

dentsu wisdom series.

entertainment

like never before





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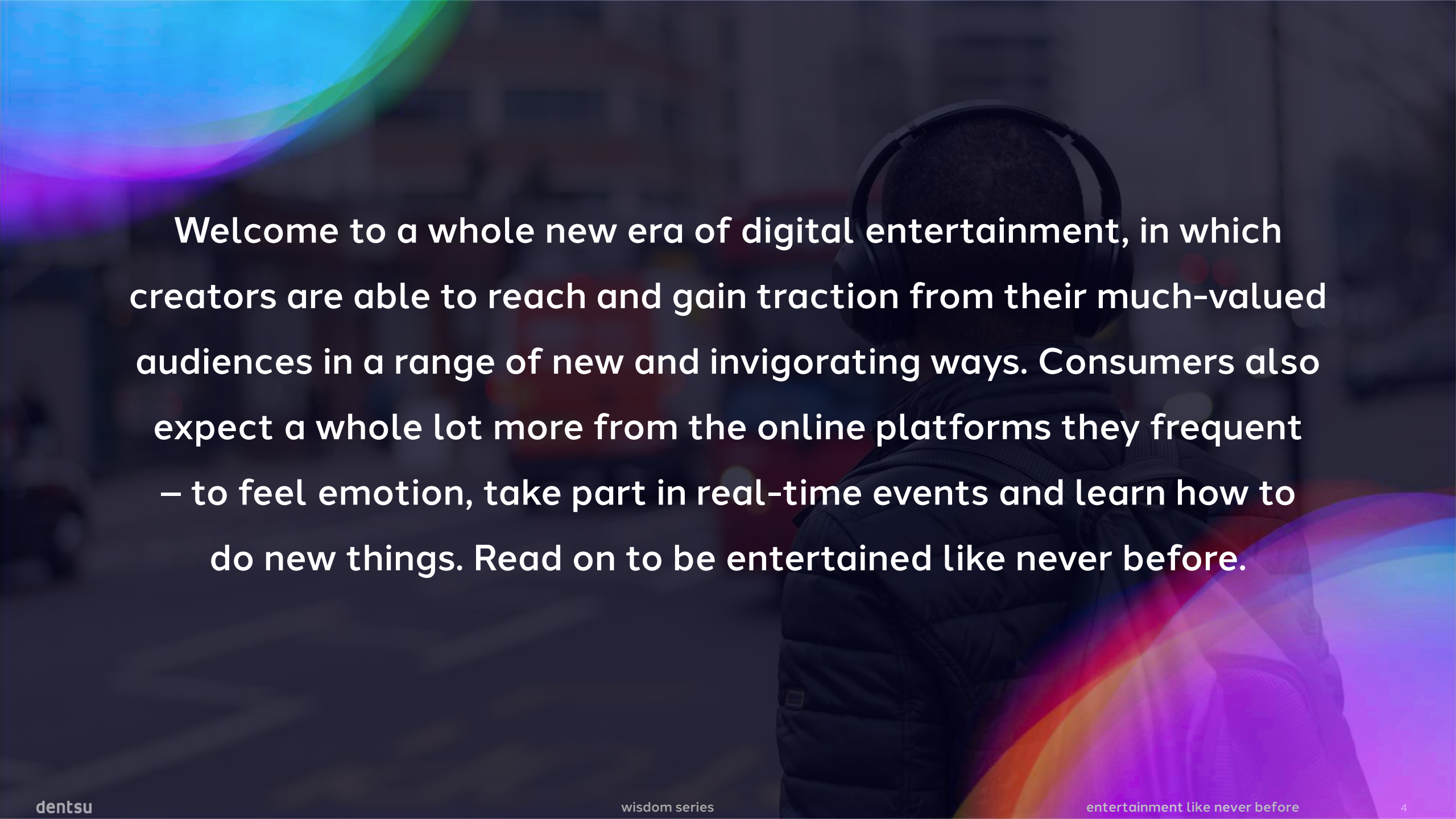
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- YouTube Listens In To Africa's Youth Market

EXECUTIVE SUMMARY

Entertainment Like Never Before

By Dawn Rowlands, CEO of dentsu SSA



Welcome to a whole new era of digital entertainment, in which creators are able to reach and gain traction from their much-valued audiences in a range of new and invigorating ways. Consumers also expect a whole lot more from the online platforms they frequent – to feel emotion, take part in real-time events and learn how to do new things. Read on to be entertained like never before.

Entertainment Like Never Before

Brands forging ahead in the digital entertainment arena today are fully on board with the extent to which they need to present new and emerging markets to the entertainment masses. “You don’t, after all, have to be based in Kenya to relish the excitement of *Super Sema*,” says Nadine Zylstra, Head of Kids and Learning for YouTube Originals. “All the animation is made locally, all the voices are created there, it is 100 percent created from Kenya. But ... the viewership is very, very global,” she enthuses.

And this, of course, is part of the impetus of YouTube initiatives such as the Black Voices fund, launched last October, specifically designed to build up new voices on the platform; a whole subset of which are African creators who appear to have the beginnings of what it takes to become an entertainment phenomenon. And YouTube’s goal, through that fund, is to amplify those voices because YouTube is a really effective place on which to build a global audience.

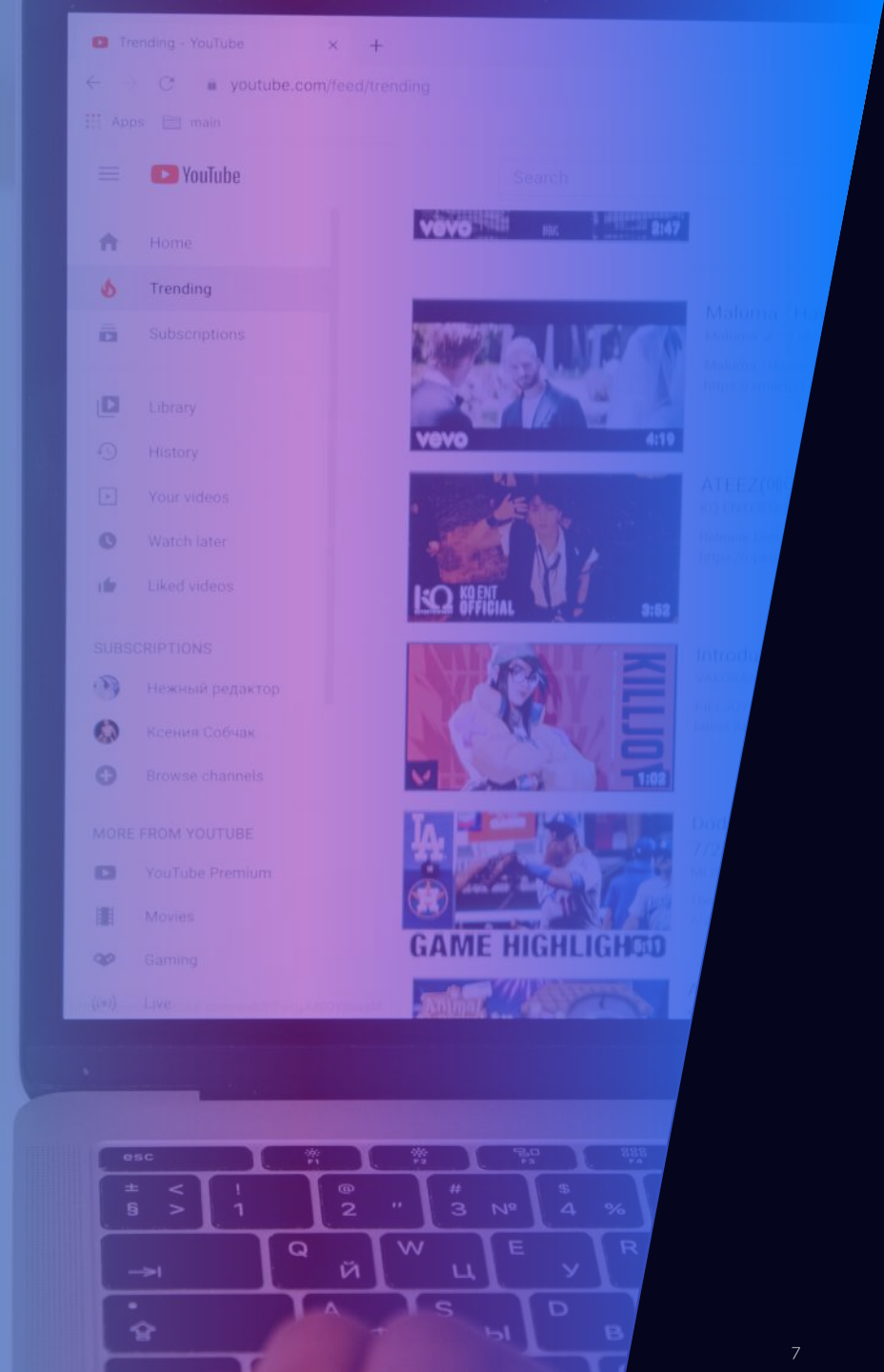
Entertainment Like Never Before

There are, of course, multiple ways in which to tell a story and content marketing is the way in which a story can be packaged. According to Roy Karuhize, content marketing strategist, creative and CEO of the TrueTribe Network, “A story can be packaged as a film, in music as a song, as an article – or even as a joke... And this is where we began to introduce the consumer... We’ve reached a point where the consumer is [rather precious] about their life space, they believe in the choices they are making and you can’t tell them what to do; you can just show them what you have to offer, and they will make the decisions themselves. In other words, you have to tell them a story, and see if they respond to that story and whether that story connects with them,” he enthuses.



Entertainment Like Never Before

But as our team of dentsu experts reveals on page 49, “Branded entertainment challenges you to make something that’s impossible to ignore. Stand so tall they can’t look over you. Be so *extra* that your presence takes up all the available free space. Don’t do it the way it’s been done before you. Or how it’s expected to be done.” So instead of making great content to sell something, it involves making content that connects with people’s “passion points”, which is where the content creators enter the picture and are so much more crucial, today, than – in fact – the original advertiser.



Entertainment Like Never Before

In fact an [article](#) by head of marketing at Contently, Joe Lazauskas, explains what happens when a story resonates with us: “Essentially our brains run on electrical pulses, and when we hear stories our brains light up. Neuroscientists have this saying that neurons that fire together, wire together. So, when we’re hearing a story and our brain is lighting up, you have all of these neurons that are then wiring together, which triggers us to remember more of the information we’re getting.” Lazauskas goes on to advise that a good story told well involves “relatability, novelty, fluency, and tension... [Plus] we really like content that is super easy for us to immerse ourselves in and where there’s a really low barrier to entry between us and the story we’re being told.”

But some audiences are harder to reach than others. Gen Z and the Millennials prefer to stream entertainment on channels that aren’t friendly to traditional advertising formats; they are known to skip and block ads – which highlights the importance of knowing how to speak to this segment of the market, how to put a client’s message in front of them and the importance of partnering, placement and collaboration to ensure that what is created is original and resonates with the unique interests and concerns of this youthful age group.

Entertainment Like Never Before

It comes as no surprise then that platforms such as TikTok and YouTube are investing heavily across Africa in growing the creators of the future, advises senior strategist for South Africa and sub-Saharan Africa at Carat, Megan Sayle. “Social content as 'bite-sized snippets of everyday life' has never been a more apt description of this media as it is today. With platforms such as TikTok becoming increasingly mainstream, we're seeing a shift away from the beautifully curated Instagram feeds of 2015 to a far more realistic portrayal of everyday reality – something both the creators and consumers, alike, are invested in.”



Entertainment Like Never Before



TikTok recently launched its Rising Voices initiative which aims to empower the dreams of 20 South African creators by offering them mentorship to become the content creators and entrepreneurs of the future. Just one example is @kaylaimkay, who focuses on mini vlogs, fashion, hair and food. “When she touches on these topics, though,” enthuses Sayle, “they’re from the perspective of a real person – showing the world what she does on hair-wash day and how she cooks her favourite rendition of two-minute noodles.”





A few cool rags-to-riches stories are among the mix, with @khaby.lame, a 21-year-old retrenched factory worker from Senegal, now wooing his TikTok followers from the glamour of Italy. He began making TikTok videos only 18 months ago and is already estimated to have over 100 million followers; he's worth between US\$1.3 and US\$2.7 million. That makes him second on the platform only to media personality and dancer Charli D'Amelio.

Entertainment Like Never Before

And then, of course, there's streaming – currently operational in more than 50 African countries – with the pandemic's many lockdowns seeing streaming-curious individuals taking and plunge and signing up. On Showmax, for example, reveals the platform's head of content in Africa, Candice Fanguero, "Trendy, current and local-celebrity-based reality content is feeding the need for voyeurism and escapism" because these choices allow viewers to "to sit back, relax and escape the chaos of everyday life by slipping into the lives of others". Fanguero adds: "All of our African markets are demanding local content and, as we roll out our hyper-local strategy, we see this appetite increasing – particularly in South Africa, Nigeria and Kenya".

But in other markets, such as Mozambique, creators are turning to social media and streaming platforms to find an audience that transcends their local borders and an increasing number of brands are seeking to associate themselves with such artists and their followings to take advantage of the trend. Notable among those who have overcome local challenges to rise to recent stardom include artists King Cizzy and Mark Exodus, filmmaker Mickey Fonseca, producer Ellputo and photographer Doug Condzo. The Odd One, page 32, also mentions 15 other Mozambican artists whose work you just have to take note of.

Entertainment Like Never Before

The challenges, of course, in growing the African digital entertainment niche include expensive data and a relatively low level of disposable income among its residents – but brands are working around this and prioritising the content requirements of their audiences over and above what the competition is up to or being overly fixated on current industry whims.



Entertainment Like Never Before

Of interest is the way in which streaming has “come to play a major role in helping both the talents and their fans to interact and make something good. Talents do not have to depend solely on events or endorsements; the key industry players now know they can make good money from the digital distribution of their intellectual content,” says Nigerian artist and repertoire expert Bizzle Osikoya.

More than ever, the consumers of content are dictating to the creators where and how they want to consume it – often with bite-sized snippets winning out over anything longer. Shorts are gaining in traction on platforms ranging from YouTube and Showmax to TikTok and Triller. With attention spans nowhere near what they used to be, it’s amazing to think that we used to be able to sit still and focus for the entire 75 minutes of a traditional feature film.





Contributors

Our Expert Panel

Our Expert Panel



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CHAPTER 01

Emerging Stars from Nigeria

By Tochukwu Macfoy, Content Team Lead at Storylab


Introduction

Despite being hit badly by the pandemic, entertainment made 2020 survivable. TV shows, films, music albums, Instagram, TikTok, Triller and YouTube videos provided comfort for many individuals, as they grappled with the uncertainty of the strange coronavirus (COVID-19). These were made possible by talents who pushed the boundaries of their creativity in a difficult era to deliver the best.

Notably, the streaming game completely changed Nigeria's entertainment environment, with many new talents emerging because of this platform. Audiences saw, for example, Top Tier Entertainers such as Don Jazzy focus on short Instagram clips. His daily comic short form pieces, which ruled in 2020, have lived on successfully into 2021.

Technology has empowered young filmmakers to experiment with genres, which has expanded into storytelling and animation within the entertainment space. In fact, Co-Founder and Managing Director of Film One Entertainment, Moses Babatope, insists that this expansion has brought forth new leaders in film making, as well as fresh new actors.

On the music scene, streaming is also reigning supreme. Artists and Repertoire (A&R) Expert and Music Promoter Bizzle Osikoya put it this way: "The area of streaming has come to play a major role in helping both the talents and their fans to interact and make something good. Talents do not have to depend solely on events or endorsements; the key industry players now know they can make good money from the digital distribution of their intellectual content. It is sure to skyrocket this year."

A group of six people, three men and three women, are walking outdoors at dusk. They are dressed in a mix of casual and semi-formal attire. The scene is dimly lit, with a soft glow from the setting sun. In the foreground, there is a large, vibrant rainbow light effect that curves across the bottom right corner. The overall mood is one of camaraderie and shared experience.

Read on for some of Nigeria's most notable merging talents in the Food Blogger, Acting and TV Presenting, Social Media, Comedy, Fashion, Blogging, Dance, Music and Film genres.

Actor Personas



Jemima Osunde
– Actress

Her attention to her roles leaves you either hating or loving her. With her robust track record, Jemima has been nominated best actress in a leading role by the 15th African Movie Academy. With her energetic and expressive personality, she would leave you in awe with her amazing acting talent. She is currently starring in the trending online series *Papa Benji*.

SOCIAL NETWORK			
NUMBERS	170 116	721 000	133 000



Jidekene Achufusi
– Actor

Jidekene gained popularity in the movie by Ramsey Noah, *Living In Bondage* and, to date, his acting skills are untapped. This hard-working and focused rising star already has five awards under his belt; most likely as a result of his stand-out personality and the intellect with which he interprets his roles. Professionally known as Swanky JKA, Jidekene is a well of potential whom you should keep your eyes on over the years ahead.





SOCIAL NETWORK			
NUMBERS	2 506	126 000	5 645

Actor Personas



Tomike Adeoye
– Media Personality, MC & Actor




Tomike creates content and hosts events with such class that it literally makes you want to open your wallet to the initiatives at hand. She is a hard-working and award-winning actress, whose easy-going personality easily warms the heart; she is loved by many and a household name. Having worked with brands such as Maltina and The Platform Capital, she has brought her fanbase – whom she refers to as her family – along on her journey. Not a day goes by that she is not tagged by her contingent of fans.

SOCIAL NETWORK				
NUMBERS	4 300	399 000	11 700	89 600



Tobi Bakare
– Actor, Host, Artist & Photographer

Tobi has a depth of talents which are finding expression in the most unique places. After finding fame through the reality TV show *Big Brother Naija*, Tobi has blossomed into an outstanding actor and TV host. He is multi-talented and highly influential among his peers and the Nigerian youth, boasting a following of almost two million people who appreciate the value he offers.




SOCIAL NETWORK			
NUMBERS	44 900	1 900 000	391 000

Social Media, Comedy and Fashion Personas



Mike Edwards
– TV Presenter & Professional Athlete




Aside from being a classic host who is well received by both local and international audiences, Mike, a professional football player, has also just represented Nigeria at the Olympics. When it comes to elegance and class, his carriage is top notch. Mike gained prominence as runner up on the reality TV show *Big Brother Naija* and has soared in the acting world ever since. His outstanding charisma and charm have seen him nominated as brand ambassador for the likes of Schweppes and Budweiser.

SOCIAL NETWORK			
NUMBERS	232 335	1 600 000	541 000



Maryam Apaokagi (Taaoma)
– Comedian & Actor

Her videos leave you in tears of laughter. With high numbers of followers across social networks, Taaoma is one of the queens of skits – her imaginative strength impresses to the extent that she keeps her audience asking for more. Being a 90s kid, she uses stories and experiences from her years growing up to influence her skits, meaning her followers can enjoy many “back when” moments. Even if your story differs from hers, she will still get you chuckling. Taaoma is a multi-talented content creator who strives to make a positive impression. She is loved by millions and a major influencer among the Gen-Z age group.

SOCIAL NETWORK			
NUMBERS	372 000	2 400 000	483 000

Social Media, Comedy and Fashion Personas



Temisan Emmanuel
– Media Personality & Actor




Aside from his daily comedic #TeaWithTay sessions, Temisan is also an actor with a great diversity of talent. With the ability to hold a conversation and keep it interesting, his art of communication is one to observe. He is a witty conversationalist. Loved by many, his skill level is on the rise and he is one to watch with his talent for effortlessly taking on a character.



Bukunmi Adeaga-Ilori (Kie Kie)
– Event & TV Host, Actor, Model

Kie Kie stands out for her incredible taste in fashion. While she is an amazing content creator, her vibrancy is also partly what appeals to her half a million-plus fans and followers. She is highly influential among her extensive fan base, whom she delights with her sense of humour and creative spirit.

SOCIAL NETWORK		
NUMBERS	138 000	1 860

SOCIAL NETWORK			
NUMBERS	1 400	619 000	58 900



Blogger, TV Presenter and Dance Personas



Chef Tolani's
“Diary of A kitchen Lover”
 – Chef & Food Blogger

Chef Tolani’s daily videos will restore your love of cooking, by showing you all the things you need to cook a beautiful meal in minutes. With her ability to make difficult recipes look easy and her bubbly personality, this is a chef and food blogger to keep your eyes on. A key selling point of this vibrant personality is the burst of energy she brings to the screen and her ability to draw in her viewers.




