

MADE IN AFRICA, WATCHED GLOBALLY?

Market Intelligence on Distribution, Audience and Social Impact Themes across Egypt, Kenya, Nigeria, Rwanda, Senegal, and South Africa

giz Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) GmbH

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This publication is a product of the 'Made in Africa, Watched Globally? Market Intelligence on Distribution, Audience and Social Impact Themes across Egypt, Kenya, Nigeria, Rwanda, Senegal and South Africa' research, implemented by Dalberg on behalf of the Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) GmbH and the African Export–Import Bank (Afreximbank) through the Creative Africa Nexus (CANEX) initiative. All rights are held by the implementing and funding partners.

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Recommended Citation:

Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) GmbH, African Export–Import Bank/ Creative Africa Nexus (CANEX), and Dalberg. (2026). Made in Africa, Watched Globally? Market Intelligence on Distribution, Audience and Social Impact Themes across Egypt, Kenya, Nigeria, Rwanda, Senegal and South Africa.

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This report was commissioned by the Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) GmbH and Afreximbank and produced by Dalberg, with support from the Creative Africa Nexus (CANEX) Programme as well as the GIZ self-initiated Moving Pictures Africa project and CANEX Creations Inc. While this report was commissioned and funded by these partners, the findings, interpretations, and conclusions expressed herein are those of the authors and do not necessarily reflect the official policy or position of GIZ or Afreximbank.

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FOREWORD

Africa's film industries are standing at a historic crossroads. Digital connectivity is expanding rapidly. At the same time, a young and creative population is reclaiming the continent's narrative on the global stage. Film has emerged as a powerful engine for cultural expression and economic resilience. Yet, a persistent gap remains despite this immense creative energy. A disconnect exists between high-potential content and the structural systems needed to reach a paying audience.

This report is a collaborative effort between the Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) GmbH, the African Export-Import Bank (Afreximbank), through its Creative Africa Nexus (CANEX) programme, and Dalberg. It provides the critical evidence needed to move the industry from potential to sustainable prosperity (understood in this report as durable local reinvestment: stronger recoupment, greater local ownership of intellectual property, and reduced dependence on external donor or platform financing). We analysed distribution, audience development, and financing across six key markets (Egypt, Kenya, Nigeria, Rwanda, Senegal and South Africa) over the period from 2020 to 2025. This process allowed us to move beyond identifying obstacles. We have now articulated concrete, data-driven pathways for growth.

> *"Turning complex industry realities of selected Africa's film markets into practical market intelligence is a remarkable achievement reflected in robust data and trend analysis. Equally powerful is the human story behind the numbers: the compassion, courage and determination of filmmakers, distributors and social impact campaigners who are driven to bring stories to audiences, open minds and connect people. We celebrate both the knowledge this report creates and the people whose commitment gives the industry its heart and purpose."*
>
> **Anna Sophie Herken, Managing Director of GIZ**

The findings are unequivocal. Building a thriving film sector is about more than just making movies. It requires strengthening the entire ecosystem. We must integrate mobile money into streaming platforms. We need to decentralise cinema infrastructure and standardise rights management. The roadmap ahead is clear. Data shows that African audiences are not passive. They actively seek high-quality, socially relevant stories that mirror their lived realities.

This report arrives at a crucial juncture, aligning with broader continental goals for creative economy integration. It offers a blueprint for policymakers, private sector investors, and international partners to work together. These recommendations are ambitious yet achievable. Success depends on turning cultural pride into a robust, self-sustaining business model (stronger recoupment, greater local ownership of rights, better audience data, and less dependence on external platforms and grants).

Who this report is for and how to use it:

This report speaks to several audiences with different needs, and readers may choose to focus on the sections most relevant to them. Policymakers and regulators can draw on the country chapters (Section 3) and the recommendations (Section 6) to inform incentive design, tax structures and reporting requirements. Funders and financing institutions can use the financing sections (Section 2.5 and Section X.5 in each country chapter) to identify where distribution and audience-development capital is most needed. Streaming platforms and broadcasters can use the distribution sections (Section 2.2 and Section X.2 in each country chapter) to inform licensing, windowing and commissioning decisions. Producers and filmmakers can draw on the audience development sections and the case studies (Section 5) to inform release strategy and audience-building. Development partners, donors and NGOs can use the social impact sections (Section 2.4 and Section X.4 in each country chapter) to support impact measurement and ecosystem infrastructure. Readers with limited time may begin with the Executive Summary and Section 6 (Recommendations), then turn to the country chapter most relevant to their market.

We invite you to read this report as a celebration of Africa's cinematic resilience. It is also a call to action. We look forward to a future where the continent's filmmakers no longer have to choose between creative integrity and financial security.

Submitted by GIZ, Afreximbank, Dalberg

ACKNOWLEDGEMENTS

This report was commissioned by the Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) GmbH and Afreximbank and produced by Dalberg, with support from the Creative Africa Nexus (CANEX) Programme as well as the GIZ self-initiated Moving Pictures Africa project and CANEX Creations Inc. Victor Chudal-Linden, Linda Musita, Osahon Akpata, Jean-Elie Ilunga, Fiyin Kosoko and Temwa Gondwe provided strategic and technical guidance throughout the process. We gratefully acknowledge the valuable insights and feedback provided by filmmakers, distributors, and policy actors in Egypt, Kenya, Nigeria, Rwanda, Senegal, and South Africa. Their contributions were vital in mapping the unique topography of each market.

We extend our sincere thanks to the team at Dalberg for their rigorous analysis and dedication to this study. We specifically thank Bill Apiyo, Daniel Kamau, Lilian Nyasetia, Mette Halborg, Pascal Okuda, Pauline Oduol, Sally Lago, Serene Habbal, Seyi Olawoyin, Shadrack Munene, Simon Mbai, and Violet Gisore for their essential contributions. We also recognise the technical leadership provided by Alpha Ouma, Daniel Omollo (Dalberg Research) and Motunrayo Ojo (What Kept Me Up) in synthesising the complex datasets that underpin these findings.

Special gratitude is due to the members of the Advisory Reference Group, who provided peer review and ensured local relevance from the inception of this study. We thank Brian Etuk (Nigerian Film Corporation), C.J. “Fiery” Obasi, Gamal Guemeih (Post Investments), Ladun Awobokun (FilmOne), Mamadou Dia (Joyedidi Productions), Mohammed Said Ouma (DocA), Motunrayo Ojo (What Kept Me Up), Serge Noukoue (Okada Media & Nollywood Week), Tambay Obenson (Akoroko), Thandeka Zwana (Indigenous Film Distribution), Timothy Owase (Kenya Film Commission), and Torsten Frehse (Neue Visionen). Their role in validating findings and acting as champions for uptake within regional ecosystems has been invaluable.

We would also like to acknowledge the following moderators who supported the qualitative research process: Chloé Ortolé Diop (Senegal), Karim ElCharkawy (Egypt), Nduruka Njoroge (Kenya), Nomaswazi Cornelia Twala (South Africa), Olayinka Abiola (Nigeria), Sifiso Makhubu (South Africa), and Yuhi Amuli (Rwanda).

We would like to express our sincere gratitude to Tamara Mariam Dawit from Gobez Media Inc. for her holistic peer review, valuable guidance, and comprehensive insights, which greatly enhanced the overall quality and depth of this report.

Finally, we thank the various filmmakers, distributors, and policy actors who shared their time and expertise. Most importantly, we thank the film audiences in Egypt, Kenya, Nigeria, Rwanda, Senegal, and South Africa who participated in the anonymous audience surveys. Their perspectives are the heart of this report.

This study was made possible with funding from GIZ and Afreximbank. The content is the sole responsibility of the authors. It does not necessarily reflect the official views of the funding partners or their respective boards. Our collective hope is that these findings serve as a catalyst for growth. We aim to support a future where Africa film industry thrives through improved distribution, stronger audience engagement, and sustainable financing.

Contributing organisations:

EXECUTIVE SUMMARY

This summary orients readers to the report's headline findings and calls to action. The full evidence base, country-level detail and methodology are set out in the Introduction, Collective Insights, country chapters and recommendations that follow.

Headline Findings

Production is growing but distribution is not keeping pace

Across the six markets, film and television production volumes are rising, but the infrastructure to connect those films with paying audiences has not grown at the same rate. Cinema screens are concentrated heavily in capital cities: Kenya has fewer than 50 screens nationwide, with over 75% in Nairobi (SinemaFocus, 2025); Rwanda entered 2026 with a single operational commercial cinema hall after the closure of Canal Olympia Rebero; South Africa saw a 33% reduction in major cinema sites between 2015 and 2025, with closures concentrated in lower-priced regional venues (Capstone Report, 2025). Across most African markets, the average is one screen per 787,000 people. Most producers work with a very small pool of buyers, typically a few broadcasters and streaming platforms, which creates significant pricing pressure and limits commercial independence. Stakeholders consistently described this as a structural value gap: the industry generates content that audiences want, but the systems to deliver it sustainably and at scale are missing. A second structural problem is the near-total absence of centralised, reliable industry data in most markets. Without it, distributors, platforms, and investors make decisions on anecdote rather than evidence, further deterring institutional capital.

Revenue figures are rising, but fewer people are watching

A pattern visible across Nigeria and South Africa illustrates the tension at the heart of African film distribution where revenues are going up while audience reach is stagnating. In Nigeria, theatrical revenue grew 34.7% in 2025 to reach 15.6 billion Naira (approx. USD 10.9 million, FilmOne Yearbook 2025). Admissions grew by about 5% and remained below the 2021 peak. The revenue growth came almost entirely from ticket price inflation of around 270% over five years, meaning exhibitors are successfully earning more from a smaller, wealthier urban audience while structurally excluding the mass market. In South Africa, admissions rose 14.2% in 2023 while gross box office fell 11.2% to R575 million (approx. USD 24.4 million, NFVF Annual Report 2024), as audiences returned mainly through promotional pricing. In 2024, both fell: admissions by 34.5% to 5.4 million and revenue by 4.5% to R549.3 million (NFVF). In both markets, local films bear the heaviest cost. South African domestic titles made up just 3% of releases and less than 1% of box office revenue in 2023 (NFVF). In Nigeria, over 90% of films classified annually by the National Film and Video Censors Board (NFVCB) never reach a cinema screen, moving directly to digital or informal channels.

Across all six markets, YouTube leads by audience reach because it is free. Paid subscription services reach a smaller, higher-spending segment. Egypt shows the bifurcation clearly: Shahid VIP (2.15 million subscribers) and Watch iT (1.25 million) account for roughly 88% of paid OTT subscriptions, reflecting strong demand for Arabic-language content, yet YouTube is the most widely accessed platform, used by 59% of Egyptian viewers (GMI, 2025).

In Kenya, platforms like Viusasa have built mass-market reach by offering content at KES 10 to 20 (approx. USD 0.08 to 0.15) per 24-hour subscription, which aligns with the spending habits of a market where irregular incomes make fixed monthly subscriptions impractical. In Senegal and Rwanda, where formal cinema infrastructure has largely collapsed, YouTube accounts for even more of total consumption; Marodi TV in Senegal has built 8.67 million subscribers and 4.6 billion views on a fully free, advertising-supported model (DataReportal, 2026).

Piracy is widespread across all six markets. Audience surveys found that 63% of Nigerian audiences who use unofficial platforms do so mainly because legal options are too expensive, and 55% of Kenyan audiences use piracy as a primary access method, with 67% citing content unavailable on legal platforms as the driver (Dalberg Research audience surveys, 2025 to 2026). African films are growing their international presence with 83 films from the six countries generating over 700,000 European cinema admissions between 2020 and 2024 (LUMIERE database, European Audiovisual Observatory). At the same time, global platforms pulled back substantially during 2024 and 2026. Amazon Prime Video stopped commissioning African originals in January 2024, Showmax closed in April 2026, and Netflix now commissions primarily in South Africa with Nigeria as a secondary market. These developments make African-led distribution infrastructure a practical necessity.

Audiences are large and engaged, but underserved and underpaid

Audience surveys confirmed strong and consistent demand for locally relevant film and television content across all six markets. The research identified three viewer groups with different implications for pricing and distribution. Local Content Loyalists, who make up 43 to 59% of audiences in more established markets, are committed to domestic stories but highly price-sensitive. Global Quality-Seekers are technically demanding and gravitate toward international content or piracy when local production does not meet their standards; in Kenya, this segment records a Net Promoter Score (NPS) for local film of -80%. Value-Seeking Family Streamers, a fast-growing group, navigate between YouTube, Pay TV, and micropayment services and give local African content an NPS of +42% in Rwanda when it is priced accessibly (Dalberg Research audience surveys, 2025 to 2026).

The biggest barrier to growing paying audiences is data cost. Across much of the African continent, 1GB of mobile data costs an average of 3.1% of monthly income, above the 2% global affordability threshold set by the Alliance for Affordable Internet (A4AI). Regular streaming is out of reach financially for most of the population. Audience surveys found that over 60% of OTT users subscribe to a platform for a single title and immediately cancel. When MultiChoice raised prices by 31% across the rest of Africa in FY25 to offset a USD 293 million foreign exchange loss, it lost 1.2 million linear subscribers, a drop of 8% (MultiChoice Integrated Annual Report, 2025). Platforms that have aligned pricing with real consumer incomes have had better outcomes. Daily micro-subscription models at approximately USD 0.08, pioneered by Viusasa and Safaricom Baze in Kenya, have demonstrated that mass-market scale is reachable when pricing matches actual spending patterns.

Word of mouth is the main way audiences discover films in five of the six markets: 93% in Egypt and 82% in Nigeria first hear about films through friends and family. Senegal is the exception, where social media leads (67% against 57% for friends and family (Dalberg Research, 2025 to 2026). Algorithmic recommendations play a minor role. Acting quality is rated important by 96–100% of viewers in every market; a compelling plot by 86–100%. Awards matter much less, and vary widely: from 34% in Kenya to 79% in Rwanda. Language matters significantly for retention. AI-powered dubbing and translation tools offer a practical pathway to scale content across linguistic boundaries, but African languages carry cultural and community value that raises questions around IP ownership, data rights, and consent that require governance frameworks before these tools can be deployed equitably.

Financing is uneven and missing at the most critical stage

In addition to Afreximbank's USD 2 billion CANEX facility adding institutional capacity in Africa, South Africa has the most developed financing environment of the six, combining public incentives, broadcaster pre-sales, and international co-production treaties. Egypt mobilised new public capital in 2025, including a government-allocated EGP 500 million (approx. USD 9.6 million) Cinema Revival Plan. Nigeria's model is primarily private and self-funded; high-end productions now attract private investors targeting returns of 25 to 40%. In Kenya, Rwanda, and Senegal, production financing is fragmented and dependent on grants and development partners. Kenya's Docubox carries a disproportionate share of independent film financing. Senegal's Fonds de Promotion de l'Industrie Cinématographique et Audiovisuelle (FOPICA) plays a critical but chronically underfunded role.

The most critical gap across all six markets is not in production financing but in distribution financing. Existing funding structures are heavily weighted toward production, with very little available for marketing, subtitling, dubbing, festival access, and promotional campaigns. Separately, only South Africa has a tax incentive framework for production that meaningfully attracts international shoots. Nigeria has proposed a 25% tax rebate that has not yet been implemented. Egypt's Film Commission is working toward a streamlined permit process but has no operational cash rebate. The absence of competitive incentive frameworks across most markets limits foreign direct investment and leaves producers dependent on European co-production arrangements, which, as multiple stakeholders confirmed, typically require a share of the budget to be spent in the partner country.

Film has documented social impact, but lacks the infrastructure to scale it

Audience surveys found that only 9 to 18% of viewers across the six markets prefer purely escapist content. Themes of youth opportunity and aspiration drew the highest audience interest in every country surveyed: 51 to 61% in Kenya, 53% in Nigeria, 61% in Senegal, and 50% in South Africa. Gender equality and governance accountability ranked second and third. These figures indicate that socially relevant storytelling is a mainstream audience expectation, not a niche preference.

Documented film impacts in the six markets are substantial. The Shuga campaign, produced by Shuga Global (formerly the MTV Staying Alive Foundation) across Kenya, Nigeria, and South Africa, is the most thoroughly evaluated case. Post-broadcast assessments recorded significant declines in sexually transmitted infection (STI) rates and in rates of early marriage. In Senegal, the series Yaay 2.0 centred on male infertility and prompted a documented increase in men seeking sperm analysis and a national advocacy push for the operationalisation of Senegal's Medically Assisted Procreation centre. Also in Senegal, the documentary L'utilité et l'attachement, about unpaid compensation owed to communities displaced by the Regional Express Train project, led directly to presidential instructions for redress. In Rwanda, Le silence des mots was credited with reopening an 11-year-old closed legal case in France related to genocide survivors.

Two structural problems limit further growth. First, there is a financing mismatch because impact investors typically evaluate social films on audience reach, while mainstream commercial distributors and exhibitors screen for box-office potential. Films that meet social criteria often fail the commercial test, which limits their distribution reach and their ability to generate employment within the broader creative economy. This is not a problem unique to Africa, but it is particularly acute in markets where alternative distribution channels are underdeveloped. Second, systematic impact measurement is largely absent. While anecdotal evidence of impact is widespread, there are no standardised frameworks for tracking behavioural change or policy outcomes across the sector. In a funding environment that is increasingly data-driven, that gap makes it harder to attract institutional capital that requires documented results.

RECOMMENDED ACTIONS

Policymakers and Regulators

01 Harmonise classification and licensing frameworks through AfCFTA to reduce cross-border transaction costs.
02 Shift local content policies from production quotas to enforceable screen time and catalogue obligations for cinemas, broadcasters, and streaming platforms.
03 Develop tax credit and production rebate frameworks to attract international co-productions. South Africa and Rwanda provide applicable models.
04 Mandate data reporting from cinemas and broadcasters as a condition of public incentives.
05 Adopt a dual approach to piracy: digital enforcement combined with VAT exemptions and micro-licensing frameworks that make legal content genuinely affordable.

Private Funders and Financing Institutions

01 Government and private financiers should consider establishing dedicated national and regional distribution funds for subtitling, dubbing, marketing, and release execution in line with their internal strategies and policies. This is the most consistently cited gap across all six markets.
02 Shift from project-based grants toward ecosystem investment; fund distribution infrastructure, audience engagement, and data systems alongside content.
03 Use blended finance instruments that integrate production, distribution, and impact as linked components.
04 Create, structure and adopt the IP assignment model as a replicable collateral mechanism and structure investment at slate level to spread risk ensuring its sustainability and acceptance across various stakeholders both in government and private sectors.
05 Fund standardised, longitudinal social impact measurement frameworks to attract institutional capital that requires documented results.

Streaming Platforms, Broadcasters and Exhibitors

01 Adopt micropayments, daily subscriptions, and ad-supported models integrated with mobile money. These have demonstrated mass-market reach in Kenya and Nigeria.
02 Partner with telecom providers to bundle content with data packages or offer zero-rated access.
03 Invest in recommendation systems and targeted marketing to make African content actively discoverable rather than passively available.
04 Rebalance cinema pricing with perceived value in markets where ticket inflation has suppressed admissions.
05 Extend full advertising monetisation to African markets currently excluded, as its absence removes the primary financial incentive for local content creation.

Producers and Filmmakers

01 Plan multi-window distribution strategies from the outset, combining theatrical, streaming, broadcast, and community screenings.
02 Secure legal and business affairs advice before signing any agreement in which IP or editorial control may transfer to a commissioning body.
03 Treat content protection and rights management as a production cost, not an afterthought; premature release on free platforms undermines licensing value.
04 Build capacity in rights management, revenue diversification, and contract negotiation through Distribution Labs.
05 Use community and word-of-mouth marketing as the primary audience development tool, given its reach in five of six markets, alongside social media, which leads in Senegal.

Development Partners, Donors and NGOs

01 Audit funding criteria to ensure they support the filmmaking process rather than prescribing content outcomes, which narrows creative range and pushes filmmakers toward donor agendas.
02 Fund documentary distribution and community impact activation as distinct line items, not add-ons to production budgets.
03 Include local-language subtitle and dubbing costs in every distribution grant.
04 Structure impact funds as co-financing vehicles that crowd in private investment rather than purely grant-based interventions.
05 Develop longitudinal measurement frameworks tracking behavioural and policy change over years, not viewership alone.

Section 6.5 sets out these actions in more detail for each stakeholder group, distinguishing between governments and regulators, development finance institutions, public film funds, private investors, donors, platforms and industry actors.



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LIST OF ACRONYMS & ABBREVIATIONS

AFAC	Arab Fund for Arts and Culture	GDP	Gross Domestic Product
AfCFTA	African Continental Free Trade Area	GIZ	Deutsche Gesellschaft für Internationale Zusammenarbeit GmbH
AFD	Agence Française de Développement	GMI	Global Market Insights
Afreximbank	African Export–Import Bank	ICASA	Independent Communications Authority of South Africa
AFRIFF	Africa International Film Festival	IP	Intellectual Property
A4AI	Alliance for Affordable Internet	IPTV	Internet Protocol Television
AI	Artificial Intelligence	ITU	International Telecommunication Union
ARPU	Average Revenue Per User	KFC	Kenya Film Commission
ATP	Average Ticket Price	KFCB	Kenya Film Classification Board
AVOD	Advertising Video on Demand	MICE	Meetings, Incentives, Conferences, and Exhibitions
BMZ	Federal Ministry for Economic Cooperation and Development (Germany)	MTF	MultiChoice Talent Factory
CAGR	Compound Annual Growth Rate	NBC	National Broadcasting Commission (Nigeria)
CA	Communications Authority of Kenya	NCC	Nigerian Communications Commission
CANEX	Creative Africa Nexus	NFC	Nigerian Film Corporation
CEAN	Cinema Exhibitors Association of Nigeria	NFVCB	National Film and Video Censors Board (Nigeria)
CCI	Cultural and Creative Industries	NFVF	National Film and Video Foundation (South Africa)
CIFF	Cairo International Film Festival	NGO	Non-Governmental Organization
CNRA	Conseil National de Régulation de l'Audiovisuel	NPS	Net Promoter Score
CNRM	Conseil National de Régulation des Médias	OIF	Organisation Internationale de la Francophonie
DTH	Direct-to-Home (Satellite TV)	OTT	Over-the-Top (Streaming Services)
DTIC	Department of Trade, Industry and Competition (South Africa)	PESP	Presidential Employment Stimulus Programme
DTT	Digital Terrestrial Television	RFO	Rwanda Film Office
EFC	Egyptian Film Commission	RDB	Rwanda Development Board
EIAD	École Internationale des Arts du Spectacle (Senegal)	SODAV	Société Sénégalaise du Droit d'Auteur et des Droits Voisins
EUNIC	European Union National Institutes for Culture	STI	Sexually Transmitted Infection
FAST	Free Ad-Supported Streaming Television	SVOD	Subscription Video on Demand
FESPACO	Festival Panafricain du Cinéma et de la Télévision de Ouagadougou (Burkina Faso)	TVOD	Transactional Video on Demand
FISA	Film Industry Satellite Account	UNFPA	United Nations Population Fund
FOPICA	Fonds de Promotion de l'Industrie Cinématographique et Audiovisuelle (Senegal)	VOD	Video on Demand
GBO	Gross Box Office	WTP	Willingness to Pay
GBV	Gender-Based Violence		

Key terms used in this report:

Independent films refer to productions financed and produced outside major commercial studio and broadcaster systems, typically by filmmaker-led teams drawing on grants, personal capital, pre-sales or crowdfunding.

Social impact films refer to films whose primary intended purpose includes raising awareness of, or shifting attitudes or behaviour on, a social issue, as assessed throughout Section 2.4 and each country's Social Impact section.

Work-for-hire refers to a commissioning arrangement in which the funder or commissioning body retains editorial and/or ownership control of the finished work, as distinct from a grant to an independently authored project.

Debt financing refers to capital that must be repaid, typically with interest, regardless of a film's performance; equity financing refers to capital provided in exchange for an ownership stake and a share of returns, with no fixed repayment obligation.


FPS
23.98
SHUTTER
1/50
f8.7
00:00:00:00
GAIN
4 dB
WB
5800K
TINT
10
f8.7
AUTO EXPOSURE
OFF
BRIGHT
CONTRAST
PEAKING

1. INTRODUCTION

1.1 Background and Context

The markets for Africa's film industries are experiencing rapid growth, driven by demographic expansion, urbanisation, and increased digital connectivity. Key industries in Africa, such as Kenya, Rwanda, Nigeria, South Africa, Senegal, and Egypt, are emerging as important production hubs, each with distinct national structures but shared challenges in financing, infrastructure, and market integration. At the same time, global demand for African stories is increasing, with streaming platforms, broadcasters, and international partners expanding their engagement with the continent's content.

Despite this momentum, Africa's film industries remain constrained by fragmented distribution systems, limited audience data, weak intra-African circulation, and underdeveloped mechanisms for measuring social and economic impact. These challenges limit the scalability and sustainability of the industry, particularly in reaching diverse audiences both within Africa and globally. Without efficient marketing and distribution, African films struggle to reach audiences. Without clear audience insights, investment decisions carry higher risk. Without measurable impact, it becomes harder to position film as a priority sector for policy and financing.



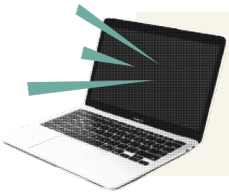
Understanding how these challenges manifest across different markets is critical to identifying where targeted interventions can unlock growth, strengthen sustainability, and expand the reach of African film. It is against this background that the Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) GmbH and the African Export–Import Bank (Afreximbank) commissioned this study to deepen understanding of the African film ecosystem and identify pathways to unlock its full potential through improvements around the distribution system.

The partnership leverages the unique strengths of the two institutions. Afreximbank has dedicated a critical up to USD 2 billion financing facility via its CANEX Programme to scale production and infrastructure in the creative industries. GIZ, on the other hand, acts as a catalyst for the ecosystem through investing in the generation of industry knowledge, strategic capacity development, and cross-sector partnerships to position African film for sustainable growth across the continent. Together, they bridge the gap between high-level capital and grassroots impact, transforming the industry's financial potential into improved livelihoods for creative professionals.

1.2 Objectives and Research Questions

The primary objective of this study was to generate actionable insights to inform strategy, policy, and investment decisions across Africa's film sector. It aims to support governments, financiers, industry stakeholders, and development partners in strengthening distribution systems, expanding audiences, and enhancing the (social) impact of film.

Specifically, the study sought to:



Map the current landscape of film distribution across the six focus countries (Egypt, Kenya, Nigeria, Rwanda, Senegal, and South Africa) and at the global level, identifying key channels, emerging models, and bottlenecks



Analyse how audiences for African films are developed and sustained, including patterns of access, platform use, and engagement



Assess the specifics around social impact films, including financing, marketing campaigns and audience preferences



Map the film financing ecosystem and successful investment models



Identify scalable practices, business models, and partnerships that can strengthen the ecosystem

1.3 Methodology and Scope

The study focused on six countries selected to reflect diversity in geography, language, market size, and industry maturity: Kenya and Rwanda (East Africa), Nigeria and Senegal (West Africa), South Africa (Southern Africa), and Egypt (North Africa). Together, they represent Anglophone, Francophone, and Arabic-speaking contexts and capture a range of policy environments and production capacities. They also represent a sizable share of films produced in Africa and were therefore used as a proxy to understand the African film topography in this study.

The study was complemented by an international market assessment, with a focus on Germany and selected international markets, to provide an external perspective on the financing, distribution, market access and partnership opportunities available to African filmmakers and industry stakeholders beyond the continent.

Consistent with the commissioning partners' view of Africa as a single continental market, the report does not divide the continent into sub-Saharan Africa and the Middle East and North Africa. Regional terms (North, West, East and Southern Africa) are used only as geographic descriptors, and where a source covers only part of the continent, this is stated.

The study adopts a mixed-methods approach, combining:

- **Secondary research & media analysis:** Literature review and media analysis are used to map how African filmmakers can monetise their work and identify critical challenges facing distribution, such as limited financing, weak infrastructure, regulatory hurdles and market access barriers. This helps pinpoint information gaps and structural obstacles, supporting recommendations to strengthen monetisation and attract distributors across the continent
- **Primary Research:** These interviews focused on understanding the barriers, challenges and experiences of different distribution platforms on airing African films. Also, understanding what drives decision-making when interacting with African filmmakers and how to improve it. The primary research was executed through a three-pronged approach (See Table 1):
  - Key Stakeholder/Informant Interviews with filmmakers and distributors, marketing platforms and policy actors
  - Audience survey, targeting the African film audience/viewers, to capture their perceptions and drivers of watching films and form a good foundation for audience development
  - Case studies across the continent in different areas to illustrate innovative approaches to distribution, audience development, and impact

	QUALITATIVE		QUANTITATIVE
Country	KIIs	Case studies	Audience survey
Kenya	16	1	304
Rwanda	13	–	165
Nigeria	15	1	304
South Africa	16	–	434
Egypt	13	1	213
Senegal	14	2	210
Germany	4	–	–
Total	91	5	1,630

Table 1 Primary research interviews

With national samples of roughly 165–434 respondents per country (1,630 in total), the audience survey is not statistically representative of each country's full population; it captures indicative patterns within the urban, peri-urban and rural strata sampled (see Section 1.4, Limitations) rather than precise population-level estimates and should be read alongside the qualitative stakeholder evidence with which it is triangulated. This is broadly in line with the most recent national audience study commissioned by South Africa's National Film and Video Foundation, which completed 379 face-to-face intercept interviews across all nine provinces and likewise treats its results as directional rather than population-level estimates (NFVF, 2026)[1].

1 Birguid (2026). South African Audience Research (Cinema, Digital, Film and Video Content). Report prepared for the National Film and Video Foundation (NFVF), RFP19 2025-2026, 27 May 2026. National face-to-face intercept survey of audiovisual consumers aged 18 and over (n=379 completed interviews across all nine provinces), complemented by 17 stakeholder interviews.

Analysis

The analytical process employed a triangulation framework to ensure high internal validity across the six study markets. Quantitative data from the audience surveys was cross-referenced with stakeholders' insights from stakeholder interviews and secondary industry reports to identify recurring structural patterns. This mixed-methods approach allowed the study to ground its findings in both empirical market data and lived industry experience, strengthening the relevance and credibility of the resulting insights and recommendations.

A central component of this phase was the Audience Segmentation Analysis. Rather than treating African viewers as a monolith, the study utilised cluster analysis to categorise audiences into four distinct segments based on their viewing habits, content preferences, motivations, platform and device usage and willingness to pay. The segmentation drew on gender, age and urban/peri-urban/rural location as demographic variables, alongside device usage, spend and content preferences; it did not use language or religion as segmentation variables, although intercultural and interreligious themes were captured separately as content preferences in several country surveys. Multiple segmentation models were tested, with the final segments selected for statistical robustness and practical relevance. Each segment was then profiled across key dimensions such as demographics, viewing behaviour, and content preferences, enabling a nuanced understanding of who audiences are, how they consume content, and what drives their choices. This segmentation allows the report to move beyond broad market averages and provide granular strategies for targeted audience development. Finally, thematic coding was used to synthesise stakeholder narratives, mapping them against the identified economic and distribution barriers to ensure that all recommendations are grounded in both market data and lived industry experience.

1.4 Limitations

This study provides a comprehensive synthesis of the African film ecosystem across six diverse markets. Chief among these, the absence of reliable, standardised distribution, audience and revenue data across the six markets is not only a limitation of this study's method; it is itself one of the report's central findings, discussed further in Section 2.2.5.

The data gap reflects an ecosystem-level problem that requires sustained investment, governance and standardisation, not simply a constraint on this research. However, the following limitations should be considered when interpreting the findings:

- Data on film production, distribution, and audience behaviour in many African countries are patchy, fragmented, or entirely absent for recent years (2022-2026). In several markets, official statistics on box office, streaming consumption, or informal distribution are either not collected or not publicly available. This forced the analysis to rely on proxies such as revenue estimates from industry associations, box office aggregates compiled by private analytics firms, cinema ticket sale trends, film-commission Audience Survey, festival participation and sales- market catalogues, and social media engagement metrics. These proxies provide indicative patterns rather than precise, audited indicators. The study used estimates drawn from a range of industry, distributor and survey sources cited at each point in the report.
- The reliance on secondary sources means that some claims about impact, financing, and audience behaviour rest on qualitative narratives and grey literature evidence rather than systematic impact evaluations or large-scale surveys. Future primary research, including more granular audience data and structured impact assessments, will be needed to refine and test the hypotheses put forward here.





2 COLLECTIVE INSIGHTS

Africa's film industry is no longer defined by isolated national markets but by interconnected yet uneven ecosystems undergoing rapid transition. Across the six focus countries, Egypt, Kenya, Nigeria, Rwanda, Senegal and South Africa, the industry is expanding in volume, visibility and economic relevance. However, this growth is neither linear nor evenly distributed. It is shaped by sharp contrasts in market size, production capacity, financing depth, regulatory maturity and infrastructure access. Taken together, these differences reveal both the source of Africa's creative momentum and the structural bottlenecks that continue to limit scale, sustainability and cross-border circulation.

From a macroeconomic perspective, the combined screen-content economy across the six countries represents the core of Africa's formal film and audiovisual market. South Africa, Nigeria and Egypt account for the bulk of monetised value, driven by population scale, higher disposable incomes, more established broadcasters and stronger platform presence. Nigeria stands out as Africa's largest production hub by volume, producing 1,000+ films annually through Nollywood's highly informalised, market-responsive model (NFVCB[2] catalogue, 2021-2025). South Africa, by contrast, generates fewer titles but captures significantly higher value per project, underpinned by stronger technical infrastructure, international co-productions and a mature Pay TV and OTT market. Egypt occupies a parallel position in North Africa, sustained by a long-established studio system, a large Arabic-speaking audience and relatively high television and digital consumption.

Kenya and Senegal represent mid-sized, fast-evolving markets, characterised by growing production activity and rising digital consumption but constrained by limited monetisation pathways. Rwanda, while the smallest of the six in absolute market size, has positioned itself strategically through public investment and international partnerships, prioritising long-term ecosystem development over short-term output. Across all six markets, growth in film consumption is increasingly driven by Pay TV and OTT services rather than cinema, reflecting broader shifts in audience behaviour, affordability constraints and infrastructure realities (Table 2).

2.1	Continental Overview
2.2	Film Distribution – Africa-wide Patterns
2.3	Audience Development – Africa-wide Patterns
2.4	Social Impact – Africa-wide Patterns
2.5	Opportunities and Strategic Levers

[2] National Film and Video Censors Board (NFVCB). Link

Table 2 Comparative size and growth of the Pay TV and OTT market by country (USD million) | Source: GMI

	ESTIMATED				PROJECTED					
	2022	2023	2024	2025	2026	2027	2028	2029	2030	CAGR
Egypt	553	544	533	525	540	557	575	582	610	5.3%
Kenya	473	477	481	487	498	512	528	546	574	5.5%
Nigeria	1,101	1,114	1,119	1,236	1,279	1,329	1,378	1,447	1,520	5.9%
Rwanda	69	75	79	81	84	86	89	91	94	4.9%
Senegal	165	175	179	184	187	191	195	202	210	5.1%
South Africa	1,931	1,832	1,776	1,773	1,844	1,925	2,014	2,110	2,238	6.8%

Production volume varies dramatically across the continent, revealing distinct models of industry organisation. Nigeria produces films at an industrial scale, with low budgets, rapid turnaround and strong domestic cultural resonance, but limited per-title revenues and weak downstream rights exploitation. South Africa and Egypt operate more formalised production systems, with higher budgets, stronger guild structures, and a clearer separation between film, television, and digital formats. Kenya and Senegal sit between these poles, with growing numbers of independent features, documentaries and series, often supported by donor funding, broadcasters or international partnerships rather than purely commercial finance.

Despite rising output, production growth has not been matched by a proportional expansion in monetisation channels. In most markets, filmmakers face a narrow set of viable buyers, typically a small number of broadcasters or streaming platforms, creating intense competition and downward pricing pressure. This imbalance contributes to what many stakeholders describe as an “oligopoly of success”, where a limited group of established producers and production companies capture repeat commissions, while newer entrants struggle to sustain careers despite increasing overall output.

Financing structures remain one of the most significant points of divergence between markets. South Africa benefits from comparatively advanced financing instruments, including public incentives, co-production treaties, broadcaster pre-sales and international servicing work that cross-subsidises local production. Egypt similarly draws on broadcaster finance and vertically integrated production entities. Nigeria’s financing model is predominantly private and self-funded, reliant on rapid recoupment and volume rather than long-term asset building. In Kenya, Rwanda and Senegal, production financing remains fragmented and heavily dependent on grants, NGOs, development partners and, increasingly, commissioning from digital platforms.

Across all six countries, access to risk capital remains limited. Few markets offer dedicated film funds with sufficient scale or continuity, and private equity participation is minimal outside South Africa. This financing gap directly affects content ambition, production quality and the ability to invest in marketing and audience development, reinforcing the broader “value gap” between creative potential and commercial sustainability.

Regulatory and institutional environments further shape market performance. South Africa and Egypt have relatively established film institutions, classification systems, and policy frameworks, albeit with ongoing debates over transformation, quotas, and platform regulation. Kenya and Senegal are actively reforming their policy landscapes, with proposed creative economy legislation, local content quotas and digital taxation frameworks under discussion. Rwanda stands out for policy coherence and ease of doing business, despite its smaller domestic market. Nigeria’s regulatory environment remains fragmented, with limited enforcement capacity and weak data collection, reflecting the largely informal nature of its industry.

Infrastructure constraints are a unifying challenge across all six markets, though their manifestation differs. Formal cinema exhibition remains severely limited outside South Africa and Egypt, with extremely low screen-to-population ratios in Kenya, Nigeria, Senegal and Rwanda. This scarcity constrains box office revenues, limits audience habit formation and marginalises theatrical releases for domestic films (Table 3). As a result, cinema no longer functions as the primary gateway for African films but as a narrow, event-based or prestige window.

Country	Cinemas	Screens	Screens per million population	GBO 2025 or last reported	GBO (USD)	Admissions (2025 or last reported)	Avg. ticket price	Avg. ticket (USD)
Egypt	140	437	3.70	EGP 1.8B	37M	14.3M	EGP 180	3.5
Kenya	14	45	0.79	KES 50M	386K	–	KES 650	5.0
Nigeria	118	352	1.48	₦15.6B	10.4M	2.8M	₦5,596	4.0
Rwanda	1	1	0.07	–	–	–	RWF 2,500	1.8
Senegal	8	18	0.95	–	–	–	XOF 6,000	8.5
South Africa	69	450–500	6.9–7.7	R 549.3M	30.1M	5.4M	R 108	4.2

Table 3 Cinema infrastructure and box office numbers | Source: Author's compilation (Egypt – elcinema.com, ScreenDaily; Kenya – Box Office Mojo; Nigeria – FilmOne Yearbook; South Africa – NFVF (2024), Numero)

Digital infrastructure has partially filled this gap. Mobile broadband penetration and smartphone adoption have enabled rapid growth in Pay TV and OTT consumption, particularly in urban areas. However, high data costs, uneven connectivity and price-sensitive audiences restrict viewing time and willingness to pay. Platforms have responded with prepaid models, mobile-only tiers and advertising-supported services, driving audience reach but compressing revenues. This dynamic creates a paradox where audience numbers are rising, yet value capture per viewer remains low (Table 4).

