinds of podcasts to meet the audience's various needs.

## activities when listening to podcasts



**Our take:**

In Nigeria only, podcast audiences listen as a sole activity. They also do not listen while commuting. This differs widely from the South Africa and Kenya results.

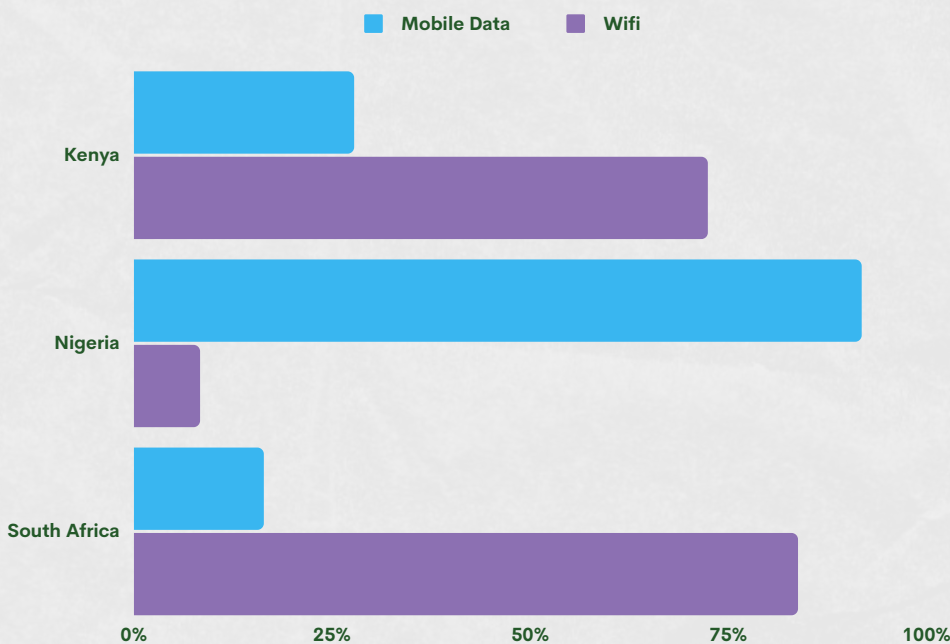
In all three countries, a large proportion of the audience listens at home.



consumption by theme



how podcasts are accessed



**Our take:**

In South Africa and Kenya, wifi is the main channel of access.

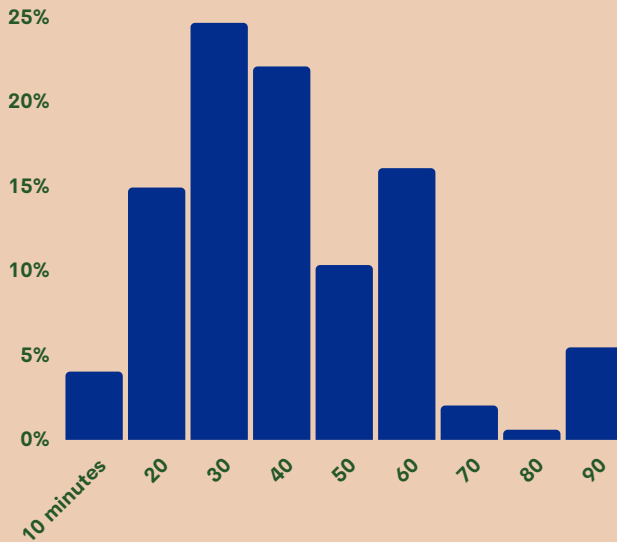
In Nigeria, mobile data is preferred.





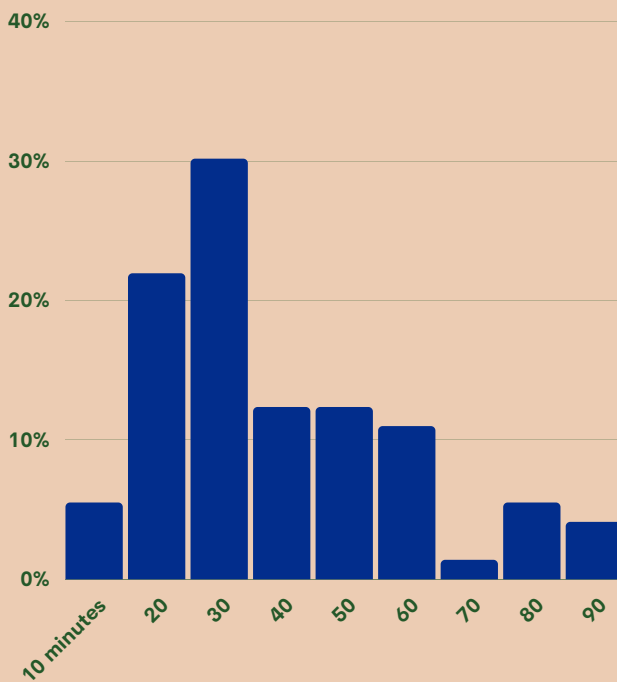
ideal podcast duration

Overall



“  
**Our take:**  
Across the three countries, the most preferred length of a podcast for audiences is between 30 to 40 minutes.”

Nigeria

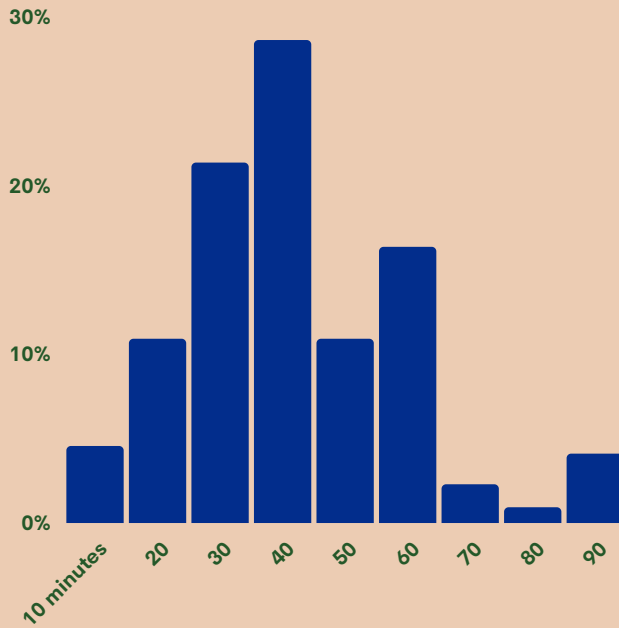


“  
**Our take:**  
In Nigeria, the most preferred length of a podcast episode is 30 minutes.”