Tolani is brand ambassador for the likes of Aria, Cowbell, Morning Fresh, Samsung and Diosdlite.

SOCIAL NETWORK		
NUMBERS	437 000	28 700



Ify's Kitchen
 – Food Blogger

Ify’s cooking videos are highly relatable, most likely because of her down to earth conversational style as she talks food and creativity in the kitchen. Her ability to create awesome content is a huge asset to the world of food and entertainment, making her stand out from the influencer crowd. She is also a brand ambassador for Mamador Cooking Oil – quite an accolade.

SOCIAL NETWORK			
NUMBERS	79 716	668 000	33 500

Blogger, TV Presenter and Dance Personas






Ozoemena Joseph Chukwu
– TV Host




Sports analyst Ozoemena hosts with a calm and effortless approach; his amazing personality makes him cut out for the TV presenter role. Following his rise to fame in *Big Brother Naija*, Ozoemena has grown in both application and the value he offers his viewers. This up-and-coming star has a significant following and is highly sought after!



Onyekwelu Jennifer Ebere
– Dancer & Content Creator

Going by the stage name Jenni Frank, this influencer creates content surrounding her genre of choice – dance. With her high energy and pure vibes, she easily keeps her followers on their toes. Jenni is young and communicates her creativity passionately, which is seeing her gain rapidly in popularity.

SOCIAL NETWORK			
NUMBERS	12 000	1 400 000	467 000





SOCIAL NETWORK				
NUMBERS	1 500	311 000	12 300	1 100 00

Musician Personas



Chike
– Musician





With a ringing voice, ability to sing in different Nigerian languages and clean lyrics, Chike has a certain future in the industry. “Boo of the Booless”, as he is sometimes called, came into limelight when he was awarded the runner-up position in *The Voice Nigeria* and his genre is still developing. What’s important is that his unique voice oozes potential – and he’s only just beginning. Notably, he recently entered into the world of acting and his first feature film, *Gangs of Lagos*, is likely to be very well received.

SOCIAL NETWORK				
NUMBERS	71 000	719 000	80 800	280 000



Oxlade
– Singer & Songwriter

Fast-rising artist Ikuforiji Abdulrahman Olaitan, popularly known as Oxlade, is a much-loved Nigerian singer and songwriter. His love for music began in secondary school and developed to the extent that two years after beginning university he in fact dropped out in order to focus on his musical career. On hearing Oxlade’s single “Sour”, Chocolate City rapper Blaqbonez saw potential in him and decided to feature him in his next project, “Mamiwota” and his fame grew following this iconic collaboration. Thereafter, Oxlade also featured on Fireboy DML’s hit single, “Sing”. Since then, he has continued to showcase his vocal intrepidity to the enjoyment of Nigeria’s musical public.





SOCIAL NETWORK				
NUMBERS	5 800	949 000	558 000	39 600

Musician Personas



Zinoleesky
– Vocalist





Zinoleesky is a Nigerian vocalist and lyricist who has been signed to Naira Marley’s record label, Marlian Music Imprint. In an attempt to dominate in his genre, this artist typically participates in different sorts of musical fights and freestyles, which is among the qualities that brought his talents to the attention of the Marlian Music President. Zinoleesky was inspired to keep pushing, from early days, when Kizz Daniel responded to his rendition of a rap battle and there’s been no stopping him ever since.

SOCIAL NETWORK				
NUMBERS	5 600	1 100 000	27 800	5 890



Buju
– Vocalist

Buju became popular via social media after requesting that his audience help him tag Zlatan Ibile in a recording session, so that Zlatan could dash him a free verse. After the video went viral, Buju was signed by Burna Boy to Spaceship Records where he recorded a remix of his single “L’enu”, featuring Burna Boy in an introductory anthem. Most recently, Buju brought out an EP, entitled *Buju To Your Ears*.

SOCIAL NETWORK				
NUMBERS	1 500	273 000	112 000	15 600

Musician Personas







Ladipoe
– Vocalist





Vocalist Ladipoe was signed to Mavin Records in 2017 by Don Jazzy and rose to prominence with the song "Feel Alright", where he got featured by rap duo Show Dem Camp. He also released a new single "Jaiye" in March 2019, before dropping the hit song "Know You" featuring Nigerian Joromi singer, Simi. His new song titled "Feelings", featuring Buju, has become the 2021 anthem of the year in several countries – but most especially Nigeria.



Ayra Starr
– Singer, Songwriter & Model

Oyinkansola Sarah Aderibigbe, a Nigerian singer, songwriter and model who goes by the name "Ayra Starr" follows a musical style that encompasses Afropop, R&B and Soul. She began posting cover songs on her Instagram page at the age 17 but her musical career truly kicked off when she posted her first original work, "Damage", in 2020. The song caught the attention of label executive Don Jazzy, who was quick to sign her to Mavin Records. In 2021, she released her eponymous debut extended play – *Ayra Starr EP* – which soon became the year's second-most streamed Nigerian female project.

SOCIAL NETWORK				
NUMBERS	292 387	341 000	74 500	12 600





SOCIAL NETWORK				
NUMBERS	6 500	424 000	73 100	1 480

Musician Personas



Omah Lay
– Producer & Singer

In January 2020, Omah Lay teased his Instagram followers with a verse he had recorded and the feedback was incredible. Four months later, on 22 May 2020, he dropped his entire debut EP, *Get Layd*, which included the previously released singles ‘You’ and ‘Bad Influence’. The EP was an instant commercial success, soon becoming the most streamed Afrobeat album on digital stores. This year, Omah Lay has graced the biggest stages in Nigeria and secured a weighty feature with Apple Music.

SOCIAL NETWORK				
NUMBERS	1 796 072	1 500 000	886 000	578 000



Actor Personas



Timini Egbuson
– Actor

Timini is an actor, model and presenter who caught the attention of the TV-watching public when he played Tobi in the series *Shuga*. Since those days he has hosted a range of different TV shows, featuring in the likes of *Tinsel* and *Skinny Girl in Transit*. With his handsome good looks, he is currently a brand ambassador for the BeautybyTamar skincare range.

SOCIAL NETWORK			
NUMBERS	33 378	911 000	106 000



Bimbo Ademoye
– Actress & Brand Influencer

Bimbo is a famous Nigerian actress, model and social media Influencer who, before she commenced on her acting career, was in the hair-extension business. She has also worked as a presenter, marketer and front-desk officer. After attending several auditions, ace producer Uduak Isong-Oguamanam discovered Bimbo in 2015 and featured her in the short film by Eva George, *Where Talent Lies*. This movie earned her an award at the Africa International Film Festival (ARIFF) and she has gathered a huge fan base since then.




SOCIAL NETWORK			
NUMBERS	21 000	1 500 000	6 481

Actor Personas



Sharon Ooja
– Producer & Singer

Sharon came into limelight after she played the role of "Shalewa" in the web series *Skinny Girl in Transit*. She was listed as a top female celebrity of 2020 and a Nollywood actress whose talents should not be missed during 2021.

SOCIAL NETWORK			
NUMBERS	1 718	767 000	14 300



CHAPTER 02

The Odd One – Entertainment in Mozambique

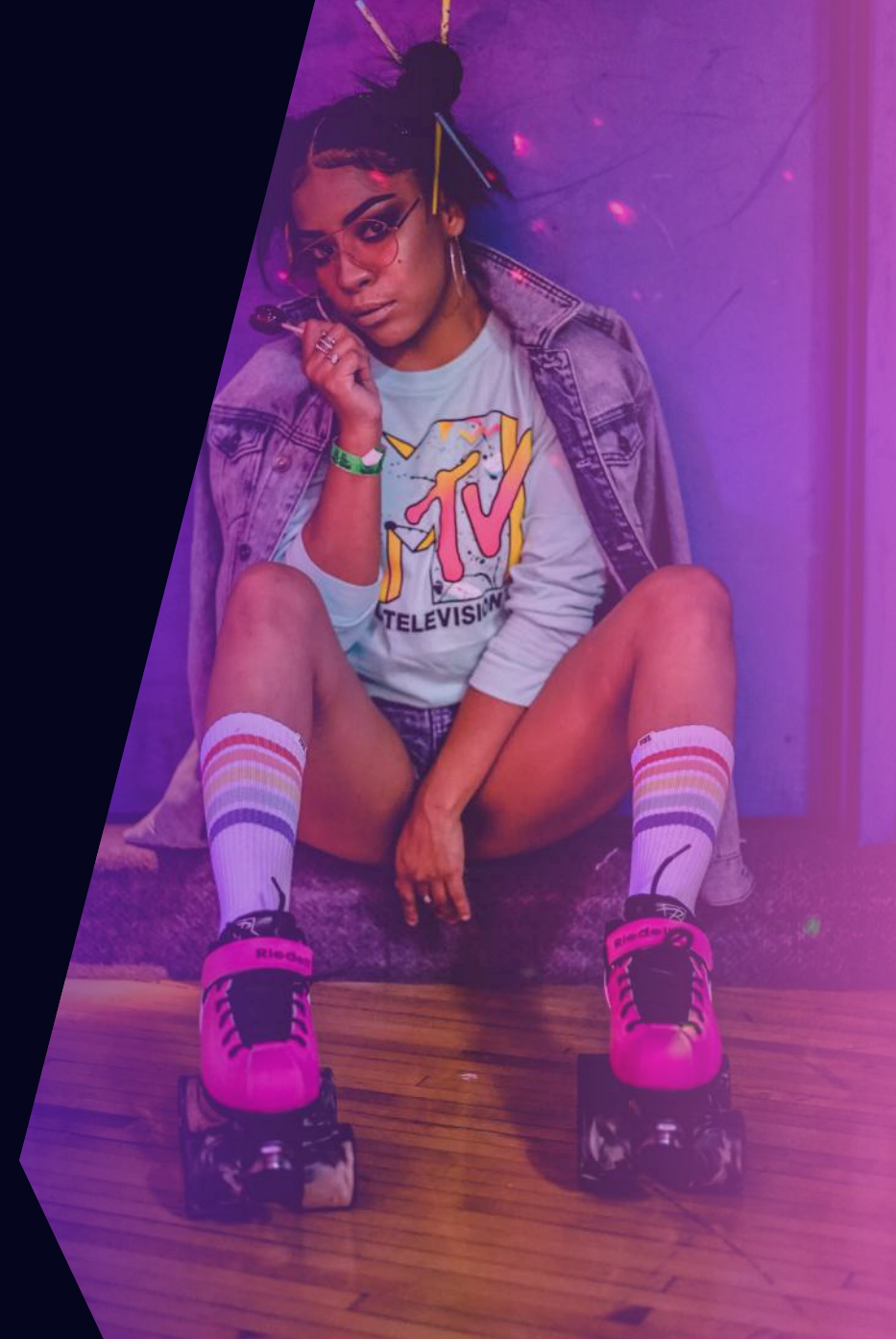
By Mitchell Collinson, Creative Director, dentsu Mozambique
and Alix Liasse, Social Media Manager, dentsu Mozambique

The Odd One

Mozambique finds itself in a unique situation.

It is a Portuguese-speaking country surrounded by English-speaking nations.¹ While Mozambique is part of Eastern Africa, it is highly influenced both culturally and economically by its southern neighbours – such as South Africa.²

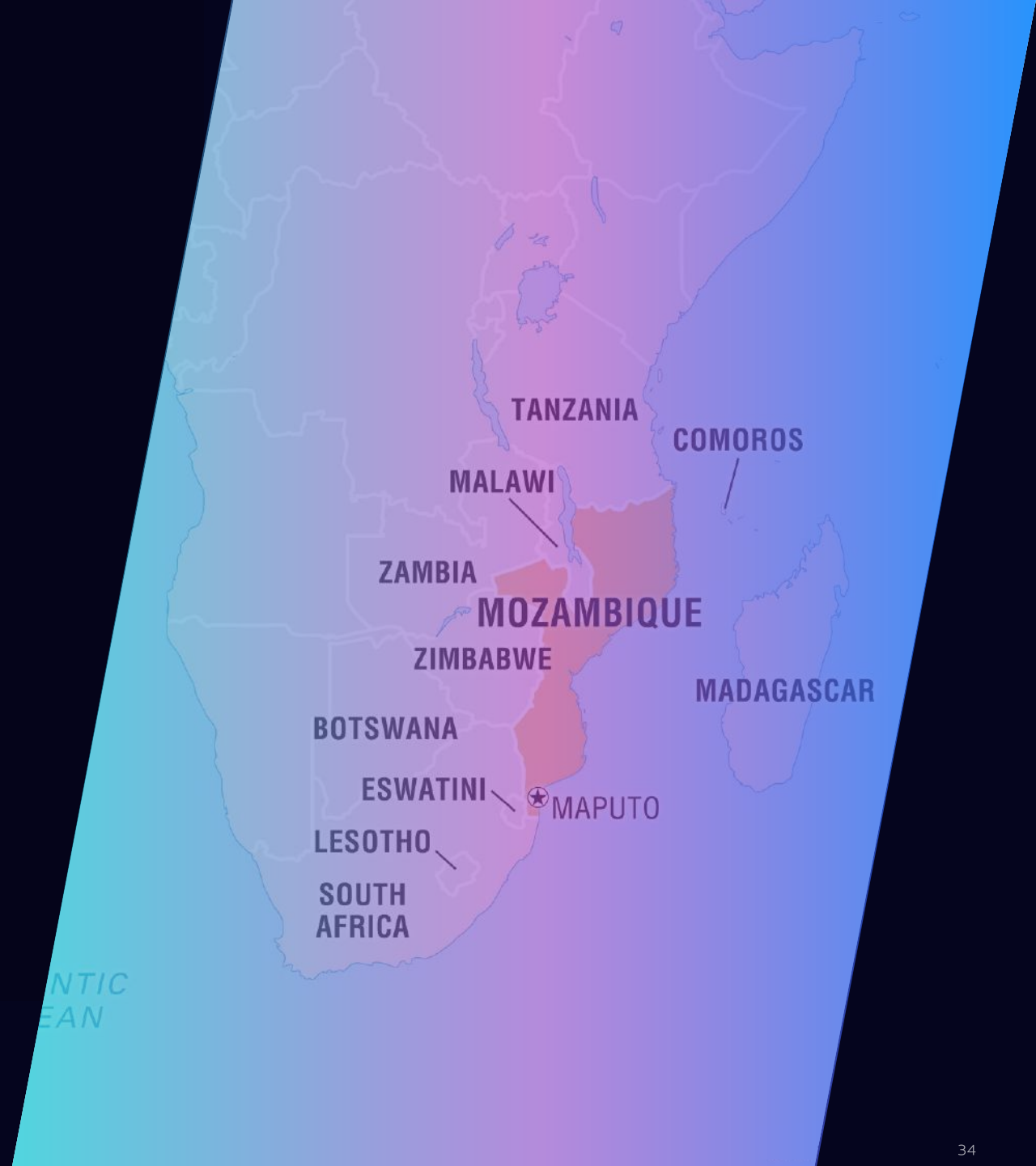
Due to its location, lack of technology and forethought, Mozambique had been overshadowed – with its national entertainment talent fighting for some degree of recognition and exposure.



The Odd One

Being a Portuguese-speaking nation also means there is heavy cultural influence from Portugal, Angola and Brazil.³

It is also important to note that while Portuguese is the official language, there are over 40 other languages spoken in the country.⁴



The Odd One

Nigerian music, and especially US culture, also play a big part in shaping Mozambique's cultural scene, which is the direct result of globalisation.

With increased access to information, Mozambicans also have exposure to new cultures and are being inspired by worldwide trends.

These foreign influences have not impoverished local culture but, instead, have provided technologies, symbolic resources and a new infrastructure for disseminating local ideas and practices.



A perfect example of this is the role social media plays in allowing Mozambican talent to transcend its borders.

1. <https://hal.archives-ouvertes.fr/hal-01291121/document>
2. <https://www.iese.ac.mz/lib/cncb/AI-2002a-SA-Mozambique-linkages.pdf>
3. <http://analisesocial.ics.ul.pt/documentos/1332346935D0gZO3rk0le46DK4.pdf>
4. <https://translatorswithoutborders.org/language-data-for-mozambique>

The Biggest Challenges

The main industry challenge, notes prominent emerging artist King Cizzy, is the lack of education and knowledge surrounding building a personal brand and working with other businesses. Lacking these skills makes it tougher for artists to secure desirable deals and partnerships. Brands may be easily taken advantage of, while the expected visibility and recognition is unlikely to be obtained.


Artists also do not know how to use their results and KPIs to their advantage. Due to the constant change experienced in the Mozambican market, artists may battle to cater for the needs and wants of their followers – while still maintaining their own identities and styles. Consumers are also still choosing to tap into more international content and tend to only value artists once they obtain international recognition.

Certain media outlets still opt to give audience to less serious content, trendy or popular matters whether good or bad; whereas the valuable work of emerging artists is not granted the same coverage.

Additionally, most career options in the entertainment industry are not taken seriously. There is a lack of investment in the success and growth of an artist, which impacts their impetus to continue. There is still a long way to go when it comes to changing this mindset and providing a better support system for artistic talent in the county.

Opportunities

With the rise of the internet, things are slowly changing. Brands are getting more involved with artists and content creators. The power of entertainment to influence the masses is becoming important, and there are an increasing number of brands seeking to associate themselves with artists and their followings. From car brands to beverages, there is a growing investment in both content and talent.⁵

 ⁵ https://hi-in.facebook.com/hyundaimoz/videos/novo-hyundai-santa-fe-2021-baza-com-ronil/1147806135728297/?so=permalink&rv=related_videos;
<https://www.youtube.com/watch?v=N9bhoAztQOU&pp=sAQA> ;

The entry of social media and streaming platforms in the Mozambican market have also opened new avenues for artists to highlight their work. Many are now able to make an income through these platforms, as they provide the opportunity to reach a range of markets while educating those they reach on local content and Mozambique as a whole.



Opportunities



Mark Exodus
– Artist

Artists such as King Cizzy and Mark Exodus have even managed to reach Portugal and Angola through their social media and streaming platforms, with their tracks being featured on Spotify and Apple Music in the “top trending” lists.



Opportunities

The movie *Redemption*, which was filmed and produced in Mozambique by Mickey Fonseca and Mahla Films, also became the first Mozambican film to receive a Netflix entry.

Producer Ellputo is still one of the main drivers of change, partnering up with numerous international artists from all over the world (e.g. Brazil, South Africa and Nigeria), in a quest to inspire and defy the stereotypes and their struggles.

Social Media has made all of this possible, through shares and a constant effort to create relevant, viral content, thereby resulting in more artists gaining fans and deals (e.g. such as via MadKbeatz).


Opportunities




Douglas Condzo
– photographer and filmmaker

The photographer and filmmaker Douglas Condzo has also transcended borders with his talented perspective. Working across fashion, documentary, portraiture and narrative storytelling, Douglas' portfolio captures and represents his versatile interests and accessible approach – as well as demonstrating his dedication to finding and illuminating tender moments of realness, complexity and beauty. Notably, his fragments exhibition was held at the YoungBlood Arts and Culture Development in Cape Town, South Africa.⁶

 ⁶ <https://www.youtube.com/watch?v=KQVnC26NqwA> ;

 <https://www.oceanafrica.io/articles/douglas-condzo-royal-bath>;

 <https://douglascondzo.com/>



Opportunities

More recently, P Money (@PizzaWPineapples) was featured on genius's cosign live show on twitch⁷, showcasing his music to an audience of more than 10 million people worldwide.



⁷ https://www.youtube.com/watch?v=ZglzdzdQV_V8



Opportunities

Social media remains a force placing an increasing number of eyes on Mozambican culture, the perfect example of which has been Nigeria's Burna Boy being featured on DJ Tarico's "Yaba Buluku Remix" with Preck and Nelson Tivane – an Amapiano-inspired super hit which has received more than 1.8 million views on YouTube.⁸

This partnership was made possible through Geobek Records, an organisation which is considered a driving force behind the pan-African cultural vision.