Country	Pay TV Subscribers (Million)	OTT Subscribers (Million)	YouTube Users in 2025 (Million)[3]
South Africa	6.7 (10.5% of the total population)	3.42 (5.4%)	26.9 (41.4%)
Nigeria	8.2 (3.5%)	2.28 (1%)	30.5 (12.8%)
Kenya	1.7 (3.0%)	0.75 (1%)	12.1 (20.9%)
Egypt	5.1 (4.5%)	4.93 (4.2%)	49.3 (41.5%)
Senegal	0.55 (3%)	0.15 (1%)	5.42 (28.5%)
Rwanda	0.4 (3%)	0.23 (1.6%)	1.35 (9.2%)

Table 4 Pay TV and OTT (SVOD and TVOD) Platform subscribers, 2025 | Source: GMI

[3] DataReportal (2026). The "state of digital" of a country in 2026 - YouTube Users. Link

Market share by Pay TV and OTT platforms, 2025

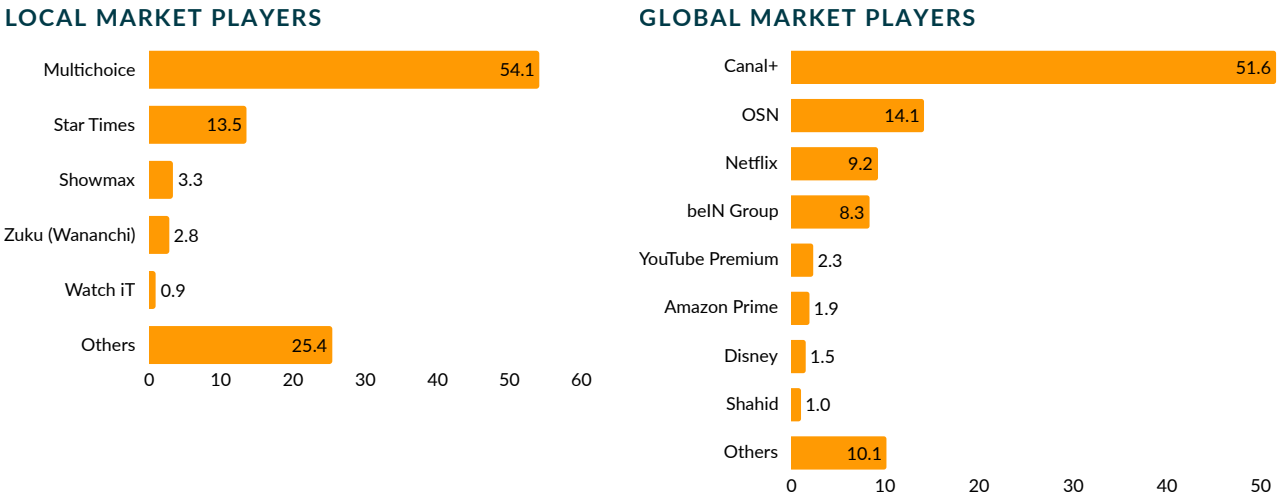


Figure 1 Local and Global Market Share by Pay TV and OTT Platforms, 2025 | Source: GMI

In synthesis, the continental picture that emerges is one of significant creative momentum constrained by structural fragmentation. Africa's film markets are growing, but unevenly and in ways that privilege access over value. Without stronger financing mechanisms, deeper distribution networks, improved data systems and coordinated policy responses, the current digital-first expansion risks reinforcing existing inequalities rather than unlocking inclusive, sustainable growth. This tension forms the foundation for the cross-cutting analysis that follows in the remainder of Chapter 2.

2.2 Film Distribution: Africa-wide Patterns

The African film distribution landscape is currently defined by a structural transition, moving away from a historical reliance on traditional theatrical windows and state-funded broadcasting toward a fragmented, digital-first ecosystem. This evolution is not uniform across the continent; instead, it is a multi-speed progression dictated by varying levels of infrastructure maturity, consumer spending power, and digital literacy. At the heart of this shift is the *"Value Gap"*: a persistent tension in which high access costs (mobile data and tickets), inconsistent content quality, unbalanced competition with international films and platforms as well as poor discoverability prevent mass-market conversion, despite a massive latent demand for local storytelling. Furthermore, the industry is stifled by an *"Evidence Gap"*, where the lack of centralised public performance data forces stakeholders to operate on anecdotal evidence and assumptions, deterring the large-scale institutional investment required to professionalise the sector. Stakeholders also point to a training and planning gap: distribution and audience strategy are frequently treated as a post-production afterthought rather than built into development and financing from the outset. This gap appears most acute in markets with less established pan-African and global market experience, such as Rwanda and Senegal, and among emerging producers who lack access to established theatrical gatekeepers.

To understand these patterns, the six focus markets are viewed through a comparative framework based on their industrial distribution levels: Mature Anchor Hubs (South Africa and Nigeria), Regional Digital Engines (Egypt and Kenya), and Emerging/Blank Slate Markets (Senegal and Rwanda).

Mature Anchor Hubs: South Africa and Nigeria

South Africa and Nigeria serve as the continent's industrial anchors, yet they are currently navigating different phases of market correction. While they boast the highest production volumes and most established infrastructure, they are facing a theatrical contraction and significant subscriber erosion in traditional segments.

The Pricing vs. Admissions Paradox

A critical strategic thread emerging in these anchor hubs is that revenue growth is no longer synonymous with audience expansion. In Nigeria, the 2025 Nigeria Box Office Yearbook by FilmOne[4] reports a staggering 34.7% increase in theatrical revenue, bringing total revenue to ₦15.6 billion. However, this growth was almost entirely driven by aggressive ticket price inflation. Actual admissions grew by only about 5%, remaining well below the 2021 peak. This indicates that exhibitors are successfully capturing more value from a wealthy, urban niche, the "quality seekers", while structurally excluding the mass market through prohibitive pricing.

In contrast, South Africa's mature market is defined by volume-driven cord-cutting. As inflation compresses discretionary spending, traditional Pay TV has faced a sharp decline. Multichoice Group's Integrated Annual Report[5] indicates that active linear subscribers fell from 8.6 million in March 2024 to 7.9 million in March 2025. The migration is toward hybrid digital models; while linear subscriptions fall, DStv Stream grew by 38% in the same period, suggesting that audiences are not abandoning content but are instead seeking more flexible, app-based viewing that avoids the lock-in of long-term contracts.

The Crisis of Visibility for Local Film

Despite being volume leaders, local films in these hubs struggle for relevance in their own theatrical markets. In South Africa, NFVF[6] reports that domestic titles accounted for 7% of 246 releases in 2024 vs. a mere 3% of the total 253 releases in 2023. Despite this increase, domestic films contributed only 0.75% to the total revenue, generating R 4.12 million in 2024 compared to R 5.2 million in 2023, out of the overall revenue of R 549.3 million. In Nigeria, while Nollywood dominates cultural conversation, over 90% of classified films never reach a cinema screen, moving directly to digital or informal channels. This marginalisation leaves local producers with zero leverage over exhibitors, who prioritise Hollywood blockbusters to cover high mall-integrated overheads.



[4] FilmOne Yearbook: https://yearbook.filmoneng.com/
[5] MultiChoice Group. Integrated annual report for the year ended 31 March 2025. Link
[6] National Film and Video Foundation (NFVF) Box Office Reports. Link.

Regional Digital Engines: Egypt and Kenya

Egypt and Kenya represent the continent's most dynamic digital hubs, characterised by high mobile penetration and strong cultural soft power. However, both markets suffer from hyper-centralised distribution infrastructure, which significantly limits the reach of formal film distribution channels beyond major urban centres, leaving most of their populations underserved.

The Infrastructure Concentration Gap

In both Egypt and Kenya, theatrical distribution is a tale of two cities. In Egypt, approximately 90% of screens are in Cairo and Alexandria, with major chains like VOX and Renaissance controlling about 70% of the market[7]. In Kenya, there are fewer than 50 screens nationwide, according to SinemaFocus (2025)[8], with over 75% of them concentrated in Nairobi. This geographic monopoly has effectively decoupled the massive, tech-savvy youth demographic in regional areas, such as Southern Egypt or rural Kenya, from the cinematic experience. For these regional audiences, digital access is the default rather than a choice, forcing them to rely on mobile-first streaming and social media platforms for film consumption.

Digital Distribution Logic: The "Kadogo" Economy

In Kenya, the digital frontier is defined by the "Kadogo" (small) economy, a culture of micropayments that mirrors local spending habits. Subscription-based models (SVOD) have achieved only modest penetration because fixed monthly fees sit uneasily with irregular cash flows. Successful local platforms like Viusasa have thrived by offering content for as little as KES 10-20 (USD 0.07-0.15) for a 24-hour rental. This model aligns with a consumer base that prefers flexible, low-commitment transactions over the "paywall paradox" of global streamers.

Egypt's digital shift, while also mobile-led, is anchored by regional gatekeepers. Platforms like Shahid and Watch iT have evolved from auxiliary rights-buyers into primary commissioners, outperforming international services like Netflix due to a deep preference for localised Arabic content. However, this growth has created new data silos in which these platforms treat engagement metrics as trade secrets, leaving independent Egyptian filmmakers without the evidence needed to negotiate fair licensing fees.

Emerging/Blank Slate Markets: Senegal and Rwanda

Senegal and Rwanda represent the continent's "renaissance" markets. They are currently witnessing historic surges in production and government investment but are simultaneously grappling with total exhibition crises.

The Exhibition Crisis and Theatrical Rebirth

Senegal's trajectory is a narrative of "rise, fall, and digital rebirth". From a "Golden Age" of 80 theatres in the 1970s, the country fell into a total exhibition vacuum by the early 2000s. Today, despite a recovery, the market remains fragile with only 18 operational screens, 83% of which are in Dakar. Rwanda faced an even more acute crisis in late 2025 following the closure of the Canal Olympia Rebero multiplex, leaving the nation virtually without formal commercial halls, aside from Cine Mayaka.

[7] ScreenDaily (2025). Egyptian box office set to surpass pre-Covid levels in 2025. Link
[8] SinemaFocus (May 2025). Crisis in Kenyan cinemas. Link

The YouTube-First Strategy

In the absence of physical screens, YouTube has emerged as the most important distribution channel in these markets. In Senegal, 58% of catalogued films produced between 2020 and 2025 were released on digital platforms, with 60% premiering on YouTube channels such as Marodi TV. Marodi's model illustrates a transnational reach, with 40%[9] of its viewership coming from the diaspora in France and other African nations, proving that locally produced content can achieve global scale when distributed through free-to-access, ad-supported channels.

In Rwanda, the "blank slate" potential is being operationalised through Zacu TV, which evolved from broadcasting via YouTube to a niche VOD platform and eventually into a major 100% Kinyarwanda television channel following its acquisition by Canal+. This demonstrates that in emerging markets, success lies in hyper-localisation, utilising lightweight apps and regional distribution highways to aggregate audiences who have been structurally excluded from cinema.

The Streamer Retraction and Its Uneven Impact

The rollback of global streaming investment in Africa marks a structural turning point for film distribution on the continent. Between 2016 and 2022, Africa was positioned by global platforms as a strategic expansion geography, characterised by aggressive commissioning, experimentation with formats, and tolerance for local-market risk. That phase has decisively ended. What has replaced it is a model of selective engagement, where platform investment is concentrated in fewer markets, fewer titles and fewer producers.

This shift is not speculative. At a Johannesburg press conference reviewing its African operations since 2016, Netflix confirmed that its activities on the continent have been concentrated almost entirely in just three countries: South Africa, Nigeria and Kenya, with a total investment of approximately USD 175 million over six years (Netflix Africa Impact Report[10], 2024). The geographic concentration of this investment, coupled with its subsequent reallocation, provides a clear empirical foundation for understanding the uneven consequences of streamer retrenchment.

Netflix's Shift Toward Selective Premium Commissioning

Netflix remains the most visible global streamer operating in Africa, but its strategy has evolved sharply. Between its market entry in 2016 and 2022, the 2024 Netflix Africa Impact Report highlights that Netflix commissioned 21 officially designated African Original programmes, alongside hundreds of licensed titles. These commissions were disproportionately concentrated in South Africa, which alone received USD 125 million in investment for 16 original productions, and contributed more than 170 films, series and documentaries to the Netflix catalogue.

By comparison, Nigeria received USD 23.6 million, largely for licensing 283 titles, with commissioning limited to just three original programmes, while Kenya commissioned only two original programmes (alongside the first launched original Country Queen) across the entire period. No Netflix Originals were commissioned in Senegal or Rwanda.

[9] Africanews (August 2024). Senegalese film industry seeing notable evolution. Link
[10] Netflix's socio-economic impact: South Africa, Nigeria & Kenya (2016-2022). Link

Crucially, Netflix's post-2022 behaviour further entrenched this hierarchy rather than flattening it. CNN[11] reports that following an initial USD 175 million investment across South Africa, Nigeria and Kenya (2016–2022), Netflix doubled down on South Africa, injecting approximately USD 250 million into South African content between 2021 and 2024 alone. This capital redeployment coincided with a visible slowdown in new commissioning elsewhere on the continent.

This data clarifies that Netflix's so-called "pan-African" strategy has, in practice, been an anchor-hub strategy, anchored overwhelmingly in South Africa, with Nigeria as a secondary catalogue and diaspora market, and Kenya as a limited experimental node. The shift toward fewer, higher-budget, exportable titles, Netflix's widely observed "flight to quality", has reinforced producer concentration, sharply reduced entry points for emerging filmmakers, and deprioritised culturally specific, mid-budget film projects that cannot demonstrate international scalability ex ante.

While Netflix highlights positive spillovers in its Netflix Africa Impact Report, such as 12,000 jobs supported and USD 218 million in GDP impact across its African operations, these benefits accrue disproportionately within the same three markets, reinforcing structural asymmetries rather than mitigating them.

Amazon Prime Video's Pause in African Originals

Amazon Prime Video's disengagement has been quieter but no less consequential. CNN further highlights that after commissioning a small number of African Originals, primarily in Nigeria and South Africa, including the Gangs of Lagos, Amazon effectively paused all new African Original commissioning between late 2023, completing only projects already under contract.

Unlike Netflix, Amazon never established meaningful upstream development partnerships or a broad acquisition strategy in Africa. As a result, the pause did not merely reduce commissioning, it eliminated an entire alternative buyer from the mid-budget film ecosystem. In Nigeria, Amazon had functioned as a counterweight in negotiations, particularly for genre films and star-driven projects. Its withdrawal reduced competitive tension, weakened producer leverage and compressed pricing across all premium deals. For regional digital engines such as Kenya and Egypt, Amazon's pause confirmed a harsher reality: global streamers are unwilling to underwrite ecosystem development in markets where subscriber growth and export performance remain uncertain. For emerging markets like Senegal and Rwanda, Amazon's absence reinforces their effective exclusion from premium global commissioning altogether.

Showmax as Africa's Missing Middle Distribution Layer

If Netflix and Amazon represent the top tier of global premium platforms, Showmax historically served as Africa's missing middle, and its closure[12] in April 2026 represents the most structurally damaging shift in the distribution ecosystem.

Showmax's role differed fundamentally from that of global streamers:

- It commissioned mid-budget local originals.
- It prioritised cultural proximity over global exportability.
- It distributed content across 40+ African markets.
- It provided consistent commissioning continuity, particularly for Anglophone African creators.

[11] CNN (31 October 2025). How streaming is revolutionizing Africa's film industry. Link
[12] Canal+ (05 March 2026). Multichoice retires Showmax after comprehensive review. Link

Backed by MultiChoice, Showmax benefited from one of the largest local-content production pipelines on the continent. According to MultiChoice disclosures[13], the group produced 6,500 hours of local content per year across 22 languages, with a total content library of 84,871 hours and revenue of ZAR 20.9 billion (approximately USD 1 billion). Over 50% of its general entertainment budget was dedicated to local production in FY2023 alone.

Even as spending tightened, MultiChoice still produced 5,340 hours of local content in 2025, despite this representing an 18% year-on-year reduction from FY2024. This contraction underscores the broader retrenchment pressure, but also highlights the scale that is now being lost entirely with Showmax's shutdown.

Showmax Originals were not marginal. In Kenya alone, Showmax launched 12 Original titles in 2024, doubling output from 2023, spanning drama, reality, and youth-oriented formats[14]. Across Africa, Showmax has produced more than 30 Originals across South Africa, Nigeria, Kenya and Ghana, with executives confirming continued expansion plans prior to the strategic reset[15]. Subscriber growth reportedly increased by 26% year-on-year for four consecutive years to 2023, illustrating strong market traction. Omdia, a research firm, reported that Showmax subscribers had reached 2.1 million in 2023.

This made Showmax the critical bridge between YouTube and Netflix: large enough to pay licence fees and support professional crews, but flexible enough to commission culturally specific, non-export-driven storytelling. Its closure, therefore, constitutes not a platform failure, but the removal of an entire distribution and financing stratum.

Uneven Impacts Across the Three Market Tiers

The consequences of streamer retrenchment differ sharply by market tier (Table 5).

- In anchor hubs (South Africa, Nigeria), scale provides partial protection. Netflix investment continues, albeit concentrated among established producers. Broadcaster pre-sales, incentives and service production mitigate risk. However, mid-budget films and emerging filmmakers lose access, accelerating market concentration and narrowing creative diversity.

- In regional digital engines (Kenya, Egypt), the impact is destabilising. Kenya was disproportionately dependent on Showmax for scripted, local-language commissioning. Its closure leaves a financing gap that neither YouTube nor smaller OTT platforms can fill. Egypt's terrestrial TV system is robust, but global retrenchment constrains international exposure and foreign capital inflows.

- In emerging markets (Senegal, Rwanda), the effects are systemic. These markets never fully benefited from global commissioning during the expansion phase. Retrenchment, therefore, entrenches exclusion. YouTube-first success and policy-driven strategies enable reach, but the pathway to sustainable premium film financing effectively collapses.

Strategic Consequences for African Film Distribution

Streamer retrenchment reshapes African film distribution in six concrete ways:

- Distribution pipelines thin, particularly for mid-budget films.
- Local-language storytelling becomes riskier, as platforms favour export logic.
- Emerging filmmaker access narrows, reinforcing elite capture.
- Negotiation power shifts decisively to platforms, compressing fees and rights.
- Pay TV and telco bundles regain importance but cannot replace commissioning scale.
- Release strategies fragment, depressing long-term value capture.

[13] Multichoice Group (2024). Integrated annual report for the year ended 31 March 2024. Link
[14] Expression Africa (13 January 2025). Showmax Wrapped: The shows Kenyans watched most in 2024. Link
[15] Rest of Africa (10 October 2023). African streaming services are struggling to compete with Netflix and Prime Video. Link

Country	Netflix	Amazon Prime Video	Showmax (pre-closure)	MultiChoice (Pay TV ecosystem)	Canal+ (Post-acquisition outlook)
South Africa	High, concentrated - Ongoing commissioning of fewer, higher-budget Originals - Major reinvestment (~USD 250m, 2021–2024) - Focus on exportable series	Paused (2023) - No new Originals commissioned after pipeline completion	High (2022–2025) - Largest Showmax Originals base - Multi-season scripted & reality	Very high - Core production hub - Part of 5,000+ hrs/year of local content	High (legacy strength) - Strong Francophone bias historically limited, but SA remains strategically protected
Nigeria	Medium, selective - Heavy licensing (280+ titles) - Limited Originals commissioning (≈3 originals)	Paused (2023) - Previously key alternative buyer for genre films	High (pre-2026) - Key market for mid-budget scripted & reality	High - Major beneficiary of MultiChoice drama & series spend	Medium - Strong market logic, but Anglophone commissioning strategy unclear
Kenya	Low–medium - Only 2 Originals commissioned historically - Licensing dominates post-2022	None / paused	Very high (critical) - 12 Showmax Originals in 2024 alone - Core driver of premium local production	Medium - Supporting role via Pay TV, but not a replacement for Showmax	Low–uncertain - Significant exposure risk post-Showmax closure
Senegal	None - No Originals commissioned - Occasional catalogue acquisition	None	Very low - Limited engagement	Low - Small-scale production support	Medium (relative uplift) - Part of Francophone strategy, but limited volume
Rwanda	None	None	None	Low - Limited content commissioning	Low–medium (policy-driven) - Potential strategic interest through Zacu TV, but no established pipeline

Table 5 **Platform commissioning activity in Africa (2022–2025) by country and platform**

Implications for Anglophone vs Francophone Markets

A final asymmetry is linguistic. Showmax's withdrawal disproportionately harms Anglophone African filmmakers, as it was the primary mid-tier commissioner. Francophone markets, by contrast, remain more structurally aligned with Canal+'s historical commissioning infrastructure. Unless Canal+ articulates a clear Anglophone commissioning strategy post-acquisition, the continent risks divergent creative trajectories rather than integration.

The retrenchment of global and regional streamers does not signal disengagement from Africa, but it does mark the end of ecosystem-building through platform expansion. What emerges instead is a regime of selective engagement, one that rewards scale, predictability and exportability, while systematically excluding smaller markets and emerging talent.

The strategic task ahead is not to attract another global platform, but to rebuild the missing middle through regional funds, hybrid distribution models, and data-driven commissioning ecosystems capable of sustaining African film beyond episodic platform interest.



The Evidence Gap: Data as a Structural Constraint

A critical but often under-recognised constraint shaping film distribution performance across African markets is the uneven availability of reliable distribution intelligence. While production capacity, infrastructure access, and financing structures are frequently discussed as growth constraints, the ability to measure audiences, track revenues, and monitor exhibition performance remains equally decisive in determining whether film ecosystems can scale sustainably.

Across the six focus countries, the maturity of distribution data systems closely mirrors broader differences in market institutionalisation. Some countries benefit from relatively structured reporting environments anchored by film agencies and regulators, while others rely on fragmented or platform-specific performance indicators that limit visibility across the distribution chain. Importantly, even the most advanced systems remain incomplete, reinforcing the need for coordinated sector-wide intelligence frameworks (see Table 6).

South Africa

Institutional Strength with Emerging Reporting Gaps

Among the six markets, South Africa retains the most structured film-sector data environment, supported by a network of national agencies with defined mandates across production, broadcasting regulation, and industrial policy.

The National Film and Video Foundation (NFVF) remains the primary source of national box-office tracking, production reporting, and audience insights. Complementing this work, the Independent Communications Authority of South Africa (ICASA) regulates broadcasting and licensing environments affecting Pay TV and content quotas, while the Department of Trade, Industry and Competition (DTIC) plays a central role in the design of incentive policies, influencing production and distribution investment flows.

Together, these institutions provide the most comprehensive evidence base in the market for understanding theatrical trends, broadcaster behaviour, and incentive performance outcomes. However, important gaps remain. Notably, the most recent full-year national box-office report published by the NFVF covers 2023, with only a mid-year update released for 2024, highlighting the fragility of continuous reporting pipelines even within relatively advanced ecosystems.

For distributors and exhibitors, these interruptions create uncertainty about the trajectories of admissions recovery following pandemic-era disruptions and complicate forward planning for release-window optimisation and localisation strategies. South Africa, therefore, illustrates an important continental lesson: institutional presence does not automatically translate into continuous distribution of intelligence availability.

Nigeria

A Multi-Institution Landscape Without Centralised Performance Tracking

Nigeria's film distribution ecosystem is supported by several influential institutions and private-sector intermediaries, yet performance data remains fragmented across regulatory, exhibition, and platform environments.

The National Film and Video Censors Board (NFVCB) plays a central role in classification and licensing oversight, while the Nigerian Film Corporation (NFC) supports infrastructure development and sector promotion. Within the exhibition sector, the Cinema Exhibitors Association of Nigeria (CEAN) provides periodic admissions and revenue snapshots, which serve as the most widely cited indicators of theatrical performance trends.

Private distributors further shape visibility within the ecosystem. Companies such as FilmOne Entertainment collaborate with international analytics firms, including Comscore, to track selected theatrical performance indicators, while digital platforms such as EbonyLife ON Plus provide partial insights into subscriber-level engagement patterns.

Despite this institutional density, Nigeria still lacks a consolidated national distribution intelligence framework capable of integrating theatrical admissions, Pay TV licensing performance, and OTT consumption behaviour into a unified reporting architecture. As a result, the country's large production scale operates alongside limited visibility into audience behaviour outside major urban exhibition corridors such as Lagos and Abuja. For investors, this creates uncertainty around whether revenue growth reflects genuine audience expansion or ticket-price inflation within premium multiplex environments.



Egypt

Strong Cultural Scale but Centralised Data Flows

Egypt's distribution ecosystem benefits from one of the longest cinematic traditions on the continent, yet performance tracking remains concentrated within metropolitan industry networks rather than nationally coordinated reporting systems.

Institutions such as the Egyptian Film Commission (EFC) play an important role in facilitating international production partnerships, while industry platforms, including Elcinema.com, provide structured metadata on productions, credits, and releases. However, neither currently functions as a national distribution intelligence repository capable of aggregating admissions trends or regional screen utilisation metrics.

As a result, theatrical performance monitoring remains largely Cairo-centric, reinforcing the already pronounced concentration of exhibition infrastructure within Cairo and Alexandria, which together dominate national screen access. This centralisation constrains distributors' ability to evaluate expansion opportunities into secondary urban markets and limits evidence-based policymaking aimed at decentralising exhibition infrastructure.

Kenya

Institutional Innovation Without Integrated Distribution Metrics

Kenya represents one of the continent's most dynamic digital distribution environments, yet it continues to operate with fragmented cross-platform performance measurement systems. The Kenya Film Commission (KFC) plays a strategic coordination role across investment promotion, location marketing, and sector development planning. Complementing this work, the Kenya Film Classification Board (KFCB) regulates classification and compliance with exhibition standards.

An additional institutional layer is provided by the Communications Authority of Kenya (CA), which plays a critical role in regulating the broader broadcasting ecosystem. Through the Programming Code for Broadcasting Services, particularly Clause 5.2, the CA enforces a 40% local content quota for broadcasters and provides one of the clearest regulatory definitions of "local content" within the country. This definition extends beyond language to include factors such as ownership of the production company, the nationality of the production team and creative crew, and the extent of Kenyan participation across the value chain. Importantly, the CA also publishes quarterly Sector Statistics Reports, which remain among the country's most consistent sources of data on Pay TV subscriptions, broadcasting penetration, internet usage, and broader communications trends.

Importantly, Kenya has also pioneered the Film Industry Satellite Account (FISA) initiative, representing one of the most ambitious attempts on the continent to measure the economic contribution of the audiovisual sector using national accounts methodologies.

However, despite these advances, Kenya still lacks a consolidated distribution-performance tracking system capable of integrating theatrical admissions, Pay TV licensing data, and mobile-first OTT consumption indicators into a unified national dataset. This creates a paradox in which Kenya demonstrates strong digital experimentation capacity, including micropayment streaming models, while distributors continue operating without reliable national audience measurement frameworks.

Rwanda

Policy Alignment Without Market Measurement Systems

Rwanda's film ecosystem reflects strong policy coordination through institutions such as the Rwanda Film Office (RFO), operating under the Rwanda Development Board (RDB). These agencies have played a central role in positioning the country as an emerging production destination while supporting infrastructure investments and skills-development initiatives.

However, systematic distribution reporting frameworks remain largely absent. There is currently no consolidated national dataset tracking admissions performance, streaming engagement trends, or regional exhibition utilisation. For distributors and investors, this limits the ability to assess the commercial viability of new cinema infrastructure projects or to evaluate the scalability of domestic streaming and broadcasting platforms such as Zacu TV beyond early-stage adoption.

Senegal

Strong Public Support Structures Without Distribution Analytics Infrastructure

Senegal's film ecosystem benefits from one of the most structured public financing frameworks in Francophone West Africa, anchored by institutions such as Fonds de Promotion de l'Industrie Cinématographique et Audiovisuelle (FOPICA) and the Direction de la Cinématographie du Sénégal (Directorate of Cinematography), which support production development and sector revitalisation strategies. Regulatory oversight is provided by: Conseil national de Régulation des Médias (CNRM), formerly Conseil National de Régulation de l'Audiovisuel (CNRA), while rights-management responsibilities rest with Société Sénégalaise du Droit d'Auteur et des Droits Voisins (SODAV - Senegalese Copyright and Related Rights Office).

Together, these institutions form a coherent governance structure supporting production growth and copyright protection. However, no equivalent institutional architecture currently exists for tracking theatrical admissions, screen utilisation, or digital platform engagement at the national level.

This reinforces reliance on platform-level analytics, particularly YouTube performance indicators from studios such as Marodi TV, rather than sector-wide distribution intelligence systems capable of guiding investment planning.



From Institutional Presence to Intelligence Systems: The Missing Layer

Across the six markets, a clear pattern emerges. Film commissions, classification boards, regulators, and copyright agencies are widely present. However, distribution intelligence systems remain largely absent as a dedicated institutional function.

Where data exists, it is typically:

- platform-specific rather than sector-wide,
- metropolitan rather than national,
- production-focused rather than distribution-focused,
- or intermittent rather than continuous.

This creates an "evidence gap" that directly affects investment confidence across theatrical exhibition, Pay TV licensing, and OTT platform scaling environments. However, closing this gap requires moving beyond general calls for "more data" toward a clear definition of what data is needed, how it should be collected, and how it can be standardised across markets.

At a national level, a functional distribution intelligence system should capture a core set of indicators spanning the full distribution value chain. These can be grouped into four interrelated categories.

1. **Theatrical performance data** remains the most immediate and actionable indicator of audience demand. This includes ticket admissions disaggregated by film, screen, and location; box office revenues; average ticket prices; screen utilisation rates; and the share of local versus international content. It should also capture release windows and run durations to enable analysis of film lifecycle performance. Across most of the six markets, this dataset is either incomplete or inconsistently reported, limiting the ability to assess true market size and growth.

2. **Digital and OTT consumption data** is increasingly critical given the shift toward mobile-first viewing. Key indicators include total viewership volumes (streams and unique users), completion rates as a proxy for engagement, revenue model breakdowns (SVOD, AVOD, TVOD), pricing tiers, and consumption patterns by content origin. While this data is routinely collected by platforms, it remains largely inaccessible at the ecosystem level due to commercial sensitivities, resulting in fragmented visibility.

3. **Distribution infrastructure data** is essential for understanding access constraints. This includes the number and geographic distribution of cinema screens, seating capacity, broadband and mobile penetration by region, Pay TV subscriber density, and device usage (e.g., smartphone versus television). Such data enables stakeholders to identify structural bottlenecks, particularly in hyper-centralised markets where infrastructure is concentrated in capital cities.

4. **Audience demographics and behavioural data** provide the foundation for effective content commissioning and pricing strategies. This includes age, income, and geographic segmentation; urban–rural consumption differences; language preferences; willingness to pay; and platform usage patterns. Across all six markets, this remains the least developed dataset, despite its importance for both public and private sector decision-making.

Lessons from Existing Data Systems

Experiences across African markets, as well as comparable international systems, highlight several practical lessons for data system design.

1. Systems based on voluntary reporting tend to produce incomplete and inconsistent datasets. In markets such as Nigeria, where exhibition data is partially coordinated through industry associations, the absence of mandatory reporting standards results in uneven coverage and limits comparability across operators.

2. Data quality improves significantly when reporting is linked to incentives or regulatory requirements. South Africa's relatively stronger system demonstrates that institutions can generate meaningful datasets when reporting is tied to funding eligibility (both access to funding and the reporting requirements attached to it), licensing, or compliance frameworks. However, even in this context, gaps persist when reporting is discontinuous or when enforcement mechanisms are weak.

3. Digital platform data presents a structural challenge. Globally, OTT platforms treat performance metrics as commercially sensitive information. As a result, national systems cannot rely on full transparency from platforms and must instead adopt models that balance data access with commercial confidentiality.

Practical Approaches to Data Collection and System Design

Building a functional distribution intelligence system in African markets requires a pragmatic, hybrid approach that reflects both institutional realities and market constraints.

1. A **first** priority is the introduction of standardised, mandatory reporting frameworks for cinemas and broadcasters. This would involve daily or weekly box office reporting through centralised digital systems, using harmonised templates across all exhibitors. Crucially, compliance should be linked to licensing conditions or eligibility for public incentives to ensure consistent participation.

2. **Second**, aggregated and anonymised reporting mechanisms for OTT platforms should be developed. Rather than requiring detailed proprietary data, regulators can request high-level indicators such as total viewing hours for local content, relative shares of local versus international consumption, and broad revenue bands. This approach improves market visibility while respecting commercial sensitivities.

3. **Third**, the establishment of independent data intermediaries or trusted third-party aggregators can play a critical role in consolidating and standardising data across sources. Such entities would be responsible for collecting, validating, and publishing regular market intelligence reports, reducing fragmentation and improving credibility.

While national systems are the foundation, the long-term objective should be to develop a harmonised regional distribution intelligence framework. This does not require centralising all data, but rather aligning key metrics, definitions, and reporting standards across markets. A harmonised approach would include common indicators such as admissions, average revenue per user, and screen density; aligned reporting intervals; and interoperable data formats. This would enable credible cross-country comparisons, support regional distribution strategies, and provide a stronger evidence base for continental investment decisions.

Country	Key Institutions	Core Mandates	Distribution Data Currently Available	Critical Distribution Intelligence Gaps
South Africa	National Film and Video Foundation (NFVF); Independent Communications Authority of South Africa (ICASA); Department of Trade, Industry and Competition (DTIC)	NFVF: production support, audience research, box-office reporting; ICASA: broadcasting regulation and quotas; DTIC: incentives and industrial strategy	National box-office reports (latest full-year: 2023, mid-year 2024 update); production statistics; broadcaster licensing environment insights; partial audience research datasets	No continuous real-time admissions tracking; limited OTT consumption transparency; fragmented Pay TV performance visibility; inconsistent reporting continuity
Nigeria	National Film and Video Censors Board (NFVCB); Nigerian Film Corporation (NFC); Cinema Exhibitors Association of Nigeria (CEAN); FilmOne Entertainment; Comscore (select reporting); EbonyLifeON	NFVCB: classification and licensing; NFC: infrastructure and sector promotion; CEAN: cinema performance reporting; FilmOne: distribution analytics partnerships; platforms provide proprietary engagement data	Periodic box-office revenue and admissions snapshots via CEAN; selected Comscore-supported theatrical tracking; distributor-level performance intelligence	No unified national admissions database; limited regional exhibition reporting; fragmented OTT engagement visibility; limited integration across theatrical, Pay TV, and digital ecosystems
Egypt	Egyptian Film Commission; Elcinema.com; Ministry- linked cultural institutions	Production facilitation; metadata cataloguing; sector coordination; international co-production engagement	Film catalogues and release metadata; selected box-office reporting concentrated in major metropolitan markets (Cairo, Alexandria)	No national screen utilisation dataset; limited regional admissions tracking; fragmented OTT consumption reporting; lack of integrated national distribution performance dashboards
Kenya	Kenya Film Commission (KFC); Kenya Film Classification Board (KFCB); Film Industry Satellite Account (FISA) initiative	Investment promotion; location marketing; classification and exhibition compliance; national economic contribution measurement (FISA)	Macroeconomic contribution estimates through FISA; licensing oversight; classification datasets	No integrated national box-office tracking; limited Pay TV licensing visibility; fragmented OTT analytics despite strong mobile-first consumption patterns
Rwanda	Rwanda Film Office; Rwanda Development Board (RDB)	Sector promotion; production investment attraction; skills development; infrastructure coordination	Policy-level sector mapping; investment facilitation indicators	No national admissions tracking; limited cinema utilisation reporting; minimal OTT engagement datasets; absence of audience segmentation evidence
Senegal	FOPICA; Direction de la Cinématographie (Ministry of Culture); Conseil National de Régulation de l'Audiovisuel (CNRA); SODAV	Production financing support; regulatory oversight; copyright and rights management; audiovisual sector governance	Production financing records; copyright registration datasets; regulatory oversight indicators	No national theatrical admissions reporting; limited digital platform engagement metrics; absence of national exhibition infrastructure utilisation data; reliance on platform-specific analytics (e.g., YouTube- led performance indicators)

Table 6 **Institutional Mandates vs Distribution Data Availability Across the Six Focus Markets**

Ultimately, the challenge is not simply one of data availability, but of transforming fragmented datasets into decision-grade intelligence. Without reliable and standardised distribution data, investors cannot accurately assess market potential, distributors cannot optimise release strategies, policymakers cannot target infrastructure gaps, and platforms cannot benchmark performance across territories.

Strengthening distribution intelligence systems, therefore, represents one of the most actionable cross-cutting interventions available to policymakers and industry stakeholders seeking to unlock scalable growth across African film ecosystems. Improved measurement capacity would not only support more accurate market benchmarking but also enable distributors, exhibitors, and streaming platforms to transition from experimental release strategies toward evidence-driven continental distribution pipelines.

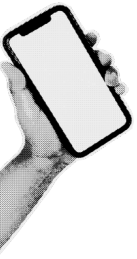


2.3 Audience Development: Africa-wide Patterns

The structure of the African film audience is currently undergoing a radical transition from traditional, state-sponsored broadcast consumption to a young, mobile-first, digitally savvy ecosystem.

While the continent possesses a massive latent demand for locally resonant storytelling, the process of audience development is caught in a structural "Value Gap", a tension where high access costs (tickets, mobile data), inconsistent technical quality, and poor discoverability prevent passive interest from converting into sustained, paying viewership. Unlocking the industry's estimated USD 20 billion potential requires a shift from treating audiences as mere consumers to cultivating them as active participants in a digital cultural economy. Central to this challenge is the "Evidence Gap": a near-total lack of centralised, transparent audience data that forces filmmakers and investors to operate on assumptions, thereby increasing risk and deterring institutional capital.

The Demographic Revolution: A Youth-Led, Mobile-First Shift



Africa is undergoing a profound demographic transformation, serving as the primary catalyst for the film industry's digital pivot. With over 70% of the population under 30 across much of the continent, and Egypt boasting a similar profile with over 60% under 35, the continent's audience is defined by its youthfulness. This generation has effectively leapfrogged traditional desktop adoption, entering the digital economy directly via mobile devices. Consequently, smartphones have emerged as the primary gateway for video entertainment. Statista highlights that smartphones account for over 57% of total viewing in the African SVOD market. This mobile-first trend is driven by high mobile internet traffic, reaching up to 74% in some areas, and limited fixed-line broadband, OpenSignal reveals. In markets such as Kenya, mobile connections now exceed the total population, cementing the handheld screen as the first window for cinematic releases.

This demographic shift has fundamentally altered how audiences discover and consume film. Discovery is no longer driven by legacy media; instead, it has become a form of social currency. In Nigeria, 82% of audiences hear about new films through friends and family, while in Egypt, this figure reaches a staggering 93%. Social media platforms like TikTok, Instagram, and YouTube have become the primary engines of awareness, with TikTok (used by 87% of Kenyan viewers for content) and Instagram cited as critical drivers of viral momentum. This "always-on" connectivity supports a growing preference for on-demand access and serialised storytelling, with over 62% of viewers engaging in binge-watching behaviour.

Furthermore, the mobile-first nature of this audience has spurred innovation in consumption formats. Gen Z and Millennials now spend between 40% and 60% of their viewing time on short-form video, largely due to its significant data cost advantage: it consumes 20–25 times less data than a standard long-form episode. This habit is forcing platforms to adapt through mobile-native engineering, prioritising lightweight applications, data-saving modes, and offline viewing to overcome persistent bandwidth and cost constraints. In South Africa, video already dominates mobile traffic, accounting for 76% of total data usage, while Nigeria's online population of over 140 million as of August 2025, according to the Nigerian Communications Commission (NCC) represents a massive reservoir of potential streaming minutes. To successfully unlock this demographic's potential, the industry is increasingly moving toward hybrid models such as FAST and
ad-supported tiers that align with the mobile ergonomics and price sensitivity of Africa's youthful, digitally native population.