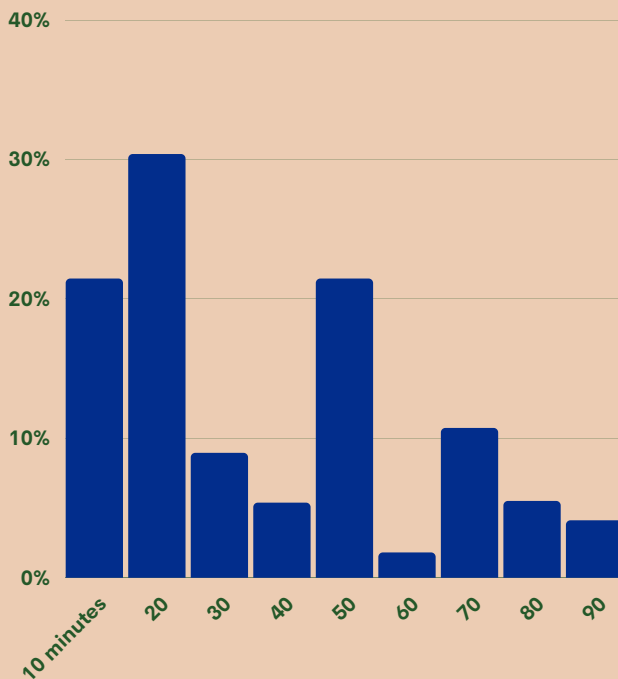
ideal podcast duration

Kenya



“  
**Our take:**  
In Kenya, the most preferred podcast length is 40 minutes.  
”

South Africa

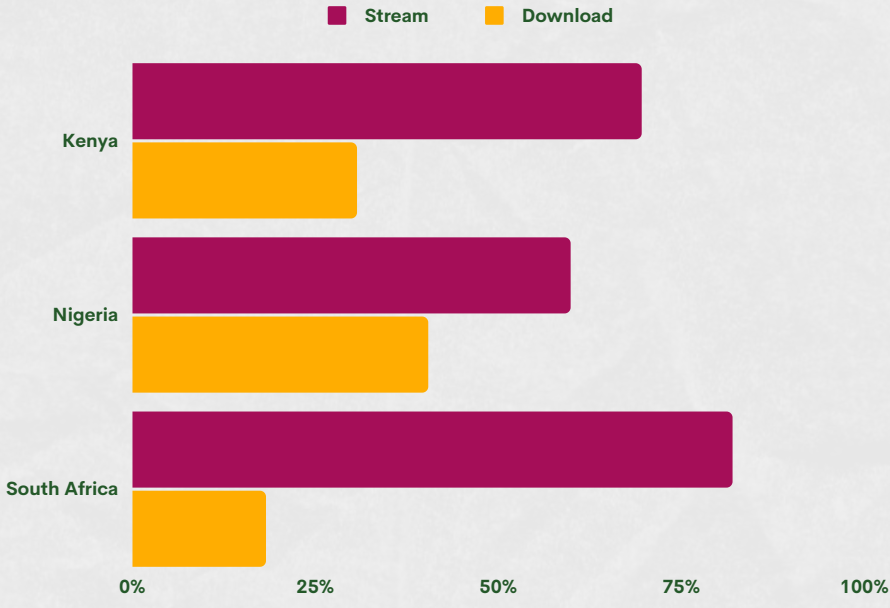


“  
**Our take:**  
In South Africa, the most preferred podcast episode length is 20 minutes.  
”





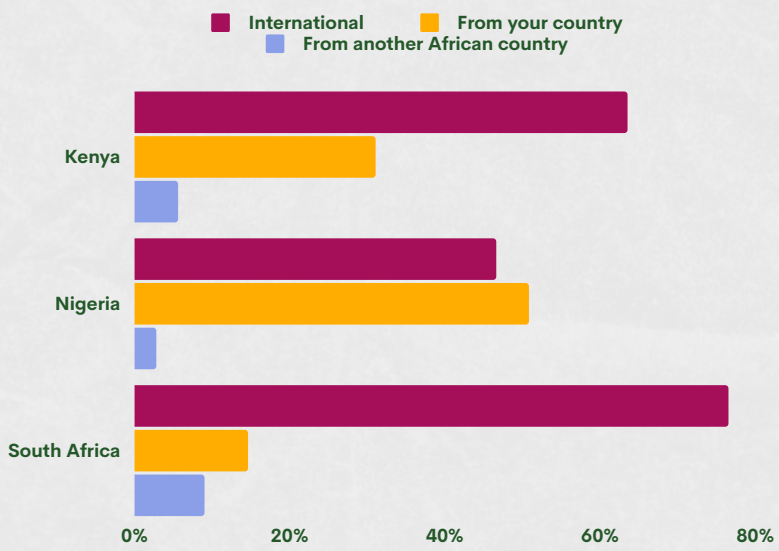
## stream vs. download



**Our take:**

Audiences prefer to stream rather than download podcasts. Notably, in Nigeria where mobile internet is the preferred channel of access, streaming is also high.

## podcast category most listened to



**Our take:**

There is a huge gap in awareness of African podcast among audiences in Kenya and South Africa. In Nigeria, audiences listen more to local podcasts than international, suggesting that podcast awareness is higher.