⁸. <https://www.pulse.ng/entertainment/music/burna-boy-and-mozambiquean-dj-tarico-appears-in-new-video-for-yaba-buluku-alongside/c51pzsq>



<https://www.youtube.com/watch?v=6xWd-SpMoOY>

15 Mozambican Artists To Keep An Eye On



Elgar Miles
– Rapper



<https://www.instagram.com/elgarmiles/>



Laylizzy
– Rapper



<https://www.instagram.com/laylizzy>



Mark Exodus
– R&B Singer



<https://www.instagram.com/markexodus/>



Valter Artístico
– Zouk Singer



https://www.instagram.com/valter_artistico/



Mariana Carrilho
– Opera



https://instagram.com/mscarrilho?utm_medium=copy_link

15 Mozambican Artists To Keep An Eye On



MadKbeatz
– Producer



<https://www.instagram.com/madkbeatz/>



Ellputo
– Producer



<https://www.instagram.com/ellputo/>



Edward Assis
– Fashion Model



<https://www.instagram.com/edwvrdz/>



Luxury Recycle
– Stylist & Singer



https://www.instagram.com/luxury_recycle/



Melanie de Vales
– Actress



<https://www.instagram.com/melaniedevales/>

15 Mozambican Artists To Keep An Eye On



Mickey Fonseca
– Film Director



https://www.instagram.com/my_i_series/



Inesio Samuel
– Photographer



<https://www.instagram.com/inesiosamuel/>



Douglas Condzo
– Photographer
& Filmmaker



<https://www.instagram.com/douglascondzo/>



Anibal Açucarado
– Digital Creator



<https://vm.tiktok.com/ZMdTEVgYP/>



Mana Cecy
– Digital Creator




<https://vm.tiktok.com/ZMdTEWGip/>

CHAPTER 03

TrueTribe On Content Marketing And Storytelling

Roy Karuhize, Content Marketing Strategist, Creative and the CEO of the TrueTribe Network chats to Joel Rao, CEO of Digital Brands in East Africa at dentsu SSA



As much as it sounds generic, or general, it's the truth. We have to get deeper into what the word 'content marketing' really means. And it refers to 'story'; content marketing means storytelling, says Roy Karuhize, content marketing strategist, creative and the CEO of the TrueTribe Network when he chats to Joel Rao, CEO of Dense Digital Brands in East Africa at dentsu SSA.



<https://youtu.be/RE1nLFZk-pY>

CHAPTER 04

Branded Entertainment And The Neuroscience Of The Story

By Justine Drake, Content Director,
Emma Odendaal, Director of Digital Content,
Dylan Muhlenberg, Digital Editor of BMW Motorrad and
Lynn-Leigh Brandt, Digital Strategist, all at John Brown Media SA

Branded Entertainment And The Neuroscience Of The Story

“We need to stop interrupting what people are interested in and be what people are interested in.”

- *Craig Davis, former Chief Creative Officer at J Walter Thompson.*

Branded Entertainment And The Neuroscience Of The Story

Given the glut of options available, brands are stretching their marketing budgets in order to hedge their bets and attempt to stake their claim in as much of this brave new world as possible. More often than not though, the result is quantity being prioritised over quality. However, savvy advertisers are using the power of emotive storytelling to make us experience something real while aiming straight for our “feels”.

Not exactly new, advertiser-funded programming has been around ever since Proctor & Gamble funded, produced and coined the term “soap opera”. What was once called sponsored or advertorial content has evolved into something much more sincere and – best to get this phrase out of the way early on and then be done with it – authentic.

An umbrella term for all brand-produced content, Branded Entertainment’s goal is to encourage audiences to watch or engage with the same mindset they would a film or TV series. As opposed to more traditional forms of advertising, where brand messages can be placed before or during the experience of other unrelated content, the subtlety and storytelling that’s crucial to Branded Entertainment is key.

Instead of making an extended ad or lengthy sales pitch, the goal is to create something that audiences will seek, share and engage with. Richly varied and with no one-size-fits-all approach, Branded Entertainment is a long-term strategy that can grow and build loyal audiences.

Branded Entertainment And The Neuroscience Of The Story

While video dominates the branded entertainment space, its origins can be largely found in print (i.e. *Marvel Comics*). Following this model is *Supa Strikas's* soccer cartoon. Caltex made this investment a few years back in 2011, but the essence of branded entertainment and what it can achieve is still highly relevant. “With the budget on offer, we had to go with branded content that media owners wanted to air – or to publish – essentially free and, in that way, we could get the brand impressions that we needed to make this campaign worthwhile for Caltex,” says Richard Morgan-Grenville, CEO Strika Entertainment (watch his full interview [here](#)). *Supa Strikas* aired on Disney in South East Asia and was the first branded content show to be carried on the channel. Interestingly, the characters from *Supa Strikas* were seen beyond the comic and were used for various brand activations.



Branded Entertainment And The Neuroscience Of The Story

Although no longer sponsored by Caltex, *Supa Strikas* is today a global comic series available in 16 countries and published in both print and video formats.

Patience is certainly key. Instead of tracking clicks or conversions, the best way to measure the impact of Branded Entertainment is much more qualitative. It sounds simple, but it can't be overstated enough that Branded Entertainment must be *entertaining*. This is in sync with changing online behaviour, where people are less likely to comment or share brand posts directly – while they are more likely to tweet about something or share it to their Instagram story. This presents new challenges for advertisers seeking the impact of their actions.

This led us to reach out to a few of the experts in our network who are able to speak passionately about their work and share their ideas, learnings and lessons.



Branded Entertainment And The Neuroscience Of The Story



Tochukwu Macfoy

– Content Team Lead, at StoryLab, Nigeria

While at medical school, Tochukwu Macfoy, Content Team Lead at StoryLab Nigeria, watched so many episodes of ER, the US medical drama TV series, that after graduating he no longer wanted to become a doctor. Instead, he opted to create the first African medical drama. “I quickly realised there was no funding nor structure for what I wanted to do,” he said while boarding a plane for Los Angeles. “I had to put my dreams on ice.”

Then Tochukwu landed a job at MTV Base and, while experiencing that particular rollercoaster ride, has since been exposed to everything he requires to go ahead and create his show. This includes production, distribution and, never one to miss an opportunity, “You’re a writer? Can you write a script?” But that’s if he ever finds the time, because as a Production Partner and Content Lead at StoryLab in Nigeria, he’s currently occupied making magic for clients.

Inspired by what Steve Jobs did with Apple – “...the creativity, the colour, the emotion... truly, Jobs was the father of entertainment marketing...” – Tochukwu believes the future of marketing lies in branded entertainment and he applies the same Jobsian thinking to his projects today.

According To Tochukwu, There Are Three Parts To Branded Entertainment

1. Influencer Marketing

This is hugely dependent on the talent, and the influencer must align with the tone of messaging, the concept of the campaign and even its scope. In choosing an influencer, the goal is to potentially appeal to thousands of new customers with an interest in your products and/or services. The reason influencer marketing works comes down to the concept of social proofing. While the idea is that people follow the online advice and actions of others, the trick is in making sure these consumers witness authentic relationships and alignments between the brands and influencers involved.

2. Product Placement

Together with product integration are outgrowths of the current trend in drive-in entertainment marketing, which aims to transmit a consistent message across many different communication platforms. Both approaches work, but product placement is more limited in scope than product integration. The purpose of product placement is to secure exposure for a brand by placing it into the set or storyline of an established entertainment vehicle. For example, a home-appliance brand could benefit by appearing in the kitchen of a popular sitcom or having its characters discuss how they use it. On the other hand, the purpose of product integration is to coordinate the tools of marketing communication to ensure that a single, integrated message comes through in advertising, sales promotion, public relations messaging, personal selling and social media. Most product placements are handled by the sales team, who specialise in connecting marketers with television or movie producers. Successful product integration require in-depth knowledge of the target audience and experience in the full range of media options and communication tools – which includes storytelling, for example.

According To Tochukwu, There Are Three Parts To Branded Entertainment

3. Original Content

This is originally produced brand programming that finds a new audience which is attracted to it. This could happen when a brand sets out to introduce fresh aspects of its brand story, so that different episodes of the original content give a different perspective to the brand – the goal being to give off a robust feel. Just look at Nike, a brand that does this particularly well. After production costs, it's important to leave sufficient budget for activation around the content, which the brand should devote budget to (i.e. paid media and promotion), should be marketed and have a unique profile.

Applying all three parts of branded entertainment to his award-winning campaign, [Kings of Football](#), Tochukwu set about using creativity to solve a problem for his client Budweiser, who was official sponsor of the Premier League and La Liga. Unfortunately, their biggest competitor had sole rights to advertising on the big screen.



According To Tochukwu, There Are Three Parts To Branded Entertainment

In an effort to stay top of mind during the League without the above-mentioned Premier League Broadcast package, Tochukwu kicked off the campaign early in the season. Launching on OOH, a range of iconic sites then employed key "Be A King" brand visuals that displayed top Premier League players doing their thing. The global television commercial, "Make Way for The King", also launched pre-season.

The next phase of the Budweiser campaign consisted of the launch of the "Take Your Shot" videos, which encouraged fans to seize the moment and take real-life shots that drew inspiration from their favourite celebrities and football idols. The video featured the likes of Nigerian pop icon and actor Banky W, Nigerian TV personality Ebuka and former pro footballer Ian Wright. These videos were amplified via top-tier media and influencers, along with broadcast integrations.

On the big screen, Budweiser maintained presence with the La Liga media broadcast package on SuperSport, enjoying a presence during all live La Liga matches. The brand further owned the big screen with the *Kings of Football Show* – a football TV asset on SuperSport by Jimmie the Entertainer and Osereme, where football fans could connect with players and personalities through a range of passion points and be inspired to be kings of their own lives.

The show was the first-ever football lifestyle show curated for a beer brand in Nigeria. Second screen tactics included the *King of The Match* (KOTM) Twitter gaming challenge, where fans received weekly notifications to make their picks for KOTM using an app chatbot. The initiative proved a huge compliment to the global Budweiser *King of The Match* asset and garnered over 69 000 registered players within three months of activation.

Further wins included:

+22

million people
reached across
Nigeria

+71

million total
impressions
achieved during
the campaign

84

percent of
respondents
thinking KOF
better than any
other football
show

40

percent brand
rating increase by
helping elevate the
experience of
football fans

Cathy Boxall, Global Senior Vice President Brand Entertainment at The Story Lab UK, creates content for media owners and specialises in developing, producing and selling TV shows. Working with the likes of Jaguar Land Rover, Vodafone and Burberry, it's up to Cathy to figure out how to speak to a younger audience.



BURBERRY

Reaching A Youthful Audience

“The Millennials (Gen Y) and Gen Z stream entertainment on channels that aren’t friendly to traditional advertising. They skip and block ads, and so we need to know how to speak to them, how to put a client’s message in front of them and then partner, place and collaborate to create something original.”



Reaching A Youthful Audience

According to Cathy, it's about observing, acting quickly on those observations, and then approaching each challenge in a fresh way.

“Coming in at the end is too late. You need to be first. It's also important not to try and shoehorn your idea. Rather come with a concept and work with the experts to approach it in an entertainment-first manner. Who is it for? Where is it viewed? Consider that, then create.”

Reaching A Youthful Audience

With no proven path and many different models to choose from, the constant is to know why you're doing something, remain flexible, trust your partners and put the audience's entertainment first.

When P&G sought to develop a new model of brand storytelling that would appeal to Gen Z and the Millennials, they knew their content solution had to be “distinctively P&G” while still bolstering Gillette's brand mission: to empower men to be the very best they can be.


To tackle this challenge, dentsu assembled an integrated team of creative and media experts from its in-house production company – The Story Lab – to conceptualise, create, produce and distribute an original premium content series.

The team saw an opportunity to approach this impressionable demographic as change agents in relation to a future generation of men, who could effectively dismantle stereotypical gender roles, reject toxic masculinity and overcome adversity to achieve greatness.

Reaching A Youthful Audience

In order to turn this insight into an original activation, dentsu collaborated with its open ecosystem of media partners to find a true, inspiring story about young men overcoming adversity through the power of community. The SMAC Entertainment Team – notably, Michael Strahan, two-time Emmy winner, Super Bowl Champion and co-host of ABC’s “Good Morning America” – uncovered the story of Biff and his St Francis football team, who had been blackballed from their Baltimore private Catholic school league for being "too good." Working with Gillette’s brand team, The Story Lab developed, produced and distributed a series that would creatively embody Gillette's core values by turning them into overarching themes: mentorship, overcoming adversity and the power of community.





The original series was released in the form of a four-episode documentary, [The Cost of Winning](#), produced by The Story Lab, co-owned by P&G and distributed in the US by HBO and HBO Max. Each 30-minute episode features the St Frances Academy Panthers' high-school football programme in Baltimore, Maryland.

Here's what made this activation unique and “distinctively P&G” both on-screen and off-screen:

Original, inspiring & authentic storytelling.

Gillette and dentsu uncovered an authentic consumer insight that was then weaved into every aspect of the story's development, production and distribution process.

The series isn't focused on selling products or brands, but is instead focused on surfacing true stories, authentic people and their future potential.

Innovative engagement model.

Leveraging an ad-free model, *The Cost of Winning* represents a new consumer engagement model – one that avoids the intrusiveness of traditional advertising by co-creating and supporting content that people care about. Gillette and dentsu teams were pioneers in working with HBO and HBO Max through a hybrid creative-media model. Gillette also retains the ownership of the original content, as well as the rights for international distribution, which may generate future opportunities for both brand exposure and revenue growth.

Here's what made this activation unique and “distinctively P&G” both on-screen and off-screen:

Power of bringing creative and media together.

The Story Lab was able to conceptualise, develop, produce and distribute the series in a short space of time, versus the weeks this process would have taken at non-integrated agencies. Given dentsu's integrated model, creative and media came together to produce a seamless multi-project delivery of *The Cost of Winning*. In addition to the four-part series, additional brand extensions – such as a companion podcast with Victor Cruz and the ‘Best a Man Can Be Scholarship’ – were activated soon afterwards to unleash the full potential of creative and media coming together.

Led with diversity, equity and inclusion (DE&I).

Leveraging a diverse media supply chain, *The Cost of Winning* embodies DE&I from start to finish. The team assembled a diverse production crew, who could help shape the story and ensure accurate portrayals of young Black men and BIPOC (Black, indigenous, of colour) communities. Further, SMAC, Gillette and dentsu didn't just tell a story about St Francis, but also found tangible ways to support the school by providing scholarships and donating 15 percent of the production budget to the school for greater economic empowerment.

Here's what made this activation unique and “distinctively P&G” both on-screen and off-screen:

Nominated for a Sports Emmy, *The Cost of Winning* achieved more than what its team had set out to do originally. The series premiered on HBO, followed by streaming on HBO Max, and quickly became the top-performing sports title since the launch of HBO Max.

Leaning primarily on organic efforts and dentsu's ecosystem of media partners, the series optimised media spend and surpassed the KPIs set by the Gillette team. The premiere of *The Cost of Winning* reached, at launch, three million viewers across HBO platforms and continues to grow, a huge success for a show of this scale with each episode after that averaging 700 thousand viewers.



Here's what made this activation unique and “distinctively P&G” both on-screen and off-screen:

While Gillette planned for the campaign to be a cost-neutral investment, it quickly became a profit-generating campaign and drove mutual benefits for all parties involved. This was largely due to the popularity of the trailer preview presented live on GMA by Executive Producer Michael Strahan, among other paid media and social media opportunities.

From a philanthropic standpoint, St Francis Academy received a US\$150 000 donation and the collaboration created the first Gillette “The Best A Man Can Be” scholarships, which provided US\$50 000 in college tuition for two well-deserving athletes. These scholarships were presented to the athletes, live on GMA, with more than 3.4 million viewers tuning in.



GLOBAL INSPIRATION Inspired?

Here are five more of our favourite examples of Branded Entertainment:

Global Inspiration

1

Formula 1 responded to declining TV viewership with behind-the-scenes Netflix docuseries [Drive to Thrive](#), now in its third season and drawing fans the sport had been previously unable to attract. The first season had a huge impact on Formula 1's audience in the US. Race-day ticket sales for the first Grand Prix held after *Drive to Survive*, which debuted in 2019, rose 15 percent. ESPN later said its average viewers per Grand Prix race had risen to about 928 000 in 2021, up from about 547 000 in 2018.

2

Video on Demand (VOD) services in sub-Saharan Africa are largely dominated by global players such as Netflix. But, when it comes to local mobile-first solutions, cellular networks have developed data-lite (in some cases zero-rated) VOD products.

[Vodacom's Video Play](#) is a low-cost VOD product that streams movies, series, kids' shows, music videos, Nollywood offerings and more. Consumers aren't tied into a monthly subscription and multiple users can access the product via a single subscription on their mobile devices.

Global Inspiration

3

In [Livin' it Up by Capitec](#), a free-to-download mobile game, players take control of unique characters with different occupations, dreams and goals. They are required to make decisions through mini-games, where they can swipe, tap and drag their way to success; all the while learning about managing their money and at the same time having fun.

“Many people talk about financial education and how important it is, but clearly this is a skill that can't be learned from a book. Games are a brilliant way to give people a safe space in which to try different strategies around financial education to teach themselves new skills. The key for Capitec is the data and insights we can access from the game, the patterns we see and how these might influence real-world behaviour,” says Glenn Gillis, CEO of Sea Monster, a Cape Town-based gaming and 2D animation studio.



Global Inspiration

4

An Academy Award for a brand? Sounds like a lofty dream. Enter Dove's [Hair Love](#), a short film about a black father who struggles and succeeds in doing his daughter's hair, shattering stereotypes and supporting an end to discrimination based on hair. The only brand logo was in the credits. Yet, by association, Dove grew brand love and loyalty, and authentically aligned itself with a social cause. And won an Oscar in the process.

5

Reality TV is big business as an entertainment vehicle for brands. From the early days of *Big Brother*, audiences have been able to direct the storylines through their votes. The Story Lab SA and Vizeum were tasked with driving Stella Artois's brand premiumisation, while balancing European credentials with local relevance. The result was [The Taste Master](#), a six-part series of one hour each that challenged local chefs and home cooks to compete with one another. The show, which ran on SABC 3 during primetime, made Stella a part of casual gourmet food culture, through places, people and experiences.

The Data Challenge

Sub-Saharan Africa (SSA) still has the highest data prices in the world, with the average price for 1GB of mobile data coming in at US\$6,44.

This is a significant challenge for brands exploring entertainment solutions in the hopes of reaching cost-sensitive consumers.

SSA still has a journey ahead when it comes to delivering branded entertainment at scale, although promising data-lite innovations are being seen among cellular operators and financial institutions.

Why Branded Entertainment?

Marketing starts with the question: "How can we make great content to sell this?"

Branded entertainment starts with the question: "How can we make content that connects with people's passion points?", which shifts the brand from advertiser to content creator.



Why Branded Entertainment?

The global trend towards ad-free subscriptions is unsurprisingly indicative that audiences are becoming harder to reach. [Forty-two percent of people worldwide use ad-blockers](#). With the exception of South Africa, SSA hasn't seen the same growth in downloads of ad-blockers and ad-free subscriptions. But, research shows that half of all Gen Z-ers and Millennials would choose to consume content with no ads to improve their online experience and reduce data consumption.

Within the skippability of ads, lies a challenge for traditional advertising and a reduced opportunity for branded entertainment. So, how does one get audiences to want your ads, even actively seek them out in new *and* traditional formats?

This is where neuroscience comes in. When you tell or listen to a story, a biological response occurs in your brain. In fact, according to research by Uri Hasson, professor of Psychology and Neuroscience at Princeton University, when people tell a story, the brains of both the speaker and the listener show similar, shared patterns of activity. They transition into a kind of sync with each other. The more in sync they become, the better the understanding of what is being told or listened to.

Entertainers have discovered that by tapping into the neuroscience of storytelling, they can deliver the authentic experiences their audiences crave. This is why collaborations between brands and creative teams, such as the ones we've mentioned above, take their cue from audience-led, editorial content rather than brand-centric communication. This results in entertainment, value and connection in a way that moves beyond ads, product placements and traditional brand sponsorships, and appeals to hard-to-reach audiences.

Why Branded Entertainment?

The key to producing a connection between storyteller and listener, says Prof Hasson, is that the audience has to *want* to meet the storyteller halfway. Instead of looking at a product and thinking “How can we make content to sell this?”, brand entertainment starts with “How can we make great content that connects with people’s passion points?”, thereby shifting the focus from advertiser to entertainer and content creator.

Trends

CO-COLLABORATION

Tapping into consumers as content creators and change agents and nurturing communities is the basis of content's holy grail – fandom. When brand love and affinity are so powerful, the end-consumers (the fans) themselves become content creators on behalf of a brand.



Read our white paper on the power of fandom

<https://www.dentsuwisdom.com/>



Trends

BRAND ENTERTAINMENT STUDIOS

Marketers experimenting with entertainment is nothing new. P&G, after all, put the soap into soap operas in the 1930s. But the trend of brands acting as content creators in TV series', virtual reality (VR), audio and even on WhatsApp is becoming a fast-developing space.