Economic Stratification and the "Connectivity Tax"

The growth of Africa's digital film ecosystem is fundamentally governed by a rigid economic pyramid, where affordability acts as a decisive structural barrier rather than a matter of consumer preference. While the continent has a massive latent demand for storytelling, the vast majority of households operate within narrow discretionary spending limits, which exclude them from traditional, premium global streaming models. Central to this exclusion is the "Connectivity Tax": the hidden, often prohibitive cost of mobile data that effectively doubles or triples the price of content for end users.

The Economic Pyramid: Household Spending Tiers

An audience survey across the six markets reveals that African households are sharply stratified by their monthly "Willingness to Pay" (WTP) for entertainment, a metric that determines which platforms can achieve mass-market scale.

- The Mass-Market Base (40–50% of households): This segment represents the largest portion of the potential audience but can only sustain entertainment expenditures between USD 0 and USD 3), placing a structural ceiling on pure SVOD growth.
- The Middle-Income Urban Segment (15–20% of households): Catering to the USD 8 per month bracket, this tier is the primary battleground for regional streamers like Showmax and mobile-only plans from Netflix.
- The Premium Urban Segment (5–8% of households): This group, typically dual-income households, can afford tiers between USD 8 and USD 15 per month.
- The Elite/Expatriate Tier (2–4% of households): Only a tiny fraction of the population can afford premium subscriptions exceeding USD 15 per month, making high-ARPU strategies inherently niche-focused.

The Connectivity Tax: Data as a Barrier to Entry

For the African consumer, the "effective price" of a film is not the subscription fee alone but the combined cost of access and delivery. Mobile data costs represent a significant financial burden, typically accounting for 40–50% of total streaming expenses.

- I**ncome Displacement:** While 1GB of data in developed markets costs between USD 0.50 and USD 1.50. For a lower-income household, buying a single gigabyte can consume 5% to 15% of their monthly income.
- **The Affordability Gap:** The average cost of 1GB across many African markets is USD 3.31[16]; which is 3.1% of the monthly income of most low-income households and significantly higher than the global UN's 2% affordability target. While international affordability benchmarks, such as those from the Alliance for Affordable Internet (A4AI) and the International Telecommunication Union (ITU), typically measure affordability as the cost of 1GB of data relative to monthly income, this metric does not fully capture the realities of video consumption in mobile-first markets. In practice, moderate-quality streaming can consume between 1GB and 3GB per hour, meaning regular film and series viewing may require 40GB–60GB of data per month for active users. This creates a substantial recurring cost burden for lower- and middle-income households.
- **The Expiry-Date Constraint:** Telecom operators across African markets frequently offer short-duration promotional bundles that appear affordable in absolute terms, for example, daily or weekly data packages in Kenya. However, these bundles are generally designed for browsing and social media usage rather than sustained long-form video streaming. Importantly, unused data is often forfeited once validity periods expire, forcing consumers into repeated purchasing cycles. As a result, audiences may technically have internet access without having economically sustainable access to streaming-level consumption.

[16] Bestbroadbanddeals (2026). The cost of 1GB of mobile data in 237 countries. A global league table of mobile data costs. The average cost of one gigabyte (1GB) was calculated from over 5,600 mobile data plans worldwide. Link

- **The "Effective Price" Paradox:** In Nigeria, the cost burden of streaming is disproportionately high compared to developed economies, where high-speed broadband is a negligible fraction of earnings. Consequently, stakeholders cite data costs as a primary driver of churn (60-70% of SVOD cancellations) and a leading reason why audiences turn to piracy or file-sharing sites to avoid streaming charges.

Strategic Responses: Bypassing the Data Wall

To survive within these economic constraints, both consumers and platforms have adopted "data-first" survival strategies.

- **Consumer Adaptations**: To manage the Connectivity Tax, users frequently download content during off-peak windows (typically 12 am–6 am) or opt for lower resolutions such as 240p or 360p, which can reduce data consumption by 60% to 80%.
- **The Short-Form Advantage:** The data cost differential has made short-form content the default choice for the youth demographic; a 45-second TikTok consumes 5–10MB, compared to 300–500MB for a standard 45-minute episode, representing a 20–25 times advantage in cost efficiency.
- **Hybrid and Bundled Models:** The industry is moving toward hybrid models where telecommunications providers bundle zero-rated or discounted data with video services, a strategy that significantly decreases price sensitivity and increases watch-time.

Bridging the *Value Gap* thus requires platforms to look beyond their own subscription fees and address the *Connectivity Tax* that continues to siphon discretionary income away from the creative value chain.

The Pricing vs. Admissions Paradox

The most significant structural tension currently facing the African film industry is the "Pricing vs Admissions Paradox." This phenomenon occurs when headline revenue growth creates an illusion of a thriving market, while the underlying audience base is stagnating or contracting. Across the focus markets, particularly in Mature Anchor Hubs like Nigeria and South Africa, the data reveals a decoupling of financial performance from audience reach. This paradox is the primary manifestation of the "Value Gap": by raising prices to offset inflationary pressures and currency volatility, industry players inadvertently price out the mass market, thereby deterring the scale of investment required to professionalise the sector.

Nigeria: The "Premium Pivot" and Ticket Inflation

Nigeria serves as the most acute example of this paradox. In 2025, the Nigerian theatrical sector reported a record-breaking ₦15.6 billion in box-office revenue, a massive 34.7% year-on-year increase. However, this fiscal triumph masks a precarious reality: actual cinema admissions grew by a mere 4% to 2.8 million, which remains significantly below the 2021 peak of 3.3 million. The growth was driven almost exclusively by the Average Ticket Price (ATP), which has surged by approximately 270% over the last five years to reach ₦5,596 in 2025. While exhibitors have successfully passed increased operating costs to an affluent, urban niche, the "Quality Seekers", they have effectively structurally excluded the mass market. Stakeholders note that for a typical Nigerian household, the combined cost of tickets, transport, and refreshments has made cinema-going a seasonal luxury rather than a regular cultural habit.

South Africa: The "Volume Shift" and Margin Compression

South Africa presents a mirror image of the paradox: a rise in admissions but a decline in gross revenue. In 2023, cinema admissions increased by 14.2% (from 7.3 million to 8.3 million), yet total gross box office revenue fell by 11.2% to R 575 million. This proved short-lived: in 2024, admissions fell 34.5% to 5.4 million and revenue fell 4.5% to R549.3 million (NFVF). The 2023 pattern suggests that while South African audiences are willing to return to theatres, they are doing so only through promotional pricing, loyalty schemes, and discounted mid-week offerings. For filmmakers, this results in margin compression: more people are watching the films, but each individual contributes less to the bottom line. Furthermore, local films are the hardest hit by this trend; in 2023, South African titles accounted for only 3% of total releases and generated less than 1% of total revenue.

The Digital Paradox: Churn and "Content Tourism"

The paradox extends into the digital ecosystem, where the effective price of content (subscription plus data) remains the single biggest barrier to development. In markets with a GDP per capita below USD 2,500, a 15–20% increase in subscription prices typically triggers churn rates of 8–12%.

- The MultiChoice Case: In FY25, MultiChoice implemented inflationary price hikes of 31% in local currencies across the Rest of Africa to offset a USD 293 million foreign exchange loss. While this protected some revenue, the linear subscriber base plummeted by 1.2 million (an 8% drop).
- Content Tourism: High costs have birthed the phenomenon of "Content Tourism", where audiences subscribe to a platform for a specific hit title (e.g., *A Tribe Called Judah*) and immediately cancel. Over 60% of OTT users across the focus markets engage in this rotational behaviour to manage limited discretionary spending.

The Piracy Signal

The Pricing vs. Admissions Paradox is the primary driver of the "Piracy Paradox". Audience Survey indicates that 63% of Nigerian viewers and 65% of Kenyan viewers turn to unofficial platforms specifically because official services are too expensive. When legal access (subscription plus data) costs more than a one-time pirate fee or an Android box, the market defaults to the more affordable option regardless of legality. Consequently, piracy acts as a critical market signal of a price-value mismatch within the formal industry.

Strategic Implications

To bridge the value gap, the industry needs to move away from chasing high ARPU from a narrow elite and instead pivot toward high-volume, lower-margin models. This includes adopting micropayments (the "Kadogo" economy) and hybrid ad-supported models (FAST/AVOD), which better align with the fragmented, cash-flow-sensitive reality of the African consumer. Without addressing the Pricing vs. Admissions Paradox, the industry risks building a "prestige niche" that fails to achieve the scale necessary for long-term economic sustainability.

Psychographic Segmentation: Moving Beyond the Monolith

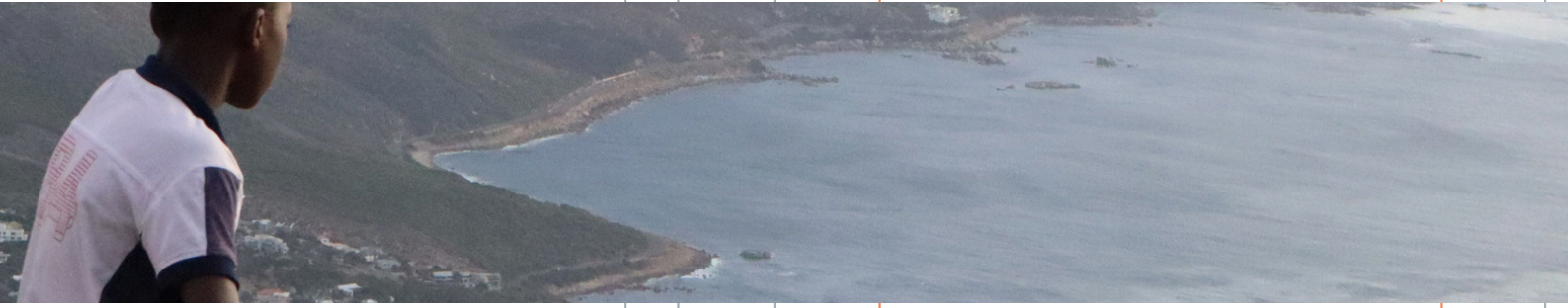
To bridge the *Evidence Gap*, industry stakeholders must move beyond treating African viewers as a monolithic consumer base. Cluster analysis across the focus markets reveals a highly fragmented psychographic landscape in which viewing habits are shaped by a complex interplay of cultural identity, technical expectations, and economic pragmatism. Rather than a single "African audience", the data identifies three primary archetypes navigating the *Value Gap* at different speeds.

1. **The Local Content Loyalists:** Relatability as a Driver: Comprising the largest share of mature markets, notably 59% of Egypt's "Heavy Local-TV Traditionalists" and 43% of Nigeria's "Nollywood Loyalists", this segment is anchored by a profound commitment to domestic storytelling. For these viewers, cinema is a vehicle for cultural connection (cited by 75% in Rwanda) and relatable social dialogue. They are often the most resilient against the *Value Gap*, willing to tolerate lower production values if the narrative resonance is strong. However, they remain highly price-sensitive, with engagement in Senegal and Rwanda almost entirely dependent on YouTube and free-to-air TV to bypass subscription barriers.

2. **The Global Quality-Seekers:** The Technical Standard Bearers: In contrast, a younger, male-dominated segment, such as the "International Quality Seekers" in Kenya (20%) and "International-Leaning Action Viewers" in Senegal (31%), leans heavily toward high-budget global content, particularly action and sci-fi. This group presents the industry's greatest challenge; in Kenya, they report an NPS for local film of -80%, citing "non-engaging storylines" and technical gaps as the primary reasons for disengagement. For this segment, the Value Gap is qualitative; they are "leapfrogging" local content in favour of global aesthetics, often using pirated websites (IPTV and social media, especially Telegram and Facebook) to access high-bitrate international titles they feel the local industry does not yet provide.

3. **The Value-Seeking Family Streamers:** The Hybrid Pragmatists. Representing the "middle market" (36% of the audience in Rwanda), this segment prioritises affordability and family suitability. They are hybrid users who move between YouTube, Pay TV and mobile-money vouchers to manage their entertainment spend. In Rwanda, this segment gives African film the highest NPS of any segment (+42%), despite having the lowest median streaming spend (USD 4.10 a month), just above the USD 0–3 range identified as the mass-market ceiling (Section 2.3.2).

Unlocking the industry's potential requires tailoring distribution to these specific psychological triggers: converting Quality-Seekers through technical parity, and sustaining Loyalists and Families through flexible, "kadogo" (micropayment) pricing models that respect their economic constraints.



Drivers of Engagement: The Craft vs. Hype Debate

Across all focus markets, the "Deal Sealers" for hitting play are remarkably consistent: African audiences overwhelmingly prioritise craft over hype. While marketing campaigns and celebrity presence create initial awareness, the transition from interest to sustained engagement is dictated by intrinsic production values. In South Africa, for instance, acting quality (98%) and technical polish (96%) are the primary drivers of film selection, whereas institutional signals such as awards and external validation matter to only a third of viewers. This trend indicates a sophisticated audience base that rewards narrative depth and technical excellence over superficial prestige.

In Kenya, the audience is highly discerning, with 97% identifying authentic acting as the most critical factor in their decision-making. This is followed closely by technical quality (94%) and a compelling plot (86%). Like the South African context, Kenyan viewers remain largely independent of external accolades, with awards influencing only 34% of the population. This suggests that for a film to succeed in the Kenyan market, it must meet high standards of technical and narrative execution rather than relying on promotional hype.

In Nigeria, where the industry has a strong "star system," audiences still place the highest value on core storytelling elements. Acting quality (98%), plot/theme (96%), and technical quality (96%) are considered nearly universally important. While popularity (92%) and star actors (92%) hold significant sway, there is a notable decline in importance for elements such as the director's reputation (73%) and awards (77%). This implies that while a famous cast may draw an audience in, the word-of-mouth engine that drives Nollywood's commercial success is fuelled by the film's actual quality.

In Egypt, the demand for technical and narrative perfection is the highest among the focus countries. Audiences rate both plot/theme and acting quality at 100%. Technical standards remain a non-negotiable prerequisite, with 98% of viewers prioritising sound and visual polish. In contrast, institutional prestige is far less decisive, with awards (54%) and the producing director (53%) serving as secondary considerations for much of the viewing public.

In Rwanda, a market characterised by its self-taught and emerging creative class, audiences show a strong preference for well-produced, relatable narratives. Acting quality (96%) and technical visuals/sound (93%) are the primary drivers, while plot and thematic relevance (91%) are also essential factors. Interestingly, popularity or trending status (91%) is as important as the story itself, indicating that Rwandan audiences are highly influenced by social discovery and collective viewing trends.

In Senegal, successful engagement is built on a foundation of technical excellence and cultural resonance. Audiences prioritise technical quality (95%) and compelling plots (94%) but also show a unique demand for authentic representation of African cultures (91%). While peer recommendations (92%) and marketing (88%) are powerful catalysts, awards and critical reviews (both 65%) are significantly less influential in the final decision to watch a film.

Language as a Multiplier: The Power of Cultural Proximity

Cultural proximity is deeply tied to linguistic accessibility, which functions as a primary driver of emotional engagement and audience retention across the continent. In Senegal, audiences in rural areas have a documented tendency to "stay longer" when content is delivered in Wolof or other local languages, as it fosters a deeper sense of relatability and identity. This highlights language not just as a tool for communication, but as a "deal sealer" for building long-term loyalty in linguistically diverse regions.

Similarly, the "BraZulu" model, Brazilian telenovelas dubbed into isiZulu, has found massive success in South Africa on the Viu platform. This model proves that even foreign intellectual property can achieve high domestic engagement if the linguistic barrier is removed through hyper-localisation. Furthermore, the linguistic advantage of Swahili, spoken by over 100 million people across East Africa, provides a unique opportunity for regional scalability in markets like Kenya and Tanzania. Industry data suggests that sustained investment in African narratives in vernacular languages not only improves unit economics by increasing engagement but also reduces churn on digital platforms. By integrating AI-driven localisation, such as automated dubbing and subtitling, platforms can expand their libraries at a fraction of traditional costs while ensuring content resonates with the specific cultural and linguistic preferences of the region.

While AI-driven dubbing and translation offer scalable pathways to expand content across Africa's diverse linguistic landscape, language itself is not merely a technical variable, but a cultural and intellectual property asset embedded within communities. African languages carry context, identity, and traditional knowledge, raising important questions around ownership, consent, and value capture. Current AI models, which are largely developed and owned outside the continent, are typically trained on datasets that do not adequately compensate local creators or communities, creating risks of uncompensated extraction of linguistic and cultural value. In addition, the use of AI in localisation introduces unresolved challenges related to copyright, performer rights (including voice replication), data protection, and regulatory oversight. Without clear frameworks, the perceived cost efficiencies of AI localisation may be offset by long-term value leakage, in which African stories are distributed at scale while the underlying linguistic and cultural assets are monetised elsewhere. Strengthening governance around AI use in audiovisual translation will therefore be critical to ensuring equitable participation in future distribution models.

Audience evidence from South Africa suggests that acceptance of AI in film is conditional. In the NFVF's 2026 national audience survey (n=379), 38% of respondents considered no use of AI in film acceptable and 30% said the use of AI would make them less likely to watch a film, while half held mixed views on AI overall. The uses respondents found most acceptable were supportive rather than creative: marketing (19%), script development (16%), and subtitling and dubbing (13%) (NFVF, 2026)[17]. Industry stakeholders interviewed for the same study were similarly cautious, supporting AI for subtitling, transcription and workflow efficiency while raising concerns about job displacement, originality and ownership. Although this evidence comes from a single market, it reinforces the case for governance frameworks on consent, compensation and performer rights before AI localisation is deployed at scale.

[17]Birguid (2026). South African Audience Research (Cinema, Digital, Film and Video Content). Report prepared for the National Film and Video Foundation (NFVF), RFP19 2025-2026, 27 May 2026. National face-to-face intercept survey of audiovisual consumers aged 18 and over (n=379 completed interviews across all nine provinces), complemented by 17 stakeholder interviews.

Structural Barriers: The Exhibition Crisis and Piracy Paradox

The primary structural barriers to African audience growth are anchored in an acute physical exhibition deficit and a pervasive informal economy that thrives on the resulting service vacuum. These two factors create a self-reinforcing cycle of exclusion: the Exhibition Crisis ensures that theatrical cinema remains a geographically concentrated luxury, while the Piracy Paradox demonstrates that audiences will default to unofficial channels not out of malice, but because formal distribution has failed to provide affordable or accessible alternatives.

The Exhibition Crisis: A Continent Under-Screened

The African continent is defined by a severe "exhibition crisis", characterised by an absolute shortage of physical screens and their extreme geographic centralisation. This deficit creates a "geographic monopoly" where access to film is restricted to a narrow urban elite.

- Geographic Concentration: Across focus markets, theatrical infrastructure is hyper-centralised in capital cities. In Kenya, over 75% of screens are concentrated in Nairobi, leaving regional urban centres like Nakuru with none. Similarly, 90% of Egyptian screens are locked in Cairo and Alexandria, and 83% of Senegalese screens are in Dakar.

- Market Contraction and Fragility: Even in mature markets, the theatrical sector is under pressure. South Africa witnessed a 33% reduction in major cinema sites between 2015 and 2025, with closures concentrated in lower-priced regional venues. Emerging markets face even greater fragility; Rwanda entered a total exhibition crisis following the closure of its primary Canal Olympia Rebero in late 2025, leaving the nation with almost no formal commercial cinema halls.

- The Luxury Barrier: In Nigeria, while revenue surged by 34.7% in 2025, admissions grew by only about 5%, indicating that exhibitors are extracting more value from a wealthy niche while structurally excluding the mass market through a 270% surge in ticket prices.

The Piracy Paradox: A Signal of Accessibility Failure

Rather than viewing piracy purely as a criminal activity, stakeholders increasingly interpret it as a **critical "market signal"**. Piracy fills the void left by formal distribution systems that are either too expensive, geographically distant, or inconsistent in their content supply.

- **Affordability vs. Legality:** In Nigeria, **63% of audiences** turn to unofficial platforms specifically because official subscription services are perceived as too expensive. In Kenya, when legal access costs more than a one-time pirate fee or an "Android box", the market chooses the cheaper option regardless of legality.

- **Availability Gaps:** Piracy frequency is often a direct response to content scarcity. 67% of Kenyan viewers use pirated sources to watch recent films that are simply not available on mainstream platforms.

- **Normalised Unauthorised Consumption:** In Senegal, up to 75% of potential revenue is lost to unauthorised circulation, yet consumption is so ingrained that viewers often pay subscription fees to informal neighbourhood providers, believing they are acting legally. The youth demographic predominantly views file-swapping via applications like Telegram or Xender as "sharing with friends" rather than theft.



Engagement Catalysts: Festivals, Schools, and Community Cinema

In a landscape defined by an acute physical exhibition deficit, alternative channels function as essential "compensatory mechanisms" for audience cultivation. These catalysts, festivals, educational circuits, and community screenings, bridge the *Value Gap* by restoring the communal social ritual of film-going to populations structurally excluded from urban multiplexes.

1. **Festivals as Strategic Launchpads:** High-profile platforms like AFRIFF (Nigeria), FESPACO (Burkina Faso), the Durban International Film Festival and its industry-facing Durban Film Mart (South Africa), El Gouna Film Festival and Cairo's CIFF (Egypt), NBO (Kenya) and Carthage Film Festival (Tunisia) serve as critical nodes for prestige validation and organic discovery. By frequently offering free screenings, these events convert attendees into active brand ambassadors, generating the word-of-mouth social currency that drives over 80% of discovery in markets like Nigeria. However, their impact remains constrained by an urban-centricity and precarious funding models, exemplified by the 2025 Kalasha International Film & TV Market, Festival and Awards cancellation, which limit their ability to build sustained nationwide momentum.

2. **Campus Circuits and the Educational Pipeline:** Educational institutions are increasingly recognised as long-term audience builders rather than mere vocational pipelines. Initiatives like the MultiChoice Talent Factory and campus screening circuits in South Africa and Nigeria introduce young, mobile-first demographics to high-quality local narratives early. Leveraging concentrated student populations through subsidised offers creates a foundation for lifelong cinematic literacy and habit formation.

3. **The Revival of Community Cinema:** In Kenya, the small independent venue Unseen Nairobi plays a comparable role, providing dedicated screening space for Kenyan and other African films. South Africa's Sunshine Cinema, Africa's first youth-run, solar-powered mobile cinema, extends this accessibility model geographically, touring rural and peri-urban communities with local and pan-African film programming where fixed screening infrastructure does not reach. Grassroots models like Femi Adebayo's community screenings in Nigeria demonstrate the immense commercial potential of decentralised exhibition. Stakeholders advocate for a "Bioskop" revival, using mobile units and existing infrastructure like Rwanda's 30 youth centres to reach the 80% of regional populations currently underserved. By integrating small, symbolic micropayments, these models foster a culture of paying for content while bypassing the prohibitive "Hollywood premium" pricing that deters mass adoption.

2.4 Social Impact: Africa-wide Patterns

In the African context, film has transcended its primary function as a medium of entertainment to become a powerful engine for social reflection, narrative sovereignty, and behavioural change. Across the six focus markets, the industry acts as a vehicle for cultural diplomacy, allowing African storytellers to reclaim their narratives from a historical "colonial gaze" and address urgent contemporary issues ranging from land justice and gender-based violence to youth unemployment and political accountability. However, the sector's social potential is currently caught in a strategic tension: while there is a profound audience appetite for socially relevant storytelling, the *"Value Gap*" often relegates these narratives to donor-funded niches, while the "*Evidence Gap*" prevents the industry from quantifying the long-term behavioural and policy impacts necessary to attract larger-scale institutional support. Stakeholders also note an imbalance in how capacity-building funding is allocated: a large share of available training supports impact-distribution skills, but comparatively little funding supports the distribution activity itself, limiting films' ability to reach the audiences, often low-income, rural populations, that impact distribution strategies are designed to serve.

Shaping Narrative Sovereignty and Cultural Identity

The historical trajectory of African cinema, moving from an instrument of colonial control to a vibrant landscape of self-expression, underpins its current social impact. In markets like **Kenya** and Senegal, filmmakers have consciously reclaimed the screen to explore complex themes of identity and nationhood. In Rwanda, cinema's maturation is inextricably linked to the post-1994 process of peacebuilding and reconciliation, where film serves as a critical platform for testimonies and national unity.

Across the continent, audiences view film as a mirror to society. Audience surveys indicate that about 64% of Nigerian viewers and 69% of Senegalese viewers agree that local films tell authentic and relatable stories. This sense of "being seen" is a fundamental social outcome. In South Africa, films like *Elelwani* (the first Venda-language feature) provided cultural validation to communities historically excluded from mainstream representation, fostering a sense of belonging that transcends commercial box-office metrics.

Comparative Thematic Resonance: Youth, Gender, and Governance

The audience survey reveals a remarkably consistent continent-wide demand for storytelling that addresses personal aspirations and structural challenges. Rather than seeking pure escapism, African viewers are drawn to narratives that engage with their daily lived realities.

- The Youth Opportunity Narrative: Stories about young people pursuing education, employment, or a better future are the most resonant themes across almost all focus markets. This interest peaks in Senegal (61%), Kenya (51–61%), Nigeria (53%), and South Africa (50%). This reflects the demographic reality of a "youth bulge" navigating economic volatility and migration aspirations (often termed the *japa* phenomenon in Nigeria).
- Gender and Empowerment: Themes centred on strong women overcoming challenges attract significant attention, particularly in Senegal (54%), South Africa (47%), and Nigeria (46%). In Kenya and Senegal, these stories often spark deeper community dialogues on sensitive issues such as reproductive health and gender-based violence (GBV).
- Governance and Social Justice: Narratives addressing power, corruption, and political accountability are major drivers of engagement in Nigeria (45%), Senegal (42%), and South Africa (29%). Stakeholders note that these films often popularise exposés on criminal or political enterprise, turning cinematic experiences into moments of civic reflection.

Norm-Shaping and Behavioural Change

The most tangible evidence of film's social impact is found in its ability to shift social norms and influence individual behaviour. Unlike traditional public awareness campaigns, narrative-led content leverages emotional connection to recalibrate public consciousness.

- **Public Health Outcomes:** The most cited model for behavioural impact is the MTV Shuga Global campaign (active in Kenya, Nigeria, and South Africa), which combined entertainment with rigorous tracking. Post-broadcast evaluations demonstrated documented declines in STI rates and early marriage, proving that "edutainment" can achieve measurable developmental goals. In Senegal, the series Yaay 2.0 (addressing infertility) reportedly prompted a significant increase in men seeking medical analyses, a procedure previously stigmatised or refused.

- **Policy Influence:** Documentary filmmaking has demonstrated a direct line to policy change. In Senegal, the film L'utilité et l'attachement (addressing unpaid compensation for a rail project) prompted the Head of State to issue formal instructions for redress after a screening. In Egypt, the Palestinian black comedy Thank You for Banking with Us was lauded for humanising political struggles through relatable, everyday ambitions.

- **Legal Redress:** Rwanda's Le silence des mots was credited with the reopening of an 11-year-old closed legal case in France concerning survivors of the genocide, illustrating the power of cinematic evidence to drive institutional accountability.

- **Collective Memory and Transitional Justice:** Beyond individual legal redress, a growing body of African cinema is engaging with the long aftermath of mass violence — not merely as historical record, but as a space for processing unresolved grief and testing the limits of forgiveness. Rwanda's Ben'Imana (2026), the debut feature of director Marie-Clémentine Dusabejambo, offers perhaps the most striking recent example. Set in 2012 amid Rwanda's Gacaca community tribunal process, the film follows a genocide survivor who facilitates reconciliation sessions between victims and the families of perpetrators, navigating the gap between institutional justice and personal healing. Dusabejambo has described the filmmaking process itself as "a genuine process of repair" — a healing tool for both audiences and creators — and notably cast many non-professional actresses alongside real women whose stories inspired the narrative, deliberately erasing the boundary between testimony and fiction[18]. The film's Caméra d'Or win at the 2026 Cannes Film Festival[19], where it became the first Rwandan film in the Official Selection, signals that this mode of socially grounded storytelling resonates far beyond its national context, and that African cinema's engagement with post-conflict memory carries growing international cultural authority.

[18] The Hollywood Reporter (19 May 2026). 'Ben'Imana' Review: Rwandan Women Confront National Wounds and Family Secrets in a Searing Drama. Link.
[19] Festival de Cannes (27 May 2026). Rerun of the "Un Certain Regard" selection in Paris. BEN'IMANA by Marie-Clémentine DUSABEJAMBO | 1st film – Caméra d'or 2026. Link.

The Economic Multiplier: Jobs and Creative Ecosystems

Beyond the screen, the audiovisual sector is a vital engine for job creation and skills development. Continent-wide, the sector is estimated to employ 5 million people, with the potential to create an additional 20 million jobs.

- Multiplier Effect: Every high-budget production acts as a small-to-medium enterprise catalyst. A single production can create hundreds of direct roles in cinematography, editing, and management, while supporting thousands of indirect jobs in catering, logistics, and transportation. In South Africa and Nigeria, major hubs supported by platforms like Netflix contribute to the roughly 12,000 jobs Netflix reports supporting across its African operations.
- Skills Formalisation: Initiatives like the MultiChoice Talent Factory (MTF) provide fully funded education that equips young professionals with both the art and the business of filmmaking. Stakeholders also caution that many industry training programmes are not rigorously evaluated, internally or externally, and tend to concentrate on on-set production skills rather than business affairs, distribution strategy or portfolio-level greenlighting judgement—reinforcing the training and planning gap described in Section 2.2. This pre-financing of human capital reduces investment risk and professionalises the creative ecosystem across the continent.

The Strategic Tension and the Evidence Gap

Despite these successes, the industry's social potential is hindered by two critical structural failures:

1. **The Impact-Commercial Trap:** There is a recurring paradox where social impact films are systematically excluded from mainstream commercial distribution because they are judged by box-office returns rather than dialogue metrics. This forces filmmakers into a dependency on international donors and development partners such as GIZ, OIF, or the Ford Foundation, which can sometimes compromise artistic independence or lead to "issue-fatigue" among audiences. This study's audience survey did not disaggregate willingness to pay by genre (for example, documentary versus social-issue drama); stakeholders suggest this distinction matters in practice, as audiences may expect documentaries to be free (associating them with government or NGO messaging) while paying more readily for dramas. This is noted here as a gap for future research rather than a finding this study can support.

2. **The Evidence Gap:** While social impact is widely observed, it is rarely systematically measured. Most stakeholders rely on anecdotal evidence, testimonials, or social media buzz rather than structured systems for tracking behavioural change or policy outcomes. Establishing national and regional data systems to quantify these "soft" outcomes is essential to de-risk the sector for impact investors and state funders.

2.5 Opportunities and Strategic Levers

The African film and audiovisual sector stands at a critical juncture, where the potential to generate billions in annual revenue and create millions of jobs hinges on bridging the structural *"Value Gap"* and the *"Evidence Gap"*. Strategic levers must move beyond project-based philanthropy toward structured, commercially driven partnerships that leverage the continent's digital-first trajectory.

Priority Levers for Strengthening Distribution

To overcome the fragmented nature of African distribution, interventions must focus on scaling existing infrastructure and formalising cross-border trade.

- **Intra-African Co-production and Trade Treaties**: While South Africa and Senegal have active treaties with Europe (e.g., France/Germany), there is an urgent need to expand and deepen intra-African treaties and co-production frameworks. For many filmmakers, European treaties remain attractive because they provide access to structured financing ecosystems, tax incentives, and mature distribution markets with stronger recoupment potential. Intra-African treaties can help reduce overreliance on external partners and support the development of a continental rights market. However, treaties alone are unlikely to generate meaningful commercial returns unless they are accompanied by stronger monetisation pathways across African markets. Stakeholders emphasised that the African Continental Free Trade Area (AfCFTA)[20] can serve as an important enabling mechanism for cross-border digital trade and rights circulation, but broader ecosystem conditions are equally necessary. These include interoperable payment systems, stronger regional streamers and cinema networks, harmonised copyright enforcement frameworks, and more reliable audience infrastructure capable of supporting sustainable content monetisation across multiple territories. Pan-African and regional distribution companies specifically remain scarce: of the distribution and sales actors identified across this study's six focus markets, only a small number operate at cross-border or pan-African scale, among them Bigger Motion, a subsidiary of LBx Africa, and Sudu Connexion. Most distribution and sales activity identified in this study is nationally bound (see the Distribution subsections of each country chapter, Section 3.x.2, for the fuller country-level landscape). Deeper profiling of individual companies' business models, deal terms and track records was outside the evidence base available to this study.

- **Building Stronger Regional Streaming Ecosystems:** In several markets, particularly Kenya, the digital distribution landscape remains highly fragmented, with numerous small filmmaker-led VOD platforms operating without sufficient scale, capitalisation, or premium content libraries. However, stakeholders cautioned that consolidation alone does not automatically produce a commercially competitive regional platform. The more strategic priority is the development of stronger, better-capitalised regional streaming ecosystems capable of aggregating audiences across markets and sustaining recurring subscription or advertising revenue. This requires investment not only in platform technology, but also in exclusive flagship content, telecom and payment integrations, regional distribution partnerships, audience analytics, and long-term commissioning strategies. Competing effectively with large international or regional players such as Canal+ will depend less on the number of platforms in the market and more on the ability to secure premium local content and build consistent user engagement at scale.

[20] African Continental Free Trade Area (AfCFTA) is the continental agreement establishing a single market for goods and services across the African Union, intended among other things to reduce cross-border trade barriers

- **Establishment of National and Regional Distribution Funds:** A major gap identified across all six markets is the limited availability of financing specifically dedicated to distribution activities. Existing funding structures remain heavily weighted toward production, with comparatively little support for audience-building and release execution. Stakeholders recommend establishing National and Regional Distribution Funds to support activities such as audience research, data-driven targeting, trailer and promotional asset production, localisation and subtitling, marketing campaigns, and coordinated regional release strategies across cinemas, broadcasters, airlines, mobile platforms, and streaming services. In practice, such funds could draw on a blend of public budgets, development-partner and foreign-donor capital, and commercial investment; the appropriate mix is a matter for each country's own policy design. Stakeholders also point to a related opportunity: soft funding or concessional loans directed at African-owned and -controlled distribution companies would let them take on more African films and stabilise operations, rather than channelling marketing and distribution support to producers on a film-by-film basis, as is currently more common in many markets. While film festivals remain important visibility and networking platforms, stakeholders cautioned that festival acclaim alone does not necessarily translate into commercial audience demand or sustainable box office performance. Distribution financing frameworks must therefore prioritise audience conversion and monetisation strategies alongside prestige-driven exposure.

- **Distribution Labs, Rights Literacy and Market Professionalisation:** Stakeholders also highlighted the need for stronger professionalisation across the distribution ecosystem, particularly in relation to rights management, licensing strategy, and revenue optimisation. Importantly, many filmmakers do not release content on free platforms such as YouTube simply because of limited business knowledge, but because formal distribution pathways are often inaccessible, undercapitalised, opaque, or controlled by gatekeepers offering limited economic upside. Expanding creators' bargaining power, therefore, requires both training and improved market access. Distribution Labs and professional development initiatives can play an important role by equipping filmmakers, producers, and distributors with practical knowledge around licensing economics, copyright enforcement, revenue diversification across release windows, audience analytics, contract negotiation, and platform monetisation strategies. Stakeholders stressed that strengthening commercial literacy must go hand in hand with broader efforts to create more transparent, competitive, and accessible distribution markets.



Key Enablers of Audience Development

Audience growth is no longer about building multiplexes but about building broader, more affordable digital entry points.

- **Bridging the Evidence Gap through Data Accuracy:** Establishing centralised data systems trusted by exhibitors, broadcasters and streamers is the highest priority for de-risking investment. These players must trust the neutrality of the system and see commercial value in participating (including access to public funds or incentives). Recommendations include creating a Box Office for markets where formal reporting remains limited, as well as certifying trusted third-party measurement providers similar to Comscore in Nigeria. However, stakeholders also stressed that African markets require locally grounded intelligence systems capable of capturing realities often excluded from international measurement frameworks, including informal consumption, offline content sharing, community screenings, and fragmented mobile payment ecosystems. Access to government grants and public support mechanisms should be conditional on the submission of verifiable audience and performance data to improve sector-wide transparency and benchmarking.

- **The "Kadogo" Economy:** Success in price-sensitive markets requires aligning pricing with local spending habits. Platforms like Viusasa (Kenya) and Safaricom Baze have proven that daily micro-subscriptions (as low as USD 0.08) can convert unbanked audiences by bypassing the "paywall paradox" of global streamers. However, stakeholders caution that the challenge extends beyond subscription paywalls alone. Even when content is inexpensive or partially free, audiences may still avoid platforms if mobile data costs remain high, if content is not perceived as sufficiently valuable or exclusive, or if piracy offers faster, more convenient access. Audience development strategies must therefore combine affordability with stronger content differentiation, telecom integration, offline viewing capabilities, and more consistent delivery of culturally resonant premium content.

- **Revival of Community Cinema (The "Bioskop" Model):** To reach the 80% of regional populations structurally excluded from urban cinemas, stakeholders advocate for the revival of mobile screening units and "cottage cinemas". Successful models, such as Femi Adebayo's screenings in Nigeria, demonstrate that taking films directly to underserved communities is both socially impactful and commercially viable.

Mechanisms to Scale Social Impact

Social impact filmmaking should be repositioned from a donor-funded niche to a standard tool for national advocacy and behavioural change. Stakeholders highlight two different arrangements that are often conflated: donor- or NGO-commissioned work-for-hire films, where the funder owns the work and controls the narrative, and independently authored films that happen to align with a funder's thematic interest (for example, a foundation funding a story that speaks to its programme areas) without the funder holding editorial control or product placement in the work.

- **Impact Funds and Public-Private Partnerships:** Collaborative models, such as the Circuits Creative Impact Fund (a USD 15 million agreement in Nigeria[21]), demonstrate how state governments can partner with private platforms to fund and distribute commercially viable content that addresses social goals. Stakeholders emphasise that impact funds are most effective when structured as catalytic market-building vehicles rather than purely grant-based interventions. In this model, public or philanthropic capital can be used to crowd in private investment, strengthen local distribution infrastructure, de-risk commercially promising projects, and expand audience access pathways. However, stakeholders also caution against frameworks in which "impact" becomes the primary justification for funding films with limited audience appeal or weak distribution potential. Long-term sustainability will depend on balancing social objectives with audience demand, commercial competitiveness, and scalable monetisation pathways.

- **Institutional Integration (MICE and NGOs):** As with the donor-financing distinction above, this model is best understood as commercial or donor-commissioned work-for-hire rather than independent filmmaking, since the commissioning institution typically retains editorial control. Rwanda's advanced MICE (Meetings, Incentives, Conferences, and Exhibitions) sector offers a unique opportunity for filmmakers to align storylines with international conference themes, securing sponsorships from NGOs and government departments.

- **Educational Pipeline Integration:** Specialised film skills (e.g., sound engineering, colour correction) should be embedded into national TVET (Technical Vocational Education and Training) systems. Initiatives like the MultiChoice Talent Factory serve as templates for building a sustainable talent pipeline that also serves as a community of advocates for local content.

[21] MSME Africa (13 December 2025). BusinessBenue Launches $15m Creative Impact fund, Targets 300,000 job. Link.

Strategic Responses to Digital Platform Shifts

The "Great Retraction" of 2024–2026, characterised by Amazon Prime Video's exit from original commissions and the closure of the legacy Showmax service following the Canal+ acquisition, requires a shift toward African-led solutions.