A moment during the Zambian leg of the Discovery Tour.

(Image: Africa Podfest)



Laura Ekumbo (middle), Aleya Kassam (right), and Anne Moraa (left), of The LAM Sisterhood, during the proceedings of the 2022 edition of Africa Podcast Day, by Africa Podfest.

(Image: Paul Otieno / Africa Podfest)





## **DIGGING INTO AFRICA PODFEST'S INDEPENDENT RESEARCH, PART TWO:**

**Exploring opportunities for income generation that could lead to sustainable growth in podcasting communities in Kenya, South Africa, and Nigeria**





These findings were derived from analysing a total of 11 in-depth interviews between podcasters and stakeholders from Kenya, Nigeria, and South Africa. The data is presented as follows:

### *financial opportunities*

As the main aim of this research was assessing ways of generating income, this code was key in understanding how established podcasts were able to generate income through their podcasts as well as manage costs which in turn allows for more financial resilience. Financial opportunities varied from podcast to podcast depending on the business structure of the podcast and in turn, the motivation behind starting it.

From respondents from South Africa, some financial opportunities are in the form of paywall/patreon models where subscribers pay per month to access content. Commercial sponsorships, which were also found to generate income in Kenya, was another source of income in South Africa. Another income source is using other people's money (OPM) such as sponsors to fund and generate further income through production of more podcast episodes. This option is less favourable as it requires a dependency on other people. A South African Podcasters also said

**“The server fee is covered by the cost of the amount of subscribers, which I'm grateful for. For newer podcasts that we make sometimes if we can get a sponsor, then we'll split the sponsor between myself and the talent in a revenue share deal.”**

This point illustrates that server fees, which are dependent on audience numbers are key in income generation. The relationship between audience numbers is explored further in chapter 4.3 and supports the findings from Africa Podfest “is this mic on” report from 2021 December. Furthermore, private equity, grants and learning to cut production costs by self-sourcing and learning the skills required to ensure the podcasters not only know how to record a podcast episode on their own but can produce, edit and upload respective episodes without outsourcing has been a way to generate income and save where possible in both South Africa and Kenya.

Conversely, other podcast producers in South Africa and Nigeria mentioned that though sources of income would be favourable, the main focus was not generating income. Instead, they wanted to focus on being creative, gaining knowledge, putting stories and content out there as seen in the quote below:

**“I'm going like, yes. I won't earn money, but I'm going to earn something which is knowledge.”**





In Kenya, respondents shared that money is not directly generated from podcast episodes but from partnerships which in turn increase podcast value further allowing for more partnerships to be formed allowing for income generation, it is a cycle that feeds into itself positively. A Kenyan commercial stakeholder also confirmed that given how young podcasting is on the African continent, it is not yet profitable and instead revenue is constantly moving up and down, though there is immense opportunity for growth and generation income.

Respondents from Nigeria shared that a smaller team allowed for a reduction in costs, like both Kenya and South African Respondents who chose to not outsource production skills but learned how to produce their own episodes to avoid further costs. Media grants and partnerships with brands were also quoted as a source of income from one Nigerian respondent as seen in the quote below.

**“Um, I think for the first time, my journey as a podcaster, I had, I worked with brands this year about five. One of the brands literally helped them produce in my podcast, like hundred percent.”**

It is important to note that podcast producers interviewed in Nigeria were not generating as much income for reasons which will soon be explored.

### *barriers to financial opportunities*

Some barriers to financial opportunities in South Africa included scepticism on the value of podcasts and their ROIs (return on investment). This was also similar in Kenya where investors are concerned with KPIs (key performance indicators) but do not understand the metrics used to measure the output from podcasts and therefore do not see the value of partnering with podcast producers. This is seen in a quote by one Kenyan commercial stakeholder as he says:

**“What are these matrixes we can hang, onto, and won't be surprised by, So you run a campaign on Facebook, you know, reach engagement since. So, for the period of time that you've been running the campaigns, you know, this what you'll expect from. So, we always look to that security of these pillars that you can extrapolate to these new platforms. So, the moment a new platform is catchy on certain pillars. that's the frame of which podcasts are being looked at. If it was a radio show on like Terrestrial radio, no one would be asking these questions because you can be assured of reach.”**



This reinforces the idea that so long as the measures of outputs from podcasting remain unclear or are not completely understood, it will be less likely that investors will want to put money into podcasting. As a result, investors and brands are still more assured of radio because of the measurable and more “verifiable” streams though, this is disputed by another idea from another Kenyan podcaster who previously worked in radio and says:

**“They will put money into traditional media platforms that do not have even a quarter of the numbers or the insights that podcasting gives you in real time. For example, radio. And so I worked at a radio station, let's call it AFM, right? Yes. And we would say that we have, um, 7 million people, for example, listening to the station, we're basing this on research that we did like six to seven months ago.... And then we'll come and tell this person and the ad agency, we have 7 million people, listen for station, put your advert that you're going to spend 1.5 million, put it on the breakfast show at between 7 and 7:05 or 7 and 7:15. Right. And you'll charge you an arm and a leg, that's one of the most expensive hours on radio. Yes. But why, why is this a lie? We have lied to you that this 7 million people that we've we've figured are listening to very dubious ways are listening all the time.”**

Podcasters also share the fact that needing to share audience numbers as proof or justification for funding may be disheartening especially in the early stages of podcasting. Further barriers to financial opportunities in South Africa also include the fact that branded podcasts do not work as audience members listen to the podcast for their specific content/topic and not because certain brands are affiliated with said podcast therefore, branded partnerships may not always lead to an increase in income revenue. Promotion of podcasts is also an expense that has been seen to be a financial barrier in South Africa as the reach is lower because of the lack of promotion for some podcasts in South Africa. As a result, podcasting being a fairly new concept on the African continent and there being a need to create new models for business, it can be difficult to gain loans from the bank to assist with podcast costs as the true value of podcasting is not seen, which is a similar concept to what the Kenyan commercial stakeholder quoted above.