Dedicated digital entertainment teams have been set up and developed by brands such as BMW, who recently launched a gaming and eSports division, and Corona who is building a strategy around a production studio that produces high-quality content such as [Free Range Humans](#).

Commenting on skincare brand Neutrogena's own studio, "[We're] creating entertainment, not advertising," said Tyler Rochweg, a digital marketing and innovation manager at Johnson & Johnson.

Old Mutual, in turn, has launched AMPD Studios, a music, business and culture hub in Johannesburg, South Africa, that brings industry icons and up-and-coming artists together into a recording, production and co-working studio to produce content in a number of formats and give Old Mutual access to an influential audience of artists.

While not all brands will have the appetite nor resources to set up an entertainment division such as this, an agency can act as an extension of your team allowing you to scale up or down, depending on your specific needs and thereby bringing best-in-class innovation to market at high speed.

Trends

#NOFILTER

There has been a radical shift, as a result of the COVID-19 pandemic, away from highly polished content in favour of candid, authentic moments. The success of TikTok is easily the best example of how important authenticity is to audiences. They want grit, reality and for influencers to show their true selves. They empathise with the anti-heroes' backstories, applaud success and laugh at themselves. Anything that is seen as manipulation or designed to "trick" people into buying a product is quickly called out.

REALITY TV

Love it or hate it, reality TV continues to be an important feature of pop culture in SSA. Globally successful series' such as *Survivor* continue to deliver the numbers, brands that have never dabbled in reality TV are making an entrance (Mattel is developing a reality competition series, *Barbie Fashion Battle*), while behind-the-scenes docuseries such as Nike's [The Day Sports Stood Still](#) provide outlets for brands to build out purpose-led marketing campaigns.

Trends

SO MUCH MORE THAN JUST TV

Younger audiences are not watching as much linear TV. In the UK, Ofcom reported a 53-minute drop, between 2014 and 2018, in daily live TV viewing of 16 to 24-year olds. The US is experiencing a similar trajectory, in spite of the pandemic, with Nielsen 2021 revealing that television viewing times have dropped 23,4 percent year-on-year in the 18 to 34-year age group. In contrast, 18 to 34-year olds spent 2,5 times as much time using apps and accessing the internet via smartphones, compared to watching linear TV. "People are watching the public service broadcasters less, as they are no longer the only or necessarily the preferred source of content that 'informs, educates and entertains'," is the feedback from Ofcom. Alternative forms of entertainment designed to suit the audience's chosen platforms are key. Brands should explore audio, gaming, VR and mobile messaging services as entertainment formats to truly engage their customers.



Summary

Instead of paying to be noticed, like everyone else does, Branded Entertainment challenges you to make something that's impossible to ignore. Stand so tall that they can't look over you. Be so extraordinary that your presence takes up all the available space. Be sure of yourself, be unique, be relevant and engrave yourself into people's minds. Don't do it the way it's been done before you. Or how it's expected to be done. Don't be average ... Be entertaining.

CHAPTER 05

Exciting Creators And Social Personalities From Across The Continent

By Megan Sayle, Senior Strategist SA And SSA, Carat

Africa's Rising Voices: A look at some of the most exciting creators from across the continent

The African continent is absolutely brimming with world-class content creators and personalities who are now bringing their dynamism to the global stage. This movement is nowhere near new but now, fuelled by the rise of the mobile phone and the accessibility of data, these personalities are finally being able to receive the recognition and the platform for exposure that they deserve. The mobile phone has opened a two-way dialogue, facilitating the stream of culture in, but even more importantly out of Africa, where it is taking global culture by storm.

This accessibility of both the creators and their content has also influenced the platforms and types of content being consumed across the continent. Social content as “bite-sized snippets of everyday life” has never been a more apt description of this media as it is today. With platforms such as TikTok becoming increasingly mainstream, we're seeing a shift away from the beautifully curated feeds of 2015 Instagram to a far more realistic portrayal of everyday reality – something both the creators and the consumers, alike, are requesting.

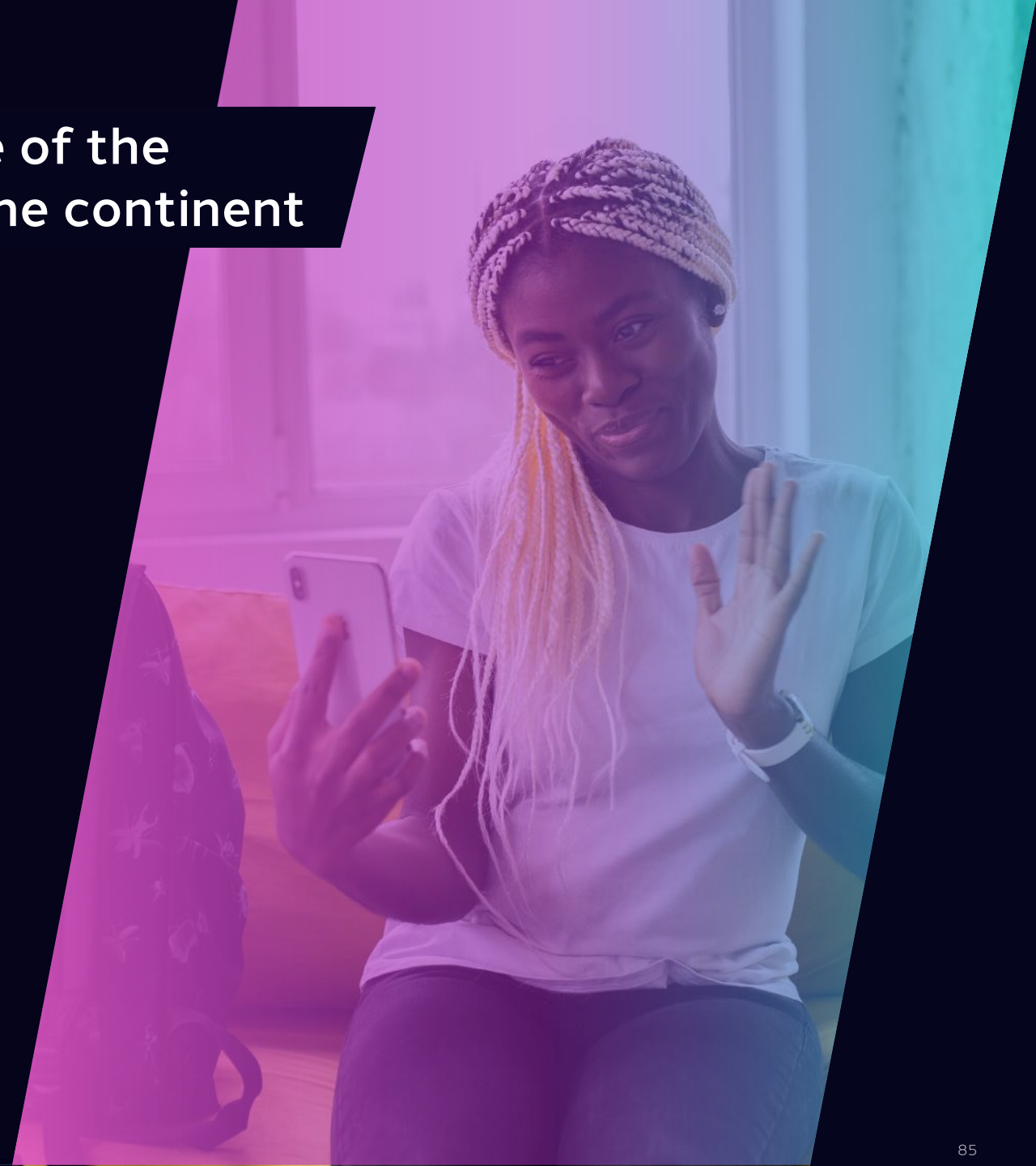
Africa's Rising Voices: A look at some of the most exciting creators from across the continent

Consumers expect to be met with empathy, value and collaboration by the brands they follow, and creators are not excluded from this narrative. A recent Spotify trends report looking at the cultural trends of Gen Z-ers and Millennials stated that “unlike traditional broadcasters, who rarely go off-script, [creators] often reveal their vulnerable and raw ‘real’ selves – which listeners are more likely to feel intimately connected with. Millennials and members of Gen Z crave representation. That’s why creators from both generations are now bypassing the traditional gatekeepers of culture to uplift voices and viewpoints that have been historically underrepresented by mainstream media.”



Africa's Rising Voices: A look at some of the most exciting creators from across the continent

This “upliftment of voices historically underrepresented” is nowhere truer than on the African continent, where creators across platforms and genres – from music, to sport and food, are now followed, applauded and celebrated for creating a more authentic positioning that is leaving consumers with the feeling of a deep and meaningful relationship with them.



Africa's Rising Voices: A look at some of the most exciting creators from across the continent



Elsa Majimbo

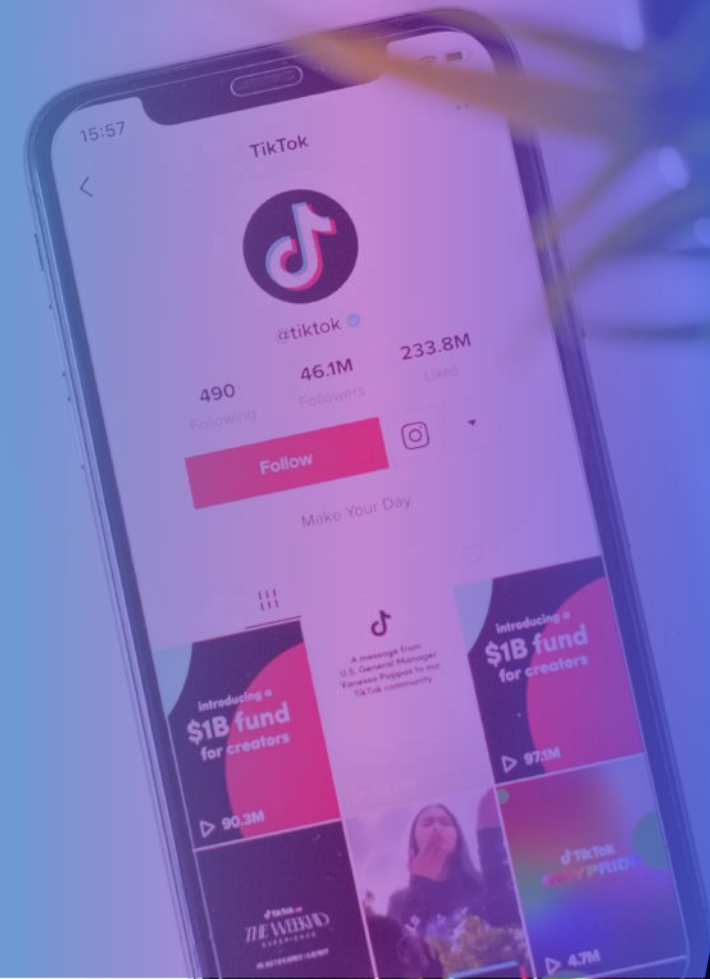
– Instagram and TikTok creator

A great example of this consumer experience can be found in relation to the newly popular Instagram and TikTok creator, Elsa Majimbo. [@Majimb.o](https://www.instagram.com/Majimb.o) is currently studying journalism in Kenya, where she was relatively unknown up until 2019. When the pandemic hit, she began creating incredibly relatable, short-form comedy sketches about everyday struggles – including those on being teased for always eating take-aways, to dating, and even about the reason she uses her snooze button. Majimbo's videos provide the consumer with the feeling that she is authentic. Her videos are badly filmed, she intersperses each sentence with a contagious belly laugh and, if she's not doing that, she's stuffing crisps into her mouth. All of this saw her followers increase exponentially within only one year. As of August 2021, she has over 2.3 million followers on Instagram and over 900 thousand on TikTok.

Her unique brand of comedy is juxtaposed with a love for fashion, which she celebrates on her feed through highly stylised outfit shots. This brand of authenticity and passion has led her to gain the recognition of Rihanna, grace the covers of *GQ South Africa* and even to forge a brand partnership with Italian designer, Valentino.

Africa's Rising Voices: A look at some of the most exciting creators from across the continent

If we acknowledge what creators and consumers are truly looking for, it is no surprise that some of the most popular and growing platforms across the continent include Instagram, TikTok and YouTube. All these platforms enable simple, short-form video content to be uploaded and consumed everywhere and anywhere – and even better if it's on a smartphone while you're on the move.



Africa's Rising Voices: A look at some of the most exciting creators from across the continent

It is no surprise, then, that both TikTok and YouTube are investing heavily across Africa in growing the creators of the future. TikTok recently launched their Rising Voices initiative which aims to empower the dreams of 20 South African creators by offering them mentorship to become the content creators and entrepreneurs of the future. These rising TikTok creators have anywhere from 40 000 to almost two million followers and cover a range of unique topics. The most popular of these relate to food, music, fashion and sport, however the shift in the type of content being created and consumed means that, especially on TikTok, creators are taking a “jack of all trades approach” rather than focusing only on what they're good at.



The result has been that this year's rising TikTok artists cover everything from comedy to dance, even illustration. They demonstrate their cooking abilities – good or bad; and how well they can sing, dance, even lip-sync – no matter whether they're a good performer or not.

Africa's Rising Voices: A look at some of the most exciting creators from across the continent



[@kaylaimkay](#) is one such creator. Her bio lets us know that she focuses on mini vlogs, fashion, hair and food. But when she touches on these topics, they're from the perspective of a real person – showing the world what she does on hair-wash day and how she cooks her favourite rendition of two-minute noodles.



This rise in showcasing your authentic self has also given impetus to creators who specialise outside of the traditional content pillars. The most popular TikTok account in South Africa, in terms of followers, in fact belongs to Wian Van Den Berg – better known as [@Wian](#). His daily magic tricks are so loved that he has racked up almost 14 million TikTok followers alone.



In both Nigeria and Ghana, we are seeing comedy-focused creators being some of the most followed. Nigerian comedian [@McShemComedian](#), who has over 4.5 million TikTok followers, strives to create short format, comedy role-play sketches.



Ghanian creator with over 500 000 followers, [@aji-anje](#), describes her TikTok account as “slowmo, acting, comedy and a sprinkle of vibes”. Check it out.

Africa's Rising Voices: A look at some of the most exciting creators from across the continent



However, it would be amiss to mention comedy and not talk about the second most followed account in the world: a 21-year-old, retrenched factory worker from none other than Senegal, who is now living – enviably – in Italy. [@khaby.lame](#) began making comedy videos on TikTok only 18 months ago and is now estimated to be worth between US\$1.3 and US\$2.7 million, with over 100 million followers. Rumour has it he may even be set to take over the top spot on TikTok – thereby dethroning US social media personality and dancer Charli D'Amelio.



And it is not only the traditional social channels that are putting their faith in local creators. Social Music platform Triller recently celebrated what they termed the #ILoveAfricaBecause campaign – calling on African creators to produce and upload content which celebrates all the reasons for loving the continent. As part of this campaign, Triller welcomed multi-talented Kenyan hip-hop artist, [@Khaligraph Jones](#) into the fold – an artist who is headlining TrillerTV's first African series on the platform. He has over 1 500 followers on Triller and 1.8 million on Instagram.



It is safe to say, though, that the “masters of the trade” are not suffering in terms of popularity by any means; we see some of the biggest names across music, food, fashion and sport going from strength to strength when it comes to being a creator. Much loved South Africa ex-Tanzanian singer [@Shomadiozi](#) now has over 1.2 million followers on Instagram and almost 700 000 on TikTok. While she is best known for her phenomenal musical ability Maya, as her friends call her, also gives fans insight into her much-admired hairdos – and partners with local and international brands across her platforms, most recently with the energy drink, Play.

Africa's Rising Voices: A look at some of the most exciting creators from across the continent



[@YemiAladeOfficial](#) is another singer turned fashionista, brand ambassador and content creator. Hailing from Nigeria, Alade has over 900 000 followers on TikTok and 14.4 million on Instagram. She intersperses her highly produced art and music with relatable TikTok videos of her eating, doing her night-time beauty routine and participating in the latest dance challenge.



And it's not just music stars who are leading the way in becoming Africa's most exciting creators – South Africa's [@Kefilwe_Mabote](#) is a fashion and luxury creator, businesswoman and, most recently, author. She has over 1.2 million Instagram followers and, while her main focus is fashion, partnering with brands of the calibre of Dolce & Gabbana and Jean-Paul Gaultier, she has also recently written a book *Kefilwe Mabote: Influencer De Luxe: From Soweto to Milan*. This is another case of a creator who is great at one thing then revealing their authentic self to the world via other creative projects. Kefilwe has separate social feeds for fashion and her book, with her author Instagram profile boasting having over 10 000 followers.



Actor [@Dudufaitdesvideos](#) is another creator to note, hailing from Senegal and employing his platform not only to promote himself as an actor, but also to keep his followers entertained with comedic content that dramatises daily life in Dakar. Dudu has over 2.2 million Instagram followers and at least 1.1 million on TikTok and, just like Majimbo, integrates his acting and comedy content with his “b-layer” – which encompasses trendy lifestyle and fashion-based content.

This is in no means an exhaustive list of the exciting established and rising creators coming out of the African continent. It merely scratches at the surface of what is fast becoming one of the cultural and creative content epicentres of the world. The platform, merely a facilitator, is almost irrelevant – as long as these creators, and their consumers, have access to a mobile phone, they will continue to create and consume respectively. As content continues to transcend platforms and strives to emulate authentic and relatable life, we'll only see the further expansion of exciting creators providing rich and engaging content to Africa and the world.

CHAPTER 06

Why Smart South African Brands Are Investing In Esports

By Alan Kietzman and Federico Dedeu, Directors at Esports Factory

Esports In South Africa: Why Smart Brands Are Investing

Even the most casual of sports fans recognise the name Lionel Messi. And if you're a sports fan in South Africa, you also probably recognise the name Lucas Radebe. It's not surprising that famous soccer players have been household names for decades. The sport generates billions in revenue each year as a result of its merchandise, media coverage and high-profile sponsorships.

But what about the names of South African pro gamers such as Sonic? Or Detrony? Or Elusive? Esports players aren't recognised as world-famous athletes ... *yet*. But it's not a matter of "if"; it's a matter of "when".



What Are Esports?

Esports are competitive video games, with the genre encompassing first-person shooters (Call of Duty), multiplayer online battle arenas (League of Legends), and virtual sports (FIFA). Every esports, in fact, has its own flavour but, in general, all esports are: organised; competitive; and designed for several players (i.e. both individuals and teams can take part).

Professional esports players compete head to head in international tournaments, oftentimes for prize money. The industry is exploding all over the world, but especially now in South Africa.



The State Of Esports In South Africa

South Africa has, over the last three years, become one of Africa's largest video game markets and the scene is more active than it has ever been. Organisations such as Mettlestate, the African Cyber Gaming League (ACGL) and Telkom VS Gaming manage the country's esports tournaments. These esports organisations host and broadcast important tournaments, offer up cash prizes to the top players, and support localised leagues and cups. It should be no surprise, then, that millions of gamers call South Africa home. But what may cause your eyes to pop out is that among those millions, one could be your great-grandma on Candy Crush.



Meet Our Gamers

South Africa has over 20 million gamers. And when we take a deep dive into the demographics, it is possible to uncover who is gaming and why. According to Esports Factory:

52.5 percent of gamers are male, 47.5% are female; Half of all SA gamers are between the ages of 21 and 35;

Over 25 percent of gamers are between the ages of 36 and 50;

SA gamers are affluent – 45.2% of all players earn a high income;

Most SA gamers have full-time jobs;

The majority of gamers in SA live on their own (with or without a partner) and have children; and

Since the start of COVID-19, there's been a 75 percent increase in online video-game traffic.

Meet Our Gamers

In short, South African gamers are predominantly young and have the disposable income available to spend on high-quality gaming. Of course, not all gamers want or use top-of-the-line gaming equipment; and not every gamer is under the age of 35. But, on average, the South African gaming community spends about [R4.9 billion](#) each year on this pastime.

This is over and above the income spent on gaming accoutrements – from headsets, gaming chairs, gaming keyboards and downloadable content (DLC), to in-app purchases, annual membership subscriptions and more.

Meet Our Mobile Gamers

There are over two billion mobile gamers in the world, and 20.3 million of them reside right here in South Africa. Most South African mobile gamers are female, making up 74 percent of all players. The majority of SA gamers are youthful, between the ages of 21 and 35; but a staggering 26.8 percent are over the age of 36.