1. **Reducing Platform Dependency:** South Africa's reliance on international streamers mirrors challenges across the continent. The sector must pivot toward super-aggregation strategies, where local telcos (such as MTN) and broadcasters (such as SABC+) provide unified interfaces for local and international content, thereby reducing subscriber churn. To be sure, aggregation alone will not solve the issue of differentiated content economics, as platforms also need compelling exclusive programming and stronger audience analytics to retain users.

2. **Telecom Integration and Micropayment Infrastructure:** Given the dominance of prepaid mobile consumption across African markets, stakeholders identified telecom integration as one of the most important strategic levers for expanding legal digital consumption. Bundled streaming access, carrier billing, micropayments, and sponsored data partnerships can significantly reduce friction for users who remain excluded from traditional subscription models or formal banking systems. Platforms such as Viusasa and Safaricom Baze in Kenya demonstrate how aligning pricing structures with local spending habits can improve audience conversion and retention. More broadly, telecom partnerships can help local distributors overcome one of the continent's largest structural barriers: the disconnect between strong mobile penetration and limited streaming affordability.

3. **Regional Licensing Exchanges and Rights Market Development:** A major weakness across African film ecosystems remains the fragmentation of licensing demand. Stakeholders therefore recommend the development of regional content licensing exchanges capable of aggregating buyers from broadcasters, airlines, hospitality networks, telecom operators, educational institutions, and streaming services. There is also a business-affairs education gap on the buyer side. Stakeholders highlight that in several East African markets, broadcasters acquire world rights with no windowing; sometimes from limited awareness of alternative deal structures, sometimes as a negotiating default. Addressing this through buyer-side training could enable broadcasters to co-finance films across territories or take second-window positions instead of acquiring exclusive world rights outright. Such frameworks would allow independent producers and ideally strong African distribution companies acting on their behalf to monetise content across multiple territories and release windows rather than relying on single-platform exclusivity deals. Over time, stronger regional licensing systems could help establish a more liquid continental rights market, improving recoupment opportunities for producers while increasing the circulation of African content across borders.

4. **Strengthening Local Recommendation Systems and Audience Intelligence:** Stakeholders repeatedly highlighted the absence of robust recommendation engines and localised audience intelligence systems across many African-owned platforms. While global streamers benefit from advanced behavioural analytics that optimise retention and content discovery, many local platforms still operate with limited audience segmentation and weak personalisation capabilities. Investment in recommendation systems, user analytics, and viewing-data infrastructure could significantly improve retention rates, advertising performance, and content targeting for African platforms. Better audience intelligence would also strengthen commissioning decisions and support more commercially responsive local content ecosystems.

5. **Adapting the "YouTube-First" Model:** Senegal's Marodi TV illustrates how free, ad-supported digital distribution can accumulate 8.67 million subscribers and 4.6 billion views, proving that independent creators can build massive audiences while bypassing traditional gatekeepers. Stakeholders view this as evidence that African creators can build meaningful scale through accessible digital distribution models, particularly where formal theatrical infrastructure remains limited. However, stakeholders also caution against positioning YouTube-first distribution as a replacement for the broader film ecosystem. Advertising yields across many African markets remain relatively low, monetisation tools are unevenly available across countries, and platform algorithms can change unpredictably, leaving creators dependent on external platform rules and revenue-sharing systems. Stakeholders echo that it is only possible to earn money from YouTube when a) the account is set up in the US or Europe and b) the country has a large diaspora audience. Sustainable long-term industry growth will therefore still require stronger theatrical circuits, regional streaming platforms, telecom partnerships, licensing markets, and enforceable copyright systems capable of supporting higher-budget productions and long-term intellectual property monetisation.



6. **Rebuilding the Missing Middle: Scale Existing Platforms Before Building New Ones:** Section 2.2.4 identifies the closure of Showmax as the loss of Africa's 'missing middle': the tier of platforms large enough to pay licence fees and commission mid-budget local content but not bound by the export logic of global streamers such as Netflix. The evidence from this study points to rebuilding that tier by strengthening existing African platforms and aggregators rather than financing new continental platforms from scratch. Stakeholders in Kenya argued that the market already has too many under-capitalised platforms and that investment should go to those with established audiences. In Egypt, the stakeholders likewise recommended working with existing services such as Watch iT and Shahid rather than launching a new platform. Additionally, broadcaster- and telco-linked services such as SABC Plus and eVOD in South Africa, and micro-payment services such as Viusasa and Safaricom Baze in Kenya, show that platforms aligned with local pricing and data realities can reach scale. The closure of Showmax despite MultiChoice's scale shows that capital alone does not guarantee sustainability. On this basis, public and development finance is best used to: (i) provide growth capital and content-linked facilities, such as co-commissioning funds or minimum guarantees for mid-budget African titles, to platforms with demonstrated audiences, conditional on local commissioning commitments and data sharing; (ii) support consolidation or shared back-end services where markets are fragmented; and (iii) fund shared infrastructure that no single platform will build alone, including payment integration, rights registries and audience measurement. A new platform should be considered only where no viable local or regional platform exists and a credible content pipeline and distribution partnerships are in place.



7. **Payment Systems: Build on Existing Rails and Invest in Interoperability:** The same logic applies to payments. Audiences already pay for content through mobile money, airtime and carrier billing, and the services that have reached mass-market audiences, such as Viusasa and Safaricom Baze in Kenya, did so by integrating with existing mobile-money and telecom billing systems rather than building new ones. The study therefore does not recommend developing film-specific payment systems. The gaps lie instead in three areas: integration, as stakeholders noted that smaller platforms often lack seamless mobile-money, carrier-billing and pay-per-view options; interoperability across operators and wallets within markets; and cross-border collection and settlement, which limits the ability of platforms and rights holders to monetise audiences across multiple territories (Section 2.5.1). Continental infrastructure such as the Pan-African Payment and Settlement System (PAPSS), launched by Afreximbank with the AfCFTA Secretariat to settle cross-border transactions in local currencies[22], could be explored as a settlement layer for cross-border licensing and subscription revenues. Support should therefore focus on integration grants or technical assistance for platforms, regulatory work on wallet interoperability, and pilots that link cross-border content sales to existing settlement systems.

Unlocking Africa's film potential requires a transition from fragmented support to technologically enabled, commercially driven partnerships. This will depend on strengthening regional licensing markets, improving audience intelligence systems, integrating telecom-driven monetisation pathways, and investing in localisation and distribution infrastructure. Together, these shifts can reduce dependency on external platforms while expanding the long-term monetisation potential of African stories across the continent and the diaspora. Through leveraging AI for localisation, formalising data systems to close the Evidence Gap, and adopting hybrid "Kadogo" pricing models, the industry can finally bridge the Value Gap and achieve continental scale.

[22] Afreximbank (2022). Pan-African Payment and Settlement System launched by President Akufo-Addo, foreseeing USD 5 billion annual savings for Africa. Link.



3 COUNTRY REPORTS

EG	KE	NG	RW	SN	ZA
Egypt	Kenya	Nigeria	Rwanda	Senegal	South Africa

1	Country Context
2	Film Distribution
3	Audience Development
4	Social Impact
5	Financing and Enabling Environment
6	Country-Specific Priorities and Opportunities

Egypt

Country Context

Current State of Film

Egypt is the most populous nation in the Arab world and North Africa, with an estimated population of approximately 118 million as of 2025, according to UNFPA[23]. The country has a notably youthful demographic, with about 63% of the population aged 15-64 and ~60% under 30, creating a substantial consumer base for media and digital content. Digital connectivity has strengthened significantly, with internet penetration reaching 82.7% by the end of 2025[24], supported by the rollout of 5G networks in major urban hubs like Cairo. This digital growth is a key enabler for Egypt's film industry, often dubbed the "Hollywood of the Arab World", which has a storied history dating back to 1896. The film ecosystem is centred around the Egyptian Media Production City, a massive 35 square kilometre hub that serves as the operational backbone for both domestic and international productions.



Overview of National Film Ecosystem

The Egyptian film industry is currently defined by a profound structural dualism. On one side lies a centralised commercial mainstream that relies on star-driven, formulaic content to mitigate high financial risks. On the other, a vibrant independent sector often termed "alternative cinema" is achieving international critical acclaim but remains economically marginalised within the domestic market. Stakeholders point to a lack of mid-level production that bridges these two worlds. The COVID-19 pandemic served as a definitive digital catalyst, permanently shifting the industry's centre of gravity from physical theatres to streaming platforms. Services like Shahid and Watch iT have evolved from auxiliary rights-buyers into primary industry gatekeepers. While this has expanded the reach of Egyptian content, it has introduced a new data silo problem, where independent creators are kept in the dark regarding audience preferences. Egypt's demographic profile, characterised by a massive, tech-savvy youth population, presents a significant opportunity that is currently hindered by geographic and economic barriers. The industry remains heavily Cairo-centric, leaving the cultural narratives of Southern Egypt and Nubia largely unrepresented. Furthermore, the rising cost of cinema attendance has decoupled the youth from the theatrical experience, moving them toward short-form digital content. In this report, 'Southern Egypt' refers to the Nile Valley governorates south of Greater Cairo down to Aswan, a region historically referred to as Upper Egypt; it does not denote a separate administrative region.

[23] United Nations Population Fund (UNFPA – 2025). Link
[24] DataReportal. The "state of digital" in Egypt in 2026. Link

Film Distribution

The distribution landscape in Egypt is currently undergoing a significant transition from traditional cinema-led models to platform-driven strategies. Traditionally, producers license completed films to local distributors who manage theatrical bookings and marketing, with major releases securing slots in multiplex chains concentrated heavily in Cairo and Alexandria. While the exhibition sector contracted in the 2010s, revenues have rebounded, with 2025 projections exceeding USD 37 million. However, market structure remains highly centralised, with approximately 90% of screens located in Cairo and Alexandria, with major chains like Renaissance, VOX, and Galaxy controlling over 70% of the market[25]. This urban concentration represents a significant gap, leaving regions such as Southern Egypt and rural governorates underserved by theatrical infrastructure. Secondary distribution windows include pay television, such as OSN and beIN Media Group, and widely accessible free-to-air channels like MBC Group, which remain crucial for national reach. Increasingly, OTT platforms are reshaping the ecosystem by acquiring post-theatrical rights or directly commissioning original content. Regional platforms such as Shahid and the local Egyptian platform Watch iT dominate the streaming market, outperforming international services like Netflix due to a strong preference for localised Arabic content. Despite this growth, distribution is affected by a regulatory environment in which scripts and completed works require approval from censorship and licensing bodies, which can sometimes create operational bottlenecks. Furthermore, the industry faces structural constraints from online piracy, which accounts for an estimated 30-40% of market losses[26].

Distribution Channels

The Egyptian cinema industry is entering a structural growth phase characterised by a shift toward high-end multiplex assets. The market grew from 100 venues in January 2024 to 140 in July 2025, with year-on-year growth of 6.1% between July 2024 and July 2025[27]. Geographically, the market remains concentrated in Greater Cairo, Giza, and Alexandria. Active screens grew from 400 in 2017 to 437 by July 2025[28]. The relative youth of the infrastructure, with an average theatre age of just over four years, is complemented by increasing digital maturity. Over 32% of theatres now maintain dedicated websites, while nearly a quarter have an active presence on major social platforms.

Total box office revenue for 2025 reached approximately USD 37 million (EGP 1.8 billion)[29], signalling a full recovery to pre-pandemic levels. Total cinema admissions for the year are estimated at 14.3 million. The Egyptian box office exhibits a unique home-court advantage, with local productions typically capturing over 60% of total annual revenue. According to ScreenDaily, domestic films accounted for eight of the top ten highest-grossing titles in 2025. This was led by the comedy *Siko Siko* with USD 3.7 million, followed by Project X at USD 2.8 million and El Shater at USD 2.2 million. The highest-performing international release ranked eighth with USD 1.2 million. The year also saw a record-breaking performance for arthouse cinema, with the feature debut *Seeking Haven for Mr. Rambo* becoming the highest-grossing Egyptian arthouse release in history.

[25] Variety (22 November 2025). Saudi Arabia Is Now the Principal Export Market for the Egyptian Film Industry, Report Says. Link
[26] ScreenDaily (2024). Egyptian authorities close down MENA's largest piracy site. Link
[27] Mohammad Hussain (2025). Egypt's cinema map is evolving -Here's the Data. Link.
[28] Mohammad Hussain (2025). 437 Cinema Screens in Egypt – July 2025. Link.
[29] Elcinema.com. https://elcinema.com/en/work/2094784/boxoffice

A pivotal development is the meteoric rise of the export market, which now often serves as the primary source of revenue for high-budget productions. Saudi Arabia has emerged as the most critical driver of international revenue. In 2024, 33 Egyptian films were screened in Saudi Arabia, collectively earning USD 53 million, more than double their domestic box office takings. This trend continued into 2025, with major titles generating over USD 22 million across 20 international markets[30]. This export performance points to a broader opportunity: the market-access lessons from Egypt's Gulf distribution relationships could inform export strategies for other focus countries, discussed further in Section 6.1. Beyond the Gulf, Egypt is re-establishing its presence on the global festival circuit, with successes at Cannes and Tribeca facilitating new distribution agreements across Europe and North America.

Despite its recovery, the theatrical channel is defined by a profound structural paradox: it remains the gold standard for cultural prestige while becoming increasingly inaccessible to the general population. Modern multiplexes are concentrated almost exclusively in high-end urban malls within Cairo and Alexandria, creating a geographic monopoly that has effectively decoupled the country's massive youth population from the traditional theatrical experience. High ticket prices and a lack of provincial infrastructure have forced a significant migration toward informal digital circulation and professional streaming alternatives. Consequently, the theatrical window is often reduced to a formula-driven market, where major production-distribution monopolies prioritise star-led comedies to mitigate financial risk. This commercial narrowing has left a notable representation vacuum for the diverse cultures of Southern Egypt, Nubia, and the Delta.

Audience Survey confirms that cinema remains a formal, structured experience. The median number of visits is four per year, suggesting that cinema is not part of routine viewing. Spending per visit is relatively low at EGP 53.08 (USD 3.25). Barriers to attendance are led by time constraints (48%), followed by lack of interest and distance (20% each). Cost is a factor (16%), but not the main one. A smaller group prefers to wait for films on other platforms (13%). This forms a clear pattern: cinema is not avoided because it is unaffordable, but because it is less convenient.



[30] Variety (22 November 2025). Saudi Arabia Is Now the Principal Export Market for the Egyptian Film Industry, Report Says. Link

Digital platforms – Pay TV and OTT

Egypt occupies a distinctive position within Arabic-language screen industries as both a major domestic audience market and the historical centre of Arabic language film production. Its Pay TV and OTT ecosystem reflects this dual function, operating simultaneously as a national consumption platform and as a regional distribution gateway. While satellite Pay TV continues to dominate household access to premium television services, streaming platforms are expanding rapidly, particularly within subscription video on demand. Research by GMI on the Pay TV and OTT markets shows that OTT revenues more than doubled between 2022 and the forecasted 2030 value, growing at a robust compound annual rate (CAGR) of 12.2%. According to GMI, Egypt has roughly 4.93 million unique OTT subscribers. Subscription based viewing environments support catalogue depth and repeat consumption, allowing both new releases and legacy Egyptian films to remain visible to audiences for longer.

A defining characteristic of Egypt's OTT ecosystem is the dominance of regional Arabic-language streaming platforms. Services such as Shahid VIP, Watch iT, Jawwy TV, TOD, and OSN Plus collectively account for approximately 88% of paid OTT subscriptions in the country. Arabic-language platforms alone account for roughly 80% of the streaming audience, demonstrating the continued importance of language as a structuring factor in platform competition and audience reach. Differences in catalogue composition across platforms highlight the continuing importance of Egyptian cinema within the streaming ecosystem. Table 7 summarises the content library breakdown for major platforms.

Platform	Active Subs (K)	Total Hours	Local %	Regional %	International %
Shahid VIP	2,150	17,000	21.8	73.4	4.8
Watch iT	1,250	8,000	42	57	1
Netflix	550	15,600	0.6	2.4	97
OSN Plus	420	14,400	8.1	81.7	10.2
TOD	350	6,920	22.6	76.8	0.6
Jawwy TV	950	6,920	8.2	93.1	0
Weyak	285	1,260	92.1	6.7	1.2

Table 7 Content Library Breakdown for platforms in Egypt | Source: GMI, 2025

Watch iT has 42% Egyptian content; Weyak has over 90% legacy Egyptian films. Stakeholders report that platforms have become the primary financiers of original content, yet viewership data is treated as a trade secret, leaving independent creators in the dark.

Total Pay TV and OTT revenue is projected to grow from USD 525 million in 2025 to USD 610 million by 2030 (5.3% CAGR). OTT is growing at 12.2%, while Pay TV is growing at only 2.9%. Prepaid subscriptions dominate. Piracy is relatively low when legal options are affordable and available, and audiences use them.

Market Structure: Key Distributors, Platforms, Broadcasters, Exhibitors

Distributors are the most concentrated segment of the market. MAD Solutions is universally cited as the dominant distributor for independent and arthouse Arab films, with stakeholders describing it as having a near monopoly. Many filmmakers express frustration that they have no realistic alternative, even when dissatisfied with contract terms or lack of transparency. The Lebanese company Abbout Productions is mentioned as the only other significant distributor, though it focuses primarily on Lebanese films. Film Clinic operates a distribution arm alongside its production company, focusing on commercial and some independent Arab films, particularly those with Gulf co-production elements. Beyond these, the commercial sector is heavily dependent on Gulf distributors, primarily three major entities: Arab Radio and Television Rotana, and Shahid, owned by MBC. These Gulf buyers provide distribution advances that effectively finance much of Egyptian commercial cinema, giving them outsized influence over which films get made and how they are marketed.

Streaming platforms present a fragmented and opaque landscape. Watch iT is described as the most widespread in Egypt due to its low subscription price (around EGP 30) and focus on local content. Shahid, the leading Arabic platform from MBC Group, has a large library of Egyptian series and films and commissions original content, though it is perceived as more expensive. Netflix, while globally recognised, is less widespread in Egypt because of its higher subscription cost (around EGP 350), it acquires some Egyptian independent films and produces originals, but stakeholders complain about the complete lack of data transparency regarding viewership and revenue. Mubi is mentioned as a specialised platform for art-house films, but its reach in Egypt is very limited.

Broadcasters play a minimal role in the independent film ecosystem. Egyptian state television is described as largely irrelevant for independent cinema, airing primarily commercial content and propaganda during Ramadan, with no commissioning of socially engaged documentaries or short films. Several stakeholders lament that Egypt lacks the public service broadcasting model found in Europe, where channels like Arte, Canal+, and the BBC are major buyers of independent documentaries and short films. Al Jazeera Documentary Channel is mentioned as a significant outlet for documentary films from the region, though it requires specific formats and topics that do not always align with filmmakers' visions. European public broadcasters are frequently cited as buyers of Egyptian short and documentary films, providing significant revenue and exposure, but only for filmmakers who have European co-production connections.

Exhibitors are the most constrained segment. Zawya Cinema is the only dedicated art-house cinema in Egypt. Almost every independent filmmaker interviewed mentioned Zawya as their primary or only theatrical venue. It is described as a cultural hub that has cultivated a loyal audience, but its capacity is limited to one location with small screens. Cinema El Maadi is a newer independent cinema initiative mentioned as an alternative, though still niche. Commercial multiplex chains, located in shopping malls, are described as almost entirely closed to independent films, prioritising Hollywood blockbusters and Egyptian commercial films with major stars. The once-extensive network of 36 cinema clubs across Egypt, which in the 1960s and 1970s toured villages and towns screening 35mm films for free, is now defunct.



Audience Development

Egyptian audiences exhibit a strong preference for local storytelling, with domestic films capturing approximately 60% of box office revenue despite representing only about 20% of annual releases. Consumption habits are increasingly mobile-first, driven by the youthful demographic and high social media engagement. Marketing practices follow a unique bifurcated model: commercial blockbusters rely almost exclusively on the personal social media accounts of their star-studded casts, while festival films use international sales agent networks and award branding to build critical legitimacy, though they often struggle to translate this prestige into broad domestic audience reach. Education and training institutions such as the Higher Institute of Cinema and the American University in Cairo play a vital role in audience development by fostering a pipeline of skilled professionals and cinematically literate consumers. Despite these strengths, high ticket prices relative to inflation and the lack of distribution channels outside major metropolitan areas remain significant barriers to wider audience participation. There is a recognised need for more robust audience data systems, as precise annual admissions data is not consistently published.

Egypt Film Audience Segments

The audience survey identifies three distinct consumer segments, reflecting different levels of attachment to local content, platform preferences, and sensitivity to access barriers. As shown in Table 8, these range from locally anchored television audiences to more digitally oriented viewers who actively combine African and international content. The segmentation points to a differentiated audience-development opportunity: content quality and discovery are central for local-first audiences, affordability and access matter more for hybrid viewers, while choice, personalisation and discoverability are particularly important for globally oriented digital audiences. The implication for distributors and platforms is that audience growth is unlikely to come from a single distribution or pricing model; rather, strategies should be tailored to the needs and behaviours of these distinct segments.
Below is a table summarizing the three audience segments:

Table 8 Egypt film consumer segments | Source: Audience Survey

Dimension	Segment 1: Heavy Local- TV Traditionalists	Segment 2: Cinema Oriented Streamers	Segment 3: Global Explorer Digital Families
Segment distribution	n = 126 (59%)	n = 44 (21%)	n = 43 (20%)
Gender	54% male and 46% female	52% female and 48% male	56% male and 44% female
Age distribution	25 - 44 years (73%)	25 - 44 years (73%)	35 - 54 years (65%)
Content preference	Local (99%) + International films (56%)	Local content (100%)	Local (100%) + International films (88%)
Top genres	Drama (87%) and comedy (79%)	Comedy (66%) and romantic comedy (50%)	Drama (98%), comedy (95%) and action (77%)
Primary device	Smart TV (95%)	Free satellite TV - 93%	Free satellite TV - 100%
Main platforms	YouTube (70%) and Watch iT (48%)	YouTube (40%) and Watch iT (55%)	YouTube (100%)
Fallback option	Free-to-air TV (87%)	Free-to-air TV (82%)	Free-to-air TV (56%)
Main motivations	Entertainment (81%), Family friendly and for kids (35%) and High-Quality Storytelling (34%)	Affordability / Accessibility (61%) and Recommendation from friends/family (48%)	Entertainment (86%), Cultural Connection (44%), High-Quality Storytelling (44%)
Key barriers to watching local films	Storylines that are not engaging (27%) and Storylines that are not original (23%)	High cost of subscriptions (21%) and Data/connectivity (21%)	High cost of subscriptions (35%) and Lack of awareness about new releases (33%)
NPS African films	69%	43%	21%
Growth triggers	Better personalization and recommendations and higher-quality original African films	Lower subscription prices and higher-quality original African films	Free with ads' tiers on major platforms and better personalization and recommendations

The segments highlight a transition from traditional TV to hybrid viewing. Expanding access, lowering costs, and improving content discovery are critical to growing film consumption.

Film Discovery and Marketing Channels

Film discovery in Egypt is predominantly social, with personal networks and social media substantially outweighing formal marketing and industry-led channels. As shown in Figure 2, this suggests that audience awareness is built primarily through conversation, recommendation and online sharing, rather than through cinema advertising, festivals or platform-led promotion.

For distributors and marketers, the finding points to the importance of designing campaigns that generate conversation and social engagement, rather than relying solely on conventional advertising or platform placement.

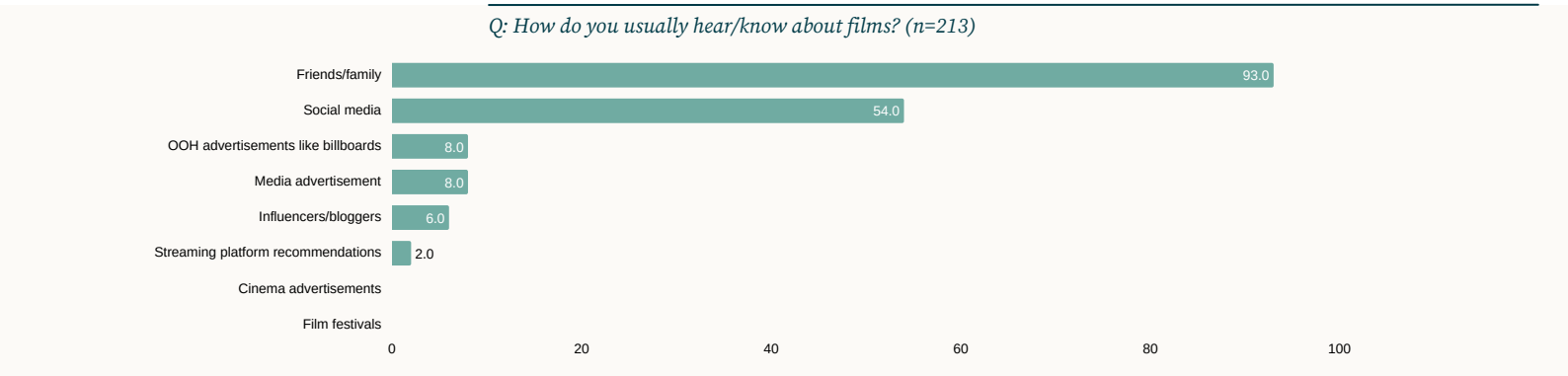


Figure 2 How audience in Egypt know/hear about new films | Source: Audience Survey

What Drives Audiences to Watch Films

Egyptian audiences are primarily motivated by entertainment, social recommendation and storytelling quality, with affordability and family suitability also shaping viewing decisions. Figure 3 highlights that the strongest film-selection factors relate to the content itself, particularly plot, acting, technical quality and genre, while awards and other industry credentials carry comparatively less weight.

The findings suggest that audience appeal is driven more by the strength and relevance of the film than by institutional recognition. For distributors and marketers, this reinforces the importance of investing in compelling stories and quality production while using peer recommendation and targeted marketing to strengthen discovery and conversion.

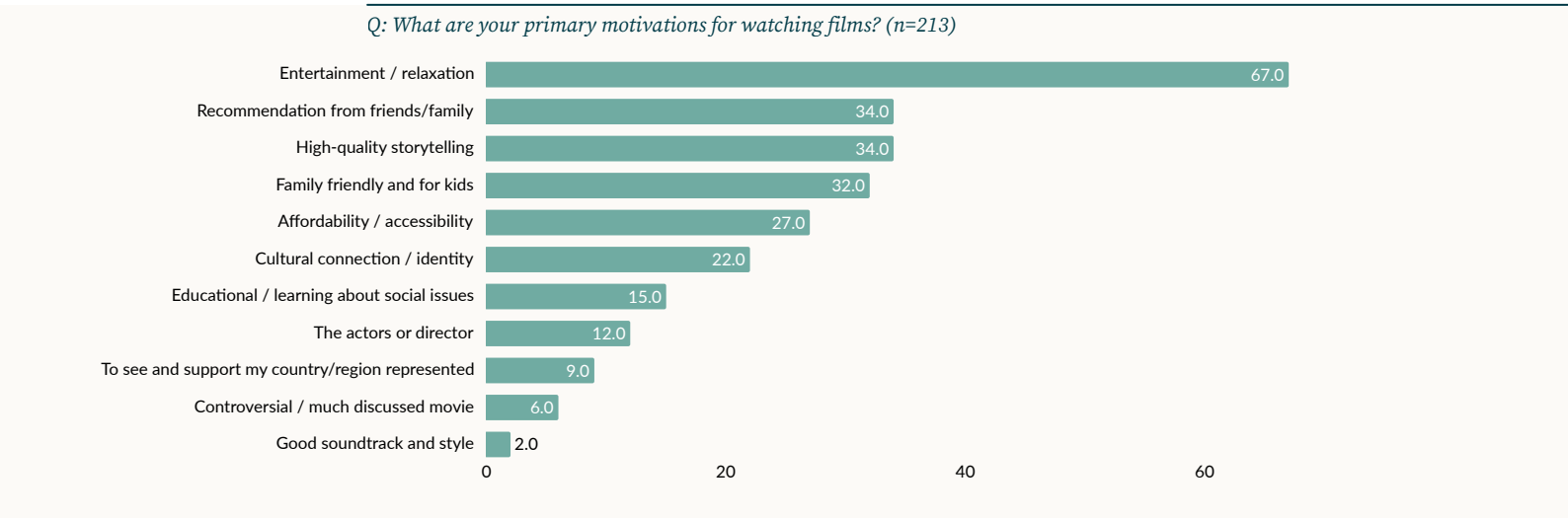
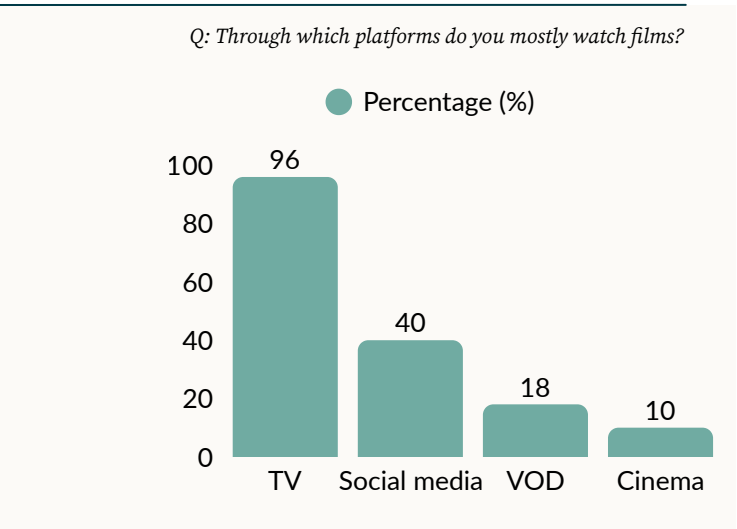


Figure 3 Primary motivations for watching films in Egypt | Source: Audience Survey

Audience Viewing Platforms and Access to Films



Film viewing in Egypt is anchored on connected home screens. Televisions are the dominant device, with almost every viewer (100%) using them. Smartphones play a supporting role (30%), while laptops are less prominent (7%). Television remains the primary viewing platform, with almost all audiences (96%) watching films on TV. Social media plays a secondary role (40%), while video-on-demand platforms (18%) and cinema (10%) are less central (See Figure 4). Within streaming, usage is concentrated around a few platforms. YouTube leads (59%), followed closely by Watch iT (49%). Netflix and Shahid sit further behind at 20% each. Piracy platforms are used by a small minority (6%). Television viewing is almost entirely free-to-air (100%), with limited Pay TV usage (16%), pointing to a strong reliance on accessible, non-subscription-based distribution.

Figure 4 Primary viewing platforms in Egypt | Source: Audience Survey

Streaming Behaviour and Platform Preferences

Local content dominates the streaming environment. Almost all audiences (96%) watch local films, while international content plays a much smaller role. American films reach 19%, with other regions barely registering (See Figure 5). On both YouTube and Watch iT, local films account for nearly all viewing. Stakeholders confirmed that platform strategies have increasingly adapted to clear audience signals, with early efforts to promote international titles failing to generate sustained engagement. Over time, platforms responded by prioritising local content, recognising that audience subscription and viewership are primarily driven by familiar, culturally resonant Egyptian titles. Additionally, local platforms are often seen as more aligned with societal values and norms, which increases their acceptability among households.

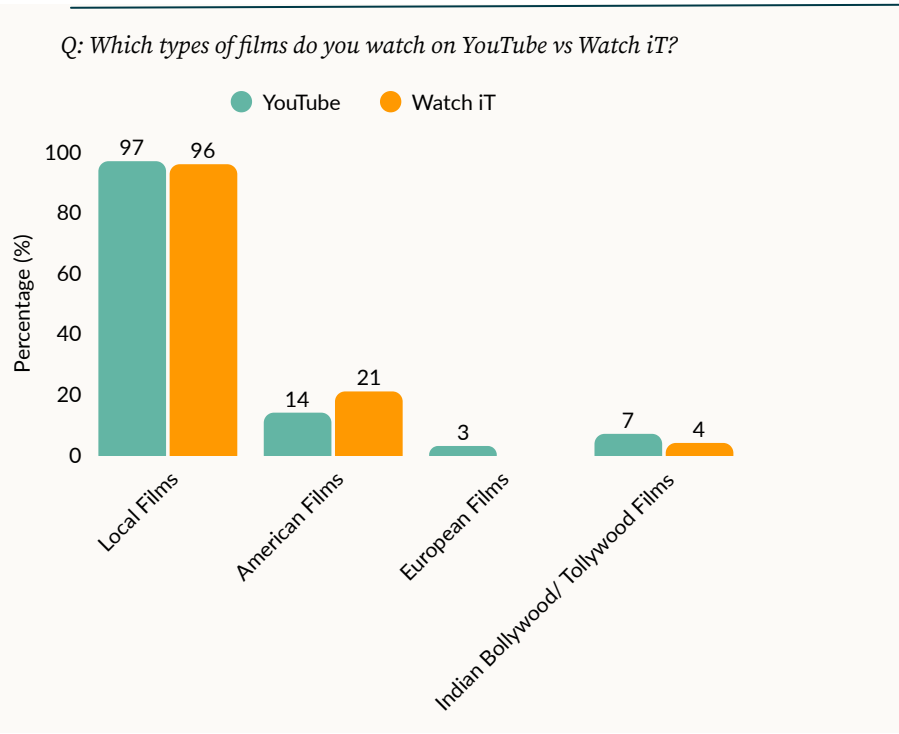


Figure 5 Films streamed on YouTube & Watch iT in Egypt
Source: Audience Survey

Streaming frequency is steady but not intensive. Weekly viewing dominates (84%), with very limited daily use (See Figure 6). Streaming devices reinforce this pattern: smart TVs lead (75%), followed by Pay TV connections (57%) and laptops (43%). Streaming is still largely a shared, home-based activity. Subscription behaviour is restrained: most users subscribe to just one service, and monthly spending is low, with a median of EGP 167 (USD 3.15). Streaming complements television rather than replacing it, and growth is likely tied to affordability and access to relevant local content rather than expansion into multiple subscriptions.

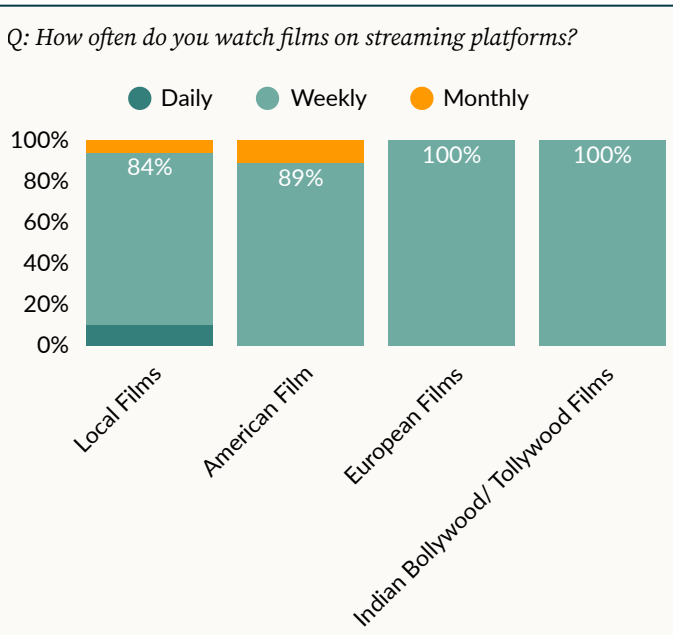


Figure 6 Frequency of streaming in Egypt | Source: audience survey



Festivals, Campus Circuits and University-Based Screenings

Stakeholders recognise that major festivals such as Cairo International and El Gouna successfully attract dedicated audiences and generate significant media attention, with screenings of classic films now selling out. However, this success is largely confined to a narrow, pre-existing audience of cinephiles and industry professionals, highlighting a gap in reaching broader or more diverse viewers. Criticism centres on the seasonal and elitist nature of festivals, which are often seen as sponsor-driven and disconnected from organic audience development. Despite their visibility and prestige, festivals play a limited role in expanding cinema audiences beyond an already-cultivated segment.

Universities are viewed as natural partners for audience development, with the potential to engage young and curious viewers. While some isolated successes, such as daytime screenings or events organised by the Jesuit Film School at the French University in Cairo, demonstrate how institutional partnerships can foster active engagement, these efforts remain sporadic and largely donor-dependent. Structural limitations further constrain university-based audience building. Most Egyptian universities lack film studies programmes, dedicated screening spaces, or campus film societies, and the few resources that exist are concentrated in Cairo. Without formalised programmes or infrastructure, universities remain an underutilised channel for cultivating informed and engaged audiences.

The most striking finding is the near-universal lament for Egypt's defunct cinema club network. In the 1960s and 1970s, 36 cinema clubs operated across the country, screening 35mm films in villages and towns for free or nominal fees. That infrastructure has completely disappeared. Stakeholders argue that reviving cinema clubs, even in a modest, digital form, would be more effective for audience building than any number of festivals. Cultural palaces still exist in many governorates but are underutilised; with small investments in digital projectors and curated programming, these spaces could become local screening hubs.

Education and Training Actors as Audience Builders

Stakeholder interviews reveal that education and training actors in Egypt, such as film schools, media programmes, and workshop initiatives, are not perceived as effective audience builders. Instead, these institutions are understood primarily as vocational pipelines for producing filmmakers, technicians, and content creators. The Jesuit Cinema School and Luxor School are described as "factory-like" environments focused on employability and community empowerment, not on cultivating critical viewers. Audience development is consistently attributed to a separate, underfunded ecosystem: the defunct network of cinema clubs, festivals such as Panorama, Zawya, and community screenings. State-run film education, notably the Higher Institute of Cinema, is remembered as a lost asset that has suffered budget cuts and lost its role in audience engagement. Where training initiatives engage audiences, such as the Jesuit Film Lab's distribution and criticism modules or mobile cinema projects in Qusayr, stakeholders describe them as nascent, underfunded, and small-scale.

Demand for Local and African Content

Egyptian audiences display an overwhelming preference for local films (100%), reflecting the historical strength and cultural dominance of Egypt's domestic film industry. International content plays a secondary role, with Turkish (21%) and American films (20%) having some reach, followed by Indian and European films (See Figure 7). This indicates that Egypt's film ecosystem is highly self-sustaining and culturally anchored. However, stakeholders emphasise that this 100% preference is increasingly tempered by a "quality over quantity" mandate from audiences. Maintaining domestic dominance requires moving beyond the formula trap of safe, star-led comedies and action films that many viewers now find repetitive. The modern Egyptian audience is looking not only for local stories but for authentic, human-centred narratives that offer a conscious processing of contemporary reality. Consequently, investment must pivot toward humanising the script-writing process and leveraging festival prestige to ensure that Egyptian films remain the primary social dialogue of the nation.

Egyptian audiences display the strongest localisation of film consumption among the countries surveyed, with 93% reporting that the films they watch most often are locally produced. Very small shares watch other African (4%) or international films (1%) most often (See Figure 8). This pattern aligns with audience attitudes, where 100% say it is important that films are locally produced (54% very important, 46% somewhat important).