In Kenya, data showed that a lack of desire from listeners to subscribe or pay for content such as podcasts was a barrier to income and as a result, understanding audience behaviour was key to overcoming this barrier which will be further touched on in section 4.3 There is also difficulty in registering companies as NGOs which in turn, results in podcast companies needing to be registered as commercial businesses leading to increased costs as seen in the quote below.

**“It's registered as commercial. Um, the parent company that is unfortunately, which means that I, now, whether I make money or not have to, um, pay certain things.”**





A lack of trust and the need to be selective about business leads and partnerships was also noted which could also be seen as a barrier to financial opportunities. It is important to build relationships between podcast producers and trust that the people whom podcasters are in partnership with share similar values and visions of the podcast. There is a sense of honour as podcast producers are being entrusted to share someone's story and want to ensure anyone else involved understands that, which can be difficult to find as is the case in Kenya.

Additional barriers also include a lack of understanding of quality podcasting, story development, and structuring as one podcaster shared:

“*People don't see, uh, or rather the people I've worked with, they don't understand that podcasting is actually like stuff needs to be scripted, uh, stuff, like you still have to develop the podcast. So it's not like I have an idea and tomorrow you go make the podcast.*”

It takes time and patience which many people do not have and this, in turn, can lead to inconsistency when releasing content. Another podcaster also shared that a challenge is the lack of training and skill development in the area of podcasting which in turn does not allow for good quality podcasts to be produced as the focus at institutions is primarily geared towards news production as seen below:

“*Hopefully they'll start offering courses in podcasting, a KMC. I know they have a course in, in radio. Yeah. Producing, but it's mainly geared towards like news news, uh, programs.*”

Further to that, commercial stakeholders also made mention of the fact that investors struggle to see the economic value of Podcasting in Africa and that a lack of easy searchability and discoverability also means many good quality podcasts are going unnoticed.

In **Nigeria**, a similar issue was noted as there is a tendency for restrictions on creative freedom from partnerships and brand which can dissuade podcast producers to want to work with brands and in turn generate income. It was also noted that from the podcast producers we spoke to based in Nigeria, impact was more important than profit therefore, the business structure doesn't focus on the generation of income but instead focuses on ensuring key, taboo or even sensitive topics were shared with the intended audience. Podcast producers also mentioned the time and commitment it takes to record and upload episodes was also a barrier to sustainable growth and therefore income generation, this was also the case in Kenya as “not being able to podcast full time” was mentioned by a few podcasters. Lastly, the uptake of podcasting among audiences, in general, is slow which in turn influences audience numbers and has an impact on income generation which is further discussed next.



During the proceedings of the South African leg of the Discovery Tour.

(Image: Africa Podfest)





### audience numbers

In the previous study by Africa Podfest and Baraza Media Lab (December 2021), all podcasters interviewed discussed the importance of audience numbers. They talked about the importance of such metrics when seeking monetary partnerships such as “episode downloads” and “duration of listening.” These partnerships are forms of income generation hence the decision to use “audience” numbers as a code for this study. This study not only explores the number of people listening to the podcast episode but also their behaviours, such as their decisions to download rather than stream which also counts when looking at the number of episode streams and downloads.

A South African podcast stakeholder says:

“**Unfortunately, the only way to make money off of anything in media is to provide a guarantee that there is a significant audience there, right?**”

In addition to the above quote, he reemphasises that building an audience is very important when trying to generate income through sponsors and partnerships as seen in the quote below:

“**Right. And that's, I think, and that's, I think what people oftentimes forget and don't, and don't put enough effort into, and it's so amazing because they're, they're very good at putting the effort into chasing up brands for sponsor this, do this, let's do this collaboration, all of that kinda stuff where, you know, try and building audience. But now I know it's also difficult because how do you attract people to content? You know, in this age of like, um, hyper targeting with Facebook ads and LinkedIn and Twitter, all of that kind of stuff. It's very easy to send your content, your video, your YouTubeing to an audience, whereas podcasts aren't like that, um, podcasts, you can't, I can't add, uh, advertise a podcast that will land in your Facebook feed. Um, well I think there's a work around now with Spotify, but yeah, there's never been that kind of targeting level. There're no shortcuts to building an audience. Um, which I think is also probably why those podcast audiences are so valuable.**”

Which is why being able to show you have a wide reach through audience numbers is key.



In Kenya, on one hand podcast producers know the importance of the premium subscription model similar to that of Spotify and Apple. On the other hand, they are also reluctant to introduce such models to their audience prior to understanding their audience behaviours such as their willingness to pay consistently. This is because they also want to ensure they retain their audience even in the transition to a premium subscription model which would allow for consistent income generation. This is illustrated in the quote below. Further research into this issue has been suggested to understand if audience members would pay for such services

**“And so I know we generally say Kenyans, don't like to pay for, for things, which to some extent they, there's proof around that.”**

In Nigeria, there is also an understanding that the larger the audience, the more money that can be generated directly from the different audio content that is available, either by charging listeners fees or through services rendered. Interestingly, unlike Kenya and South Africa, Nigeria has had an easier experience creating an audience for its audio content industry as a result of the Nollywood film industry, also known as Asaba as this Asaba model demonstrated that local content is indeed consumed and allows audience members to invest in local audio content as it is a tried and tested model as seen in the quote below;

**“And that's now like created because of that, like it created like, um, audiences because the first thing you need to do when you create any content is to find an audience. And if there's no audience, you have to create that audience. And that takes time, and what Nigeria has that, that Kenya didn't have is that, that Nollywood that Asaba model created an audience that was, that knew that there's local content and it can be consumed. And it speaks to them, the, the films are not quality, but like they were, they were telling stories that people were longing to share and watch.”**

Some podcasters in both South Africa and Nigeria also discussed that focusing on numbers can be discouraging and that to them, the impact was more important than profit. One South African podcaster shared that their audience statistics included listeners from Brazil and Australia which is not their target market but shows interest from diaspora and international audiences.