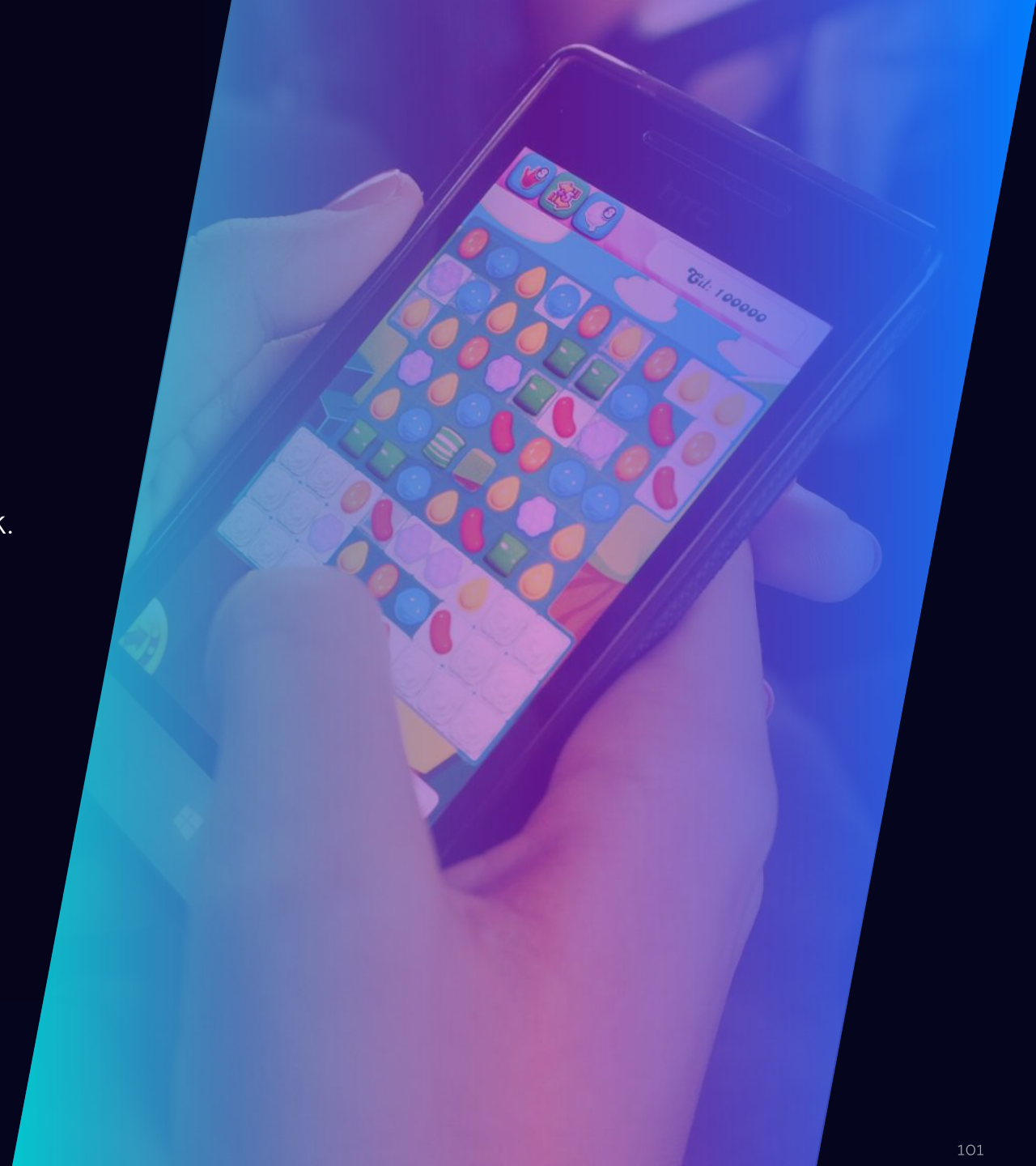
Most South African mobile gamers are in full-time employment and live with their partner and child(ren). This makes sense because individuals with full-time jobs and a family to care for need games they can pause at any time and which they can play on the go. This convenience may explain why mobile gamers in SA spend, collectively, around R.3.134 billion on games – up 9.4 percent year on year.



Meet Our Mobile Gamers

In fact, more than half of the country's mobile gamers spend over an hour a day playing mobile games. Nearly half of South African players open mobile games five to 10 times a day; while 62 percent of gamers play between three and 10 different mobile games per week.

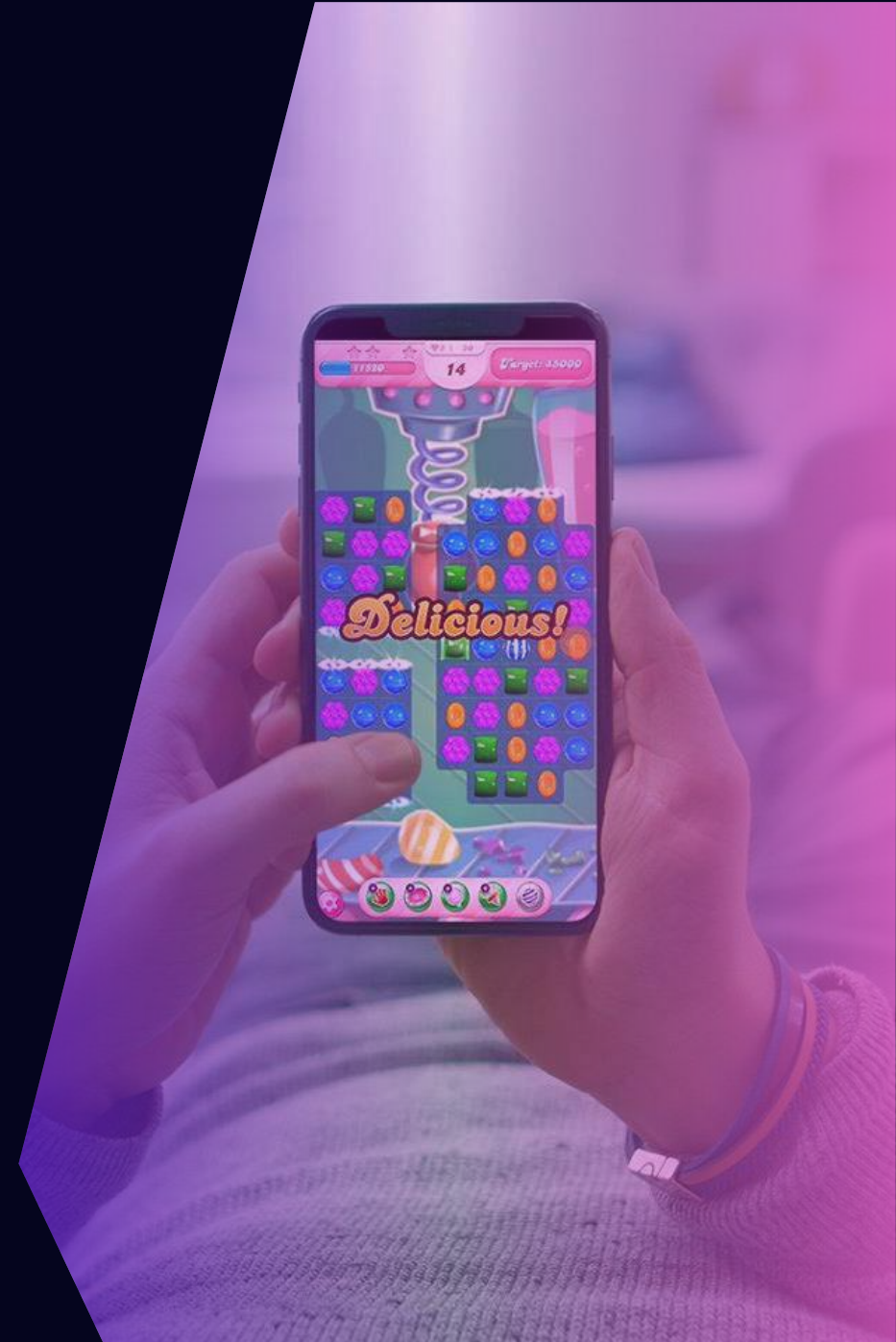
Perhaps the reason South Africans love mobile gaming so much is because, as Esports Factory points out, these options are relaxed. On average, South African gamers find they are three times more chilled and focused when they play mobile games as opposed to when they spend time on social media.



Spotlight On Casual Mobile Gamers

Candy Crush is one of the highest-grossing mobile games of all time. It has changed the way most people think about gaming. No longer are games limited to teenagers or young people flush with cash. And no longer are we limited to gameplay in our homes. Now, mobile games are accessible to any player with a smart device. In fact, within the last six months, 60 percent of mobile gamers in South Africa opted to play this game.

The majority of South African mobile gamers are casual in nature, and they don't see themselves as "true gamers." Since the majority of South African gamers are mobile gamers, this is puzzling. Let's break it down.



Spotlight On Casual Mobile Gamers

A mobile gamer is anyone who plays a game on their phone or smart device. And the type of mobile game doesn't matter, either. Someone who plays Candy Crush on their phone is a mobile gamer. Anyone who plays card games such as solitaire is a mobile gamer. Professional gamers who play League of Legends on their phones are mobile gamers. Why does the definition matter?

Brands and advertisers care about target audiences or the primary users of a given product or service. Since South Africa's mobile gaming population is so diverse, and many mobile gamers don't even know they're gamers, brands may not understand their target audience, may miss the mark and send the wrong message — expensive mistakes when it comes to ad spend.



Gaming And Ads In South Africa Over COVID-19

South Africans love mobile gaming. And they've proven more open to advertising than most brands realise — even during the recent COVID-19 lockdowns. The majority of gamers who are part of the Tapjoy mobile app network either like or don't mind in-game ads. During COVID-19 lockdowns, gamers were found to be more likely to interact with in-game ads and revealed they were comfortable with ads that mentioned the pandemic.

Further, brands that used in-game ad platforms over the course of the pandemic thus far — such as Tapjoy — have been seen to secure more conversions, more consumer spending and more ad opens. This makes sense because as South Africans headed home to shelter for months at a time, they proceeded to download more games and spent more time playing them than they ever had before.

Ultimate Opportunity For Brands

Professional esports tournaments capture the attention of millions of gamers at a time and offer huge payouts to the top competitors. The huge payouts involved and millions of active viewers taking part creates a combined scenario that is catching the eyes of many South African brands. They're willing to spend big bucks in exchange for captive audience attention. And, remember, those captive audience members are also high earners.

Competitive gaming isn't a niche subculture anymore. It's a mainstream industry with its own mainstream attention. As mentioned earlier, the ACGL is an esports company based here, on South Africa soil. The company manages, hosts and broadcasts competitive gaming events and tournaments to South African players. And they help brands and other organisations to break into the local esports scene. In essence, the ACGL exists to make connections between brands, players, teams and tournaments or gaming events.



Ultimate Opportunity For Brands

Further, South African brands can partner with Esports Factory to advertise directly to gamers as they play. Backed by the latest technology, Esports Factory takes deep dives into the South African gaming community. They're able to identify key submarkets and pinpoint specific data to support advertising campaigns in the most intelligent manner.

After all, the more information brands have about their audience, the more likely their advertising will resonate. For example, Esports Factory has noticed that young people in South Africa (i.e. those aged 16 or younger) are moving away from popular gaming platforms and embracing global options such as Roblox.

Roblox is a relatively new gaming platform that has effectively captured the attention of 200 million+ players (10 million+ players per month) and won the hearts of Gen Z-ers globally. In-app ad platforms such as Bloxbiz allow brands to advertise to millions of people as they play. Meanwhile, Esports Factory helps brands take advantage of these new gaming frontiers to increase ROI, sales, and brand awareness across South Africa.

Final Thoughts

South Africa's regional esports industry is booming. In a space where more players are competing, payouts are getting bigger and tournament views are growing, it's time for those late-blooming brands to catch up. And not just with competitive esports, but also with mobile and casual gaming.

The South African gaming markets are bursting with potential for businesses and advertisers alike. This is why companies such as Esports Factory are paving the way for brands to leverage the power of esports advertising in South Africa.



A large esports arena with a massive crowd and vibrant stage lighting. The scene is filled with people, many holding up their phones to capture the event. The stage is illuminated with bright blue and purple lights, creating a high-energy atmosphere. The arena's structure is visible, with a complex network of beams and lights overhead.

Visit [Esports Factory](#) online and follow them on social media to level up your own brand.

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CHAPTER 07

Viewership Trends From Showmax Africa

By Candice Fanguero, Head of Content at Showmax Africa

Trends in entertainment and viewership choices at Showmax Africa, a division of the MultiChoice Group

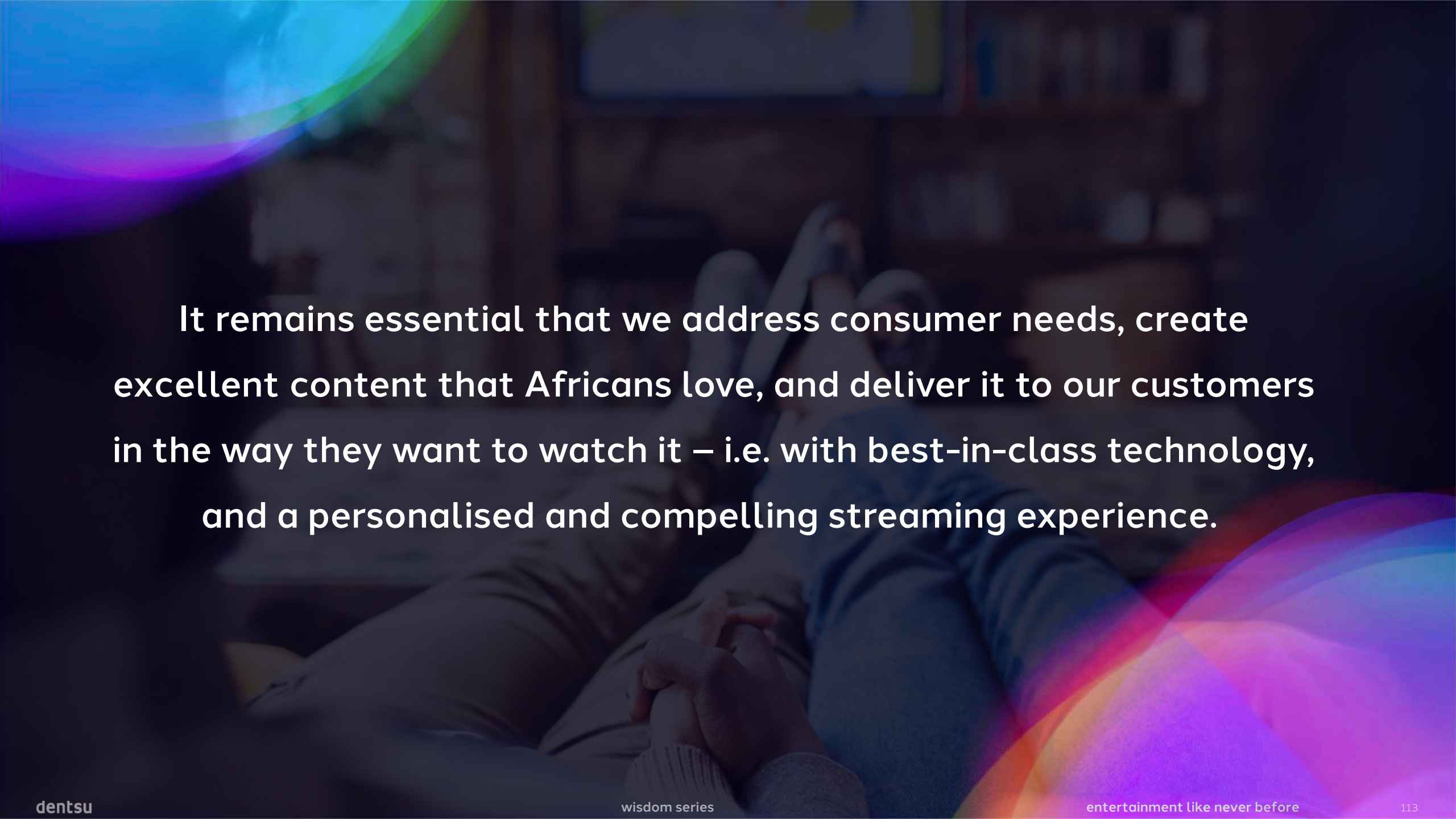
It goes without saying that the global pandemic has impacted the African world of entertainment and the viewership choices our subscribers are making. We've seen how lockdowns are moving the vibe away from "everyday street hustle" to "on the TV screen hustle", where TV time is now facilitating bonding time between family members and local content is even more important to viewers. Viewers have become more active consumers of content; much more discerning of what they watch. Content should stimulate, challenge, unwind or inspire to draw preference.



Trends in entertainment and viewership choices at Showmax Africa, a division of the MultiChoice Group

Rather than changing *what* people were watching, lockdowns changed *how* people watched. For those individuals who may have been streaming-curious before, lockdown saw them take the plunge and sign up to see what streaming on demand was all about.

What all of this has meant for us as a fundamentally African streaming business – operating in more than 50 African countries and within a number of diaspora markets – is that we've had to change the way we work. We've had to become more agile, more strategic and even to push the boundaries of innovation.



It remains essential that we address consumer needs, create excellent content that Africans love, and deliver it to our customers in the way they want to watch it – i.e. with best-in-class technology, and a personalised and compelling streaming experience.

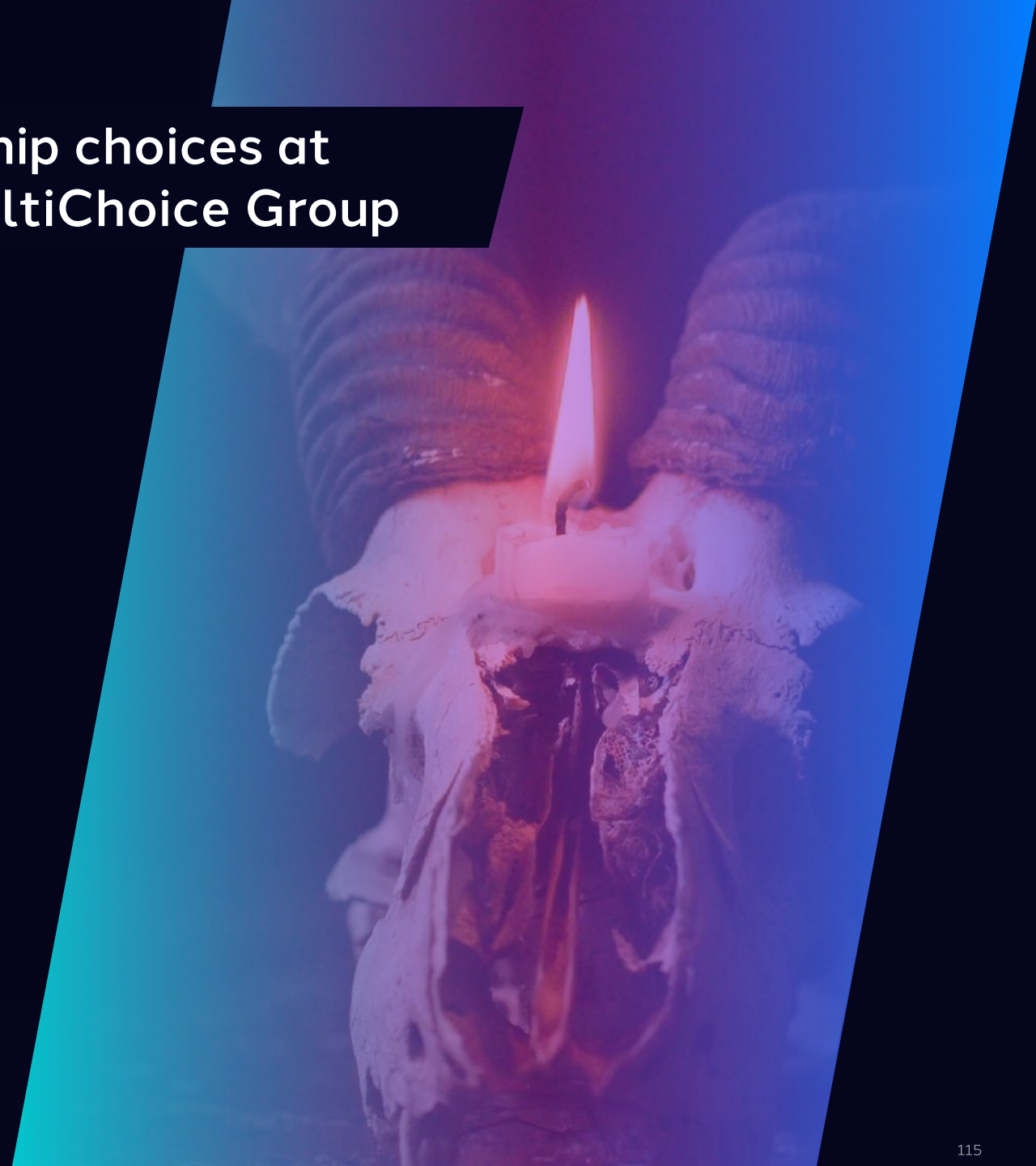
Trends in entertainment and viewership choices at Showmax Africa, a division of the MultiChoice Group

On Showmax, trendy, current and local-celebrity-based reality content is feeding the need for voyeurism and escapism. Life right now is crazier than fiction and it's clear that our viewers are choosing to sit back, relax and escape the chaos of everyday life by slipping into the lives of others. Showmax viewers are highly engaged when it comes to watching local celebrities – especially our Showmax Originals – be it the sassy and sexy *Real Housewives of Durban*, *Life With Kelly Khumalo* or the highly controversial gqom couple Babes Wodumo and Mampintsha in *Uthando Lodumo*.