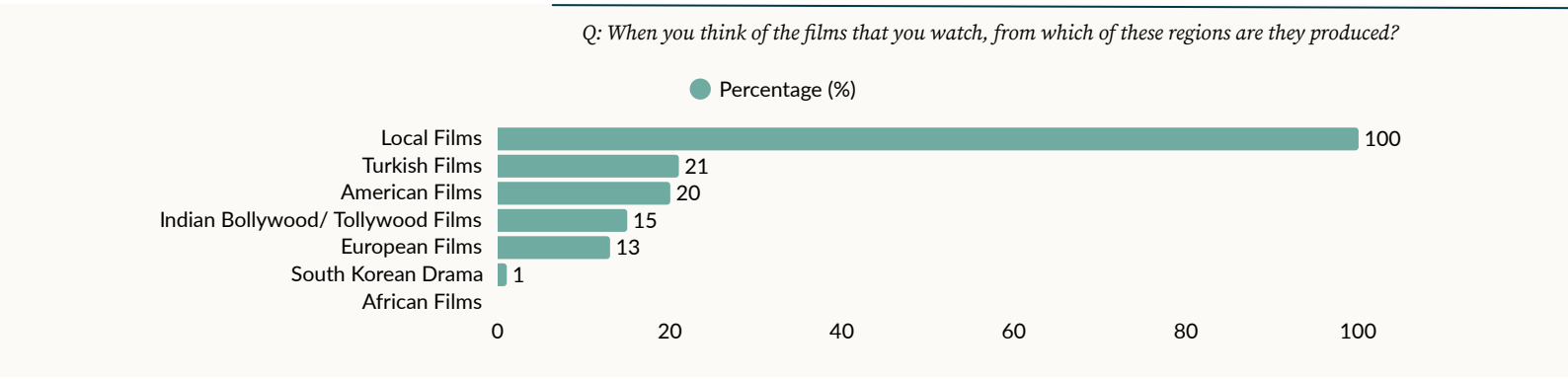


Figure 7 Regions of films watched by Egyptian audience | Source: audience survey

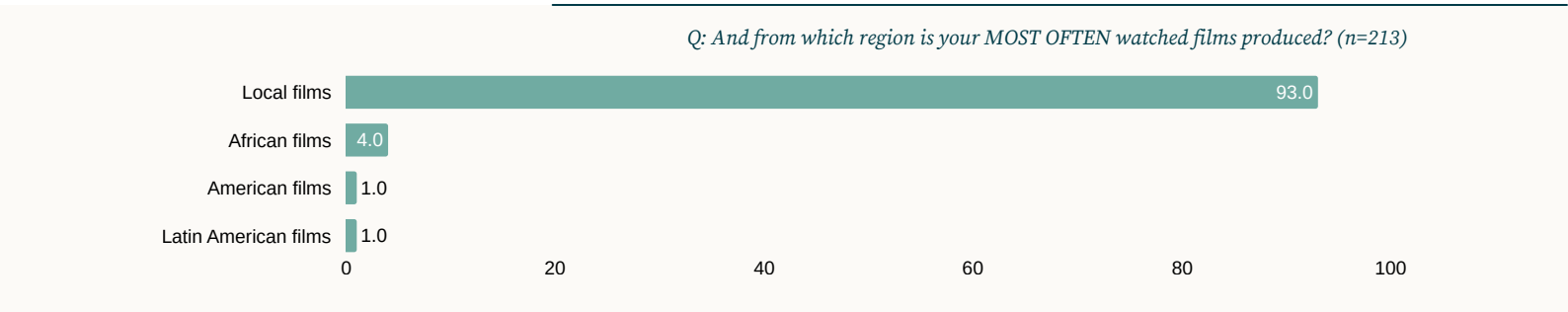


Figure 8 Most frequently watched region by Egyptian audience | Source: audience survey

Barriers to Audience Growth for Local Films

For Egyptian audiences, the largest barrier to watching African films (as distinct from local Egyptian films) is lack of interest in the stories or themes (36%), followed by language or subtitle barriers (30%) and concerns about production quality (23%). Limited availability on commonly used platforms (16%) and low awareness (13%) also affect viewership (See Figure 9). Among audiences, 36% report no significant barriers to watching African films, suggesting that many viewers who want to watch such content are able to do so. However, among those who face barriers, the most prominent relate to storytelling: films perceived as not engaging (23%) or not original (20%), followed by difficulty finding where to watch them (18%) and production quality concerns (16%). Cost and preference for international films are relatively minor issues.

Egyptian audiences express strong appreciation for the cultural authenticity and quality improvements in local and African films, with 56% agreeing that production quality has improved in the last 5 years and 61% saying local films tell authentic stories. However, willingness to pay for local content is comparatively moderate (43%), indicating price sensitivity or competition with international content. Additionally, 41% find it difficult to locate local films on mainstream platforms, while a substantial 37% believe local films are not well marketed. For stakeholders, this indicates the need to strengthen marketing strategies and digital distribution while also investing in high-quality productions that can compete with global content and justify paid viewing.

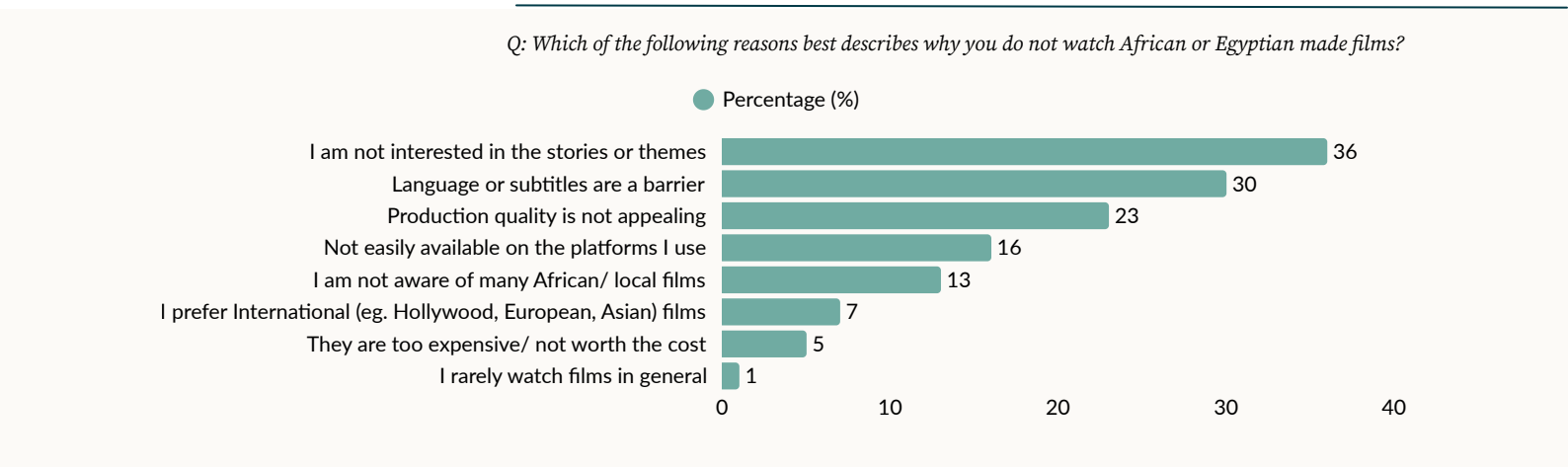


Figure 9 Why Egyptian audiences choose not to watch local or African films. | Source: Audience Survey



Audience Engagement and Word-of-Mouth

Audience engagement in Egypt is relatively passive after viewing, with recommendations representing the most common form of post-viewing interaction. Figure 10 indicates that fewer audiences actively seek additional films, engage with filmmakers or actors, attend screenings, or participate in wider film communities. This suggests an opportunity to strengthen the post-viewing audience journey, using recommendations, related-content prompts and community-building mechanisms to convert individual viewing experiences into continued engagement and repeat consumption.

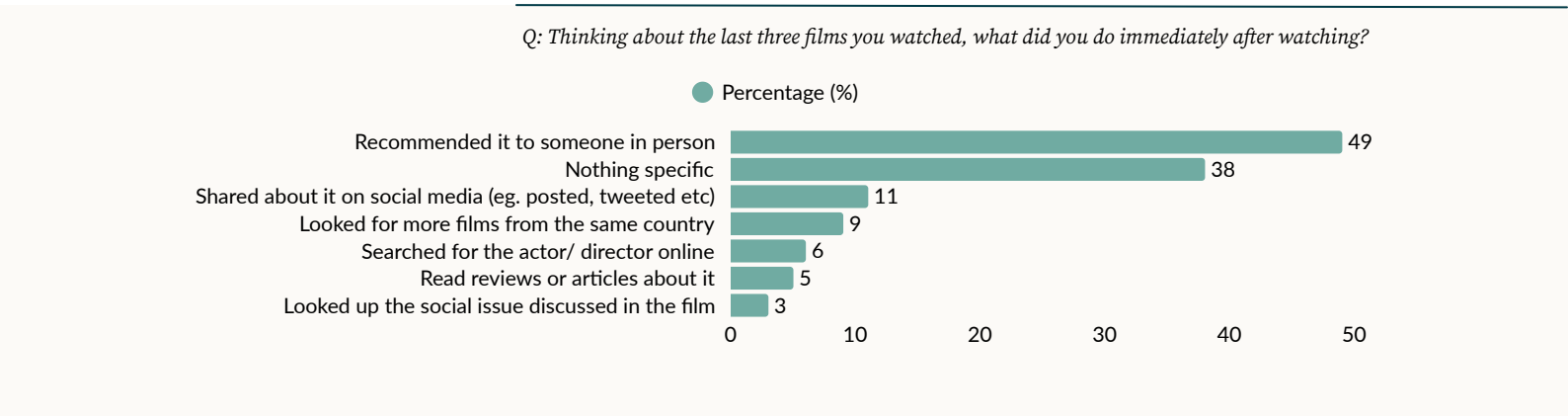


Figure 10 Film-related actions that Egyptian audiences do after watching a film | Source: Audience Survey

Despite this passive pattern, Egypt records the strongest advocacy for African films, with 55% promoters and only 1% detractors, resulting in an exceptionally high NPS of 54%. This indicates a highly positive audience perception and strong willingness to recommend African content, suggesting that viewers are largely satisfied with the films they encounter. For filmmakers, this represents a strategic opportunity to deepen cross-African collaborations and expand narrative diversity. Distributors and streaming platforms should increase the availability of African films within Egyptian viewing channels, and funders should prioritise investments in distribution infrastructure and cross-border marketing strategies to capitalise on Egypt's highly receptive audience.

Audience Data Systems and Evidence Gaps

Stakeholders across all sectors consistently identify the absence of reliable, transparent audience data as a critical structural weakness in the Egyptian film industry. Unlike streaming platforms abroad that provide detailed analytics, the Egyptian market operates largely on anecdote, assumption, and fragmented reporting. No centralised or standardised data system exists. Filmmakers and producers report that distributors rarely share sales data or box office reports, and when reports are provided, they lack demographic breakdowns such as age, gender, location, and contextual benchmarks. Stakeholders unanimously complain that platforms like Netflix, Shahid, and Watch iT do not share viewership data with filmmakers or producers. Contracts explicitly withhold analytics, and acquisition decisions are made based on proprietary metrics that creators never see. Filmmakers are left to infer success through vague feedback or by observing social media engagement, which is acknowledged as unreliable. Exhibitors report ticket sales to distributors, but these numbers are not systematically aggregated or analysed. Piracy compounds the evidence gap: with widespread use of IPTV and pirate sites, a significant portion of viewership occurs completely outside measurable channels.

Social Impact

Social impact in Egyptian cinema is largely characterised by organic public discourse rather than coordinated advocacy campaigns. High-profile films often act as catalysts for debates on inclusive representation, gender roles, and class inequality. For instance, Feathers (2021) sparked national conversations on poverty and artistic freedom, while Amira (2021) triggered significant political discourse across the region. Despite these thematic contributions, there is a notable absence of structured social impact programming involving NGO partnerships or formal advocacy. Public sentiment, monitored through social media, shows that audiences are highly engaged with themes of cultural identity and artistic quality, often praising films that resist moral simplicity. Festivals like El Gouna provide platforms for documentaries and independent films that explore youth identity and state violence, even if these films struggle to secure wide commercial release.

Definition and Measurement of Social Impact

Across stakeholders, a clear divide emerges in how social impact is understood and measured. Funders and development organisations approach social impact as something that can be intentionally designed, tracked, and evaluated, relying on structured frameworks such as evaluation indicators, attendance figures, and engagement metrics. From this perspective, social impact is embedded within project design and accountability systems, often tied to reporting requirements and longer-term development objectives. In contrast, filmmakers, distributors, and programmers largely resist this instrumental framing, viewing social impact as an organic outcome of authentic storytelling rather than a predefined goal. For them, the most meaningful impact comes from representing underexplored realities, provoking emotional and ethical reflection, and creating space for audiences to interpret stories on their own terms. Efforts to engineer impact are often seen as reducing cinema to a tool for advocacy, which can compromise artistic integrity. Instead, stakeholders emphasise subtler forms of behavioural change – shifts in awareness, empathy, and dialogue – that are difficult to quantify but central to how cinema engages with society. As one distributor noted, a scene involving marital rape in a popular series generated a very large public debate, with people discussing whether the characters' actions were justified. That represented genuine social impact because the issue emerged naturally from the story rather than being inserted artificially as a message.

Audience Interest in Socially Relevant Storytelling

The audience survey revealed that a large share of Egyptian viewers (43%) prefer films focused purely on entertainment. Among social themes, identity and belonging (26 %) and youth aspirations (25%) stand out. Themes around relationships, mental health, and coexistence follow at moderate levels. More structural or political themes such as corruption or climate appear less frequently. Stakeholders noted that audience preferences are not simply about avoiding certain themes, but about how those themes are presented. While overtly issue-driven or didactic films may struggle to attract audiences, the same structural or political issues can resonate strongly when embedded within personal, character-driven stories. Audiences engage more deeply with narratives that evoke emotion, relatability, and lived experience rather than those that feel instructional or agenda-led.

> Take Factory Girl by Mohamed Khan. That film does not revolve around a large political issue at all. On the contrary, the protagonist is someone you could easily judge morally. She is not framed as a clear victim, and there is no obvious villain. Yet, I believe the film had a profound social impact. It brought to the screen a social group we rarely see in Egyptian cinema: young underage girls working in factories. From the outside, nothing 'unfair' appears to be happening. The girls work from nine to five and receive their modest salaries. Instead, the film tells a simple, one-sided love story between the girl and her supervisor. Yet through that intimate story, it raises deep questions about love, manipulation, exploitation, honour, and personal vulnerability. For me, that is social impact. It provokes reflection on personal and ethical questions without presenting itself as an overt 'issue film'
>
> *Filmmaker, Egypt*

Thematic Areas Where Film Has Strongest Perceived Impact

Several thematic areas were identified by stakeholders as having strong social impact. Women's issues and gender-based vulnerabilities feature prominently, with films portraying underaged workers, women navigating inheritance rights, eating disorders, and sexual harassment. When presented without moralising, these themes consistently draw audience engagement. Family dynamics and intergenerational conflict generate strong resonance, with television series like Kamel El Adad cited as successful examples because they explore everyday family dynamics without heavy political messaging. Marginalised regional and cultural identities, particularly Southern Egyptian and Nubian cultures, are almost entirely absent from mainstream cinema, and stakeholders call for funding local filmmakers in those regions to tell their own stories. The Palestinian cause has generated significant impact, especially after October 2023, with films like Palestine 36 achieving massive success and sparking discussion. Labour and economic exploitation, as seen in The Colony (2009), brought attention to factory workers' struggles without resorting to didactic messaging. Health and social awareness themes have shifted from cinema to television series, with series addressing kidney disease and child abuse generating mass public discussion and even policy conversations. Finally, authentic representation of everyday life, simply showing marginalised people as ordinary human beings rather than as victims or heroes, is repeatedly cited as the most effective form of impact. The Palestinian black comedy Thank You for Banking with Us succeeded because it portrayed Palestinians with ordinary lives, hopes, and ambitions.

> Palestine 36 entering the Oscar shortlist reflects a shift happening in Hollywood and global cinema. After years of attempts to silence Arab voices, that is no longer possible.
>
> *Distributor, Egypt*

Role of Public Broadcasters, NGOs, Donors and Foundations

Public broadcasters in Egypt play a minimal role in supporting or disseminating socially engaged films. Public television has shifted its focus toward commercial content, entertainment, and state-aligned programming, creating a gap in the ecosystem. This absence is particularly striking when compared to international models where public broadcasters are central to financing socially relevant content.

Non-governmental organisations are consistently identified as the most active actors in producing and distributing impact-oriented film content, particularly at the community level. The Jesuit Cultural Center (through its Cinema School, Luxor School, and Film Lab) is cited repeatedly as a model for using film as a tool for social development. Other NGOs mentioned include Atyaf for Development Communication and various community-based organisations in Southern Egypt. These NGOs integrate filmmaking into broader development objectives: skills training, economic empowerment, social inclusion, and mental health awareness.

International foundations and donors provide the financial backing for most impact-oriented film work in Egypt, though stakeholders distinguish between several distinct types of funding sources. Development donors, most prominently the Drosos Foundation (Swiss) and EUNIC (the network of European cultural institutes, funded by the EU), provide aid-style funding oriented toward capacity-building, training, and broader development objectives. Film funds, such as the Doha Film Institute and various European co-production funds, operate on a more industry-specific model, supporting production and festival participation as part of the film ecosystem. Arts and culture foundations, including AFAC (Arab Fund for Arts and Culture) and the Sawiris Foundation, sit somewhat apart from both, funding creative work more broadly rather than through a development-aid or film-industry lens. Despite these differences, all three types of funders share a common feature that distinguishes them from NGOs: they do not produce content directly but instead fund capacity-building, training, festival participation, and sometimes production. However, stakeholders express ambivalence about donor-driven impact work across these categories, noting that funders often prioritise "trendy" themes (climate change, women's empowerment, refugees) and that applicants learn to use the right keywords to secure funding, even if the project does not emerge from genuine artistic concern.

The most effective impact-oriented work emerges from partnerships between NGOs, donors, and festivals. For example, Drosos partnered with the Jesuit Cultural Centre to establish the Luxor Film School and the Film Lab. EUNIC collaborated with the Aswan Women's Film Festival to run training workshops for six consecutive years. The EMERGE programme at El Gouna Film Festival brought together Drosos, the Sawiris Foundation, and the festival itself to fund youth attendance and networking. These collaborations create ecosystems where training, production, exhibition, and audience development are linked. However, stakeholders note that such models are fragile and dependent on sustained donor commitment.

> In Egypt, television is no longer central in media consumption. People mainly watch channels during Ramadan. Otherwise, homes are filled with platforms, and television itself is fading. If television channels invested even modest amounts in short films, it might help them survive longer



Financing and Enabling Environment

Egypt's film financing landscape is a mix of private equity, state subsidies, and emerging international funds. Private investors and Gulf-based producers dominate commercial financing, while state support via the Ministry of Culture provides subsidies and production grants. The policy environment is also supported by the 2025 Cinema Revival Plan, which allocated EGP 500 million for production grants and training. However, the absence of a widely institutionalised cash rebate or tax credit system limits Egypt's ability to compete for large-scale international shoots compared to other global hubs. Additionally, while intellectual property laws exist, enforcement – particularly regarding digital residuals and online piracy – remains a critical priority for reform.

Incentives, Grants, Tax Credits, Funds, and Co-Production Schemes

Stakeholder interviews reveal a fragmented and largely underdeveloped landscape of financial mechanisms. Government grants have virtually disappeared. The National Cinema Center once provided substantial grants for short and feature films, enabling a generation of filmmakers to create ambitious debut works. Today, that institution no longer functions effectively; its budget appears to be entirely consumed by staff salaries, with no funds reaching production.

Regional and international grants have become the primary source of funding for independent Egyptian cinema. Key players include AFAC, Doha Film Institute, Drosos Foundation, EUNIC, Mawred, Red Sea Fund and various European national funds. However, stakeholders describe intense competition across 22 Arab countries for a limited number of grants. One funder openly acknowledged that applicants often use "trendy keywords" to increase their chances, even when the project does not genuinely engage those topics.
Stakeholders consistently report that Egypt offers no meaningful tax incentives for film production, comparing the country unfavourably to Jordan and Morocco, which have established rebate systems. Government-affiliated interviewees mentioned that tax rebates are under discussion but face bureaucratic hurdles, and the Egyptian Film Commission is working to facilitate foreign productions through a one-stop shop for permits, but actual cash rebates or tax credits are not yet operational.

Co-production is the primary model for financing independent Egyptian feature films. European partners, especially from France, Germany, Denmark, and Tunisia, are the most common, although co-production treaties exist only with France and Morocco. While these partnerships provide access to post-production facilities, festival networks, and European distribution, stakeholders express frustration with the terms. European co-producers often require that a portion of the budget be spent in their country, reducing the actual cash available for the Egyptian side. Moreover, creative interference is common: European funders may push for narratives that confirm Western expectations about the region. Several stakeholders noted that intra-African co-production is extremely rare, with the only successful example cited being the Egyptian-Tunisian co-production Souad.

A different model dominant in commercial cinema involves distribution advances. Distributors provide up to 90% of a film's budget in exchange for exclusive rights, effectively functioning as producers. This model is criticised for giving distributors excessive control and limiting the diversity of films produced (favouring action and comedy). Several independent filmmakers refuse to sell their films outright, preferring to retain rights, but acknowledge that this makes financing extremely difficult.

> What European co-production provides is not substantial cash in hand but access to festivals, to European distribution, and to sales networks. For example, a fund might offer 15,000 EUR for sound mixing, but it requires working with a specific European technician. After accommodation and service costs, very little remains
>
> *Filmmaker, Egypt*

Business Models and Revenue Mixes

Stakeholder interviews reveal a fragmented revenue landscape where commercial and independent cinema operate under entirely different logics. The commercial distribution advance model is dominant for mainstream Egyptian cinema. A distributor provides a significant advance (often 70 to 90% of the budget) in exchange for exclusive theatrical and sometimes platform rights. Revenue is generated primarily through theatrical box office in Egypt and the Gulf (especially Saudi Arabia), followed by streaming platform sales. Theatrical windows are short (one to three weeks), and films move quickly to platforms.

The independent festival-to-platform model sees arthouse films premiere at international festivals, generating critical recognition that facilitates sales to European television channels (e.g., Arte, Canal+), streaming platforms (Netflix, Mubi, Shahid, Watch iT), and, sometimes, limited theatrical release (primarily at Zawya Cinema). Revenue is typically a mix of grant funding, festival awards, and sales rather than box office. The co-production equity model involves multiple equity contributors, each putting in cash or in-kind services in exchange for territorial rights. The revenue mix is highly fragmented, and this model is criticised for leaving little net cash for Egyptian producers.

The NGO-funded impact model applies to films produced within donor-funded development projects. The film is not expected to be profitable; instead, its revenue is measured in social impact, community engagement, and training outcomes. The self-distribution or micro-distribution model sees a small but growing number of filmmakers bypass traditional distributors entirely, securing small grants or personal funds, and then self-distributing through community screenings, cultural centres, and direct negotiations with platforms. The television series model, particularly for streaming platforms, operates on a commissioning basis. The platform commissions a series and pays a license fee that covers most or all of the production budget. This model has created new opportunities for writers and directors but is highly selective.

Key Constraints and Promising Innovations

Several key constraints cut across distribution, funding, audience engagement, and production models. Centralisation of infrastructure and opportunities in Cairo means that all training programmes, post-production facilities, sales agents, and major distributors are concentrated in the capital, excluding regional talent and limiting the diversity of stories told. Lack of data transparency across the value chain means distributors do not share sales data, platforms do not share viewership analytics, and cinemas do not provide demographic breakdowns. Inconsistent censorship enforcement means decisions are unpredictable and can arrive the day before a screening, discouraging investment and forcing self-censorship. Weak intellectual property enforcement means contracts are often informal or unenforceable, and piracy via IPTV and unauthorised streaming sites is rampant. No career pathway exists between the independent and commercial sectors; the two sectors operate as parallel universes, preventing talent accumulation. The high cost of entry for technical roles means aspiring technicians from lower-income backgrounds cannot afford equipment, software, or certified training, leading to a homogenised workforce.



Promising innovations include mobile cinema and phone-based filmmaking, where NGOs have successfully implemented workshops using only mobile phones to shoot, edit, and screen short films, dramatically lowering production costs. Festival-based talent incubation with alumni tracking, such as EMERGE and New Wave programmes, brings youth from governorates to festivals and maintains ongoing peer support networks. Rotating collective production, modelled on a Tunisian practice, involves a group of producers agreeing to co-produce each other's films year by year, pooling resources without external funding. Short film packages as commercial programming, where curated programmes of three to five shorts under a unified theme, have sold out and extended their runs. A one-stop shop for filming permits, a recent government initiative, consolidates multiple permit approvals into a single window, reducing bureaucratic friction. Direct filmmaker-to-cinema micro-distribution bypasses traditional distributors, allowing full creative and financial control. Vertical drama and short-form experiments for TikTok and Instagram Reels are seen as potential new revenue streams to reach younger audiences.

Capacity Building, Collaborations and Mentorships in Relation to Financing

Stakeholder interviews reveal that capacity building, collaborations, and mentorships are not merely add-ons to film financing but are increasingly becoming prerequisites for accessing funds and sustainability mechanisms that reduce dependency on external capital. Several funders explicitly link their support to capacity-building activities rather than to film production itself. Drosos Foundation, for instance, has funded the Jesuit Cinema School, the Luxor Film School, a Film Lab for alumni upskilling, and She in Cinema (training women in non-acting cinematic crafts). The logic is that trained filmmakers are more likely to produce bankable projects and navigate the financing landscape effectively. One funder noted that applicants often lack the skills to write a proper proposal, not because their ideas are weak, but because they have never been taught how to articulate budgets, timelines, and outcomes.

Collaborations between NGOs, festivals, donors, and private companies are essential for stretching limited resources. The EMERGE programme at the El Gouna Film Festival is a prime example of multiple funders pooling resources to bring youth from governorates to the festival. The partnership between the Jesuit Cultural Centre and Drosos Foundation allowed the Film Lab to offer advanced training in production, distribution, and criticism – areas typically neglected in traditional film education. International collaborations, such as between the Jesuit School and CineFabrique in France, allow Egyptian students to learn about distribution strategies in Europe while receiving in-kind support.

Mentorship is repeatedly described as a critical resource that compensates for lack of direct funding. Experienced filmmakers, programmers, and distributors volunteer their time to advise emerging talent. While this does not put money in a filmmaker's pocket, it saves them from costly mistakes and shortens the learning curve. Funders noted that mentorship is particularly valuable for navigating the opaque distribution system. A young filmmaker with a mentor who has existing relationships can access distributors, sales agents, and platform executives much faster than someone working alone. In this sense, mentorship functions as social capital that substitutes for financial capital. However, stakeholders also warn that mentorship can be extractive if not structured properly. The most effective mentorship models are those embedded in formal programmes with clear expectations and accountability.

Some capacity-building programmes have begun to address this, but these efforts remain isolated and underfunded. Stakeholders call for dedicated workshops on film finance, contract law, and sales negotiations skills currently learned only through trial and error or informal networks.

Country-Specific Priorities and Opportunities

Priority Opportunities in Distribution

Priority opportunities in distribution involve decentralizing infrastructure beyond Cairo and Alexandria, strengthening digital enforcement to protect OTT revenues, and supporting micro-distribution paired with collective marketing. Direct cinema booking allows filmmakers to bypass traditional distributors, but full financial control remains theoretical without access to marketing budgets and audience data. Curated short film packages for commercial cinemas have proven commercially viable when supported by sponsorships and festival partnerships, though scaling this model requires ongoing curation and venue commitment. Rather than launching a new platform, advocates should work with existing services such as Watch iT, Shahid, OSN, and Netflix to create dedicated independent cinema sections, offer fairer licensing terms, and share anonymised viewership data. Intra-Arab distribution networks are underdeveloped but more promising than pan-African circuits; formal exchange agreements between festivals and distributors in these markets would open new opportunities, while expansion into other African markets would require subsidies unlikely to be sustainable.

Priority Opportunities in Audience Development

In audience development, the revival of cinema clubs and community screenings is a priority. The defunct network of 36 cinema clubs that toured villages and towns could be revived, not as commercial venues but as public cultural spaces, using digital projectors and curated programming. School and university partnerships, with discounted tickets and curated content aligned with curricula, could build lifelong cinema habits. Mobile cinema units for underserved governorates, using vans equipped with projectors and screens, can reach villages and towns with no permanent cinemas. Influencer and social media strategies, including targeted campaigns and partnerships with micro-influencers, can reach younger demographics where they already spend time.

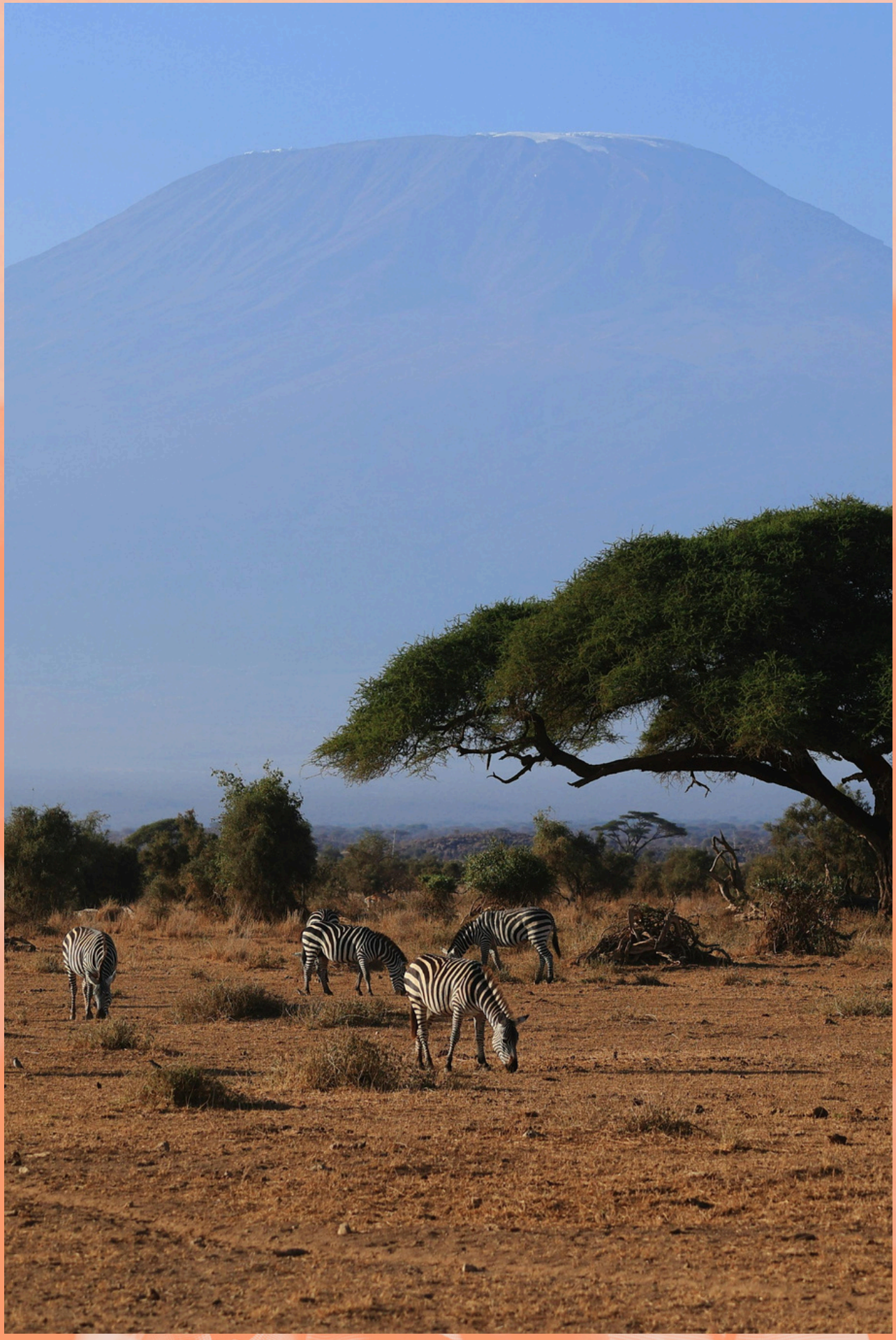
Priority opportunities in Social Impact

For social impact, integrating films into public health and education campaigns offers a clear opportunity. Film festivals and NGOs could partner with ministries of health and education to produce short impact films screened in schools, clinics, and community centres. Supporting community-generated storytelling from marginalised regions – Southern Egypt, Nubia, the Delta – would produce authentic, resonant content. Post-screening discussion forums should become standard practice for social impact films, turning passive viewing into active engagement. Documentary impact campaigns modelled on international best practices, including educational materials and facilitated dialogue, could be adopted for Egyptian documentaries addressing labour, women's rights, or displacement.

Scaling Potential: Strategic Priorities

To scale these opportunities, several recommendations emerge from stakeholder interviews. A National Film Distribution Fund should be established to provide small grants specifically for distribution (festival submission fees, marketing campaigns, platform licensing, cinema booking costs) rather than production. Data sharing should be mandated as a condition of public funding: any film receiving public or donor funding should be required to share anonymised exhibition and viewership data, creating a much needed evidence base. The collective production model should be scaled through matching grants: for every amount a collective pools from its members, a donor provides a match up to a cap, incentivising self-organisation. An intra-African film exchange programme should use existing platforms like the Luxor African Film Festival, FESPACO, and the Durban FilmMart to formalise the circulation of African films across the continent. A legal clinic for independent filmmakers, staffed by law students supervised by practising lawyers, could provide basic services, template contracts, and negotiation support, reducing exploitation by distributors and platforms. A comparable model exists in UCLA's law school-affiliated entertainment legal clinic, which could serve as a reference design. Finally, a film voucher system for low-income audiences, modelled on cultural voucher programmes in Europe, could distribute subsidized cinema vouchers to students, low-income youth population, and pensioners, building audience development at low cost. Though the voucher system is socially compelling, it should be pilot-tested as part of broader audience-development partnerships with exhibitors, schools, telecom operators, and corporate sponsors rather than as a standalone government subsidy. Sustainable low-cost access can also be achieved through dynamic off-peak pricing, membership and loyalty programs, institutional block bookings, and alternative venues with lower overhead, mechanisms that leverage market forces and existing infrastructure without recurring public expenditure. These interventions, implemented together, would address the structural constraints of Egypt's film industry while building on its historical strengths as the "Hollywood of the Arab World" and its strategic position as a bridge between the Arab-speaking markets and the rest of the African continent.

Read the full Egypt Country Report



Kenya

Country Context

Current State of Film

According to the FISA 2023[31] report, the industry generated a gross output value of KES 86.9 billion, and a gross value added of KES 38.1 billion. It supports 42,823 jobs across formal and informal sectors, with annual earnings of KES 14.5 billion, yet it receives less than 1% of the national budget allocation. Film and broadcasting averaged 0.4% of GDP between 2016 and 2022. PwC[32] projects the entertainment and media sector to grow at a compound annual rate of 5.2% through 2029, outpacing regional peers, supported by a young population with a median age of 20 and internet penetration of 48%, representing 27.4 million users as of 2025[33].

Regarding the current state of film, the non-fiction segment is growing rapidly. Documentaries and docuseries are thriving, with extended theatrical runs and strong audience engagement. Stakeholders noted that clearer distribution pathways and an emerging cinema culture are taking shape, yet exhibition infrastructure remains limited, and more cinemas and alternative screening spaces are urgently needed. One ecosystem partner observed that a film which one did not expect to stay in cinemas for more than a week or two can now have extended runs, indicating that cinema culture is being built, although infrastructure still needs to expand.

National Film Ecosystem: History, Milestones and Institutional Landscape

Historically, film arrived in Kenya with the colonisers as a tool for control rather than entertainment. After independence, Kenya continued to function largely as a filming location for foreign productions, with locals positioned as service providers. Consequently, distribution and impact production became afterthoughts for most producers. The establishment of the Kenya Film Commission in 2005 and the expansion of its mandate in 2015 marked a formal recognition of film as an economic sector. The commission's responsibilities now span policy advisory, film promotion, facilitation of local and foreign productions, investment promotion, research, capacity building, and co-production facilitation. Despite this broad framework, implementation gaps persist, most notably the absence of tax incentives, which makes Kenya uncompetitive against South Africa. As a government entity noted, South Africa has incentives while Kenya does not, and that becomes a critical issue.

Regulation remains a constraint. The Kenya Film Classification Board operates under outdated legislation and is widely perceived as restrictive, limiting political and social storytelling. The proposed Creative Economy Bill of 2026, now under parliamentary review, promises a dedicated Creative Industry Development Fund, defined to support sectors that rely on the creation, production, distribution, and exploitation of intellectual property. but its impact will depend entirely on execution. Institutional gaps include the absence of a national film fund, weak incentives, and fragmented coordination. The Kalasha funding is too constrained and unreliable – for example, the 2025 Kalasha Awards were cancelled due to a Sh40 million shortfall. Private sector and broader stakeholder involvement is urgently needed, as the government cannot manage the Kalasha effectively on its own. Meaningful co-management, public-private partnerships, or an independent trust structure could improve sustainability and reduce political interference.

[31] Film Industry Satellite Account (FISA - 2023). Estimating the economic contribution of the film industry in Kenya. Link
[32] PwC (2025). Africa Entertainment and Media Outlook 2025 – 2029. Link
[33] DataReportal. The "state of digital" in Kenya in 2025 Link

Film Distribution

Film distribution in Kenya is defined by a sharp contrast between acute infrastructure shortages in traditional cinema and a robust surge in digital streaming. SinemaFocus[34] reports that the country faces a cinema crisis, with fewer than 50 screens nationwide and over 75% of them concentrated in Nairobi. High operating costs and unfavourable revenue splits mean Hollywood blockbusters dominate, occupying an estimated 85-90% of available screen time. Most local filmmakers bypass theatrical release entirely in favour of video-on-demand platforms. A catalogue of Kenyan films licensed between 2020-2025 highlights that traditional television accounts for only 5% of new film releases. Box office data is fragmented and non-transparent; there is no unified reporting system, and cinemas treat their data as confidential. Box Office Mojo[35] reports that the total annual box office stood at approximately USD 433,922 in 2023, which declined to USD 383,004 in 2024 and slightly rose to USD 386,930 in 2025, with local films earning a disproportionately tiny share.

Distribution Landscape and Key Market Intermediaries

Kenya's distribution ecosystem remains fragmented, relying on a combination of cinemas, broadcasters, streaming platforms, festivals, and informal digital channels. Major theatrical exhibitors such as Century Cinemax, Anga Cinemas, and Mega Cinema dominate urban exhibition, although most screens remain concentrated in Nairobi. On the broadcast side, networks including Citizen TV, NTV Kenya, Maisha Magic, among others, continue to play a central role in commissioning and licensing local content.

Digital distribution has expanded rapidly through platforms such as Showmax, Netflix, Viusasa, and YouTube, reflecting Kenya's mobile-first consumption patterns. Intermediaries such as Okada Media, Crimson Multimedia, Foxton Media Ltd, LBx Africa, and Rushlake Media have also emerged. These actors increasingly bridge financing, aggregation, and cross-border licensing, though the market remains constrained by limited audience analytics, weak regional distribution coordination, and the absence of large-scale domestic distributors capable of financing multi-territory releases. As a result, many filmmakers rely on hybrid release strategies that combine streaming, festivals, community screenings, broadcaster licensing, and direct digital distribution to reach audiences.