**“Audience is hungry for African stories- even if not tailored for them specifically!”**

So though we understand audience numbers through streams, downloads and so forth are key indicators of value-based from traditional media platforms, this can also be a rather conflicting idea as this may shift focus the of podcasters from creating good quality content that is authentic to them and their audio content to then, focusing on having very specific audience numbers which may in turn influence the content they do create. This will be further explored in the discussion section.





### opportunities for growth and scaling up

As podcasting is still new and young on the African continent, we thought this would be an appropriate code to understand and learn from podcast producers and commercial stakeholders what opportunities there are for African podcasts and podcasters to grow based on their experience. Below was what was shared from each respective country.

In South Africa, opportunities included educating media companies to not rely on western expertise for guidance on podcast production but instead to generate key insights through research from the African continent. It was also noted that radio and podcasting can coexist and rather than compete for partnerships and brand deals, collaboration may help grow both platforms. This idea is further reinforced by key insights from Kenya where podcasters with a background in radio have been able to use and modify models for income generation used on radio, to create relevant models to allow their podcasts to be profitable.

Another suggestion was the compression of audio files to allow for a larger audience reach as explained in the quote below:

**“LBM Radio takes your audio, and let's say for me an average episode is about 95 megabytes and will make it like a 10th. So, you lose some audio quality, but now you are way more accessible because you're 9.5 megabytes smaller. You can listen to it on a much cheaper device as well.”**

WIFI is also key to increasing listenership as the audience having access to WIFI will allow them to have access to podcasts which will allow for podcast growth through the mechanism already discussed above. This is because of not wanting to or having to use their own megabytes which can be expensive when downloading content. This was also found to be the case in Kenya as a Kenyan podcaster shared her observation that when looking at audience behaviour and streams, she noted that majority of her podcasts streams were during the work week as seen below:

**“They only listen during weekdays. And I was like, this they're using wifi office. Like if we drop something on Saturday, there'll be no hits. Nobody's listening to them. And then suddenly like on Monday, Tuesday, everybody, the numbers are going up. So it's definitely, I wanna say people who have jobs that have wifi.”**



Overall, there is a need for more research to understand what brands and advertisers think will help with monetisation of podcasts. There is also room to explore new formats for podcasts to generate revenue. It is also beneficial to create a specific niche for your podcast as there may be less of a need to focus on numbers to gain funding as one podcaster shares:

**“If you have a niche targeted space, so you're targeting investors, like there's some investment podcasts that aren't, um, company related that are just funded by a company that are doing really well, but it's super niche and they don't necessarily have, or share their numbers. They are just like, this is who you are speaking to, um, it's the same with theirs.”**

Lastly, podcasters would benefit from understanding business relations within the industry and being intentional about who they are talking to, this would then ensure that these interactions work to the podcasts and podcasters' best interests and ensures podcasters are working with people who resonate with them at the same level.

A common opportunity for growth found in both South Africa and Kenya was business mentorship and building of podcasts networks which would allow for the sharing of resources and guidance on how to structure podcasts and make them profitable amongst other key things. Another podcaster also shared that there is a need for podcasters to understand their value and figure out how they will justify it to then apply for funding which would allow for income generation and podcast growth.

In Kenya, opportunities for growth identified were based on collaboration instead of competition with other audio content platforms including radio. This would also include learning from radio sustainability and income generation models which would act as a “template” to then help build and recreate original models for podcasts. Another approach identified which would allow for growth is ensuring an engaged audience as data has shown that the audience attracts business. Less regulation in the early stage of podcasting is highlighted as an approach to promote growth, as regulation stifles creativity which may make content less appealing to the audience. In contrast, it was noted that the novelty factor of podcasts and the fact that they not yet well understood can also allow for growth as podcasters are free to express themselves as they do not fall under the same scrutiny as traditional media entities and do not have to comply with certain laws. In turn lawyers are less incentivised to sue podcast producers unlike if they were in traditional media where there have been instances of stories getting blocked through court injunctions even before they air.





Further opportunities for growth and scaling up include working with NGOs who would be willing to sponsor specific episodes, further emphasizing the benefits of having a very specific or themed podcast or episodes. Being able to teach people how accessible and easy-to-use podcasts are would ensure a wider reach with regards to audience as illustrated by a Kenyan podcaster who taught her mother to listen to podcasts below:

**“People like my mom, cause my mom can listen to a, a podcast and she listens to podcasts. Cause I made her listen to the one I made, but she's worried about her data or like, it's just too much navigation. Like now I have to go where to go, where to go, you know? Yeah. But like once you teach them like that, like then, um, it becomes easy and easy and easy. And for me, my advocacy is as always been, let us educate our audiences and by educate, I just mean like, make it seamless for them.”**

Commercial stakeholders shared the importance of having statistics available to share with investors or donors and also re-emphasised that business models need to be original and cannot be imported from other contexts for them to be successful in the African context. Overall, there is a strong belief that though young, “Africa is going to be the largest podcasting market in the world.”

In Nigeria, opportunities for growth included carving out your own niche, and carving out new opportunities such as reaching out to non-profit organisations who might want to start a podcast. It was identified that moving beyond conventional methods would be key to gaining more opportunities for growth and income. There is a need for specialised podcast marketing services as being able to market your podcast is just as important as being able to create a good podcast. Sponsorship opportunities and pooling internal resources for sharing among podcasters to manage their production costs would allow for podcast growth as there would be more accessible resources. Nigeria also benefits from the Nollywood film industry and according to a podcaster based in Nigeria, podcast producers may have more brand sponsors if podcast were associated with Nollywood start “as you already have a face” that is well known and will ensure higher streams from the Nollywood stars fan-base. Lastly, quality control of audio content to ensure that consistent high-quality content is being produced would contribute to the industry's sustainability as a result of the content being more appealing to the audience.