Trends in entertainment and viewership choices at Showmax Africa, a division of the MultiChoice Group


Most recently we've seen our true-crime viewers highly engaged with the release of *Devilsdorp*, the four-part docuseries that investigates the 11 Krugersdorp killings between 2012 and 2016, separately known as The Appointment Murders and the Satanic Murders, and how they were all eventually traced back to Cecilia Steyn and the Electus Per Deus (Chosen By God) cult. The Showmax Original launched on Thursday, 29 July 2021 to five-star reviews, topping Showmax's SA Top 20 and setting a new record for the most hours it was watched in its first four days of launch of any show on Showmax ever.



What are the largest content demands or trends of African viewers on Showmax, and how do these differ from global trends?

In a digital world where viewers have access to a number of direct-to-consumer Subscription Video on Demand (SVOD) platforms, it's key to understand what your audience wants to watch. Time and time again we see that it's the latest, newest and freshest content from both a local and an international standpoint that fulfils this demand. Local content on Showmax is growing from strength to strength and with the release of each and every Showmax Original, we see an increasing number of viewers gravitating towards them.

Movies are a key driver for us across all territories in Africa – between great local content and a selection of international and local current blockbuster films, the largest content demands are being met. The ultimate binge experience is still one of the key reasons viewers watch SVOD services, and we have noted this happening as our subscribers engage weekly with their favourite TV series.

A hand holding a golden Emmy award against a background of colorful, abstract shapes. The background features a dark blue and purple gradient with a large, glowing, multi-colored sphere in the lower right corner. The Emmy award is positioned in the center, with its hand pointing upwards. The text is overlaid on the image in a white, sans-serif font.

Showmax also has the deepest and richest back catalogue of African classics, benefiting from MultiChoice's more than 62 000 hours of local content which encompasses International Emmy-nominated shows such as *Is'Thunzi* and *The River*.

How is MultiChoice looking to grow in the region?

The MultiChoice Group's video entertainment services span 50 markets and cater for [20.9 million customers across the continent](#), making us one of the top 10 pay-TV companies outside China. Programming is offered in 41 languages (with 17 languages related to proprietary channels only), through several dedicated local channels across our four key entertainment platforms – DStv, GOtv, Showmax and other digital properties. We provide a variety of showcase channels, but also package our own general entertainment and sport channels in-house that cover both local and international content. Local content has proven highly relevant for our customers and is a key differentiator for us. Over the past few years, we have doubled down on our investment in bringing customers quality content with a high local relevance.

How is MultiChoice looking to grow in the region?

Across Africa, a continent with more than 1.1 billion people, pay-TV penetration is still low and satellite remains the cheapest way of distributing long-form video content to the mass market. This is likely to remain the case for some years to come, which means we still have good growth prospects for our traditional broadcasting services – with an estimated addressable market of some 50 million-plus+ households.

We are also well aware of the opportunity that streaming services will represent once Africa can cross the digital divide and consumers can generally access affordable, high-speed broadband whenever they wish to.



How is MultiChoice looking to grow in the region?

Our Connected Video business, launched in 2015, is well positioned to leverage this opportunity and add incremental growth to our operations over time. It provides streaming services under the Showmax and DStv brands, which continue to enjoy solid user growth, increased viewing time per user and strong growth in play events.

Africa's complexity is our strength. Our deep local knowledge positions us to serve Africa's large population, located across vast urban and rural territories. Our distribution network caters for the informal retail markets of the continent, and our innovative payment solutions offer cash collection points as well as digital services. We also employ local teams with local partners in the countries in which we operate, to ensure our offering speaks solidly to those local markets.



Which markets have the biggest appetite for local versus global content?

All of our African markets are demanding local content and, as we roll out our hyper-local strategy, we see this appetite increasing: so far, South Africa, Nigeria and Kenya are greatest examples of this. What many people don't know, however, is that we already screen dedicated local content channels to 10 markets across the continent.



Why are telenovelas acceptable to African consumers?

Content is social currency (talk worthy)
– where telenovelas and soaps give viewers something to look forward to on a daily basis, allowing them to carve out some much-needed me-time and to be drawn into a world of drama and intrigue.

The new episodes being released each weekday offer fans the opportunity to check in with these characters regularly and to form deep attachments with them – as though the characters were part of their own family.



Access our recent Showmax Originals at the links below:



**BLOOD
PSALMS**



<https://multichoice.bynder.com/share/21A2F784-5ADE-45B9-9AC2COC88BC31939/>



DAM



<https://multichoice.bynder.com/share/EB114801-3200-4119-AD347ACC2163A3B7/>



DEVILSDORP



<https://multichoice.bynder.com/share/D1D27ECA-D2EE-43BB-833EB82FBF2DA408/>



**LIFE WITH
KELLY KHUMALO**



<https://multichoice.bynder.com/share/BO3FDB30-1F9B-4BEO-8585C8FE074F490A/>

Access our recent Showmax Originals at the links below:



SKEMERDANS



<https://multichoice.bynder.com/share/8D060DB4-38BD-4BF7-815E3E28AEDF9E39/>



**TALI'S BABY
DIARY**



<https://multichoice.bynder.com/share/D55C0743-C2AD-4BC9-9D5C342AB4D8AF92/>



**TEMPTATION
ISLAND**



<https://multichoice.bynder.com/share/148E29F9-1151-466A-86846604DF277BED/>



**UTHANDO
LODUMO**



<https://multichoice.bynder.com/share/2990D202-7A2A-4DC0-9D26064394D86178/>

CHAPTER 08

Africa's Top Nine Streaming Companies

By Joshua Kelvin, Compliance Executive at Dealswarehouse

The Top Nine Streaming Companies in Africa

Since the outbreak of the COVID-19 pandemic, the demand for online streaming services has increased significantly across the world.

People spent more time indoors due to the imposition of lockdowns and work-from-home policies, which increased the popularity of online streaming services.

From Netflix to YouTube to Spotify, national and international streaming services operate in almost every country and online streaming is now the preferred method for viewing shows, movies, sports and events, as well as listening to music.

NETFLIX

 **YouTube**

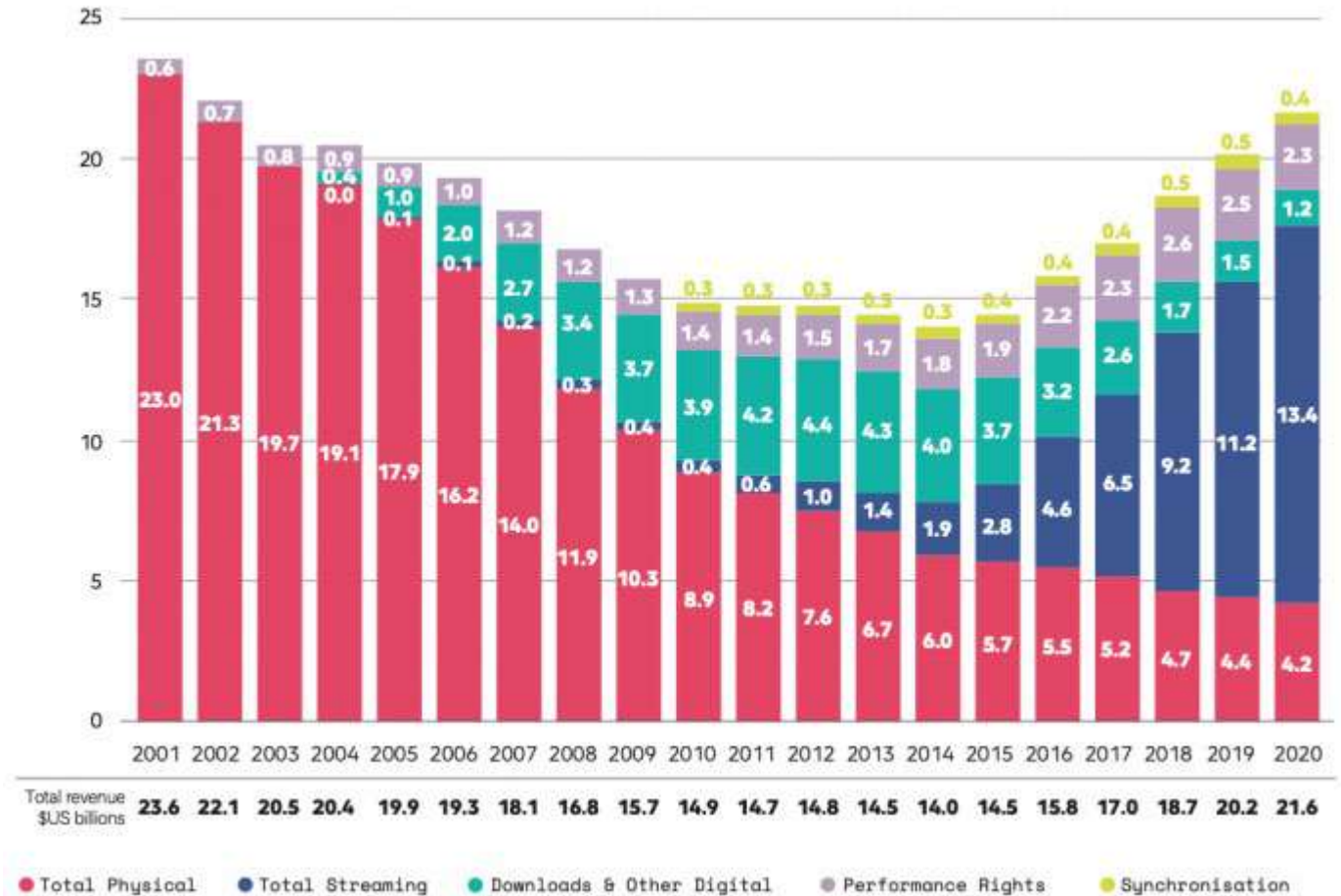
 **Spotify**

The global recorded music market grew by 7.4 percent in 2020, the sixth consecutive year of growth according to the International Federation of the Phonographic Industry (IFPI), the representative organisation for the recorded music industry worldwide. Figures released by IFPI's *Global Music Report* show total revenues for 2020 at US\$21.6 billion.

The Top Nine Streaming Companies in Africa

The growth in streaming revenues more than offset the decline in revenues from other formats, including physical revenues which declined 4.7 percent; and revenues from performance rights which declined 10.1 percent – largely as a result of the COVID-19 pandemic.

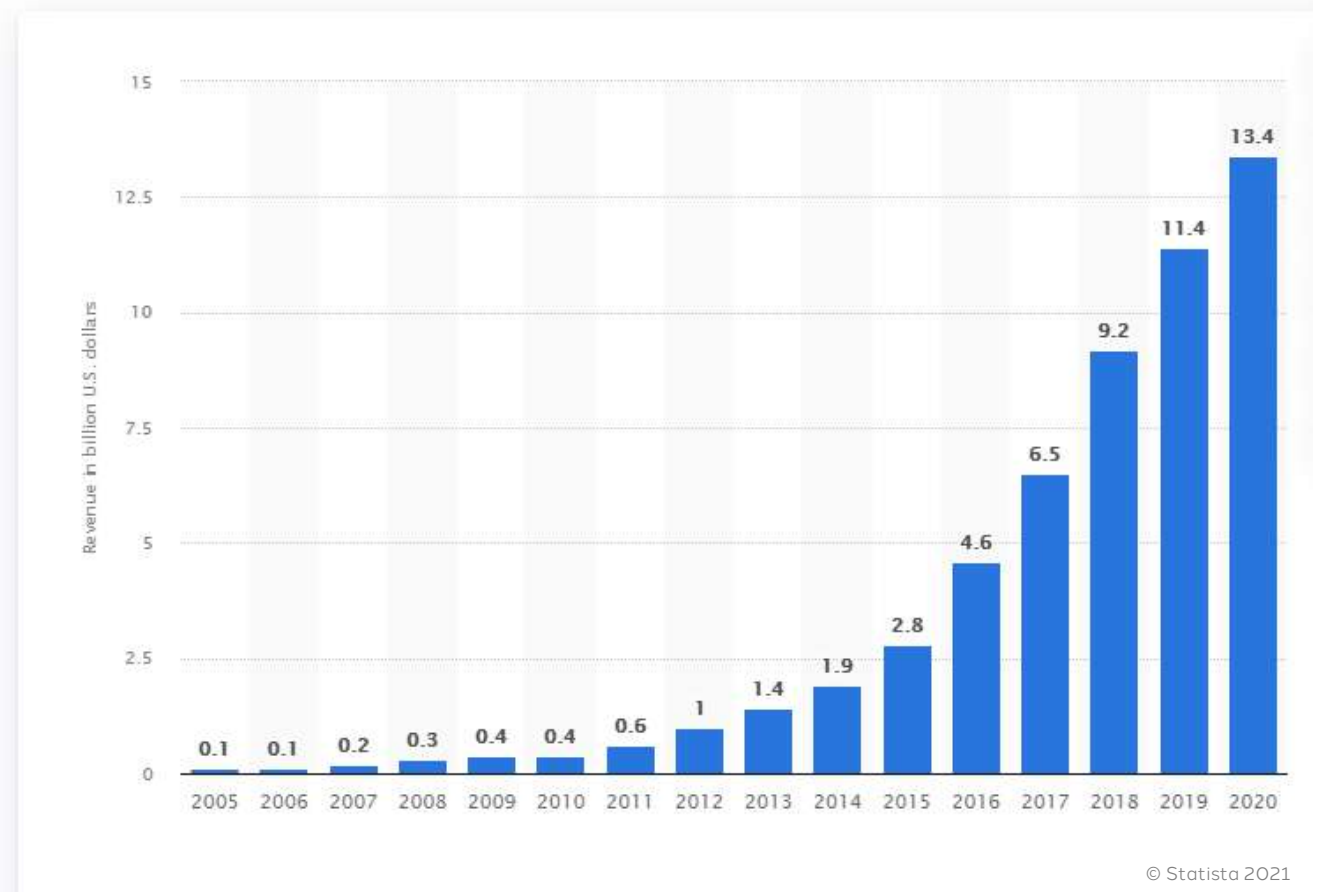
GLOBAL RECORDED MUSIC INDUSTRY REVENUES 2001-2020 (US\$ BILLIONS)



The Top Nine Streaming Companies in Africa

Growth was driven majorly by paid subscriptions, which increased by 18.5 percent. The global music streaming market was valued at US\$20.9 billion in 2019 and is expected to expand at a compound annual growth rate (CAGR) of 17.8 percent by 2027. There were 443 million users of paid subscription accounts at the end of 2020. Total streaming (including both paid subscriptions and advertising-supported) grew 19.9 percent and reached US\$13.4 billion, or 62.1 percent of total global recorded music revenues. Paid music subscriptions in the US reached an average of 75.5 million; a jump from 60.4 million in 2019 and 46.9 million in 2018.

Music streaming revenue worldwide from 2005 to 2020
(in billion U.S. dollars)



The Top Nine Streaming Companies in Africa

Although pre-pandemic research from Nielsen found that more than half (53 percent) of audio-streaming listeners were opting to use free, ad-supported services, the Recording Industry Association of America (RIAA) reports that ad revenue growth from these services was slowed by the pandemic. The growth of 16.8 percent, resulting in \$1.2 billion in revenues, is significantly less than the average growth rate of 30 percent seen within the three years prior.



The Top Nine Streaming Companies in Africa

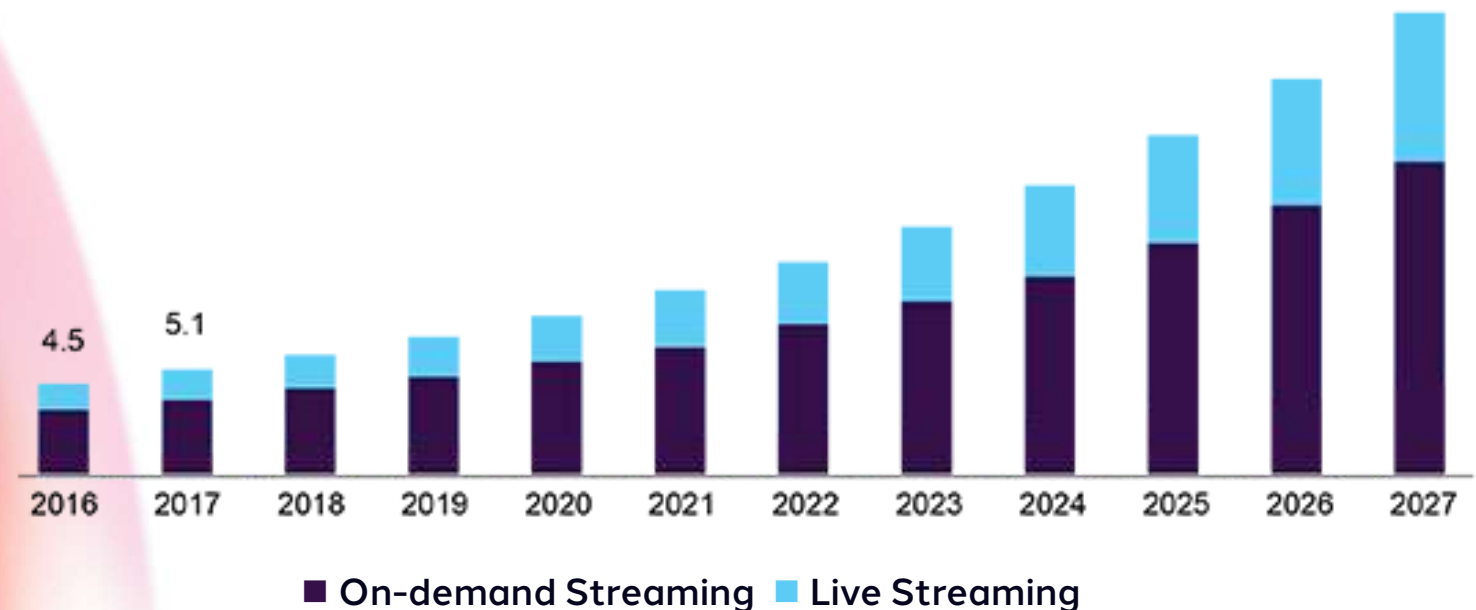
The on-demand streaming segment dominated the market in 2019, with a revenue share of nearly 70.0 percent. This segment is expected to expand at a promising pace over the forecast period as well, thanks to the increasing need to handle the risk of piracy. On-demand streaming services have emerged as a promising solution for stakeholders, right from distributors to musicians, for restricting the illegal sharing and downloading of music. The live streaming segment is anticipated to witness substantial growth, recording a CAGR of over 19.0 percent from 2020 to 2027. The primary factor contributing to this growth is the ability to reach a broader audience. Live streaming refers to broadcasting live content in real-time to people over the internet. Apart from the platforms built for live streaming, most social media channels also promote live videos. Owing to the increasing reach of live videos, an increasing number of artists are going live on platforms such as YouTube Live, Facebook, Instagram, Periscope and even Twitter. This trend is further expected to fuel the segment's growth over the forecast period.



