

Media ownership models, editorial policies, and priorities in Sub-Saharan Africa

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We are working with a vastly expanded ecosystem of what MEDIA is:

For our purposes we are working with **8** entertainment and media segments, because there are now serious censorship, access, and representation in all these areas:

- **Newspapers**
- **Magazines**
- **Television (free-to-air and PAY)**
- **Radio**
- **Filmed entertainment**
- **Recorded music**
- **Book publishing**
- **Out-of-home advertising/billboards**

Three countries in Sub-Saharan Africa – **South Africa, Nigeria, and Kenya** account for nearly **90% of advertising and entertainment spending**, and 75-80% of newspaper readership.



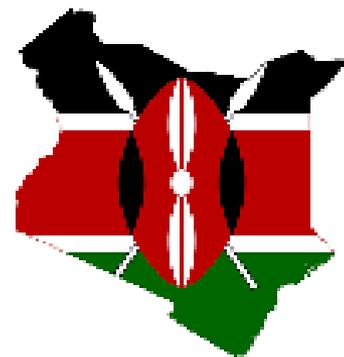
US\$5Bn by 2019



US\$4Bn by 2019



US\$3.3Bn by 2019



South Africa, Nigeria, Kenya (and Ghana) are the only Sub-Saharan markets where newspaper circulation in the last 50 years ever went over 150,000 copies (Egypt was only one in Africa to hit over 1.5 million).

Today, Nigeria no more in that class, and by 2020 too Kenya looks unlikely to have NO title selling over 100,000 copies. In last year, across the continent circulations have fallen by 35%-50% and stock value of some listed companies have fallen by as much as 85% - a result of digital disruption, demographic shifts, and a lack of imagination in the editorial response to the crisis of the industry.

Media ownership models have had mixed impact on business success of media, and media freedom in SSA:

- Listed media companies (South Africa, Kenya, Uganda)
- State-owned and partially listed (Uganda)
- Party and state owned – many
- Church, NGO, United Nations – quite a few
- Private individuals – majority

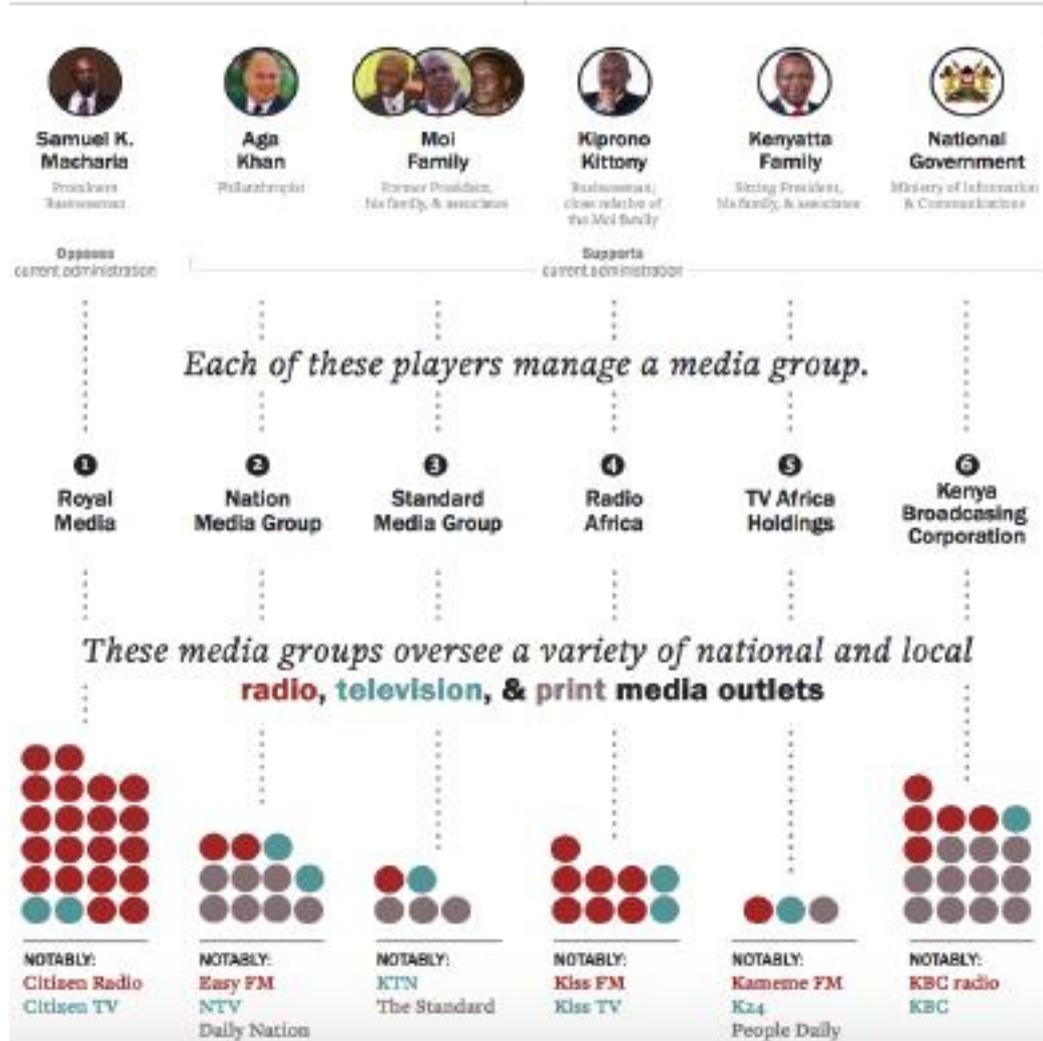
There are the old state control, and repressive laws. The most dominant form of editorial interference in the expanded private media market in SSA is corporate – but the newest is Chinese influence as in case of Independent Media in South Africa.

Kenyan Media Landscape at a Glance

6

MAIN PLAYERS

control the majority
of media in Kenya.



IRONY

In the larger, "older" African democracies, where free media has a longer history or is listed, you have higher concentration of ownership

Editorial Policies/Priorities

At base, there has been fairly limited diversity in editorial policies and priorities around Africa over the last 60 years. They all fall into FOUR broad categories – and they help explain nearly all that has happened and is happening in Africa media today.

- **Post-independence nation-building and consolidation.**
- **Post-conflict reconstruction.**
- **Post-Cold War political and economic reform and development in a globalised and digital age.**
- **The best and worst way to confront violent extremism.**