Distribution Channels

Cinema

Kenya has a small cinema infrastructure nationwide, with screens being hyper-concentrated in Nairobi. Outside the capital, Mombasa, Kisumu, and Eldoret each have only a single cinema, while several major urban centres, such as Nakuru, have none. The major cinema chains are Anga, Century Cinemax, Motion Cinemas and a few independent operators. Hollywood releases occupy an estimated 85 to 90% of available screen time, with local Kenyan films largely confined to short runs, off peak slots, or event-style screenings. Box office data is fragmented, but available figures show total annual box office at approximately USD 433,922in 2023, rising from USD 341,000 in 2022, before softening to USD 426,000 in 2024 and USD 423,000 in 2025. Local films account for a disproportionately small share of the cinema box office. The audience survey found that the median ticket price is KES 850 (USD 6.63), but the median maximum price audiences are willing to pay is only KES 600 (USD 4.68). Key challenges in theatrical distribution include the absence of screen quotas, commercial risk aversion among exhibitors, high operating costs, and unfavourable revenue splits that prioritise international studio content. This scarcity and cost mismatch have led many local filmmakers to bypass theatrical release entirely.

Digital platforms (Pay TV and OTT)

Digital platforms, both Pay TV and over the top services, have become the primary distribution channels. CA[36] indicates that Kenya has 1,662,516 Pay TV subscribers as of December 2025, led by MultiChoice (DStv and GOtv). GMI reports that Pay TV is stagnating, with a compound annual growth rate of only 1.6%, while the OTT market is growing at 14%. Furthermore, GMI estimates OTT subscribers at 750,000 in 2025. Table 9 summarises the key platforms and their local content shares.

[34] SinemaFocus (20 May 2025). The Crisis in Kenyan Cinemas and the Case for Saving Them. Link
[35] Box Office Mojo. Kenyan Yearly Box Office. Link
[36] Communication Authority of Kenya (CA). Quarterly Sector Statistics Reports. Link.

Other distribution platforms

Community screenings and film festivals serve as essential alternative pathways, especially for films seeking grassroots engagement or international exposure. Among event attendees, 71% attend community screenings and 57% attend film festivals. These are often free or low cost, funded by NGOs or thematic grants, and include post screening discussions. Festivals such as Kalasha International Film & Television Festival, NBO Film Festival, and Lola Kenya Screen provide structured exhibition opportunities. Informal cinemas, including makeshift estate cinema rooms, are cited by 19% of cinema going audiences. Physical rental and resale channels also persist: local video shops are the most frequently cited source (91% of those who rent or buy films), followed by friends or informal sellers (18%) and street vendors (9%). These informal channels fill gaps left by limited access to legitimate content, particularly in underserved or price sensitive markets.

Cinemas are heavily concentrated in Nairobi, which accounts for over 75% of screens. Outside the capital, only Mombasa, Kisumu and Eldoret each have a single cinema, while several major urban centres, such as Nakuru, have none. Hollywood releases occupy 85-90% of screens. Independent venues like Unseen Nairobi (arthouse) and Nyumba Cinema (private bookable) exist but remain small. Unseen Nairobi provides an important, if small-scale, complement to mainstream screens. It programmes dedicated runs (often a full month) for Kenyan and other African films in a private, bookable screening space, building audiences in a way comparable to Ethiopia's Videobet[37] model.

Table 9 Content Library Breakdown by Kenyan film platforms - 2025 | Source: GMI

Platform	Active subscribers (thousands)	Local content share (% of hours)
Showmax (closed April 2026)	220 (historic)	3.4% (historic)
Netflix	90	0.3%
Prime Video	88	0.1%
Viusasa	71	97.2%
K24 Plus	120	99.1%
YouTube Premium	120	N/A
Philit TV	85	94.4%
Maisha Magic	-	75.2%
MyMoviesAfrica	32	28.1%

Policy and Regulatory Environment

The government positions itself as an enabler rather than a controller, encouraging self-regulation. Intellectual property protection is grounded in the Copyright Act of 2001 (revised 2019), with the Kenya Copyright Board and the Communications Authority of Kenya as key regulators. Contracts specify usage duration, territorial rights, and revenue-sharing terms. There is concern that platforms may increasingly shift toward self-production, thereby marginalising independent creators. A government official stressed that the government has zero business in controlling businesses but would like them to run in an organised manner.

> Government has zero business in controlling businesses, but it would like those businesses to run in an organized manner.
>
> *Government entity, Kenya*

[37] SinemaFocus (9 February, 2026). Videobet, the First Independent Cinema in Ethiopia. Link.

Policy also seeks to strengthen collaboration between streaming platforms and independent filmmakers, recognizing their interdependence as platforms provide distribution and audience access, while filmmakers supply content, therefore making alignment across the value chain essential. Stakeholders emphasized that neither could operate effectively in isolation, and warned that without clear policy direction, platforms may shift toward self-production, potentially marginalizing independent creators. Consequently, government support is largely indirect, focused on improving digital infrastructure, expanding connectivity, and enabling access, though data affordability remains a persistent barrier to audience reach.

Informal Distribution and Piracy

Piracy is pervasive in Kenya. 55% of audiences use piracy as their primary method of accessing films, and a further 25% use it significantly (See Figure 11). The main drivers are the ability to watch recent films that are not available on mainstream platforms (67%), subscription costs (65%), and geographic restrictions that make content unavailable where audiences are (56%) (See Figure 12). Informal physical rental also exists, with local video shops cited by 91% of those who rent or buy films and street vendors by 9%. Stakeholders notedthe agility of informal sellers, whose choices reflect true demand and signal market trends that formal systems often miss.

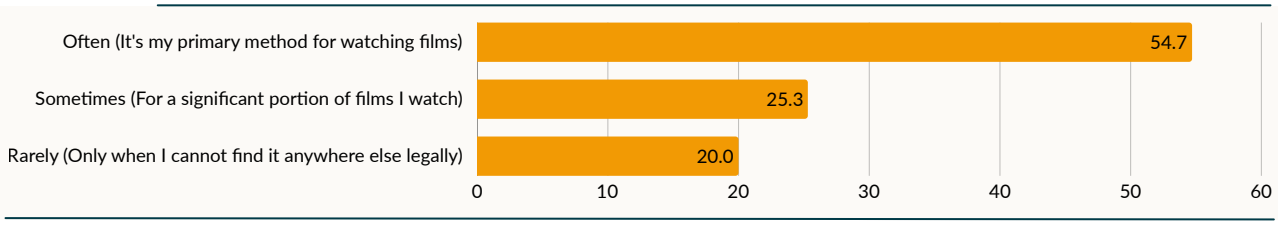


Figure 11 Piracy frequency in Kenya | Source: Audience Survey

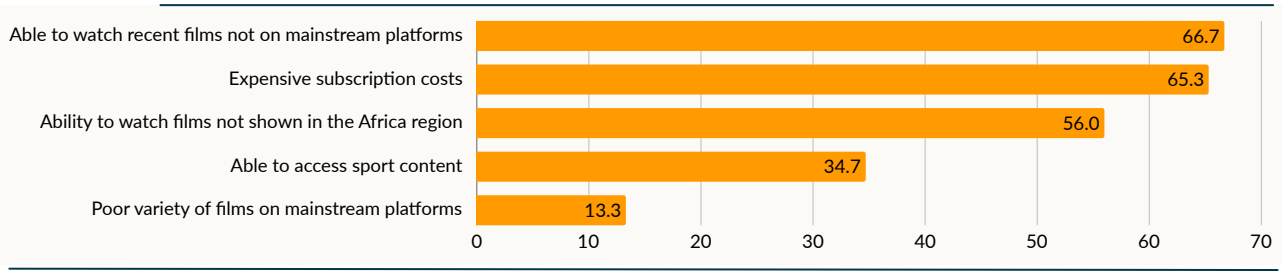


Figure 12 Reasons for piracy in Kenya | Source: Audience Survey

Piracy highlights underlying market demand and gaps in formal distribution, with informal sellers acting as agile, demand-driven intermediaries who curate content aligned with audience preferences. Stakeholders noted that such activity often signals audience direction more effectively than formal systems, while serving underserved market segments. The stakeholders noted that addressing piracy requires more than enforcement but innovation and market alignment, using piracy as a signal to design better distribution models, pricing strategies, and access points that reflect audience realities, while exploring ways to integrate informal networks into legitimate ecosystems and improve audience engagement.

> In a market where we have thin resources allocated to research, some of the illegal things that happen in the industry are indicators of the direction of how things go. If we look at the guys who sell DVDs in traffic you know there is no one as agile as that person. That guy sells DVDs in traffic.... he must have the content at his fingertips; he must know what content he is selling.
>
> *Distributor, Kenya*

Festivals and Community Screenings

Film festivals such as Kalasha, NBO Film Festival, and Lola Kenya Screen, along with community screenings, serve as critical alternative distribution channels. Among audiences who attend such events, 71% go to community screenings and 57% to film festivals (a base of only 7 respondents). NGOs often fund community screenings around specific themes, enabling free access and post-screening discussion. Regional examples include the Kilifi Creek Film Festival, which adopts an inclusive grassroots model, and the Ateker International Film Festival (AIFF) in Lodwar, which combines exhibition with capacity-building. However, festivals remain niche and underfunded, as government allocations are unreliable.

> You raise money from different, maybe people, organizations working with, focused on the themes that you are trying to work on and also the messaging and the work that you're trying to do using impact. And then from that grant, you're able to put all the salaries that you need to pay you.
>
> *Filmmaker, Kenya*

Data on Reach and Revenues

Reliable, comprehensive data on Kenya's film market is largely absent, creating a foundational gap that limits decision-making across the value chain. Without a centralized system to collect and aggregate data, stakeholders rely on fragmented insights and anecdotal evidence, leaving the industry without benchmarks to assess performance, guide investment, or track growth. This weak evidence base constrains the sector's ability to professionalize and scale.

At the box office level, performance data is largely undisclosed, with cinemas rarely sharing viewership or revenue figures. As a result, filmmakers and distributors depend on indirect proxies such as the length of theatrical runs or informal perceptions of popularity, which are neither standardized nor verifiable. This lack of transparency means each release operates in isolation, limiting opportunities to learn from past performance or build cumulative market knowledge.

Television and streaming data provide only partial visibility. TV ratings from third-party firms offer broad time-band insights but lack the granularity needed to understand audience segments or behaviours in depth. Similarly, streaming platforms operate with minimal transparency, sharing little beyond surface-level indicators like rankings, which are not considered reliable measures of performance. This opacity makes it difficult for content creators to assess reach, returns, or audience engagement.

> It just shows you the time bands; from this time to this time, this is what works. And then you have to now check. So that time was 2:00 PM peak. Then you have to go back to your schedule and check what playing at 2:00 p.m.
>
> *Distributor, Kenya*

Ancillary revenue streams such as airline licensing, community screenings, and international distribution are important but largely undocumented, as transactions are privately negotiated and dispersed across channels. While these streams demonstrate the potential for films to generate value beyond primary platforms, their cumulative contribution remains unclear. Overall, the absence of reliable, integrated data across all segments results in siloed operations, weak market visibility, and a structural barrier to industry growth and sustainability.

Gaps and Opportunities

Three major gaps characterise the Kenyan film industry. First, regional gaps as the industry is heavily Nairobi-centric, leaving most of the country underserved. Only four cities have cinemas, and reaching regional audiences requires significant additional investment. Second, genre gaps where crime dramas dominate fiction while documentaries are over-represented in festivals but under-represented in mainstream distribution. Success stories such as the documentary Battle for Laikipia, which enjoyed a nine-week theatrical run, show potential, but genres like comedy, science fiction, horror, and historical drama lack the necessary infrastructure. Producers rationally stick to proven formulas because they operate in a high-risk, low-data environment. Third, language gaps: despite over forty ethnic languages, film production is dominated by English and Swahili. Vernacular television channels show strong viewership, but there is no viable business model for mother tongue films. Public funding is essential to fill this gap, and the Ministry of Youth Affairs, Creative Economy and Sports, through the Kenya Film Commission and the proposed Creative Industry Development Fund, should allocate dedicated resources for the development, production, and distribution of mother tongue content.

Audience Development

Kenyan audiences are young, mobile-first, and highly engaged on social media, with 15.1 million active social media users. The 25-34 age demographic is most engaged with cinema discussions. While audiences express pride in local stories, they judge productions on craft, emotional impact, and originality. High ticket prices and the physical shortage of venues remain the primary barriers to audience growth in the theatrical sector.

Demographic Profile of Kenyan Film Viewers

The audience survey identifies three distinct viewer segments differentiated by their orientation towards local and international content, platform behaviour and expectations of quality. As summarised in Table 10, these range from African-first family streamers to audiences strongly oriented towards international productions.

The segmentation points to a clear competitiveness and quality challenge. While there is meaningful demand for African content across segments, higher-quality films consistently emerge as the leading growth trigger. For distributors and producers, the implication is that expanding audiences will require not only greater content availability, but stronger storytelling, production quality and discovery mechanisms capable of competing with international offerings.

Table 10 Kenya film consumer segments | Source: Audience Survey

Dimension	Segment 1 African- First Family Streamers	Segment 2: Cross- Platform Cultural Explorers	Segment 3: International Quality- Seekers
Segment distribution	n = 138 (45%)	n = 106 (35%)	n = 60 (20%)
Gender	79% female	59% female and 41% male	72% male
Age distribution	25-44 years-75%	25-44 years- 78%	25-44 years- 80%
Content preference	Local films 83%, African films 76%	Local films 86%, African films 79% and international films 100%	Local films 23%, African films 23% and International films100%
Top genres	Drama (67%) and Comedy (65%)	Drama (68%) and Comedy (61%)	Action (80%), Drama (62%) and Sci-fi (60%)
Primary device	Smartphone (70%) and Smart TV (42%)	Smartphone/Tablet (70%) and Smart TV (56%)	Smartphone/Tablet (62%) and Smart TV (60%)
Main platforms	YouTube- 94% and Netflix- 25%	YouTube - 85% and Netflix - 47%	YouTube -76%, Pirated websites -42% and Netflix- 40%
Fallback option	Free-to-air TV - 70%	Free-to-air TV- 46%	Affordable DVDs/USB sticks- 48%
Main motivations	Entertainment (86%) and Education (46%)	Entertainment (93%) and High-Quality Storytelling (64%)	Entertainment (90%), High-Quality Storytelling (72%) and Education (67%)
Key barriers to watching local films	Poor connectivity / High data costs (47%)	Storylines that are not engaging (41%)	Storylines that are not engaging (57%)
Median monthly streaming spends	USD 7.80	USD 9.40	USD 8.20
Avg. streaming platforms	1	1	1
Cinema willingness to pay	USD 3.90	~USD 4.70	USD 4.70
NPS African films	-37%	-39%	-80%
Growth triggers	Higher-quality films – 59% and Lower subscription prices – 36%	Higher-quality films – 77% and Personalization and recommendations – 48%	Higher-quality films – 80% and Personalization and recommendations – 52%

The common growth trigger across all three segments is the demand for higher-quality films, ranging from 59% to 80%. This indicates that strategic focus must shift from volume-based production to high-quality, engaging storytelling that can compete with international benchmarks.

Film Discovery and Marketing Channels

Word-of-mouth is the dominant driver of film discovery. 67% of audiences hear about films through friends and family, and 61% through social media. Streaming platforms also play a significant role (54%) (see Figure 13), while traditional media channels such as radio, television, and billboards account for less than 7% of audience reach. This shift means that marketing strategies must prioritize community-building and digital engagement over legacy media spend.

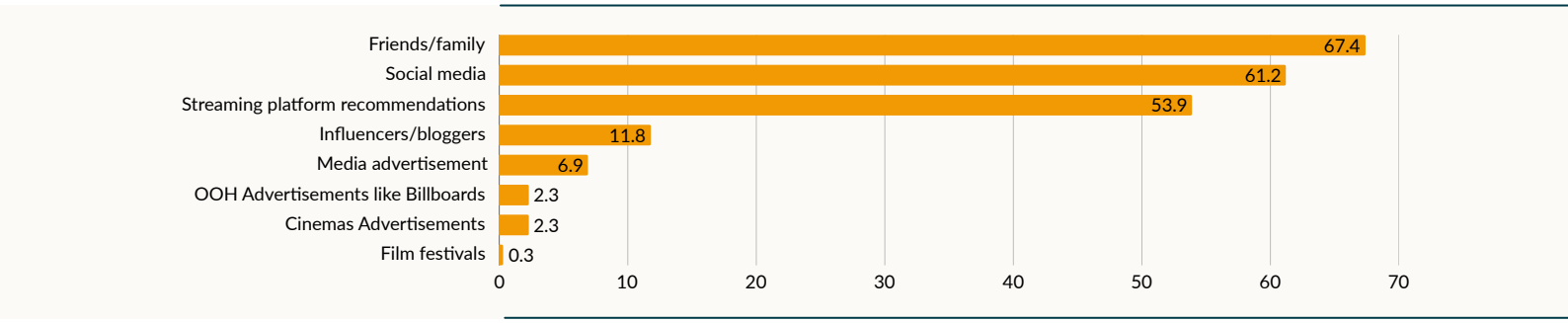


Figure 13 How audience in Kenya know/hear about new films | Source: Audience Survey

What Drives Audiences to Watch Films

Entertainment and relaxation are the dominant motivations, cited by 89% of survey participants. High-quality storytelling attracts 48%, and learning about social issues or gaining educational insights motivates 47%. Recommendations from friends and family influence 42% (See Figure 14). When choosing a film, audiences rate authentic acting as the most important factor (97%), followed by technical polish (94%) and a compelling plot (86%). Awards matter to only 34% of viewers, confirming that the proof is in the performance, not the plaque.

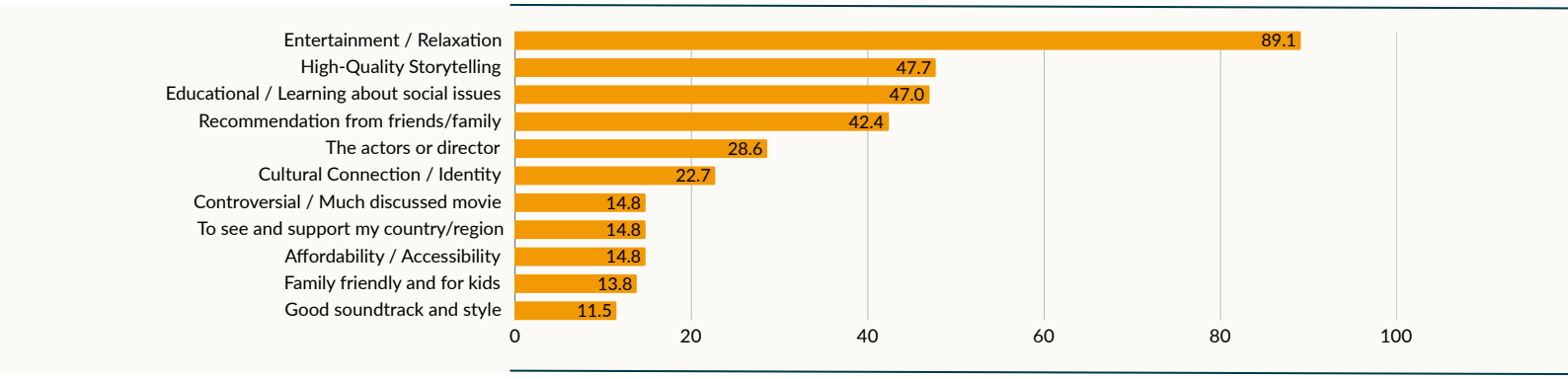


Figure 14 Primary motivations for watching films in Kenya | Source: Audience Survey

Audience Viewing Platforms and Access to Films

Television remains the primary hardware for viewing, cited by 73% of audiences, followed closely by smartphones and tablets at 69%. 81% watch films across various on-demand streaming platforms, while 48% use traditional broadcast and 36% use social media. Cinema attendance accounts for only 5%.

Among streaming platforms, YouTube is the most widely used (87%), followed by Netflix (37%), Showmax (15%), and pirated websites (13%). 64% of the sampled audience indicated that they use free-to-air television, while 43% use Pay TV. On social media, TikTok is the most frequently mentioned platform for accessing film content (87%), followed by Facebook (52%).

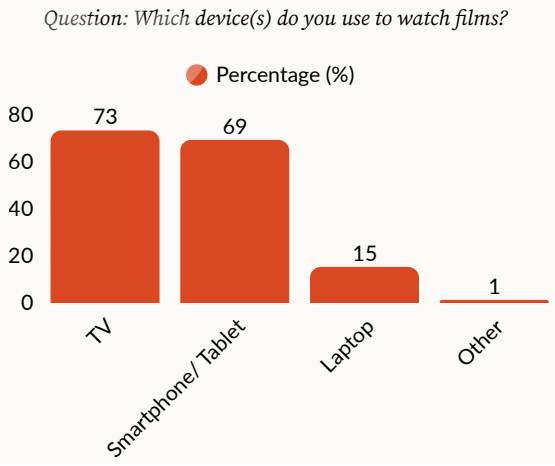


Figure 15 Devices used to watch films in Kenya | Source: Audience Survey

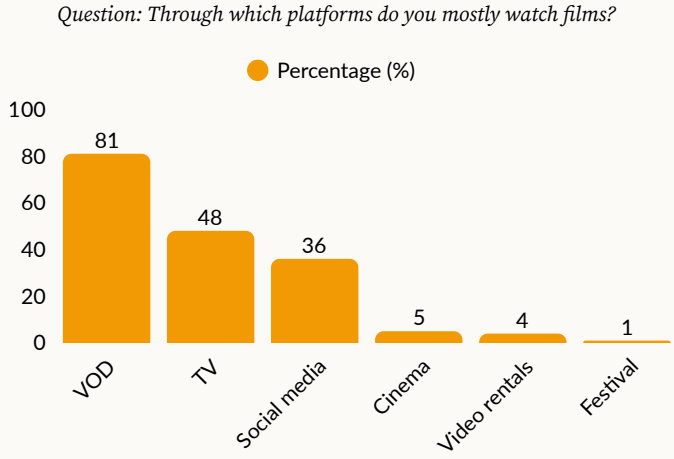


Figure 16 Primary viewing platforms in Kenya | Source: Audience Survey

Streaming Behaviour and Platform Preferences

Local films account for 24% of films watched on video-on-demand platforms, films from other African countries for 23%, and American films for 19%. On YouTube, audiences report watching local films (68%) and other African films (66%) at higher rates than American films (43%). On Netflix, viewing is more concentrated on American films (73%), followed by African films (56%) and local films (46 %). 55% of audiences stream local films daily. Regarding monthly spending on streaming platforms, 24% pay nothing, relying on free platforms; 30% access services through shared subscriptions or accounts paid for by someone else. 66% maintain only one paid subscription. These patterns show that access is shaped by cost considerations, with audiences combining free platforms, shared accounts, and occasional paid services.

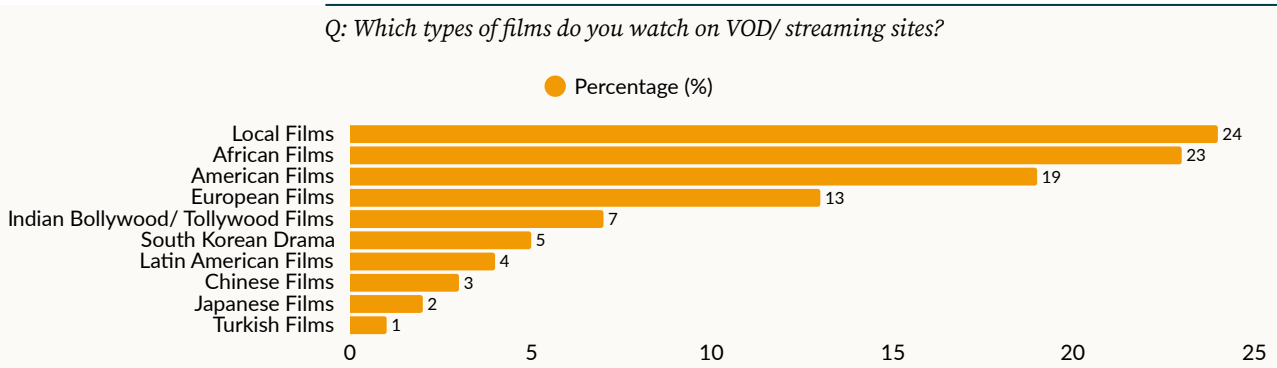


Figure 17 Type of films watched on VOD in Kenya | Source: Audience Survey

Demand for Local and African Content

72% of audiences consume Kenyan films, and 67% consume films from other African countries. The most frequently watched regions are American films (28%), other African films (25%), and Kenyan films (25%). 53% of viewers consider it very important for a film to be Kenyan, and an additional 24% consider it somewhat important. However, origin alone does not override quality. Being locally produced serves as an initial hook, but technical polish and storytelling depth are required to convert interest into loyal viewership.

Barriers to Audience Growth for Local Films

The primary barriers limiting audiences from watching more local and African films are poor internet connectivity and high data costs (37%), storylines that are not engaging (33%), and a lack of awareness about new releases (30%).

On the positive side, 63% of audiences agree that production quality has improved significantly in the last 5 years, and 59% feel that local films tell authentic and relatable stories. 55% are willing to pay for high-quality content. However, 52% find it difficult to find these films on mainstream platforms, and 51% believe the films are not promoted or marketed effectively. The NPS for local films is -46%, indicating that local films are currently failing to meet audience expectations and that stronger satisfaction will be necessary to turn viewers into advocates.

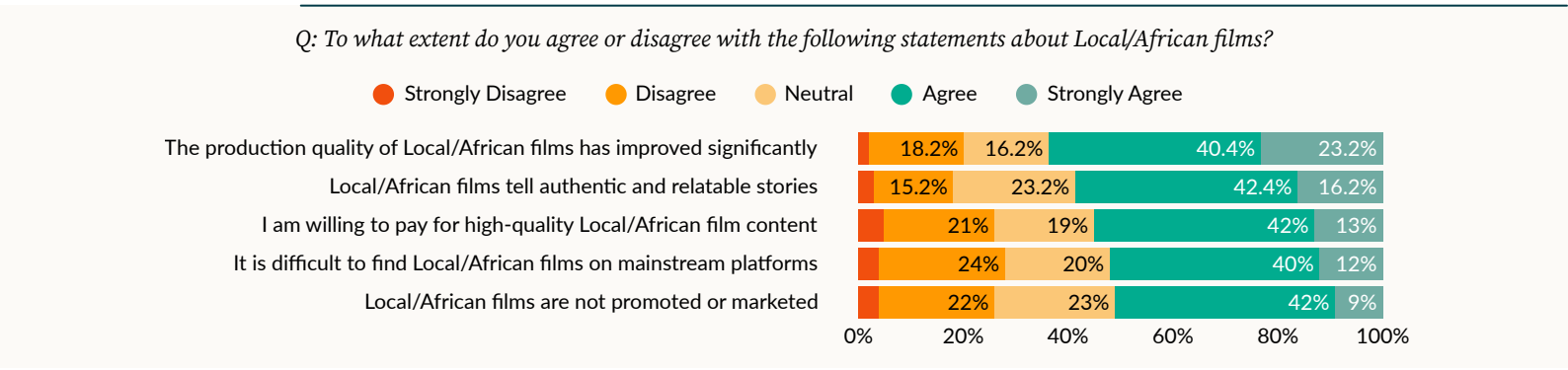


Figure 18 Perceptions on local/African films in Kenya | Source: Survey data

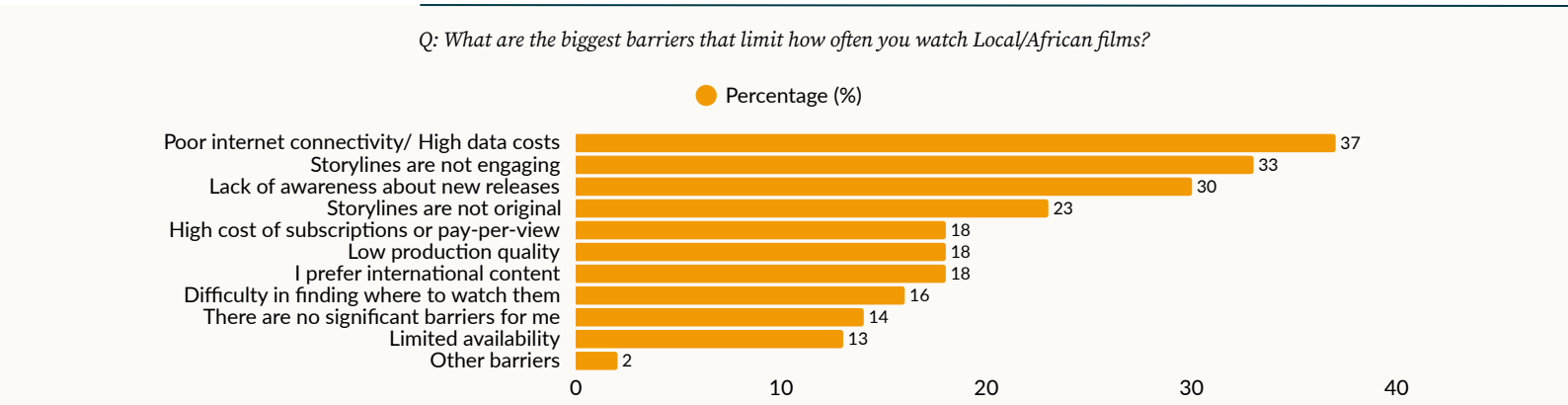


Figure 19 Barriers to watching Kenyan or African films | Source: Survey data

Audience Engagement and Word-of-Mouth

After watching a film, the most common action is recommending it to someone in person (55%), significantly outweighing digital sharing, with only 11% sharing about the film on social media. 43% look for more films from the same country, suggesting that a single film can serve as a gateway to broader regional cinema. In terms of active engagement with local and African films, 47% have searched for and downloaded a film, while only 17% have paid for content on a digital platform. Only 4% went to a cinema specifically for a film, and 5% attended community screenings. 31% of the audience interviewed reported doing none of these activities, pointing to a large segment of passive consumers.

Role of Festivals, National Events, and Marketing

Festivals such as Kitale Film Week and Kilifi Creek play a central role in building rural audiences. School drama festivals and campus clubs cultivate early engagement. However, marketing remains critically underfunded as many filmmakers allocate zero budget to promotion, while international studios typically spend up to 50% of production budgets on marketing. 69% of audiences say marketing campaigns influence their choice of film. Social media is the primary marketing channel, but is often used without a clear strategy. Influencer marketing is emerging but cautiously adopted, with authenticity mattering more than follower count. 21% of survey respondents explicitly urged the industry to improve its marketing, stating that they are unaware of the great films being made.

Social Impact

Kenyan film has a long tradition of tackling critical societal issues, with early examples including The Rugged Priest (2011) and In My Genes (2009). Documentaries such as Softie (2020) and How to Build a Library (2025) have used the international festival circuit for advocacy. The documentary Battle for Laikipia (2024) sparked extensive online discourse regarding land rights and indigenous issues. Across stakeholders, there is no single definition of social impact. Streaming platforms understand it through audience engagement and content performance. Funders avoid rigid definitions, instead emphasising a story-first approach where impact emerges as a byproduct. Filmmakers argue that all films have potential for social impact as long as viewers feel seen and heard. Distributors focus on awareness creation, community engagement, and dialogue generation, particularly through community-based models.

Audience Interest in Socially Relevant Storytelling

When asked about the types of social themes they would be interested in watching, audiences pointed to a wide range of topics. The strongest interest is in stories about young people pursuing opportunities (51%) and those centred on money, business and survival (47%). Relational and human-centred storytelling also emerges as a major driver, with 45% interested in love, relationships and family health challenges. There is strong demand for socially conscious content around gender and governance as 44% of the audience indicated that they are interested in stories about strong women overcoming challenges, and another 44% in stories addressing power, politics and corruption. Identity and cultural themes follow, with 40% drawn to stories about cultural and religious coexistence and 37% to themes of identity and belonging. Mental well-being (36%) and environmental issues (33%) indicate a gradual broadening of interests, though only 18% prefer purely entertainment-driven films, confirming that most audiences want social relevance embedded in engaging stories.

Priority Themes and Underexplored Gaps

Stakeholders indicated that priorities for the types of stories, themes, or filmmakers supported are largely influenced by donor interests rather than fixed organizational preferences. Funders explained that the thematic focus of supported films typically aligns with the priority areas of specific donors, for example, some donors fund projects addressing social issues such as gender equity or sexual and reproductive health, while others focus on different thematic areas depending on their strategic objectives. As a result, the types of films supported can vary widely and are often shaped by the funding available at a given time rather than a predetermined set of storytelling priorities. Some filmmakers also expressed uncertainty about how thematic priorities are determined, reflecting a broader perception that funding structures and external agendas play a significant role in shaping which stories receive support within the ecosystem.

Funders further indicated that filmmakers who tend to attract funding are those who demonstrate both creative and business acumen. Key factors include having a strong and competent team, clear production and distribution plans, prior experience or a proven portfolio, and partnerships that strengthen the project's feasibility. Funders also assess operational practices, such as fair contracts, timely payments, and adherence to labour standards, to ensure a healthy working environment. Additionally, filmmakers who understand the realities of production financing, such as the delayed revenue cycles typical in film, are better positioned to access loans or investment, particularly through partnerships with banks like NCBA Bank.

> "No, we've not had preference for things. It depends on what the donor wants and the thematic area that the donors are looking at. So, if we get a donor like Comic Relief who wants films around the four thematic areas that they're supporting, that's what we get. We tend to support. So, we have an array of donors. So, I can't really say we have any specific themes that we're looking at. I think it's very donor and strategy specific."
>
> *Funder, Kenya*

Underexplored and Untapped Themes in Kenyan Film and Content Production

Stakeholders across Kenya's film ecosystem highlight that while some social themes are frequently explored, several areas remain underdeveloped, particularly around gender dynamics, audience segmentation, and rural storytelling. There is growing recognition that men and women may engage differently with content, yet this distinction is not well understood or reflected in narratives, with gaps evident in stories such as women navigating male-dominated spaces like sports. Rural narratives are also described as underrepresented, and when present, they are often not produced with the same level of ambition or production quality as urban or international-facing content. At the same time, stakeholders note a broader imbalance between creative production and audience strategy, with insufficient attention given to how stories are positioned, marketed, and distributed, limiting the reach of potentially strong but underexplored themes.

There is also concern about thematic concentration in social impact storytelling, where repeated focus on areas such as governance, health, and gender can lead to audience fatigue while other relevant issues remain unexplored. Filmmakers further argue that many narratives rely on simplified archetypes rather than capturing the complexity of real human experiences, resulting in predictable or didactic storytelling. In response, stakeholders call for greater thematic diversity and a shift toward more nuanced narratives, as well as an expanded understanding of impact storytelling beyond documentaries to include fiction, series, and animation, which are seen as more accessible and potentially more effective in reaching wider audiences.

> There's definitely an over exploitation of certain themes... some audiences don't even want to have the conversations anymore.
>
> *Filmmaker, Kenya*



Financing and Enabling Environment

The financing landscape has shifted from heavy reliance on personal savings and soft loans from friends and family to a more diversified model involving international grants and streaming commissions, although Netflix and Amazon Prime have reduced their commissioning of African originals. Government creative economy budgets have increased in theory, but bureaucratic friction limits access to public funds. The informality rate in the industry is estimated at 80%, which constrains large-scale investment.

Incentives, Grants, Tax Credits, Funds and Co-production Schemes

Kenya operates without the core incentive structures such as tax rebates and production incentives that are standard in competing markets, significantly limiting its ability to attract international productions. As one distributor noted, South Africa has a tax rebate while Kenya does not. Grant funding remains highly concentrated, with organisations like Docubox carrying a disproportionate share of industry support.

Co-production treaty with South Africa (2022) and Co-Production MOU Framework with Tanzania (2019) and China (2023) exist, but they are often shaped by unequal power dynamics. For example, the first Kenyan feature film selected for Cannes, Rafiki, was produced as a multicounty co-production but was spearheaded by a South African producer with European partners. A filmmaker observed that in such arrangements, the main actor may be required to be a white girl from France simply because the money comes from France. While the proposed Creative Economy Bill signals potential progress, the current landscape continues to constrain both creative autonomy and industry growth.

Business Models and Revenue Mixes

Several emerging business models have demonstrated viability. The audience-funded production model, exemplified by Phil-It, operates on pre-sales and crowdfunding before a film is made. This aligns production with demonstrated audience demand, reduces risk for investors, and builds a committed viewership before release. Phil-It has used this model to produce multiple commercially viable films and operate its own video-on-demand platform, creating a vertically integrated revenue loop. The niche-focused production and distribution model, exemplified by LBX, concentrates on documentary and impact-driven content, attracting funding from foundations such as the Open Society and Ford Foundation while generating revenue through festival sales, community screenings, and licensing to platforms.

The revenue share platform model, used by Yakwetu, offers no upfront minimum guarantees but splits income 50/50 with filmmakers after deducting digital vending costs. This aligns incentives, provides a low barrier entry to digital distribution albeit with modest revenue per title. Beyond production level models, financing intermediaries such as HEVA provide growth capital to film businesses based on the soundness of their business model, offering loans from under USD 10,000 to USD 250,000 for working capital, equipment, and marketing. HEVA's partnership with NCBA Bank aims to mainstream commercial lending to creative businesses.

Key Constraints and Promising Innovations

Data scarcity remains the most significant structural constraint, limiting evidence-based decision-making across production, distribution, and investment. The absence of reliable consumption, viewership, and box office data forces stakeholders to rely on assumptions, which increases risk and discourages investment. Piracy further constrains the industry by undermining legitimate revenue streams, but it also indirectly reflects unmet demand. In response, the industry is generating bottom-up innovations. These include alternative screening spaces, filmmaker-led video-on-demand platforms, encrypted streaming systems that prevent unauthorised copying, and server-side ad insertion. These innovations bypass structural limitations and help retain value within the local ecosystem.

Capacity Building, Collaborations and Mentorships

Human capital development is constrained by gaps in practical, business oriented training, particularly in distribution, rights management, and contracts. Without a clear grasp of distribution timelines and processes, filmmakers may prematurely judge partnerships as ineffective. Stakeholders emphasise that transitioning from a purely creative approach to a hybrid creative business mindset is essential for sustainability. Collaborations and mentorships are emerging as critical mechanisms. Cross border distribution partnerships have begun to take shape, such as ScreenConnect, a venture launched by a Nigerian marketer, a Kenyan documentary filmmaker, and a Rwandan filmmaker. The Moving Pictures initiative, supported by GIZ and implemented by Some Fine Day Pix, brought together distributors from Kenya, Nigeria, and Rwanda to develop collaborative distribution models.

Country-Specific Priorities and Opportunities

To unlock its full potential, the Kenyan film industry must prioritize the creation of a central distribution structure and an "audience-first" mentality. Strategic opportunities exist in developing hybrid distribution models that combine paid SVOD platforms with free, ad-supported services to maximise reach across different income segments. There is also significant potential in leveraging "FilmTech" and AI-driven analytics to optimize viewer targeting and reduce the dominance of Hollywood content in local markets.

The Film Industry Satellite Account (FISA), launched by the Kenya Film Commission and the Kenya National Bureau of Statistics (KNBS), does not have operational funding and therefore remains a shell. Additionally, even if funded, FISA will not be able to capture granular box office figures, as cinemas treat these as confidential and streaming platforms regard viewership data as proprietary.

A meaningful data system therefore requires a tiered, incentivised architecture rather than a single solution. For cinema data, the Kenya Film Commission could mandate a simple, standardised frequent report of admissions per film with key demographic details such as age, education level, gender, etc. For streaming data, where platforms will not voluntarily share raw numbers, the most realistic near-term approach is periodic syndicated audience research such as GeoPoll or Ipsos, funded by development partners or an industry levy.

For macroeconomic measurement, FISA should receive dedicated annual funding from the relevant ministry to collect and validate data such as tax, employment, and registration or subscription data. The Kenya Film Commission would then compile, clean, and disseminate nonconfidential data to stakeholders.