The Top Nine Streaming Companies in Africa

The use of streaming music services is increasing in older generations. IFPI found that 54 percent of those aged 35 to 64 had streamed music in January alone. This was up eight percent from the previous year. That said, it remains that music streaming is most popular among the younger generations – with 83 percent of 16 to 24-year olds and 75 percent of 25 to 34-year olds taking advantage of this service.

U.S. music streaming market size, by service, 2016-2027 (USD Billion)



R&B and the hip-hop genre are by far the most popular with streamers, accounting for 31.2 percent of on-demand audio streams and 29.6 percent of on-demand video streams. The rock and pop genres are next, but rock listeners take a larger share of the audio-stream market (17.1 percent versus pop's 13.7 percent), whereas pop listeners make up a larger portion of the video market (15.5 percent compared to rock's 10.2 percent). Jazz fans are the less likely to stream music of all the genres.

The Top Nine Streaming Companies in Africa

The increase in digitalisation and growth in the adoption of digital music are paving the trajectory for growth in the music-streaming market. This market is moving ahead with the growth in penetration of the internet and smartphones. Both the content types, music streaming and video streaming, are witnessing high popularity across the globe. The surge in the number of service providers along with the presence of numerous subscription schemes is positively influencing the size of this market. Music-streaming services include platforms that allow users to listen to audio, podcasts and watch music videos. Moreover, these platforms offer features such as song recommendations, auto customisation of a playlist and hassle-free accessibility on apps as well as browsers, which are also expected to gain the attention of end-users during the forecast period. An upsurge in podcast genres on these platforms is further driving market growth.



The Top Nine Streaming Companies in Africa

North America accounted for the largest revenue share of over 30 percent of the market, with this regional market expected to retain its dominance over the forecast period. The presence of key market players, such as Amazon.com, Inc.; Apple, Inc.; Google LLC; and Pandora Media, Inc., is one of the primary factors driving the market in the region. Moreover, fixed broadband speeds and coverage, the high penetration of connected devices and superior digital payment infrastructure (in comparison to other segments of the market) also supplement the development of these services in the region.

In the US, recorded music revenues grew 9.2 percent in 2020 to US\$12.2 billion at estimated retail value, according to the RIAA report. This marks the fifth consecutive year of growth for the industry, as paid subscription services continue to expand their reach among the music-listening public.

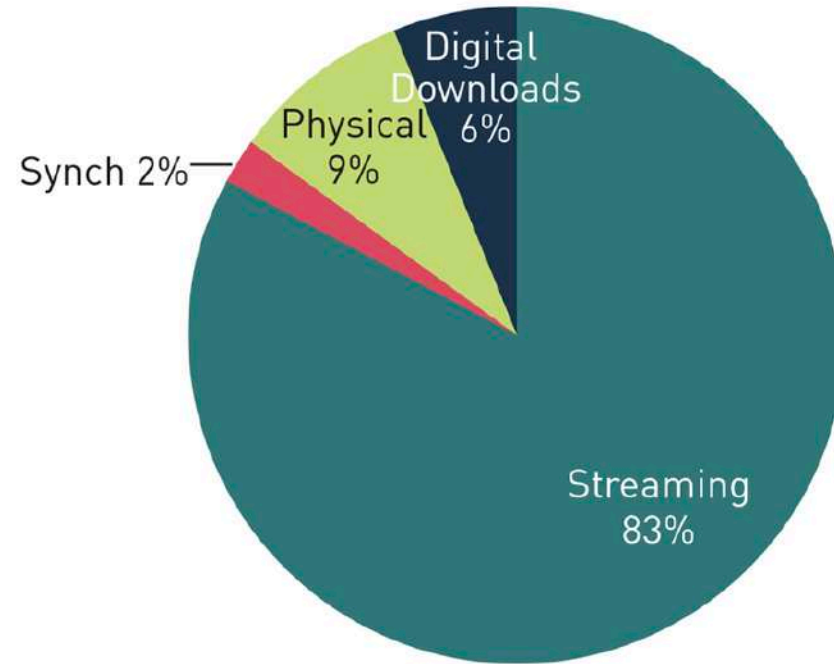


The Top Nine Streaming Companies in Africa

Streaming music revenues continued an upward climb last year, with paid subscription services, ad-supported on-demand platforms and digital radio providers contributing to US\$10.1 billion in overall revenue generated – a growth of 13.4 percent.

U.S. MUSIC INDUSTRY REVENUES 2020

Source: RIAA

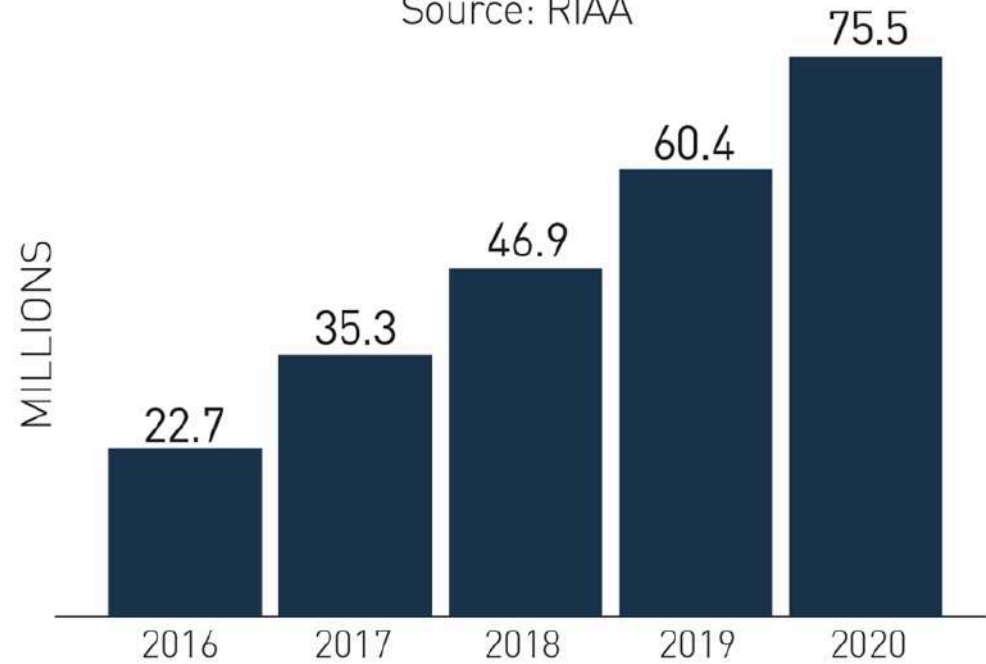


The Top Nine Streaming Companies in Africa

In November 2019, the number of audio and video-on-demand music streams in the US since the start of the year [hit the one trillion mark](#). By the end of the year, the number of streams reached 1.15 trillion, up from 887 billion in 2018. On-demand audio song streaming accounted for the majority (746 billion) of the 2019 streams, although video represented a large chunk (401 billion).

U.S. PAID MUSIC SUBSCRIPTIONS (ANNUAL AVERAGE)

Source: RIAA



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In Europe, the market was valued at US\$6 260.2 million in 2019 and is projected to reach US\$9 812.3 million by 2027; it is expected to grow at a CAGR of 5.5 percent from 2020 to 2027.

Here, digital music service providers are offering consumer-listening experiences via phones, tablets, computers and smart devices. The availability and popularity of in-vehicle infotainment systems in cars and via smart speakers in homes serve as a major opportunity for music-streaming providers to expand their businesses.



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Revenues in Europe, the second-largest recorded music region in the world, grew by 3.5 percent as strong streaming growth of 20.7 percent offset declines in all other consumption formats [IFPI Report]. Although the majority of European music collections are coming from key markets, such as the UK, Germany and France, other regions are experiencing significant growth with their own music-streaming revolutions. Digital music streaming is changing the landscape of music royalties in Europe, with much movement being seen in the traditional rankings. Other regions are consistently growing their digital share. One such region is the Nordics, where approximately 90 percent of people stream music. In the Nordic region, home to streaming behemoth Spotify, subscriptions are approximately an even split between paid and free. CISAC has reported a growth rate of 10.4 percent, over the past five years, in Central Eastern Europe's music revenue. In Southern Europe, Spain and Italy are seeing significant growth in paid subscriptions. Over 2019 Promusicae, a Spanish collections organisation, reported a growth of 24.4 percent in revenue from paid subscriptions. This translated into an increase of €2 million in revenues. Pop music remains the highest streamed music in the region, closely followed by Rock.



From the Spanish-speaking markets, including Mexico up north, Argentina in the south via Venezuela, Colombia, Peru and Chile to the Portuguese-speaking mega economy of Brazil, the Latin American music market is currently home to some of the world's biggest music hits.

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The region maintained its position as being the fastest-growing globally (15.9 percent) as streaming revenues grew by 30.2 percent and accounted for 84.1 percent of the region's total revenues. Streaming revenue holds an overwhelming majority of Latin's revenue at nearly US\$529 million, or 95 percent of its total 2019 revenue. Of that sum, 65 percent came from paid streaming subscriptions. Another 23 percent came from ad-supported streaming options such as YouTube, which was much higher than the 10 percent for the US music market as a whole. Paid subscription streaming revenue alone grew 36 percent, the biggest increase of any metric in the study, reflecting the wider trend of listeners adopting premium services such as Apple Music and Spotify Premium.

Paid subscriptions jumped to 60.4 million in 2019, up from 46.9 million the year before, according to another RIAA study published in February. Latin's resurgence has been going strong for years, according to Josh Friedlander, Senior Vice President of Research and Economics at RIAA, pointing to the growing percentage share Latin music has in the overall market. "It was four percent two years ago, 4.4% last year and now stands at five percent.

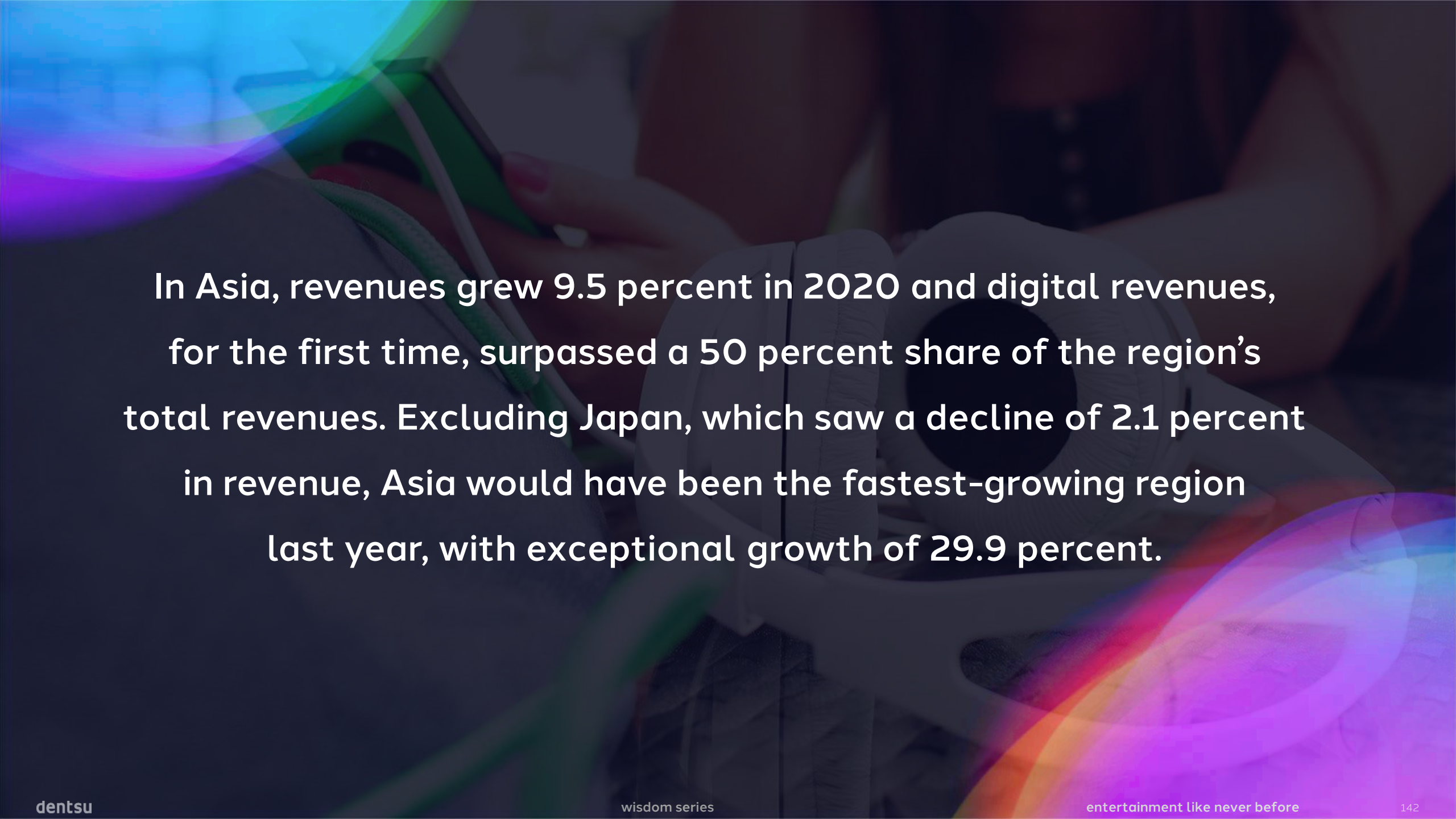
For me, that speaks to the more mainstream acceptance of Latin, within the bigger crossover hits," he advises.



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Over the last 20 years or so, Latin music has both lent to and borrowed from a wide range of other musical genres such as hip-hop, pop and reggae, and the result has been an incredible fusion of rhythms and sounds. Some of the biggest Latin American stars are some of the biggest stars globally, including Jennifer Lopez, Shakira and Marc Anthony. Recent worldwide hits such as “Despacito” and “Senorita” have even seen Spanish language songs topping the global singles charts. Notably, Puerto Rican artist, Bad Bunny, was Spotify’s most-streamed artist globally in 2020. As Latin American music continues to be a major influence on mainstream pop, its popularity is only going to increase.



A hand holding a smartphone, with vibrant, multi-colored light trails (blue, green, purple, orange) swirling around it. The background is dark, making the light trails stand out. The text is overlaid on this image.

In Asia, revenues grew 9.5 percent in 2020 and digital revenues, for the first time, surpassed a 50 percent share of the region's total revenues. Excluding Japan, which saw a decline of 2.1 percent in revenue, Asia would have been the fastest-growing region last year, with exceptional growth of 29.9 percent.

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Streaming accounted for 75 percent of digital music revenue throughout the Asia Pacific region. Comparatively, downloads accounted for 12 percent of digital music revenue in the region in 2020. As of 2019, the music-streaming market in APAC was valued at US\$6 963.5 million and is projected to reach US\$13 975.9 million by 2027. There is, justifiably, enormous optimism in the global music industry around the potential of **China** and [India](#), the world's two most populous nations, as digital starts to open doors and create new opportunities.

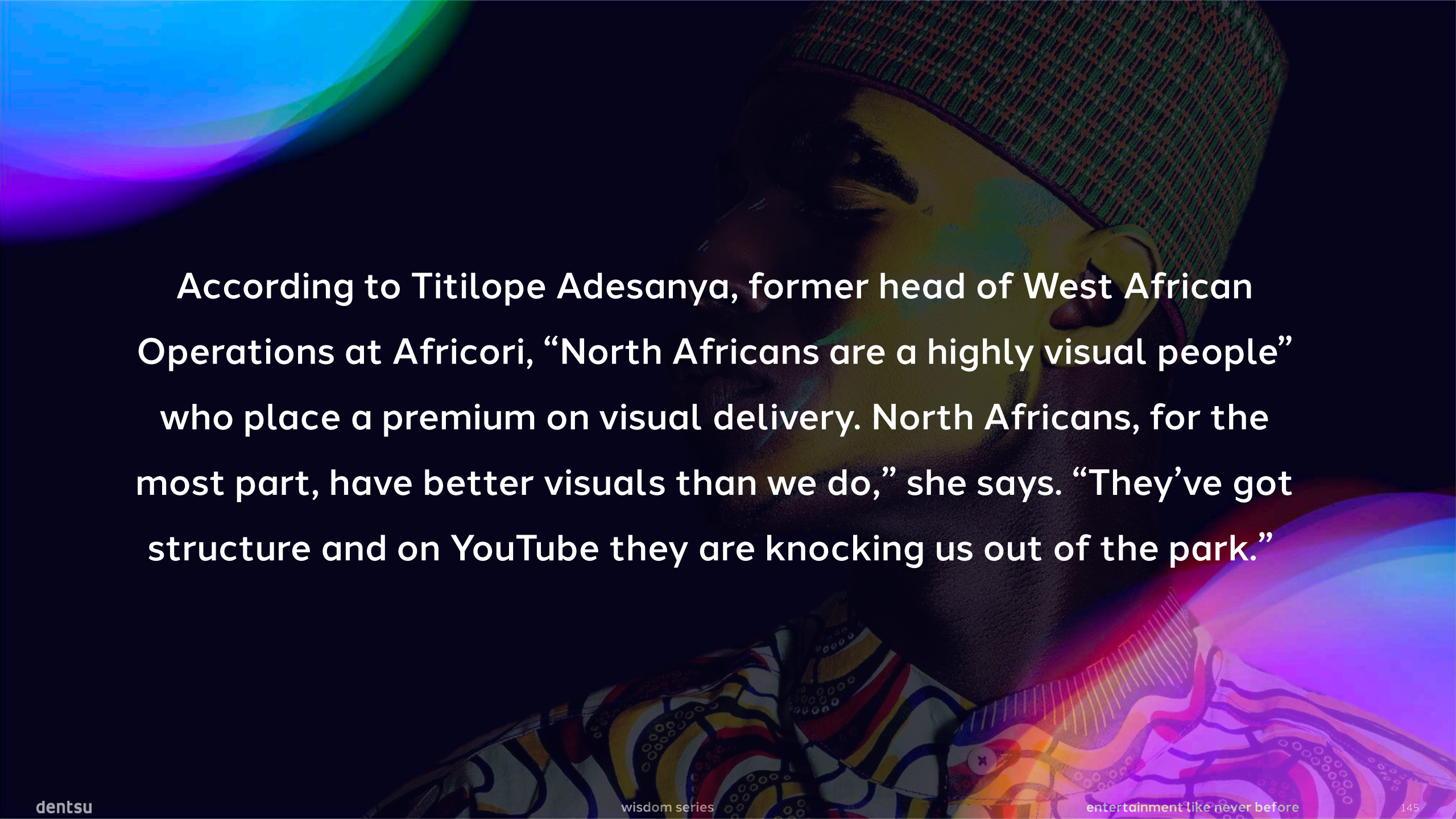
Growth in the APAC region has been powered by the emergence of a generation of digital natives, improving connectivity and more localised and personalised curation – given the region's conservative nature. Despite the presence of heavyweights such as Spotify, regional heavyweights like Tencent's *JOOX* have caught the eye in the music-streaming scene, spurred on in part by a rich inventory of better localised content. South Korea's K-POP is leading the chart of most streamed music platform in the region and, in 2020, witnessed massive growth of 44.8 percent recorded music growth.

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According to the IFPI 2020 report, recorded music revenues in the **Africa and Middle East** region increased by 8.4 percent – driven primarily by the Middle East and North African region (37.8 percent). Streaming dominated, with revenues up 36.4 percent. This report is proof of the massive potential of the North African market, even as sub-Saharan Africa (SSA) remains the darling of Western music industry stakeholders.

Beirut-based music streaming service *Anghami* has been charging forward in MENA (Middle East and North Africa) since 2012; it was the first music-streaming platform in the Middle East and North Africa (MENA), and has built a market-leading platform that offers more than 57 million songs to over 70 million registered users with around one billion streams per month.

Viewership is a thing in North Africa. In 2015, Moroccan pop singer Saad Lamjarred entered the *Guinness Book of World Records* with his song “Lm3allem,” which became the most viewed Arabic video on YouTube after garnering over 500 million views in just three months. It had 841.7 million views as of July 2020. His duet with Egyptian singer Mohammed Ramadan, released four years on, racked up 100 million views in a month – numbers that American superstars can only dream of.



According to Titilope Adesanya, former head of West African Operations at Africori, “North Africans are a highly visual people” who place a premium on visual delivery. North Africans, for the most part, have better visuals than we do,” she says. “They’ve got structure and on YouTube they are knocking us out of the park.”