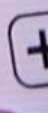


**Africa Podfest**  
We inspire and elevate podcasters in  
Africa looking to create and grow their podcasts.



(Image: Africa Podfest)

#WeAreAfricaPodfest



To





## SUMMARY AND RECOMMENDATIONS





These results build on existing evidence of the rapid growth of podcast usage in all three countries and the evidence that South Africa, Kenya and Nigeria are the most developed podcasting markets on the African continent. Indeed, there is value in podcast creation through storytelling on the African continent, and the bringing of African voices together but, as podcasters do deserve to generate income from the work they do, these findings and further research are key to exploring, researching, and overcoming the barriers faced by people within the podcasting industry to ensure they are sustaining their craft and also, profiting from it. The hope is these findings can also inspire upcoming podcasters to dive into the world of podcasting and rather than start at zero, use these findings and future research to build a business model that allows growth and income generation whilst, allowing the content that they share to be authentically theirs and not influenced by pressure to wanting to appease investors or brands as ways to generate income.

## key take-aways

1. Most audiences earn income and this shows that there is potential for commercialisation, for which there is room for experimentation, given appropriate investments.
2. While there is high disparity between capital cities and other urban centres, the significance of audiences in urban centres outside the capitals indicates potential for growth outside the norm that is mostly associated with podcasts. While internet accessibility becomes deeper in countries outside major cities, it strengthens the potential for podcast growth, especially if podcasters create content that appeals to communities outside the big cities. This bursts the myth that podcasts in Africa are only listened to in the big cities by very few audiences. Our data tells us a contrary story of expansion.
3. African audiences are mostly female and non binary. This aligns with our previous findings that podcasters are driven by a need to create content for underrepresented voices and communities such as women, youth, differently abled and queer communities. The opportunity for massive growth lies in meeting the unmet demands of these niche audiences.
4. Mobile is the place to grow. Investment in technology that meets audience and podcaster needs in the African context is likely to spur the kind of growth that would deliver on the promise of podcasting and audio on the continent. This is already demonstrated in the music industry.





5. Understand that the 'rules of the game' are different in podcasting. The survey data showing the time of day when podcasts are most listened to is informative for designing content that fits with audience preferences. Its distribution shows that podcasts have unique 'peak' and 'off peak' times compared to radio which tends to follow commuter patterns, and this is a significant consideration for all podcast producers.

6. The popularity of themes is distributed across niche interests. Of particular interest is how this diverges from mainstream media, which is highly focused on politics/ current affairs and sports. The divergence points to an opportunity for investment in the growth of alternative content themes that appeal to the emerging audiences who are moving more towards digital content. It also corresponds to the pull of podcasts to audiences who are underrepresented in mainstream media.

7. Across the 3 countries, podcast producers are keeping their costs low by working with lean teams, managing overheads and leveraging partnerships to subsidise production costs and provide value in promotion, distribution and access to growth networks. All podcast producers we interviewed pointed to their strong confidence in the future success of their ventures. They are all patiently making investments in production and content quality, teams and laying a foundation for audience growth. However, a shared desire among them is to have access to financial investment that would enable them to expand distribution, audience growth and content production - in response to increased demand.

8. Commercial stakeholders need frameworks to measure return on investment, while podcasters are aware that investing in audience growth leads to significant impact on their commercial opportunities. There is a need to invest in collective advertising and sponsorship models such as through podcast networks, and to provide financial and technical support towards experimentation. This would kick-off the process of innovation in the commercial opportunities in African podcasting, leading to higher probability of financial success in the industry.

9. A key growth opportunity identified is educating media companies to not rely on Western expertise for guidance on podcast production but instead to generate key insights through research from the African continent.

10. Radio and podcasting can coexist and rather than compete for partnerships and brand deals and collaboration may help grow both platforms.



Overall, opportunities in Africa as part of the global podcasting arena are only beginning to be widely understood and explored. There is a need for more research and experimentation to understand opportunities for commercialisation of podcasts, given that podcast audiences in all three focus countries (Kenya, Nigeria and South Africa) indicate new opportunities for media engagement and podcasters are investing in the growth of a new kind of content that will attract new audiences. A common opportunity for growth found in both South Africa and Kenya was business mentorship and building of podcasts networks which would allow for the sharing of resources and guidance on how to structure podcasts and make them profitable. It would be good to understand through further indepth exploration, how this may be working in Nigeria.

There is also a need to provide growth-support to podcasters who have already demonstrated impact. Such support includes financial, capacity development and networking opportunities that would bridge the gap towards audience growth and financial sustainability. The nature of which country-specific frameworks would work in different African countries best is also worth further exploration.

Language use innovations in podcasting across Africa are also sure to provide valuable insights into future research. This report and the work were carried out in English, leaving room for expansion into many widely used languages of Africa.





Melissa Mbugua (left) and Josephine Karianjahi (right) , Co-Founders of Africa Podfest.