Priority Opportunities in Distribution

Scale up existing platforms

The Kenyan digital distribution landscape is characterised by fragmentation where dozens of small, filmmaker-run VOD platforms operate in isolation, each with a limited catalogue and insufficient scale to market effectively or attract consistent audiences. This fragmentation prevents any single platform from achieving critical mass, while leaving consumers with no obvious, trusted destination for Kenyan content. The priority opportunity is to consolidate and scale a few existing platforms, and to make them better-capitalised and more integrated. This means moving beyond simple mergers. Consolidated platforms should be supported with targeted investment that delivers stronger telecom integration such as bundling with mobile data plans, zero-rating, or carrier billing), audience analytics to provide filmmakers and investors with transparent, actionable data on viewing behaviour and revenue, payment interoperability including seamless M-PESA integration, pay-as-you-go options, and support for multiple payment channels, and differentiated local content strategies that go beyond simply aggregating existing titles, for example, commissioning vernacular content, developing genre-specific slates, and creating curated experiences for distinct audience segments. Critically, technology upgrades alone will not solve the underlying problem. The country also requires clearer monetisation pathways such as revenue-share transparency, predictable licensing windows, and sustainable pricing models).

> Instead of people building so many different platforms, if they were to focus on the ones that are existing, we can build them bigger.
>
> *Streaming platform, Kenya*

Micropayment to align payments with how Kenyans already spend

Subscription models have failed to reach the mass market in Kenya. Netflix and Showmax subscribers' figures represent a tiny fraction of potential viewers. Adoption of "kadogo" (small) economy where audience pay tiny increments while using the platform would be encouraged. The priority opportunity is to integrate micropayment, pay-per-title pricing into the aggregated platform, using M-PESA for seamless, low-cost transactions (e.g., KES 20–50 per film, or KES 10 for a 24-hour rental). This model removes the subscription barrier, aligns with existing consumer behaviour, and creates a legitimate, affordable channel that can compete with the convenience of piracy.

However, price alone is not the only barrier. Piracy persists because it offers convenience, speed, and ease of discovery. To compete, the consolidated platform must therefore match or exceed pirate sites on user interface and user experience (UI/UX) such as fast loading, intuitive search, personalised recommendations, minimal buffering, and a frictionless payment journey. It must also improve discoverability, helping users find local content through curated collections, genre filters, and push notifications about new releases. Without these investments, even the lowest legal price will not convert habitual pirates. A successful platform will combine the affordability of micropayments with the convenience and speed that piracy has normalised.

> That's why Viusasa, for example, works because they're able to consume. It's kind of like that Kadogo culture where you know, you pay 20 Bob to watch something.
>
> *Funder, Kenya*

Hybrid model of funding and infrastructure development

Neither government alone nor private capital alone has succeeded in building a scalable local VOD platform. Government funding is inconsistent while private investors have been reluctant to back an unproven market with little data. Stakeholders suggest a hybrid model as the most viable path, where public or development finance provides catalytic capital, not for infrastructure alone, but for the full ecosystem required to sustain demand. This includes technology development and hosting, content licensing and, crucially, exclusive content pipelines to differentiate the platform from piracy and competitors, audience development, telecom partnerships, data analytics systems to provide transparent, actionable insights for filmmakers and investors, and monetisation systems capable of supporting long-term commercial viability. Sustaining demand with differentiated content is challenging as without exclusive or first-window local titles, users will have little reason to switch from free or pirate alternatives. This could be structured as a public-private partnership involving the Kenya Film Commission as convenor, a technology partner as operator, existing local platforms as content aggregators, and development partners as underwriter. The goal would not be permanent subsidy but catalytic investment, enough to prove the model, reach scale, and then transition to commercial sustainability.

> We need to see Government a bit more and not just fancy conferences. I think we need to see Government money actually going to filmmakers... the Government holds a really strong card in answering that question... both from a money perspective and now from a policy perspective.
>
> *Funder, Kenya*

Priority Opportunities in Audience Development

Audience development hinges on expanding reach beyond Nairobi, building consistent viewing habits, and investing in marketing and data systems that enable targeted engagement. While evidence shows that audiences will engage with local content when it is accessible and well-promoted, structural barriers such as high distribution costs and limited infrastructure continue to restrict this potential. At the same time, channels like broadcast and funded community screenings offer scalable pathways to reach mass and underserved audiences if leveraged strategically.

> The box office in Kenya is like 95% American film, the remaining is Kenyan.
>
> *Distributor, Kenya*

Priority Opportunities in Social Impact

Social impact filmmaking presents a strong opportunity for scale, particularly through community-based distribution, diversified formats, and stronger measurement frameworks. Expanding impact campaigns beyond urban centres has already demonstrated effectiveness in driving engagement and dialogue, while there is growing recognition that fiction and hybrid formats can be equally powerful in advancing social outcomes. However, the sustainability of this segment depends on building professional capacity and demonstrating measurable impact to funders.

> We did over 40 community screenings... and... conversations afterwards.
>
> *Distributor, Kenya*

Scaling Potential: Strategic Priorities

Scaling the industry requires government interventions across funding, policy, infrastructure, and capacity building. Key opportunities include establishing a dedicated film fund that supports the full value chain, introducing tax incentives to attract investment, expanding exhibition infrastructure beyond major cities, and building industry-wide data systems to inform decision-making. Additionally, strengthening distribution companies, fostering regional collaborations, and investing in marketing capacity are essential to unlocking growth.

Read the full Kenya Country Report





Nigeria

Country Context



Nigeria's film industry, popularly known as Nollywood, represents a cornerstone of the nation's creative economy and a significant driver of its cultural soft power. As of 2025, the country's population is estimated at approximately 230 million, providing a massive domestic base for content consumption. The creative sector, including film and music, contributed roughly ₦154 billion (*approx. USD 114.40 million*) to Nigeria's GDP in 2023[38] and currently supports over 4.2 million jobs, with projections suggesting an additional 2.7 million by 2027 if structural constraints are addressed.

Historically, Nollywood was defined by a high-volume, informal, straight-to-home-video model, but it has recently evolved into a hybrid system in which theatrical exhibition, international streaming platforms, and traditional television broadcast serve as material revenue streams. This transformation has positioned Nigeria as a global leader in production volume, second only to India, with a spike of over 2,500 films produced in 2020 alone and an average annual production of 1,000+ films[39]. Despite this scale, the industry remains characterised by a dual economy: a small tier of professionally structured, high-budget productions and a long tail of under-capitalised films that rely on informal distribution channels.

Stakeholders view structural weaknesses and uneven infrastructure as primary constraints to growth. Urban centres dominate both cinema screens and internet connectivity, while rural areas lag due to high data costs and limited electricity. The industry's commercial potential is evidenced by recent box-office records, but stakeholders emphasise that these successes are driven by private initiative rather than coordinated government support.

[38] International Trade Administration (ITA – 2025). Nigeria Media and Entertainment. Link
[39] National Film and Video Censors Board (NFVCB). Link

Overview of National Film Ecosystem

The Nigerian film ecosystem has evolved through successive technological shifts, from Video Home Systems (VHS) to streaming, and is now supported by a growing institutional landscape that includes government agencies, guilds, and private training initiatives. Key milestones include the 1992 release of Living in Bondage, which established the home-video model; the revival of cinema in the mid-2000s with the opening of Silverbird Cinemas; the launch of dedicated local-content channels such as Africa Magic; the entry of international streaming giants like Netflix and Amazon Prime; and the recent rise of epic films such as Aníkúlápó Folayan, and Jagun Jagun alongside record-breaking box-office successes. The Africa Magic Viewers' Choice Awards (AMVCA), established in 2013, has been widely credited with raising technical standards across the sector.

Parallel to these creative milestones, the institutional landscape comprises principal government bodies, guilds, and a growing number of private and non-governmental actors, yet coordination among them remains uneven. The Nigerian Film Corporation (NFC), established in 1979, develops the sector through training (via the National Film Institute, Jos) and facilitates co-production agreements. Meanwhile, the National Film and Video Censors Board (NFVCB), created in 1993, classifies films and licenses cinemas. The National Broadcasting Commission oversees television content, and the Nigerian Copyright Commission handles intellectual property enforcement. Industry guilds such as the Directors' Guild of Nigeria and the Actors' Guild of Nigeria play important but inconsistent roles.

In response to formal gaps, private initiatives like The MultiChoice Talent Factory (MTF), Ebonylife Academy, The Tony Elumelu Foundation, and newer platforms like Circuits TV fill critical gaps in training, funding, and distribution. Despite these advances, stakeholders consistently point to the absence of a unified practitioners' council, a body that would professionalise entry into the sector, ensure accountability, and provide a single point of coordination for investment, as the industry's most critical institutional gap.



Film Distribution

Distribution Channels

Distribution in Nigeria operates across a complex, layered ecosystem in which formal theatrical exhibition, rapidly expanding digital streaming, and a persistent informal market coexist, often in tension. The most striking feature of this landscape is its structural asymmetry: over 90% of films classified by the NFVCB each year never reach a cinema screen, moving instead directly to streaming platforms, television, or informal street-level channels, including USB drives and DVDs. Cinema is, in this sense, an elite gateway rather than a mass channel.

Theatrical Exhibition

The Nigerian theatrical landscape in 2025 reached a critical historical inflection point. As documented in the *Nigeria Box Office Yearbook 2025* by FilmOne[40], the industry successfully transitioned from a post-pandemic recovery phase into a period defined by aggressive revenue optimisation and international cultural export. While the market faced headwinds from inflationary pressures and a fragmented entertainment economy, the year's data revealed a resilient sector driven by "eventisation", infrastructure expansion, and a burgeoning global footprint.

Infrastructure saw steady expansion throughout the first half of the decade. By the close of 2025, the territory operated 118 cinema locations, representing a 16% increase in cinema count year-on-year. This expansion contributed to a record-breaking total of ₦15.6 billion in box office revenue. The market is dominated by three major exhibition chains: Filmhouse Cinemas commands a 26% gross box office share, Genesis Cinemas holds 19.3%, and Silverbird accounts for 19%. A notable trend in 2025 was the diversification of exhibition formats; alternative models like Imagine Cinema and Nile Cinemas successfully brought the theatrical experience to non-traditional venues and university campuses, broadening the industry's geographic reach.

Lagos generates more than half of all cinema revenue, and 45.9% of admissions from 41 locations. However, states like Edo (driven by Genesis Benin City) and Rivers are showing strong location quality and high yields, suggesting that future growth lies in optimising regional hubs outside Lagos.

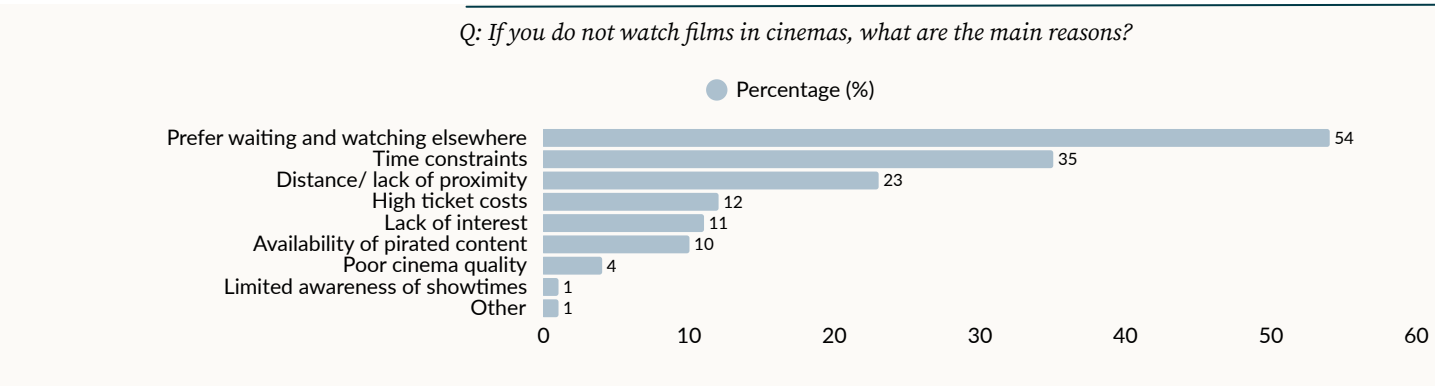


Figure 20 Reasons for not going to cinemas in Nigeria | Source: Audience Survey

This evolution in the theatrical landscape has been accompanied by a significant shift in audience consumption patterns. Audience Survey shows that 54% of audiences prefer to wait and watch films on other platforms, while 35% cite time constraints, and distance remains a significant barrier (Figure 20). Cost is cited by 12%, while piracy (10%) and lack of interest (11%) are less prominent factors. Overall, the data indicate that cinema is no longer the most convenient or accessible viewing option for most audiences, with flexibility and proximity emerging as more decisive factors than price alone.

[40] FilmOne. Nigeria Box Office Yearbook. Link

The audience sentiment was reinforced by the industry stakeholder who described cinema going as constrained less by demand and more by practical access barriers, particularly distance, traffic congestion, and limited leisure time. Therefore, limited infrastructure, combined with time, distance, and total cost, is pushing audiences toward flexible, on-demand channels. As a result, cinema is shifting from a primary distribution channel to a premium, event-based experience, while digital platforms absorb the bulk of everyday viewing.

> The audiences are now more comfortable with watching movies at their own will. You cannot box them into watching films at a particular time; they rather watch it when they want to.
>
> *Industry Distributor*

Box office performance tells a story of revenue growth decoupled from audience growth. Total theatrical revenue surged by 35% year-on-year in 2025 to reach ₦15.6 billion, and an extraordinary 212% compared to 2021 levels. Yet admissions, at approximately 2.8 million, have not recovered to the 2021 high of 3.3 million. The primary growth engine has been the Average Ticket Price, which rose nearly 270% over five years to reach ₦5,596 in 2025, confirming that exhibitors have successfully passed rising operating costs to a consumer base increasingly willing to pay premium prices for genuinely event-worthy films (See Table 11).

Year	Total Box Office (GBO)	Admissions	Δ YoY Admissions	Avg. Ticket Price	Δ YoY Avg. Ticket Price
2021	₦5,000,000,000	3,305,511	-	₦1,512	-
2022	₦6,900,000,000	3,190,249	-3.5%	₦2,163	43.1%
2023	₦7,357,362,744	2,604,408	-18.4%	₦2,825	30.6%
2024	₦11,582,758,362	2,668,146	2.4%	₦4,341	53.7%
2025	**₦15,641,644,963**	**2,795,276**	**4.8%**	**₦5,596**	**28.9%**

Table 11 Key Five-Year Growth Metrics of Nigerian cinema from 2021-2025 | Source: FilmOne, Comscore

Nollywood's cultural power within this theatrical market has reached a historic milestone. In 2025, local productions captured between 49% and 53% of total ticket sales, with 83 Nollywood titles released and 14 crossing the ₦100 million mark. Funke Akindele's *Behind The Scenes* became the highest-grossing Nigerian film of all time at ₦2.76 billion, crossing ₦1 billion in just 19 days. The 'Detty December' festive window solidified its status as the industry's most critical commercial period, accounting for nearly 19% of annual revenue. Internationally, Nollywood titles are gaining traction in diaspora markets: According to the 2025 Nigerian Box Office Yearbook, *Behind The Scenes* earned USD 219,000 in North America and £144,348 in the UK and Ireland, signalling growing global reach even if international receipts remain modest relative to domestic earnings.

Beneath these headline numbers, cinema's structural limitations are clear. Audience Survey shows that 54% of audiences prefer to wait and watch films on other platforms rather than attend theatres, with distance and time constraints cited more often than cost as decisive factors. Cinema has effectively become a seasonal, premium, event-based experience - concentrated in urban centres, dominated by festive periods, and driven by a narrow band of high-visibility releases.

Pay TV and Streaming Platforms

Nigeria is Africa's largest Pay TV and OTT market by population and by absolute subscriber potential. According to GMI, Nigeria's Pay TV and OTT market is valued at approximately USD 1.24 billion in 2025 and projected to reach USD 1.52 billion by 2030 at a compound annual growth rate of 5.9%. Within this market, the dynamics between Pay TV and OTT are diverging sharply. Pay TV, dominated by MultiChoice's DStv and GOtv, is growing at a modest 3.1% annually, constrained by currency pressure and mobile competition. OTT, by contrast, is expanding at 14.6% CAGR, with advertising-based video-on-demand (AVOD) and hybrid models leading growth. The total addressable OTT audience is estimated at approximately 2.28 million active users, of whom around 1.2 million are paying subscribers on SVOD. Across OTT platforms, Nigerian-first services account for roughly 48% of users, positioning domestic platforms as the dominant film distribution channels and reinforcing their growing influence over content commissioning, release strategies, and audience access within Nigeria's film and television ecosystem (See Table 12).

Subscription Type	Platforms examples	Total Users
SVOD	Showmax, Netflix, Amazon Prime, YouTube Premium, EbonyLife ON	1,198,000
TVOD	Circuits TV, Kava, MyMoviesAfrica	1,082,000
AVOD and FAST	Majorly, channels that are hosted on YouTube	0.5 M (12.8% of the population)[41]

Table 12 Breakdown of Nigeria OTT by Subscription Model - 2025 | Source: GMI

Within this landscape, platforms play distinct roles. Netflix and Amazon Prime, despite initial high-profile investments in Nigerian originals, have reduced local commissioning since the early 2020s. Licensing fees have reportedly declined from up to USD 1 million to a range of USD 250,000-400,000 per title. Before its closure, Showmax invested more consistently in Nigerian content, particularly series. Its closure in April 2026 leaves a dent in commissioning of originals and licensing of Nollywood titles. Indigenous platforms EbonyLife ON Plus, Kava (780,000), and Circuits TV (285,000) are increasingly significant, not just as distribution channels but as commissioning partners whose content priorities shape what gets made

Alongside these formal platforms, a far larger, creator-driven distribution layer operates on YouTube, which functions as the de facto mass-market VOD channel in Nigeria. YouTube's advertising data indicates a reach of approximately 30.5 million users in Nigeria by late 2025—equivalent to 12.8% of the total population and 28.1% of internet users. While this reflects advertising reach rather than total active users, it highlights the platform's significant scale and growing relevance as a film distribution channel, particularly in markets where affordability and accessibility shape viewing behaviour.

Within this context, leading Nollywood-focused YouTube channels now command audiences comparable to, or even exceeding, those of formal OTT platforms. For example, Ruth Kadiri TV leads the space with approximately 3.83 million subscribers, while Uchenna Mbunabo TV follows closely with around 3.67 million subscribers. Maurice Sam TV has built a substantial audience of roughly 2.55 million subscribers, while Omoni Oboli TV and other fastgrowing creator channels continue to scale rapidly, consistently attracting millions of views per release[42].

[41] DataReportal. The "state of digital" in Nigeria in 2026 - YouTube users in Nigeria. Link.
[42] YNaija (13 April 2026). Top 10 YouTube Nollywood Film Channels That We Can't Do Without. Link

These channels regularly generate multimillion view films within days of release, demonstrating both the scale and immediacy of digital audience engagement. Unlike subscription platforms, YouTube enables direct creator-to-audience distribution at minimal access cost, allowing filmmakers greater control over release timing, monetisation, and rights retention. In practice, this has established YouTube not merely as an alternative distribution outlet but as a parallel circulation ecosystem, driven by audience responsiveness, volume, and advertising based monetisation rather than traditional platform gatekeeping. Stakeholder feedback highlights YouTube as the most accessible and widely used channel, prized for its zero-subscription cost, direct creator-to-audience relationship, and democratic accessibility.

> YouTube is unbiased, they don't care, just make a good film and push to your audience… they don't need to know you to help you.
>
> *Film funder, Nigeria*

The consumption economics of the Nigerian digital video market are distinctive and consequential for revenue modelling. Nigerian audiences are willing to pay for content, but they pay frequently, flexibly, and in small increments, through prepaid vouchers, daily passes, and short-term bundles rather than long-term subscription commitments. This shift toward flexible, prepaid access is primarily operationalised through telecommunications giants who have pivoted into the roles of both distributor and facilitator. MTN operates as both a distributor and facilitator of film content in Nigeria, exemplified by MTN DoBox, a mobile movie platform developed with Do Media that offers Nigerian (Nollywood) films in various local languages. Etisalat (9mobile) primarily acts as a facilitator, offering cheaper data bundles that lower the cost barrier for audiences to access third-party streaming services, a model one distributor described as enabling "streaming bundles for films" in partnership with local streamers. This structure means audiences pay in small, frequent increments, shifting revenue toward cumulative, long-tail models and favouring episodic content, multi-window rights retention, and repeat viewing, while weakening one-off sales unless pricing compensates for limited downstream returns.

Alternative and Informal Distribution

Because formal cinema access is so restricted, alternative exhibition models are emerging to bridge the gap between high-end theatres and home-based viewing. Community cinemas and four walling (producers renting a cinema directly) have gained traction, notably through the work of Femi Adebayo, who is reported by stakeholders to have generated substantial revenue from community screenings. The government also indicated that they are promoting cottage cinemas, knock down structures that can be moved to different communities. Open air cinemas and village style viewing centres (often adapted from football viewing centres) were mentioned as informal but effective exhibition channels, especially in rural areas.

> Look at what Femi Adebayo has done recently with community cinemas and in less than a week he had generated almost half a billion Naira from communities.
>
> *Film funder, Nigeria*

At the far end of the distribution spectrum, informal circulation through piracy is pervasive and consequential. In the audience survey, among those who admitted using pirated websites and apps, 63% described these as their primary viewing method. The drivers are primarily economic and structural: 63% cite expensive subscription services, 58% point to limited variety on mainstream platforms, and 42% note that informal channels provide access to films not yet available officially. Some platforms have responded innovatively by converting former digital pirates into legitimate, commission-based marketers, a model that simultaneously reduces piracy and expands reach. Nevertheless, stakeholders estimate that piracy drains between 50% and 75% of potential industry revenue, representing one of the most significant single constraints on the sector's economic sustainability.

Market Intelligence and Revenue Streams

The ability to address these structural gaps, from infrastructure shortages to piracy, is currently hampered by a lack of centralized market intelligence. Data on box office performance remains fragmented, with no single authoritative source aggregating figures across Nigeria's cinema landscape. While the Cinema Exhibitors Association of Nigeria (CEAN) and ComScore were identified as the primary bodies collecting and releasing data, stakeholders noted that comprehensive, real-time data is often proprietary to exhibitors and not consistently shared with producers or the public.

Despite record-breaking hits like *A Tribe Called Judah* exceeding ₦2 billion, these successes are offset by lopsided revenue-sharing models. Cinemas often retain up to 60% of earnings, leaving producers to also cover publicity costs. Furthermore, annual admissions have struggled to return to pre-COVID levels, dropping from 5 million to between 2.7 and 3 million. This imbalance is mirrored in television, where licensing fees from local broadcasters remain disproportionately low relative to production costs.

> You find cinemas are giving you ridiculous percentages. I mean, you go to a cinema and they tell you that if we put your movie on our platform, we're taking 60% of the revenue. That's already ridiculous amount considering the amount used to produce it. Then from the remainder, you still have to be the one to spend money on publicizing the film.
>
> *Filmmaker, Nigeria*

Television and streaming revenue models remain inconsistent, with producers reporting that local licensing fees are often too low to cover production costs. While major Pay TV platforms like Africa Magic have significant reach, their subscriber data is not publicly shared, and free-to-air channels generate minimal direct income. According to a filmmaker, where Netflix previously could license a premium title for up to $1 million for global rights, they now only offer Africa rights for between $250,000 and $400,000, while YouTube provides transparency but low per-view returns. Consequently, filmmakers are turning to indigenous pay-per-view models, like Circuits TV, to secure sustainable profits.

> Most of the time, the offers you get from local TVs is so poor and so small. You will be struggling if you have to put your film on a local channel.
>
> *Film Distributor, Nigeria*

Ancillary revenue streams, including airlines, festivals, and international co-production treaties, also provide vital but unpredictable income for filmmakers. While airlines offer steady licensing fees and festivals serve as essential market entry points, specific revenue figures remain largely opaque. Stakeholders consistently identify this absence of centralized, reliable data as the primary barrier to industry growth. Without a unified data system, investors struggle to assess opportunities, and both private and government agencies remain constrained in their strategic planning and ability to demonstrate the sector's true economic impact.

Audience Development

Audience demographics in Nigeria are heavily segmented by age, income, and geography. Younger audiences (aged 15–35) show a marked preference for streaming due to convenience and affordability, while theatrical attendance is largely viewed as a premium social event for middle-to-upper-income urban residents. Marketing practices are overwhelmingly driven by celebrity power and social media amplification rather than structured, institutional campaigns. High-grossing films like A Tribe Called Judah achieve massive reach through the personal social media accounts of stars like Funke Akindele, while dedicated film pages often play a secondary role. User-generated content on platforms like TikTok has emerged as a critical driver of awareness, though it is rarely leveraged through formal marketing strategies. Cultural institutes and film festivals serve as alternative venues for arthouse and social impact films, providing a platform for titles that may not fit the commercial blockbuster mould. Despite these successes, significant barriers to audience growth remain, including high data costs for streaming and rising cinema ticket prices that exclude lower-income segments.

Nigerian Film Audience Segmentation

Audience Survey identifies four distinct audience segments with meaningfully different content preferences, platform habits, and barriers to local film consumption. The largest segment, Nollywood Loyalists (43% of the surveyed audience), is female-led and strongly oriented toward local content, with drama, comedy, and relatable storytelling at the centre of their viewing habits. Discovery is driven almost entirely by word-of-mouth and social media, and platform spending is relatively modest, but their support for the domestic industry is the highest of any segment and they are the primary drivers of organic promotional reach. Barriers for this group are primarily practical, poor connectivity and high subscription costs, rather than attitudinal.

African Story Seekers (24%) represent the most valuable segment for premium content distributors: they engage across multiple platforms, including YouTube, Netflix, and Showmax, are willing to pay for quality, and show strong interest in both local and pan-African storytelling. Their barriers are high subscription costs and insufficient awareness of available titles. Global Action Streamers (15%) lean heavily toward international content, particularly Hollywood, and are the most quality-sensitive of the segments. They will not engage with local films they perceive as technically inferior, and their discovery behaviour is driven by personalised recommendations and high-fidelity trailers. Hollywood-First Streamers (19%) have the lowest NPS for African films (-65%), the highest reliance on pirated content, and the deepest resistance to local production. Converting this segment requires event-style marketing that creates cultural fear of missing out on a scale sufficient to override habitual preferences (See Table 13).



Table 13 Nigeria film consumer segments | Source: Audience Survey

Dimension	Segment 1: Global Action Streamers	Segment 2: Nollywood Loyalist	Segment 3: African Story Seekers	Segment 4: Hollywood-First Streamers
Segment distribution	n = 45 (15%)	n = 130 (43%)	n = 72 (24%)	n = 57 (19%)
Gender	78% male	72% female	53% female and 47% males	70% male
Age distribution	25 - 44 years - 76%	25 - 44 years - 76%	25 - 44 years - 75%	25 - 44 years - 74%
Content preference	American -73%	Local films -89%	Local (98.6%) and African films (81%)	International films 74% with American films 81%
Top genres	Action (76%), Drama (62%) and Horror (60%)	Drama (80%), Comedy (62%) and Romcom (54%)	Drama (96%), Comedy (86%), Action (75%), Romcom (67%)	Romcom (83%), Horror (49%) and Drama (32%)
Primary device	Smartphone (81%) and Pay TV (66%)	Smartphone (82%) and Pay TV (56%)	Pay TV (88%) Smartphones/tablets (81%) and Smart TVs (58%)	Smartphone/Tablet (87%), Smart TV (25%) and Pay TV (33%)
Main platforms	YouTube - 82% and Netflix - 74%	YouTube - 89% and Netflix 36%	YouTube - 80% and Netflix 75%	Uses mainly and Showmax 46%
Fallback option	DVDs/USB sticks (33%) and Low-cost Pay TV (33%); Free-to-air TV (27%)	Low-cost Pay TV - (39%) and Free-to-air TV (33%)	Low-cost Pay TV (53%)	Low-cost TV pay (30%)
Main motivations	High quality narratives-82% and Entertainment (73%)	Entertainment (77%) and recommendations (63%)	High quality storytelling (88%), Cultural connection (85%) and Entertainment (60%)	Entertainment (66%), High quality storytelling (61%) and Educational / Learning about social issues (28%)
Key barriers to watching local films	Storylines that are not engaging (47%) Storylines that are not original (42%)	Poor connectivity (32%), High-cost subscription (28%) and story lines not engaging (21%)	High subscription cost (40%), lack of awareness (35%) and low production quality (33%)	Stories not engaging (38%), Prefer international content (30%) and Low production quality (28%)
Median monthly streaming spend	~$11.6	~$7	~$8	~$6
Avg. streaming platforms	2	1	2	1
Cinema willingness to pay	~$9	~$11	~$5.76	~$6.30
Net Promoter Score African films	-4%	78%	38%	-65%
Growth triggers	Better personalization and recommendations-54%	Better personalization and recommendations-38%	High quality originals (61%) and better personalization and recommendations (58%)	High quality originals (53%)

Role of Festivals, National Film Events, Campus Circuits, and Cultural Institutes

Film discovery in Nigeria is overwhelmingly driven by interpersonal trust and digital connectivity, with 82% of audiences relying on recommendations from friends and family, and 60% citing social media as a key discovery channel. Word-of-mouth dominance, paired with the high impact of social media, indicates that film awareness functions as social currency rather than a product of direct advertising. In response, festival organizers and cultural institutions have positioned their events as catalysts for organic word-of-mouth, creating communal viewing experiences that generate authentic peer recommendations. The Africa International Film Festival (AFRIFF), for example, makes screenings free and prioritizes audience engagement, turning attendees into active brand ambassadors within their personal networks. Campus circuits and cultural institutes similarly serve as launchpads for viral discovery, leveraging concentrated student populations and culturally aligned programming to spark conversations that extend far beyond the screening room. This bottom-up strategy built on community engagement and digital talkability, has proven more effective than high spend traditional media campaigns, which now show diminishing returns.

> Nigerians have this thing we call FOMO (Fear Of Missing Out). You don't want to be the one that somebody else is jesting about something. So, Nigerians will go and they'll watch a film that is popular. They might never know anything about the film, just that people are talking about it and they will go and watch.
>
> *Distributor, Nigeria*

Marketing and Promotion Practices

Social Media

Social media has become the dominant channel for film marketing. Platforms such as TikTok, Instagram, and Facebook serve as primary tools for reaching audiences, building anticipation, and driving conversions. Stakeholders describe a shift away from traditional billboard and radio advertising toward targeted digital campaigns that leverage influencers and user-generated content. *"Digital marketing has worked significantly… we use platform specific content to push these producers' teasers or thrillers in what that matters to them the most." Streaming executive, Nigeria*

Influencers

Influencers play a central role in this ecosystem. Some platforms have even converted former digital pirates into legitimate marketers who earn commissions for promotion. Stakeholders also indicated that performance marketing, including dancing and celebrity takeovers, has proven particularly effective at creating a sense of community around new releases.

> There's also meet and greet, the idea that people can come to the cinema and meet their favourite actor or actress. A lot of people that would not necessarily watch a film, but because say Funke Akindele or somebody is going to be there, they will come with their family members. And if those actors and actresses happen to be there on multiple days, they will come every day, take pictures, put it on their social media page.
>
> *Distributor, Nigeria*

Segment-Specific Marketing Effectiveness

Marketing impact varies across different audience segments based on their unique discovery habits. This study identifies four distinct groups that require tailored engagement strategies:

1. Nollywood loyalists: This female-led audience is the primary driver of organic growth. They respond most to relatable storytelling and community-based social media hype. Marketing success here depends on word-of-mouth and high-visibility social engagement.

2. African story seekers: This group is driven by story quality and platform visibility. They engage across multiple streaming services like Showmax and Netflix. Effective marketing for this segment requires highlighting "narrative depth" and ensuring the film is prominently featured on digital carousels.

3. Global action streamers: This segment is the most critical of local production. They respond to high-fidelity trailers and technical quality signals. To convert them, marketing must emphasize international-standard action tropes and professional cinematography to overcome their quality concerns.

4. Hollywood-first streamers: This group is the hardest to reach through formal channels due to a higher reliance on pirated content. They are motivated by high-intensity genres and global trends. Winning them over requires massive event-style digital marketing that creates a sense of cultural FOMO.

This suggests that a one-size-fits-all marketing budget is inefficient. Success requires a tiered allocation: use hype and influencers to secure the Family Streamer but invest in high-fidelity trailers and critical reviews to win over the Quality Seeker. For Distributors, the goal is to move the 47% of "Passive" and "Detractor" audiences toward becoming "Promoters" by matching the promotional channel to these specific loyalty triggers.

Barriers to Audience Growth for Local Films

The audience survey reported a strong (60%) preference for locally produced films. This is deeply rooted in cultural connection and a sense of identity that stakeholders across the industry consistently emphasised. This growing parity reflects both improved production quality and a conscious effort by filmmakers to tell stories that resonate with Nigerian audiences.

> People want to see more of themselves on screen. People want to see themselves as doctors, lawyers, you know, people living normal lives, tech guys and they want to see stories that they resonate with.
>
> *Festival organiser, Nigeria*

Films from other African countries (32%) occupy a smaller but notable space, yet qualitative accounts suggest that distribution barriers and language differences limit their reach. However, a growing interest in pan-African content, particularly at festivals and through co-productions was noted. This suggests that while regional content currently occupies a niche, there is untapped potential for greater cross-border exchange if structural barriers are addressed.

> We don't really have films outside of Nigeria, African countries getting distribution in Nigeria. So, that information on how we respond to African films in this local market is very, very slim and almost non-existent because we are not watching these films.
>
> *Filmmaker, Nigeria*

For the subset of the audience that avoids local or African content, the most critical issue is content quality rather than access; specifically, the perceived lack of originality in storytelling. Audience Survey shows that 28% of audiences cite unengaging storylines and 26% cite a lack of originality as barriers, outranking even the financial barriers of high subscription costs (25%) and poor connectivity (24%) (See Figure 21).

Financial barriers are increasingly significant and reflect the broader macroeconomic pressures bearing on Nigerian households. High subscription and pay-per-view costs are cited by 25% of audiences as a barrier to local content consumption, a marked increase from earlier periods. Data costs compound this problem. Connectivity issues affect nearly a quarter (25%) of viewers, and for those in areas without cinema infrastructure, mobile streaming is the only formal option. Yet, data remains prohibitively expensive for many, particularly in rural areas. These structural constraints are driving continued reliance on piracy and informal access channels that return nothing to creators.

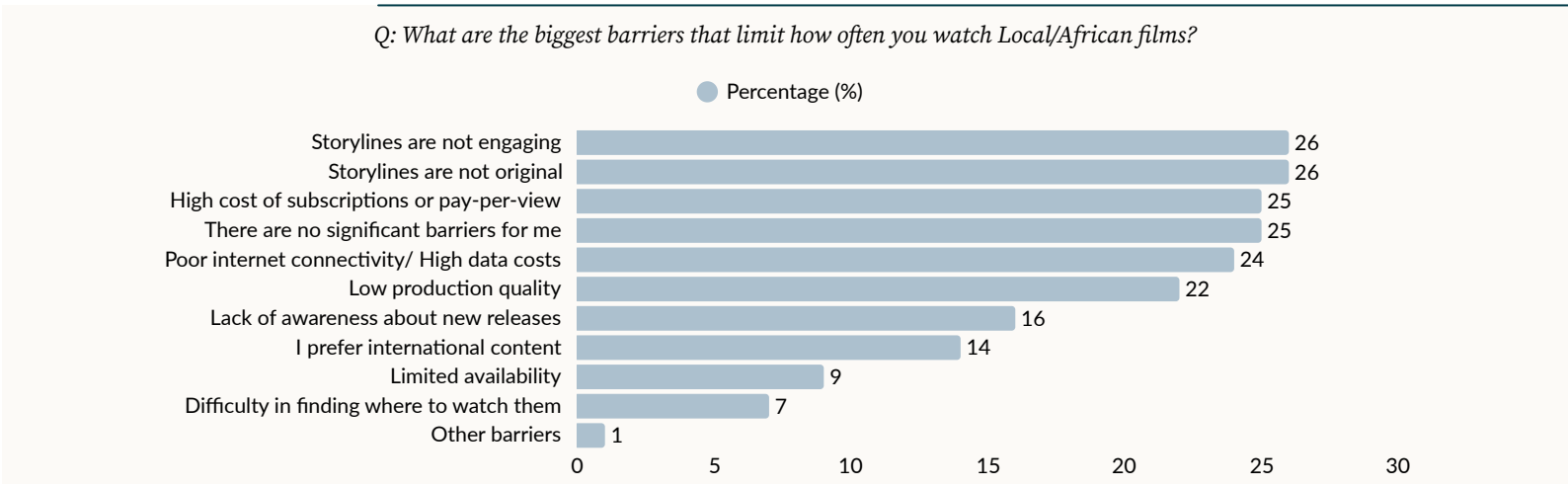


Figure 21 Barriers to watching Nigerian or African films | Source: Audience Survey

Stakeholders across the industry acknowledge this concern, noting that while technical production quality has improved markedly, narrative ambition has in many cases given way to formulaic commercial strategies. Below are some of the sentiments shared by the stakeholders.

> One thing that we have lost for the African film, Nigerian film specifically, is the originality. We're beginning to tell stories that are commercial… people tend to leave creativity or people tend to move from being creative in the sense of creating something amazing, something new to creating something adaptable, something commercial, something that can make money.
>
> *Filmmaker, Nigeria*

Nigerian audiences hold a largely positive and encouraging view of local content, with strong majorities acknowledging progress and expressing a willingness to support the industry financially in terms of paying to watch high quality content. An overwhelming 59% agree or strongly agree that production quality has improved significantly, while an even larger 64% feel that local films tell authentic and relatable stories, indicating that the creative direction is resonating with viewers on a cultural level. This positive sentiment translates into commercial potential, as 56% state they are willing to pay for high-quality local content.

However, these optimistic views are tempered by critical feedback regarding market positioning and narrative saturation. A significant 58% of respondents observe that local films often repeat the same stories, while 49% remain sceptical that local content can compete with international films in overall quality. This suggests that despite technical advancements, a persistent "prestige gap" and a perceived lack of creative variety continue to influence audience perceptions. The industry also faces a distinct disconnect in audience reach and visibility. While over half of respondents (53-54%) find it easy to locate and access films on mainstream platforms, a notable 45% agree that local films are not effectively promoted or marketed. This indicates that revenue potential is currently limited more by inconsistent marketing and narrative repetition than by a lack of interest or availability (See Figure 22).