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North Africa's young population is a big advantage: with an average age of 25, the allure of visual content is tantamount. "Most of this age group are *au fait* with smartphones, so [they are] automatically using YouTube as the easiest platform accessible to them. ... Spotify and Apple Music aren't used by [the] majority here" says Karima Nayt, a Swiss-based Algerian singer. It helps that 4G data penetration in North Africa and the Middle East is 62 percent, compared with just 34 percent in sub-Saharan Africa, according to the GSM Association, an industry body that represents mobile network operators globally. This makes it easier to stream videos on the phone in North Africa than is possible in sub-Saharan Africa.

North Africans – even in the diaspora – remain attached to traditional music genres such as chaabi, targui, andaloussi and rai, stresses Nayt. The region's willingness to embrace its Arab heritage more than its African one means it's only natural that young users prefer indigenous sounds to music from sub-Saharan Africa.

The evolution of Afro pop music, coupled with its global recognition, has given SSA a whole new landscape in the music industry. More so, there is a [new generation](#) of [digitally savvy](#) local artists and talents in SSA countries such as Nigeria, Ghana, Kenya and South Africa who, through social media, have been able push boundaries like never before.

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The streaming market in SSA has continued to grow amidst a myriad of challenges. By 2024, music-streaming revenues are expected to have hit a 12 percent annual growth rate that will see the market reach a volume of US\$822 million. Nigeria, the home of Afro beats, was projected to record music-streaming revenues of around US\$65 million by the end of 2020, according to a [report](#) by PwC. On the other hand, South Africa revenues were projected have reached US\$35 million by 2020, according to Statistica.



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African music-streaming platforms are probably a long way off from hitting the heights of Spotify or Apple Music but, in any case, Africa's music-streaming space has been growing steadily and startups have been fuelling consumer interest in music subscriptions and consumption. Among the regional heavyweights are: **Boomplay**, partly owned by Transsion Holdings, a Chinese company that is Africa's number one mobile phone supplier, launched in [Nigeria](#) in 2015 with local operations currently in about nine other SSA countries and claiming about 75 million users.

Boomplay allows users to stream music free of charge; pay for a daily, weekly, or monthly plan to save content to play offline; or purchase content to download. It has a catalogue of more than 47 million songs and videos.

Mdundo is a free music-streaming and downloading service that started in Kenya in 2013. [Created as an alternative to illegal downloading of music](#), which is widespread on the continent, it allows people to download songs, rather than stream them. Every song has a five to 10 second ad at the start. Through this model, the company made US\$300 000 in ad sales over 2019. Last year, it [raised](#) US\$6.4 million through an IPO on the Nasdaq First North Growth Market in Denmark. It had seven million users in December 2020. The service, which offers music by 80 000 artists and a catalogue of 1.5 million songs, is available throughout the continent – but its main markets are Kenya, Tanzania, Uganda, Nigeria and Ghana.

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MusicTime a streaming app from the MTN Group, one of Africa's largest mobile network operators by subscribers, was launched in South Africa in 2018. It is a pay-as-you-go service; users purchase a weekly package of two or five hours of music, and the internet data cost for listening to the music is included in the package. MusicTime has a catalogue of more than 40 million songs, with a focus on African music. It is currently also available in Nigeria, Ghana, the Republic of Congo, Cameroon, Eswatini and Zambia.





Other local music-streaming operations in Africa include Nigeria's UduX and Spintlet, Kenya's Smubu, South Africa's Mziiki and Senegal's MusikBi.

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The success of African music artists has also had its fair share of impact. Recently, Afro beats star Burna Boy bagged the Grammy Award for Best Global Music Album for his 2020 album *Twice As Tall*. Wizkid won the Best Music Video for his *Lion King: The Gift* track with American music star, Beyoncé, entitled “Brown Skin Girl”. In the same vein, South African singer Master KG won the Best African Act Award at the 2020 MTV Europe Music Awards for his hit song *Jerusalema*. Burna Boy also made history as the first African artist to achieve over 100 million streams on Spotify. From Afrobeat to Jazz to blues, African music now commands a huge global appeal. International labels such as UMG, WMG and Sony Music have also caught the wave, as is revealed below:

In 2016, singer Davido signed a deal with Sony music;

In 2019, UMG signed an exclusive global deal with Tiwa Savage, the Nigerian singer / songwriter icon, alongside Yemi Alade;

UMG and WMG have licensed several international titles to Boomplay, thus boosting their catalogue profile;

WMG sealed an agreement with Chocolate City Music in 2019, one of Nigeria’s most successful record labels; and

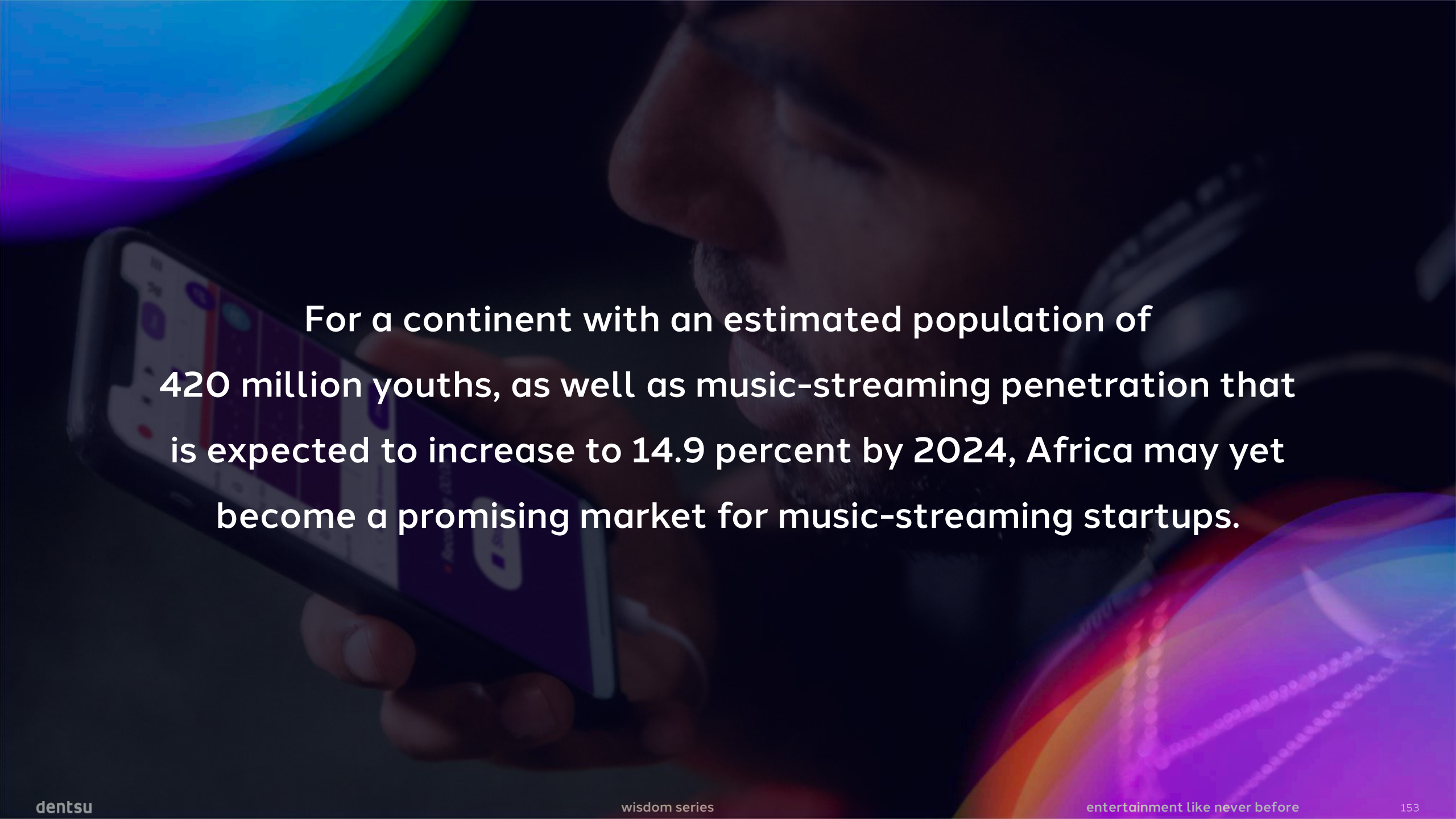
UMG also sealed deals with award-winning Afro-Pop group Sauti Sol, Kenya’s biggest contemporary music export.

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Mobile devices have taken over as the preferred method of consuming online media, given their affordability in a market with poor per capita earnings. The internet has, and continues to be, a disruptive force impacting the distribution and consumption of media within the streaming market. Additionally, internet penetration in the SSA region remains poor compared to other regions. Data costs are a barrier to people streaming more, as are the availability of global demand-side platforms (DSPs).

Up until a few months ago, when [Apple](#) expanded [Apple Music](#), the service was only available in 16 or 17 SSA countries. Spotify was only available in one country (i.e. South Africa, up until last year). Streaming revenues remain low as a result of these barriers. This notwithstanding, streaming could offer a new opportunity to consume music legally and help structure a legitimate business for a market that has been ravaged by copyright and privacy issues.



A person is shown in profile, looking at a smartphone. The phone screen displays a colorful interface with various icons and text. The background is dark with vibrant, glowing abstract shapes in shades of blue, purple, and orange, suggesting a digital or futuristic theme.

For a continent with an estimated population of 420 million youths, as well as music-streaming penetration that is expected to increase to 14.9 percent by 2024, Africa may yet become a promising market for music-streaming startups.

Here is an overview of the major music-streaming service providers:



Spotify was founded during 2006 in Stockholm, Sweden, by [Daniel Ek](#) and Martin Lorentzon. It started operations in 2008 and, as of June 2021, has over 365 million monthly active users, including 165 million paying subscribers.

It offers digital copyright restricted recorded music and podcasts, including more than 70 million songs, from record labels and media companies.

As a freemium service, basic features are free with advertisements and limited control, while additional features – such as offline listening and commercial-free listening – are offered via paid subscriptions. Users can search for music based on artist, album or genre, and can create, edit and share playlists. Spotify's revenue rose 16.5 percent to €7.9 billion in 2020, with 91 percent of its total revenue coming from its premium service and the remainder from its ad-supported service. Nearly half of Spotify's revenue originated in the US, the UK and Luxembourg, totalling a combined 48 percent market share. Unlike Apple, Spotify's biggest obstacle is its lack of first-party hardware and other services like video streaming.



Here is an overview of the major music-streaming service providers:

Apple Music

Apple Music is a subscription-based service like Spotify, offering access to over 75 million songs. It is packed with features including offline listening for when you are not connected. Apple Music offers live radio services and live radio stations, mixed with voice-command integration (thank you Siri!). The service launched in 2015 following Apple's acquisition of Beats Electronics in 2014. Users will be provided with recommendations tailored to their interest, internet radio, the ability to save music to a device for offline listening, expert curated playlists as well as playlists tailored according to a user's algorithm. Apple Music is available in over 165 countries. When it comes to music content, the service has the greatest catalogue of music with over 75 million songs in its collection. Apple Music is well known for making exclusive deals with artists such as Drake and Taylor Swift to provide its users with premium early content releases. Much of its exclusive content is due, in large part, to Apple's paid-only service; users are required to have a paid subscription after their initial three-month free trial.



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amazon music

Amazon Music is a music-streaming platform operated by Amazon. Launched in public beta on 25 September 2007, Amazon Music's plans include: Free, Amazon Music Prime, Unlimited, Unlimited Family and Single Device. With a Prime membership, users gain access to an expanded music service, called Amazon Music Prime, as part of their subscription. This plan is ad-free and has on-demand access to around two million tracks. To gain access to Amazon's full library of songs, however, subscribers will need to upgrade to a Music Unlimited plan for an extra fee. Amazon Music comes with a mobile app that includes a built-in Alexa voice assistant. This functionality means all music controls can be performed via hands-free voice commands. Amazon prime has 148.6 million members to date, with the US taking 74 percent of its total subscriptions. It is available in 19 countries.



Here is an overview of the major music-streaming service providers:

YouTube Music

YouTube Music is a relatively new music-streaming service from Google, which only focuses on "all things music" across its video-streaming platform. Launched in 2018, YouTube Music fully replaced Google Play Music by December 2020. YouTube Music gives YouTube subscribers access to just about everything they could ever want in terms of music: official albums, live performances, remixes, covers and plenty of hard-to-find music. It also offers thousands of playlists and provides music recommendations.

The service offers a free, as well as paid (Premium) membership; with the latter removing adverts, giving you background listening on your mobile device (so you can exit the app and continue listening), and granting you song downloads for later offline playback.



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Deezer was one of the first music-streaming services ever, launching just one year after Spotify in 2007. Today, Deezer is available in 180+ countries around the world, with 16 million active users. Ad-supported streaming with limited features is available free of charge, while a Deezer Premium subscription will grant access to limitless streaming. Deezer currently has 73 million licenced tracks in its library, with over 30 000 radio channels, 100 million playlists, 16 million [active](#) monthly users and seven million paid subscribers as of January 2019.



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pandora

Pandora Radio (also known as Pandora Music), which is powered by the Music Genome Project, is one of the leading platforms available on which to discover new music and podcasts. This offering operates an automated internet radio service that allows users to find new music based on their taste. The user can use [thumbs up](#) and thumbs down buttons to declare whether they like a track or not, which determines whether similar songs should be played on the station.

The company was founded during 2000, in Oakland, California, by Will Glaser, John Kraft and Tim Westergren. Pandora is a [freemium](#) service – basic features are free with advertisements or limitations; while additional features, such as improved streaming quality, music downloads and offline channels, are offered via paid subscriptions.



Comparison of selected music-streaming platforms

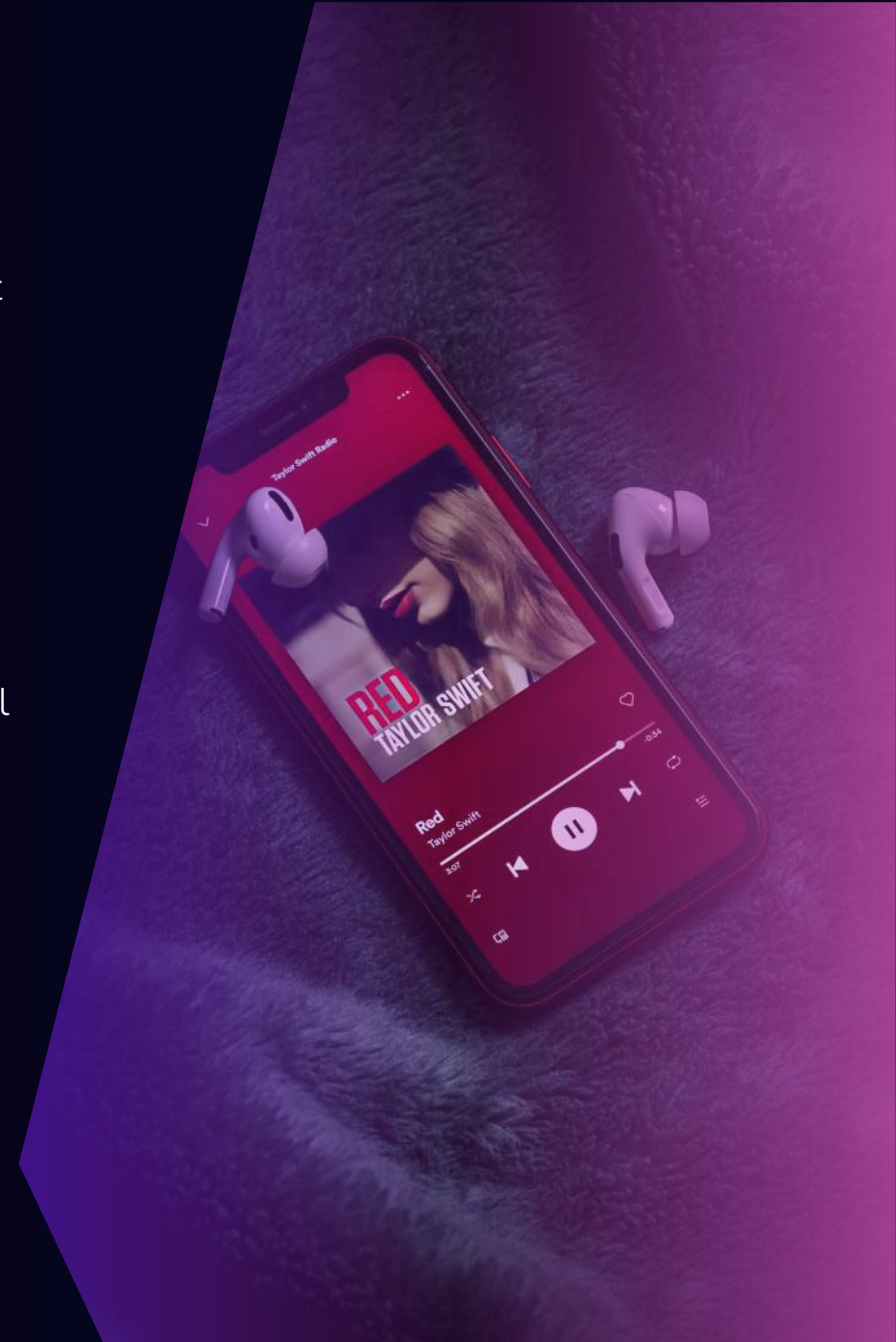
	 Spotify®	 Apple Music	 amazon music	 YouTube Music
Monthly fee	\$10 £10	\$10 £10	Prime members: \$8, £8 Non-Prime members: \$10, £10	\$9.99 £9.99
Free trial	30 days	3 months	30 days	30 days
Music library size	Over 50 million	60 million	70 million	75+ million
Music videos	Yes	Yes	No	Yes
Family plan	Yes \$16 per month, up to six	Yes, \$15, £15, for up to six people	Yes, \$15, £15, for up to six people	Yes, \$15, £15, AU\$18 per month, for up to six people
Offline playing	Mobile and Desktop	Mobile and Desktop	Mobile and Desktop	Premium and Mobile only
Podcasts	Yes	No	No	Yes



An increasing amount of media consumption is taking place today on digital media, and people spend more time now on digital as compared to traditional media. The increase can be attributed to the improvement in mobile device technologies and more widespread internet connectivity, which have provided listeners with the option of accessing digital media content on the go.

Summary

The music streaming business is on the rise, accounting for about 80 percent of total music industry revenue. The outbreak of the COVID-19 pandemic positively impacted the music-streaming market across the globe. Online music-streaming services allow users to play and listen to music of their choice anytime and anywhere. This has been facilitated by wide-scale penetration of the internet and an increase in users of digital devices (such as smartphones, Bluetooth and speakers). Moreover, upcoming technological advancements such as 5G, artificial intelligence, virtual reality and machine learning are enabling service providers to offer customised playlists and a seamless user experience to customers – which is expected to fuel the growth of the online music-streaming market. Competition in the market has also been a key factor that has driven strong growth; though Spotify remains the market leader, other service providers such as Apple Music, Amazon Music Unlimited and Pandora have also made huge strides.



Summary

Despite growing popularity of music streaming among consumers, the path to profitability for these services is less straight forward. Challenges include balancing willingness to pay for a subscription with high content costs and low advertising prices; as well as creating a more sustainable royalty model with label companies.

Innovations from music-streaming providers are shedding light on what the future looks like, with data and technology at centre stage. Data is revolutionising the way creators understand their listeners and is empowering more direct connections with fans – from creating targeted campaigns and raising awareness of new music and tours, to identifying new opportunities for engagement. Harnessing technology allows fans to discover and personalise the music they listen to at the simple push of a button.

Block-chain technology could help offer transparency through the value chain, allowing musicians and their managers to see exactly how much money they are owed, as opposed to a rampant culture of non-disclosure agreements.

Growth in the streaming market is expected to continue on an upward trajectory. Africa is likely to be a major market in the future, considering its youthful population and low internet penetration. As the space heats up, establishing the right business model will be critical for success.

CHAPTER 09

YouTube Listens In To Africa's Youth Market

Michael Zylstra, Chief Strategy Officer at dentsu SSA chats to Nadine Zylstra, Head of Family and Learning Originals at YouTube

With a view to investigating the work of YouTube on the African continent, Michael Zylstra, Chief Strategy Officer at dentsu SSA chats to Nadine Zylstra, Head of Family and Learning Originals at YouTube, about the influence of TikTok, the way the Black Voices programme is empowering local creators, and how brands cannot ignore the gravitation towards sustainability of the 14 to 24-year-old market segment.



[YouTube listens in to Africa's youth market - YouTube](#)

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