(Image by Marcus Olang' / Stills by Marcus)





2022. Understanding Value in Media: Perspectives from Consumers and Industry. White Paper. [online] World Economic Forum. Available at: <[http://www3.weforum.org/docs/WEF\\_Understanding\\_Value\\_in\\_Media\\_Perspectives\\_from\\_Consumers\\_and\\_Industry\\_2020.pdf](http://www3.weforum.org/docs/WEF_Understanding_Value_in_Media_Perspectives_from_Consumers_and_Industry_2020.pdf)> [Accessed 13 April 2022].
- (2021). Status of the Audiovisual Sector in Africa: Pan-African Federation of Filmmakers (FEPACI) Ouagadougou, Burkina Faso, April 1991. Black Camera 13(1), 150-172. <https://www.muse.jhu.edu/article/839617>.
- Adeleke, D., 2022. Communiqué 10: Can podcasts scale in Africa?. [online] Cmqmedia.substack.com. Available at: <<https://cmqmedia.substack.com/p/can-podcasts-scale-in-africa?s=r>> [Accessed 12 April 2022].
- African Union, 2022. 2021: Arts, Culture and Heritage | African Union. [online] Au.int. Available at: <<https://au.int/en/theme/2021/arts-culture-and-heritage>> [Accessed 23 April 2022].
- Ani, I., 2022. Nigeria's #EndSARS Movement and Media Suppression. [online] Columbia Journalism Review. Available at: <<https://www.cjr.org/analysis/nigeria-endsars-press-freedom.php>> [Accessed 23 April 2022].
- Caballero, A. and Bashir, S., 2022. Africa needs digital skills across the economy – not just in tech. [online] World Economic Forum. Available at: <<https://www.weforum.org/agenda/2020/10/africa-needs-digital-skills-across-the-economy-not-just-tech-sector/>> [Accessed 23 April 2022].
- Chakanetsa, K., 2022. Telling Africa's story: The future is podcasts. [online] The Mail & Guardian. Available at: <<https://mg.co.za/africa/2020-07-28-telling-africas-story-the-future-is-podcasts/>> [Accessed 7 April 2022].
- Chonghaile, C. and Stewart, K., 2022. Africa and the tech revolution: what's holding back the mobile continent? – podcast transcript. [online] The Guardian. Available at: <<https://www.theguardian.com/global-development/2016/jul/26/africa-and-the-tech-revolution-whats-holding-back-the-mobile-continent-podcast-transcript>> [Accessed 18 April 2022].
- Couldry, N., Livingstone, S., and Markham, T. (2010) Media Consumption and Public Engagement: Beyond the Presumption of Attention. Houndmills: Palgrave. 247 pp.
- Dovey, L., 2021. Entertaining Africans: Creative innovation in the (internet) television space. In Television in Africa in the Digital Age (pp. 15-37). Palgrave Macmillan, Cham.
- Deutsche Welle, 2022. Africa's Mobile Gender Gap: Millions of African women still offline | DW | 09.08.2019. [online] DW.COM. Available at: <<https://www.dw.com/en/africas-mobile-gender-gap-millions-of-african-women-still-offline/a-49969106>> [Accessed 20 April 2022].
- DW, 2022. Simon Kolawole: Mob censorship in Nigerian media is real | DW | 17.02.2021. [online] DW.COM. Available at: <<https://www.dw.com/en/simon-kolawole-mob-censorship-in-nigerian-media-is-real/a-56586611>> [Accessed 20 April 2022].
- Edison Research, 2022. The Infinite Dial 2022 South Africa – Edison Research. [online] Edison Research. Available at: <<https://www.edisonresearch.com/the-infinite-dial-2022-south-africa/>> [Accessed 1 April 2022].
- EC, 2022. Audiovisual and Media Services. [online] Shaping Europe's digital future. Available at: <<https://digital-strategy.ec.europa.eu/en/policies/audiovisual-and-media-services>> [Accessed 28 April 2022].
- Fox, K. & Ebada, Y. (2022). Egyptian Female Podcasters: Shaping Feminist Identities. *Learning, Media and Technology*, 47(1), 53–64. <https://doi.org/10.1080/17439884.2021.2020286>  
[https://fount.aucegypt.edu/faculty\\_journal\\_articles/3594](https://fount.aucegypt.edu/faculty_journal_articles/3594)
- Gachago, D., Livingston, C. and Ivala, E., 2016. Podcasts: A technology for all?. *British Journal of Educational Technology*, 47(5), pp.859-872.
- GeoPoll. 2022. Radio, TV and Internet Audience Statistics in Kenya – Q1 2021 – GeoPoll. [online] Available at: <<https://www.geopoll.com/blog/q1-2021-media-stats-kenya/>> [Accessed 2 April 2022].
- KN Law LLP. 2022. KFCB issues Co-Regulation Framework for Broadcast, Over-the-Top, and Video-on-Demand Services – KN Law LLP. [online] Available at: <<https://kn.co.ke/kfcb-issues-co-regulation-framework-for-broadcast/>> [Accessed 14 April 2022].
- La Torre, M., 2014. *The economics of the audiovisual industry: Financing TV, film and web*. Springer Nature.
- Ligaga, Dina. "'Virtual Expressions': Alternative Online Spaces and the Staging of Kenyan Popular Cultures." *Research in African Literatures* 43, no. 4 (2012): 1–16.
- Lobato, R. and Thomas, J., 2012. An introduction to informal media economies. *Television & New Media*, 13(5), pp.379-382.
- Marcocci, F., 2022. The skills you need to launch a podcast – BookMachine. [online] BookMachine. Available at: <<https://bookmachine.org/2020/06/29/the-skills-you-need-to-launch-a-podcast/>> [Accessed 21 April 2022].
- Nendo.co.ke. 2022. Report: Impact of COVID-19 on 10 Sectors of Kenya's Economy. [online] Available at: <<https://www.nendo.co.ke/covid>> [Accessed 9 April 2022].





- News24, 2022. First WhatsApp drama launches in SA | Channel. [online] Channel. Available at: <<https://www.news24.com/channel/TV/News/first-whatsapp-drama-launches-in-sa-20170602>> [Accessed 24 April 2022].
- Nightingale, K., 2022. Pod-ready: Podcasting for the developing world. [online] SciDev.Net. Available at: <<https://www.scidev.net/global/features/pod-ready-podcasting-for-the-developing-world/>> [Accessed 16 April 2022].
- Olówósejéjé, S., 2022. What Nigeria's poor power supply really costs and how a hybrid system could work for business. [online] The Conversation. Available at: <<https://theconversation.com/what-nigerias-poor-power-supply-really-costs-and-how-a-hybrid-system-could-work-for-business-144609>> [Accessed 2 April 2022].
- Oturu, D. and Takuro, K., 2022. Regulating Nigerian Content On Broadcasting Platforms: An Examination Of The Amendments To The 6th Edition Of The Nigeria Broadcasting Code - Broadcasting: Film, TV & Radio - Nigeria. [online] Mondaq.com. Available at: <<https://www.mondaq.com/nigeria/broadcasting-film-tv-radio/954936/regulating-nigerian-content-on-broadcasting-platforms-an-examination-of-the-amendments-to-the-6th-edition-of-the-nigeria-broadcasting-code>> [Accessed 18 April 2022].
- Pew Research Center, October 2018, "Internet Connectivity Seen as Having Positive Impact on Life in Sub-Saharan Africa"
- PwC, 2019. Insights from the Entertainment and Media Outlook 2019-2023. [online] Pricewaterhouse Coopers. Available at: <<https://www.pwc.co.za/en/publications/entertainment-and-media-outlook.html>> [Accessed 5 April 2022].
- Royston, R.A., 2021. Podcasts and new orality in the African mediascape. *New Media & Society*, p.14614448211021032.
- Republic of South Africa, 2022. *White paper on audio and audiovisual content services policy framework: Comments invited*. Government Gazette. Republic of South Africa.
- Reuters Institute for the Study of Journalism, 2022. *Reuters Institute Digital News Report 2020*. [online] Reuters Institute for the Study of Journalism. Available at: <<https://www.digitalnewsreport.org/survey/2020/kenya-2020/>> [Accessed 1 April 2022].
- Salaudeen, A., 2022. *Will podcasts become the new radio?*. [online] Stearsng.com. Available at: <<https://www.stearsng.com/article/will-podcasts-become-the-new-radio/>> [Accessed 6 April 2022].
- Tayo, A. and Alake, M., 2022. *The podcast goldrush in Nigeria*. [online] Pulse Nigeria. Available at: <<https://www.pulse.ng/entertainment/celebrities/the-podcast-goldrush-in-nigeria/sngfb6j>> [Accessed 7 April 2022].
- Samanga, R., 2022. *Can hateful and abusive podcasts be stopped in SA?*. [online] New Frame. Available at: <<https://www.newframe.com/can-hateful-and-abusive-podcasts-be-stopped-in-sa/>> [Accessed 19 April 2022].
- Steinmueller, W.. (2008). ICTs and the Possibilities for Leapfrogging by Developing Countries. *International Labour Review*. 140. 193 - 210. 10.1111/j.1564-913X.2001.tb00220.x.
- Taneja, H., 2014. *Media consumption on the world wide web: Integrating theories of media choice and global media flows to explain global cultural consumption* (Doctoral dissertation, Northwestern University).
- Tayo, A. and Alake, M., 2022. *The podcast goldrush in Nigeria*. [online] Pulse Nigeria. Available at: <<https://www.pulse.ng/entertainment/celebrities/the-podcast-goldrush-in-nigeria/sngfb6j>> [Accessed 7 April 2022].
- THE SUN, 2022. *NFC: 2021 Nigeria – South Africa film Audio-Visual deal begins*. [online] The Sun. Available at: <<https://www.sunnewsonline.com/nfc-2021-nigeria-south-africa-film-audio-visual-deal-begins/>> [Accessed 20 April 2022].
- UNESCO, 2022. *The African film Industry: trends, challenges and opportunities for growth*. [online] United Nations Educational, Scientific and Cultural Organization (UNESCO). Available at: <<https://unesdoc.unesco.org/ark:/48223/pf0000379165.locale=en>> [Accessed 22 April 2022].
- van der Merwe, R.L., 2021. Africa on demand: The production and distribution of African narratives through podcasting. In *Routledge Handbook of African Media and Communication Studies* (pp. 126-140). Routledge
- Wangari, N., 2022. *These podcasters are carrying African Languages into the new audio world*. [online] Global Voices. Available at: <<https://globalvoices.org/2022/01/18/these-podcasters-are-carrying-african-languages-into-the-new-audio-world/>> [Accessed 22 April 2022].

## about: africa podfest

[africapodcastfestival.com](http://africapodcastfestival.com) 

[hello@africapodcastfestival.com](mailto:hello@africapodcastfestival.com) 

[podcasting.africa](http://podcasting.africa) 




Africa Podfest is a woman-led Kenyan-based community-driven company which launched the very first Africa Podcast Day as a virtual event on February 12, 2020. Co-directed by Melissa Mbugua and Josephine Karianjahi, the company invests in our own value as Africans by inspiring and elevating African podcasters. Our vision is to create a sustainable and inclusive podcasting industry across Africa. We serve the under-resourced voices who are opening space for freedom in society including youth, low-income communities, women, activists, LGBTQA+ people and people with disabilities.

Although Africa Podfest as a company began with an annual event, it has since grown into a community platform with year-round programming in its two years of existence, running an annual international podcasting festival, carrying out original research, maintaining the African Podcast Database, hosting regular events, and telling stories of African podcasting through our newsletter, blog and social media. Learn more on our website: [www.africapodcastfestival.com](http://www.africapodcastfestival.com)

## about: baraza media lab

[barazalab.com](http://barazalab.com) 

[info@barazalab.com](mailto:info@barazalab.com) 



Baraza Media Lab is a new and exciting space for networking, collaborating, and experimenting among Kenya's media practitioners such as journalists, bloggers, writers, artists, podcasters, filmmakers, animators and other cross-disciplinary collaborators.

We provide the space and resources needed to enable media and entrepreneurs to collaborate, innovate and drive the growth and capacity of independent media.

By supporting collaborative storytelling ideas, methods, and delivery platforms; raising the skill and capacity of media practitioners; and providing an environment for new business models to emerge, we aim to build a community of like-minded media practitioners committed to acting in the public interest.





# DISCOVERY TOUR, DATA EDITION

Mapping out the present & future of African audio storytelling

An April 2022 Report