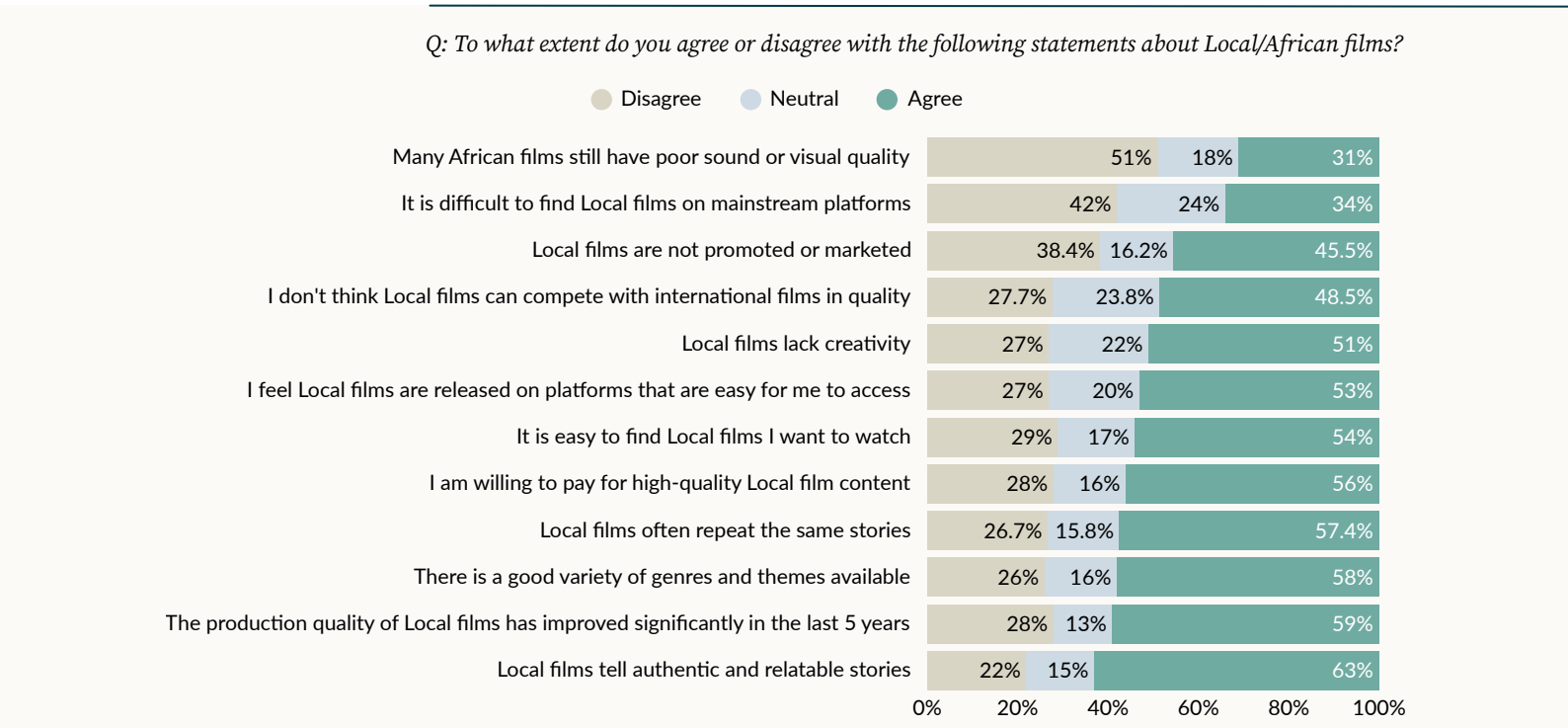


Figure 22 **Perceptions on local/African films in Nigeria | Source: Audience Survey**

The local film industry faces inconsistent progress. Audiences acknowledge better production quality, yet growth remains constrained. A disconnect exists in storytelling and visibility. Many viewers find storylines unoriginal or unengaging. Technical upgrades have not been matched by creative evolution. Poor marketing leaves quality productions invisible to target audiences. Financial barriers also act as critical gatekeepers. High subscription costs and data expenses prevent interest from turning into viewership. The industry has built respect for its craft. However, it must still solve challenges regarding relevance, reach, and affordability.

Audience Data Systems and Evidence Gaps

The absence of a centralised, reliable audience data system is one of the most consequential structural gaps in Nigeria's film ecosystem. Box office data is fragmented between CEAN and ComScore, with the latter serving as the industry standard for theatrical tracking but without a mandate to aggregate data across the full market. Streaming viewership data is almost entirely proprietary to the platforms that hold it and is not consistently shared with producers, distributors, or policymakers. Television licensing and ratings data are similarly opaque. The result is a sector in which investment decisions, production strategies, and policy interventions must be made on the basis of anecdote and approximation rather than evidence. Multiple stakeholders described this as the industry's single greatest constraint on attracting serious institutional investment.

Social Impact

Film in Nigeria is increasingly recognized as a potent tool for social advocacy and behaviour change, particularly in thematic areas such as democracy, gender rights, and migration. While most Nollywood productions focus on entertainment, a subset of films intentionally attaches social impact campaigns to their release strategies. Partnerships with NGOs and educational institutions allow these impact-driven films to maintain visibility long after their theatrical or platform premiere, facilitating sustained engagement that commercial releases often lack. Media monitoring of public discourse in 2025 indicates that over half of audience interactions centre on critiquing storytelling and production quality, though significant debates also occur regarding the industry's role in representing Nigerian identity on the global stage. Despite these qualitative insights, there is a notable lack of quantitative evidence measuring the long-term behaviour change resulting from specific film campaigns.

Defining Social Impact in Nigerian Film

Stakeholders across the Nigerian film industry defined social impact films as works that go beyond entertainment to drive measurable changes in attitudes, behaviours, or societal norms. A filmmaker described this approach: *"I produce to solve a problem. I don't produce to please people."* For many practitioners, social impact is achieved when films hold a mirror to society, enabling audiences to learn and unlearn practices by showing physical examples of what the repercussions of an action or a held notion in the country can have. A government official added that the goal is to *"recalibrate, to reconnect, to re-engineer people"*. This definition emphasises intentionality: social impact films are produced with the explicit purpose of influencing public consciousness, often in collaboration with NGOs, development agencies, or government ministries.

Audience Interest in Socially Relevant Storytelling

The Audience Survey reveals a profound preference for content that mirrors the socio-economic and personal realities of contemporary life. Most audiences (53%) are drawn to stories about young people pursuing education and better opportunities, while 51% gravitate toward narratives cantered on love, relationships, and health challenges. Resilience and structural critique also feature prominently, with audiences showing high interest in stories about strong women overcoming challenges (46%), power and corruption (45%), and survival and livelihood (45%). While themes like environmental issues (40%), mental well-being (35%), and intercultural coexistence (34%) see moderate interest, only 9% of the audience seeks films purely for entertainment, signalling a clear departure from escapism (See Figure 23).

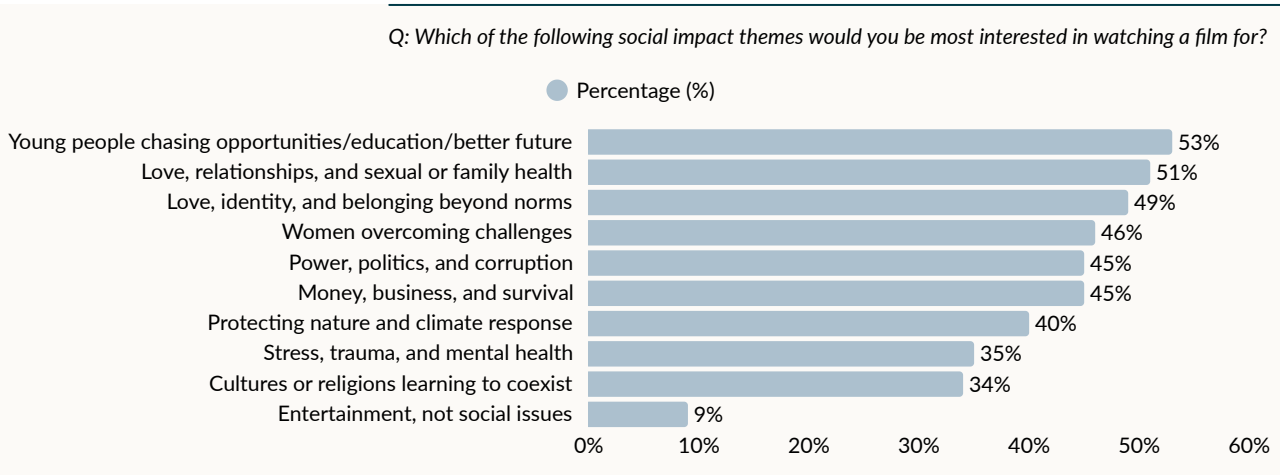


Figure 23 Social impact themes audiences want to watch in Nigeria | Source: Audience Survey

Stakeholders reinforce these figures, noting that the social commentary aspect is what truly resonates in the current national landscape. Filmmakers and funders observe that the japa (emigration) phenomenon and youth unemployment have become recurring motifs because they reflect the literal aspirations and anxieties of the viewers. Industry players emphasize that themes of governance and corruption are popular because they address the structural roots of societal crises. Furthermore, while health and environmental themes are less dominant in the commercial mainstream, they occupy a vital niche supported by development agencies and NGOs. These institutional partnerships successfully use film to reach audiences for social impact in ways traditional public awareness campaigns cannot.

> "...the social commentary aspect of it, what youths are going through unemployment, you know, child trafficking, crime in that aspect, social crime... those things tend to resonate now in the name because of... just because of the current landscape that we are as a country."
>
> *Filmmaker, Nigeria*

This suggests that for most Nigerian audiences, social relevance is not a niche preference but an integral expectation of the films they choose to watch.

Priority and Underexplored Social Impact Themes

Themes with Strong Audience Resonance and Institutional Support

Stakeholders identified a set of social impact themes that have consistently attracted audience interest and institutional backing. Health-related issues, particularly HIV/AIDS and family planning, were cited as areas where social impact films have achieved measurable outcomes. A filmmaker who worked on MTV Shuga described how the series, funded by the Gates Foundation and MTV Base, led to documented declines in STI rates and early marriage in Kenya and Nigeria. Child marriage and girl child education were also highlighted as recurring themes with strong resonance, especially when supported by NGOs and government ministries. A government official noted that the Ministry of Women's Affairs has funded films addressing these issues, using them as tools for public education. Drug abuse emerged as a pressing concern, with a funder observing that *"drugs are one of the biggest issues we have in Nigeria... it has led a lot of young people into crime."* Films tackling this theme have been supported by development agencies and community organisations seeking to reach at risk youth.

Underexplored Themes with High Growth Potential

Several themes were identified as having significant potential for growth but remain underexplored in Nigerian social impact cinema. Mental health and well being (cited by 35% of audiences as an area of interest) was noted as a gap, with stakeholders observing that stigma limits open discussion. A filmmaker explained: *"We don't have a culture that talks. We have a culture of shame."* Governance and corruption, while occasionally featured in commercial crime thrillers, remains underexplored in explicitly social impact formats. Intercultural and interreligious coexistence was also cited as underexplored, particularly in a country where religious and ethnic tensions persist. A festival organiser observed that "we need to figure out how to live together… things like that" through film.

Examples of Socially Impactful Films and Campaigns

MTV Shuga is the clearest model of socially impactful Nigerian film production and the one most frequently referenced by stakeholders across funding, production, and distribution. Produced by MTV Base in partnership with the Gates Foundation, the series addressed HIV/AIDS, family planning, and gender-based violence across multiple African countries, embedding behaviour-change frameworks and service hotlines directly into its narrative. Post-broadcast evaluation in Kenya and Nigeria documented significant declines in STI rates and rates of early marriage, demonstrating that entertainment-education, when properly designed and evaluated, can achieve measurable public health outcomes at scale.

Dry (2014), directed by Stephanie Okereke Linus, tackled child marriage and vesicovaginal fistula with a narrative precision and emotional intensity that gave it lasting advocacy value well beyond its theatrical run. The film travelled across African markets and gave its director a platform at the United Nations to advocate on the issue, illustrating how a focused social impact film can elevate a neglected health issue to international policy attention even without box office records.

No U-Turn, focused on the risks of irregular migration, employed community screenings with vernacular-language discussions to reach communities most at risk, partnering with NGOs to sustain engagement beyond the initial release.

The Women in Power Documentary, supported by development partners and screened at festivals and universities, has been incorporated into academic curricula and used in workshops to inspire young women toward political participation.

Government ministries have also commissioned social impact productions, such as a film on community mining risks by the Ministry of Mineral Resources, deployed through schools and community centres as public education tools. These films are typically screened in community centres, schools, and at public events, with the government providing logistical support and distribution.

Role of Public Broadcasters, NGOs, Donors, and Foundations in Impact-Oriented Content

Public broadcasters serve as critical platforms for distributing impact-oriented content, particularly through policy-mandated local content quotas and dedicated channels. The National Broadcasting Commission (NBC) enforces a requirement that broadcasters carry a specified percentage of local content, with the assumption that social impact films from local filmmakers will have a chance to reach wide audiences. Africa Magic, while a commercial operation, has played a significant role in showcasing social impact content through its various language channels (Yoruba, Hausa, Igbo), allowing messages to reach audiences in their native languages. Additionally, public service broadcasters such as NTA have been used by ministries to air educational films on health, agriculture, and governance, often in partnership with development agencies.

NGOs function as both funders and strategic co-designers of social impact productions, contributing expertise in behaviour change communication, community outreach, and evaluation. The Society for Family Health's partnership with MTV Shuga to embed service hotlines and action points directly into episodes demonstrates how NGO expertise can transform an entertainment product into an active behaviour-change intervention. Donors and philanthropic foundations provide the financial resources that make rigorous social impact production possible at scale. GIZ was cited by multiple filmmakers as a key funder of thematically oriented productions. The Ford Foundation has supported documentary distribution through university circuits and geopolitical zones. The Gates Foundation's funding of MTV Shuga is the model for donor-backed evaluation-from-the-outset production. The Tony Elumelu Foundation, while broader in mandate, supports media and entertainment entrepreneurs through non-refundable grants of USD 5,000 alongside structured mentorship.

> My movies or my films are mostly socially impact oriented. So, we're able to raise funds from NGOs like GIZ, for example, from development agencies because if it does hit their signals.
>
> *Filmmakers, Nigeria*

The most effective social impact initiatives often involve collaboration across all four actor types. The Circuits Creative Impact Fund for States exemplifies this: Benue State signed a memorandum of understanding (December 2025) for a USD 15 million fund to train young people, fund production of commercially viable content, and distribute that content through Circuits TV's platform. Similarly, the government's Creative Economy Development Fund, a USD 200 million initiative, involves collaboration between the Ministry of Arts and Culture, the Nigerian Film Corporation, and private banks to support content that aligns with national development goals. These collaborative models demonstrate that impact-oriented content thrives when funding, production expertise, distribution channels, and evaluation capacity are aligned across public, private, and non-profit actors.

Financing and Enabling Environment

The Nigerian film financing landscape is undergoing a premium pivot toward formalization, transitioning from informal loans to institutional equity. High-tier productions now attract asset managers projecting returns of 25-40%, supported by major initiatives like Afreximbank's USD 2 billion CANEX facility and Netflix's USD 23.6 million investment inNigeria between 2016 and 2022. On the regulatory side, the National Film and Video Censors Board (NFVCB) has shifted from a censorship to a classification model to foster creative freedom. Despite this progress, the industry remains severely hampered by intellectual property theft, with piracy draining an estimated 50-75% of potential revenue. While the government has proposed incentives, such as a two-year tax waiver for community cinema investors and plans to revitalize the National Film Institute, many of these policies are yet to be fully implemented on the ground.

Overview of Public, Private, and International Financing for Film

Public financing for Nigerian film comes through government agencies and development funds, though stakeholders consistently described it as insufficient relative to the industry's scale and potential. The Nigerian Film Corporation (NFC) provides technical assistance, training through the National Film Institute, and facilitates co-production treaties, but does not directly fund production at scale. The Creative Economy Development Fund, a USD 200 million initiative supported by the Ministry of Arts, Culture, and the Creative Economy, was cited as the most significant government financing vehicle. Stakeholders noted that accessing these funds requires robust business plans and distribution strategies, which many independent filmmakers lack. A government official added that the Bank of Industry (BoI) has also provided loans to the sector, though high interest rates remain a barrier.

Private financing dominates the Nigerian film industry, ranging from self-funding and family investments to structured equity partnerships and venture capital. In recent years, a model has emerged where actors and celebrities pool resources to co-produce films, sharing both risk and returns. Development agencies and international foundations also play a significant role: GIZ funds social impact films aligned with its thematic priorities, the Gates Foundation supported the health-focused series MTV Shuga, and the Ford Foundation has financed community screenings of socially relevant content. The Tony Elumelu Foundation provides non-refundable grants of USD 5,000 to media and entertainment entrepreneurs, though this is focused on business development rather than production budgets. Venture capital has also begun to enter the sector with some films funded by investors from the tech industry, finance, and banking. However, stakeholders emphasized that private financing is often patient capital, as returns are realized over years through multiple distribution windows.

International financing has played a transformative role, particularly through streaming platforms, development agencies, and co-production treaties. Netflix and Amazon initially invested heavily in Nigerian content, with licensing fees reportedly ranging from USD 200,000 to USD 400,000 per film. However, stakeholders noted that both platforms have reduced local commissioning in recent years. International foundations such as the Gates Foundation, and the Ford Foundation fund social impact films aligned with their thematic priorities such as health and environment and climate change.

The co-production treaties with South Africa, France, and Brazil provide access to international funding pools and distribution networks. These treaties enable Nigerian filmmakers to access grants and incentives from partner countries, though stakeholders noted that navigating the bureaucratic requirements remains a challenge.

More recently, there is also a growing wave of Nigerian filmmakers gaining direct access to UK and US creative ecosystems outside traditional treaty frameworks. For example, *My Father's Shadow* benefited from UK institutional support including the BFI and BBC, while *The Lady* premiered at Sundance with backing from US-facing independent financing channels. Similarly, *Clarissa* has secured US co-production partnerships with Neon involved in global sales and distribution. These developments suggest an expanding and more diversified international financing landscape for Nigerian cinema beyond formal co-production treaties.

Incentives, Grants, Tax Credits, Funds, and Co-Production Schemes

Tax Credits and Incentives

Unlike South Africa, which offers a 35% rebate for film productions, Nigeria currently lacks a formal tax incentive scheme for the film industry. The absence of such incentives means that Nigeria is less competitive in attracting foreign productions compared to countries with established rebate programmes. However, the government has proposed a 25% tax rebate for productions that meet certain criteria, though implementation remains pending.

Accessibility of Government Grants for Independent Filmmakers

Despite the existence of government funds, independent filmmakers consistently report significant barriers to accessing them. A key constraint is the requirement for formal business registration, comprehensive business plans, and distribution strategies, elements that many independent producers lack. The application processes are perceived as opaque and favour established production companies with connections to government officials. This sentiment was echoed across multiple interviews, with stakeholders describing a system where gatekeepers and personal networks determine access rather than merit or creativity. Moreover, the Creative Economy Development Fund, while substantial, will be distributed through a competitive process that many independents find inaccessible due to the complexity of application requirements.

Private Sector Grants and Alternative Funding

Private sector grants are often more accessible to independents due to their open application process and focus on early-stage entrepreneurs. The application process is perceived to be more transparent, and grants are disbursed directly to business accounts, with usually no equity taken. Similarly, development agencies fund social impact films through open calls, though these are often tied to specific thematic areas. These alternative sources provide a lifeline for independents, but they are not sufficient to meet the sector's overall financing needs.

Key Constraints and Promising Innovations: Financing and Enabling Environment

Key Constraints

Financing gaps persist due to investor hesitancy, unreliable data, and the lack of patient capital. Commercial lenders require evidence of returns that the industry cannot consistently provide, and currency volatility further undermines budget predictability. Policy gaps include the absence of a formal tax incentive scheme and a fragmented regulatory landscape. A government official noted that the enabling law has never been amended in nearly 50 years. Data opacity, no centralised system for box office, viewership, or industry metrics, further deters investment and strategic planning.

> If you don't have your structure in place, even if your pitch deck is right, it's not going to be an easy road.
>
> *Film Funder*

Promising Innovations

New financing models, such as pay-per-view revenue sharing, are coming up thus allowing producers to earn monthly payments based on sustained viewership, creating recurring income beyond one-off licensing fees. Co-production treaties with South Africa, France and Brazil enable Nigerian filmmakers to access international funding pools and tax incentives. The Creative Economy Development Fund signals increased public investment, though accessibility for independents remains uneven. The Tony Elumelu Foundation provides accessible non-refundable grants to media entrepreneurs alongside training.

Proposed regulatory reforms, including the Motion Picture Practitioners' Council bill and a 25% tax rebate, aim to professionalise the sector and create a more transparent enabling environment. Capacity building institutions such as the MultiChoice Talent Factory, EbonyLife Academy, Africa International Film Festival (AFRIFF), and National Film Institute are developing the skilled workforce needed to attract and manage investment. Collectively, these innovations address longstanding constraints, though their full impact depends on sustained implementation and broader accessibility.

Film Ecosystem Development

Capacity Building as an Enabler of Financing

Training institutions are critical to creating a pipeline of skilled practitioners capable of attracting and managing investment. Other than the MultiChoice Talent Factory (MTF), the National Film Institute in Jos offers professional diploma programmes that have produced many of the industry's technical crew. A filmmaker who trained at the institute noted that such formal training is essential for professionalising the workforce and meeting the quality standards demanded by international platforms. For funders and investors, a trained workforce reduces risk and increases confidence in the viability of projects.

Collaborations as Pathways to Financing

Collaborative models are enabling independent filmmakers to pool resources and access funding that would otherwise be out of reach. A filmmaker described the emerging model of actor-led co-productions as noted in the Ginger film. This structure allows producers to share both risk and returns, making projects more attractive to investors. A festival organiser noted that collaborations across the continent such as Nigerian-Kenyan co-productions, open doors to regional funding pools and distribution networks. The Africa International Film Festival (AFRIFF) serves as a networking hub where filmmakers connect with potential collaborators and funders, with the organiser describing it as "a beacon for the rest of Africa" where international partners come to identify talent.

Mentorships as Investment Readiness

Structured mentorship programmes are helping emerging filmmakers navigate the complexities of financing and distribution. The Tony Elumelu Foundation pairs its grant recipients with mentors who are experienced entrepreneurs and industry executives. A filmmaker who benefited from such mentorship noted that it provided crucial guidance on structuring a business, negotiating contracts, and developing viable distribution strategy skills that are essential for attracting investment. The MultiChoice Talent Factory also incorporates mentorship, connecting students with established directors and producers who provide practical guidance on navigating the industry.

Strengthening the Enabling Environment

These capacity-building, collaboration, and mentorship initiatives collectively strengthen the enabling environment by professionalising the workforce, creating transparent networks, and demonstrating the sector's bankability. A funder observed that investors are more willing to back projects when they see that the creative team has undergone formal training and has access to industry mentors. A government official added that the proposed Motion Picture Practitioners' Council would formalise these structures, creating a registry of trained practitioners and accredited mentors that could serve as a quality signal to investors. Together, these elements are gradually addressing the structural gaps that have historically constrained financing in Nigeria's film industry.



Country-Specific Priorities and Opportunities

Strategic priorities for Nigeria emerge from a consistent convergence of stakeholder evidence across distribution, audience development, social impact, and financing. The overarching challenge is structural: a sector of extraordinary cultural and economic potential held back by fragmented oversight, inadequate infrastructure, unenforceable intellectual property rights, and a chronic lack of reliable market data. The priority opportunities described below are grounded in this diagnosis and oriented toward interventions that are realistic, evidence-based, and achievable with modest public investment and credible co-financing from the private sector and development partners.

Priority Opportunities in Distribution

Nigeria's distribution landscape presents a set of distinct, addressable gaps, each of which corresponds to a concrete opportunity for investment or policy intervention.

- Community cinemas, mobile knockdown models, and university circuits can reach underserved audiences, but their viability depends on sponsorship and event-based monetisation, such as brand partnerships, ticketed events, or donor funding, rather than functioning as standalone alternatives to formal cinema.
- Establishing a mandatory central repository for box office and streaming performance data is essential to resolving the data gap. Access to government grants and tax incentives should be made conditional on the submission of verifiable performance metrics.
- There is a significant opportunity to scale pay-per-view and hybrid revenue models, as evidenced by the success of Circuits TV and four-walling community model, which have generated substantial revenue.
- Animation, children's content, horror, documentaries, historical epics, and biopics remain under-produced despite strong audience interest and international demand. AI tools are reducing cost barriers, especially for animation and visual effects. However, scaling these genres requires more than affordable technology as it demands strong storytelling and taste-making, robust intellectual property development, and access to long-term patient capital. Without these elements, lower production costs alone will not translate into sustainable growth or global competitiveness.

> There's a lot of talk about anime, so the Japanese government has engaged us continuously during the festival. But now with AI, anime is going to get a lot easier to make.
>
> *Festival organiser*

- English dominates distribution, while Igbo and other minority-language films remain marginal despite NFVCB incentives. Subtitling into French and Portuguese, and dubbing into African languages, provide low-cost routes to expand into regional markets, supported by AfCFTA frameworks.

> We encourage them to produce films in their own language, bring it to us and we select the best. We encourage them by giving them awards like maybe even the cash gifts of 5 million, 10 million to help them in their production.
>
> *Streaming Platform*

- Mobile-first viewing is driving demand for vertical formats, while AI-assisted production is lowering technical barriers. Co-production treaties with countries such as South Africa, France, and Brazil offer access to funding, expertise, and wider distribution networks. However, these treaties must move beyond symbolism to unlock actual distribution channels, tax incentives, and financing as announcements are often made without sufficient financial backing or implementation frameworks. Without tangible operational support, the benefits of such treaties remain limited for independent filmmakers.

Priority Opportunities in Audience Development

- Universities represent a high-density hub for audience engagement. Tailored offers, such as affordably priced student streaming bundles, can convert large student populations into consistent consumers.
- Regional film festivals, such as AFRIFF, prove effective in building brand ambassadors through free screenings and international networking. Scaling this requires moving toward sustainable revenue models, including corporate sponsorship and hybrid ticketing.
- The rise of vertical films optimized for mobile consumption aligns with the viewing habits of younger audiences, providing a low-barrier entry point for audience growth.
- There is an underexploited appetite for children's content, animation (supported by AI cost-reductions), historical epics, and documentaries, which are particularly attractive to international buyers.

Priority Opportunities in Social Impact

- Regional hubs are ideal for addressing social issues through locally relevant storytelling. The **USD 15 million** Benue State agreement for the Circuits Creative Impact Fund, focusing on youth training and commercially viable social content, was announced in December 2025 (memorandum of understanding); it is too early to assess its results
- Independent filmmakers can leverage existing support from development agencies like GIZ and the Ford Foundation, which already fund social impact content.
- A key opportunity exists in developing robust distribution pathways and evaluation frameworks to measure the effectiveness of social impact films, ensuring they remain independent of government advertising.

Scaling Potential Recommendations

Scaling Nigeria's regional film hubs effectively requires a coordinated approach involving federal and state governments, private investors, and development partners working in concert. Stakeholders across the ecosystem identify three mutually reinforcing priorities that together create the enabling conditions for sustainable growth.

The first is passing the Motion Picture Practitioners' Council and Nigerian Film Commission bills. These would provide the regulatory framework to formalise regional production and distribution activities, register practitioners, set quality standards, and attract investment at scale. The data transparency mechanisms that would follow from this legislation, a certified central database, mandatory reporting by exhibitors and platforms, would make the Nigerian film market legible to investors and policymakers for the first time, addressing a gap that a government official described as one of the biggest problems we have in this country.

The second is prioritising infrastructure investment at the state level, with a focus on film villages, sound stages, and community exhibition facilities in underserved regions. Tax incentives and co-production treaties with South Africa, France, and Brazil should be leveraged to encourage location shooting and post-production in regional centres to create film pipeline to be utilized by the cinemas. Private investors willing to finance community cinema infrastructure should be offered tax credits or accelerated depreciation on equipment, with government loan guarantees used to convert commercially viable but high-perceived-risk propositions into fundable opportunities.

The third priority is to establish partnership models between state governments, private platforms, and development agencies that combine training, content funding, and distribution into a single integrated structure. Co-production treaties with South Africa, France, and Brazil, alongside AfCFTA digital asset distribution mechanisms, should be activated to extend the reach of regionally produced content beyond Nigeria’s borders. Such partnerships enable regional hubs to move beyond isolated production activities toward commercially connected ecosystems where content is financed, made, and distributed within a coordinated framework

Read the full Nigeria Country Report





Rwanda

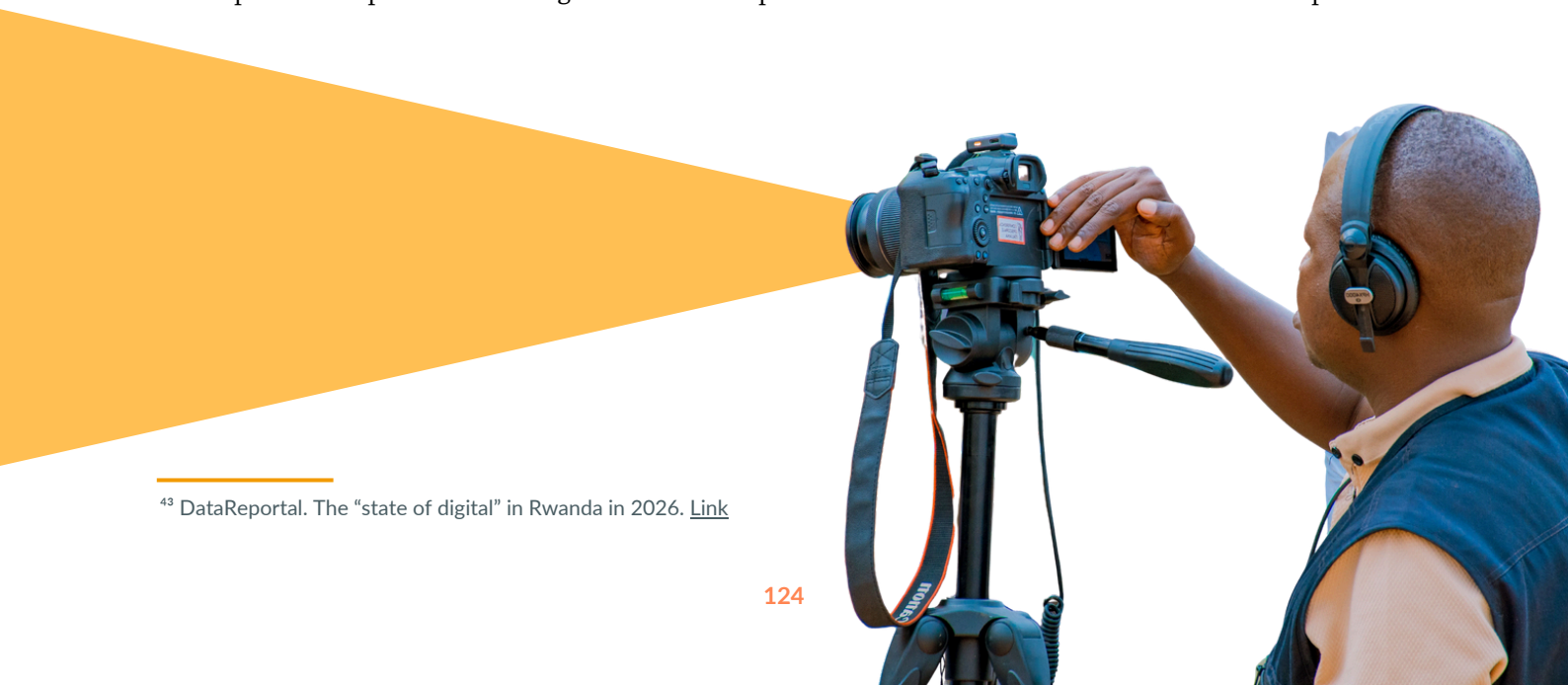
Country Context

The Rwandan film industry is currently undergoing a period of significant structural evolution. With a population of approximately 14.4 million and a rapidly growing digital landscape, evidenced by 13.3 million cellular connections and an internet penetration rate of 34.2% as of 2025[43], the country offers a burgeoning market for creative content. Historically, the formal local industry began to take shape around 1998 with the production of *100 Days*, and it has since matured into a sector that contributes an estimated 5% to the national GDP and supports roughly 7,000 direct and indirect jobs. The institutional landscape is anchored by the Rwanda Film Office (RFO), established in 2019 under the Rwanda Development Board (RDB). Despite these advancements, the industry remains characterised by a relatively low production volume compared to regional hubs, though it is currently experiencing a "historic moment" with an unprecedented surge in feature film productions in late 2025.

Rwanda's cinema has demonstrated a capacity to engage with the country's most difficult histories in ways that resonate internationally. As discussed in Chapter Two (Section 2.4.3), Marie-Clémentine Dusabejambo's *Ben'Imana* (2026) — the first Rwandan film to premiere in the Cannes Official Selection, where it won the Caméra d'Or — illustrates how domestically rooted storytelling, grounded in the lived experience of the Gacaca tribunal process, can achieve both cultural recognition and social purpose at a global scale.

Overview of National Film Ecosystem: Key Milestones and Institutional Landscape

The history of Rwanda's film ecosystem is described as being in an emerging stage, with formal production largely beginning after the 1994 genocide against the Tutsi. Another critical development in Rwanda's film industry was the shift from physical media to digital distribution, accelerated by COVID-19, which expanded access and transformed consumption patterns. The launch of Zacu TV in 2017 as a VOD platform and its evolution into a 100% Kinyarwanda cable channel by 2022 marked a turning point for local distribution. Institutionally, the establishment of the Rwanda Film Office (RFO) in 2019 provided a dedicated structure to support industry growth, reflecting recognised opportunities in the sector. More recently, the 2024 IP law further details the protections for digital works, alongside ongoing efforts to formalise Collective Management Organisations for improved royalty systems. The establishment of the Ministry of Youth and Arts signalled a heightened government commitment to structuring the sector. The ecosystem also saw the growth of private entities and especially collectives which are championing the development and professionalizing the chain from production to distribution and audience development.



[43] DataReportal. The "state of digital" in Rwanda in 2026. Link

Film Distribution

Distribution Overview

The distribution landscape in Rwanda is defined by a transition from theatrical exhibition to digital and mobile-first consumption. The theatrical sector has faced challenges, notably the closure of the Canal Olympia Rebero multiplex in late 2025, once the country's primary screening venue, largely due to high operating costs and streaming dominance. Other commercial venues, including Century Cinema, were closed down as well, while Ciné Mayaka still functions and L'Espace and Cine Junction are being used for festivals. In contrast, digital distribution is thriving, with YouTube and local Zacu TV becoming primary audience channels. Stakeholder insights indicate Zacu TV, acquired by Canal+ in 2022, is a dominant player focusing on Kinyarwanda content and digital acquisition, while the Rwanda Broadcasting Agency (RBA) supports local productions through broadcast contracts. The closure of Canal Olympia left almost no commercial cinemas in operation. Global platforms such as Netflix and Amazon Prime remain limited to higher-income users and rarely commission Rwandan content. International deals through entities such as Orange Studio (Studio Canal) and Sudu Connexion sometimes result in the loss of content ownership. Sudu Connexion is one of a small number of distributors operating at pan-African scale (see the discussion of pan-African distribution capacity in Section 2.5.1); this study did not extend to a detailed profile of individual distributors' deal terms or track record, so the ownership-related caution above should be read as one data point rather than a general assessment of the company. Filmmakers also use alternative channels such as RwandAir in-flight content, university licensing, and youth centre screenings, with promotion largely driven by social media influencers and radio campaigns.

Digital platforms: Pay TV and OTT

Rwanda represents one of the smallest but most structurally instructive Pay TV and OTT markets on the continent. In value terms, the country accounts for a marginal share of regional Pay TV and OTT revenues, yet it exemplifies several continent-wide dynamics: low absolute purchasing power, rapid growth in mobile connectivity, high price sensitivity, and strong latent demand for video content outside traditional cinema infrastructure. According to the *Sub-Saharan Africa Pay TV and OTT Market* report, Rwanda's video consumption market is overwhelmingly mobile-first, with Pay TV penetration constrained by household income levels and OTT adoption shaped by prepaid data economics rather than subscription depth. While Pay TV remains present, particularly through satellite offerings, growth momentum has shifted decisively toward OTT and online video, especially ad-supported and hybrid models. Unlike larger markets such as Nigeria, South Africa, or Kenya, Rwanda does not exhibit platform stacking behaviour at scale. Instead, households and individuals tend to rotate between services or rely on free and semi-free access points. This has significant implications for content monetisation and sustainable local commissioning.



Pay TV: Stable but Structurally Flat

Pay TV in Rwanda is characterised by low growth and gradual structural stagnation over the last years. Satellite Pay TV remains the dominant mode within the segment, reflecting limited fixed broadband penetration and historical satellite infrastructure. However, the market is mainly sustained by entry-level packages, with limited uptake of premium tiers. Key constraints include affordability ceilings, where monthly subscriptions compete with essential household expenditure, limited localisation leverage where regional and international channels dominate, and weak rural and peri-urban relevance with urban concentration. As a result, Pay TV functions more as a defensive, cashflow-oriented business than a growth engine. For content producers, it offers reach and branding but limited upside in licence fees or commissioning budgets. As of June 2025, there were 543,293 registered subscribers, of which 123,736 were active (22.8%), with Canal+ Rwanda Ltd holding 76% of the active market (See Table 14).

Pay TV	Registered Subscribers	Active Subscribers	Market Share - Active subscribers
Azam Media Rwanda	15,187	1,258	1%
Canal+ Rwanda Ltd	224,143	93,888	76%
Star Africa Media	293,486	19,367	16%
Tele 10 Ltd	10,477	9,223	7%
Total	**543,293**	**123,736**	

Table 14 Number of Pay TV subscribers as of June 2025 in Rwanda | Source: ICT Operator reports

By June 2025, the number of Pay TV active subscribers had decreased from 141,154 (June 2024) to 123,736 subscribers, representing a reduction of 12.3%.

OTT and Online Video: Growth Without Monetisation Depth

OTT video consumption in Rwanda is expanding faster than Pay TV but from a low base, with the GMI report highlighting a price sensitive market where growth is constrained more by willingness and ability to pay than availability. The market is characterised by prepaid dominance, low ARPU, mobile optimisation, and high churn driven by pricing, limited exclusive content, and data costs, with SVOD services used as supplementary entertainment while AVOD and free platforms align more closely with actual consumption behaviour. Content libraries reflect these dynamics, with global SVOD players such as Netflix and Prime Video offering over 98% international content and negligible local representation, and Showmax previously playing a limited local role with 0.3% local content, while domestic platforms like Zacu TV and MTN Y'ello TV dominate local content provision with over 87% Rwandan productions, supported by regional platforms such as MyMoviesAfrica facilitating wider African content circulation (See Table 15).

Platform Name	Active Subs (K)	Total Hours	Local			Regional			International		
			Titles	Hrs.	%	Titles	Hrs.	%	Titles	Hrs.	%
Showmax	45	5,490	8	16	0.3	280	560	10.2	4,012	4,914	89.5
Netflix	28	15,000	4	8	0.1	95	190	1.3	7,401	14,802	98.6
Y'ello TV MTN	85	254	62	186	87.3	18	54	10.1	5	14	2.6
Prime Video	6	12,200	2	4	0.03	48	96	0.8	6,050	12,100	99.2
YouTube Premium	8	-	-	-	-	-	-	-	-	-	-
Zacu TV	65	281	82	246	91.1	10	30	7.4	3	5	1.5
MyMoviesAfrica	18	231	12	24	10.4	78	156	67.5	5	51	22.1

Table 15 Content library breakdown of Rwandan film platforms - 2025 | Source: GMI

FAST, AVOD, and the Importance of Economic Fit

One of the most salient insights from the Africa market analysis is the white space for FAST and AVOD models in markets like Rwanda. These models address the central constraint of affordability while enabling scale audience aggregation. Rwanda's characteristics including high mobile penetration, growing social media usage, limited cinema access, and low tolerance for recurring payments make it structurally well-suited for: free, ad supported streaming, local-language and regional content channels and lightweight applications optimised for low data usage. However, advertising yield remains low, which places pressure on production economics. Without aggregation at a regional or pan-African level, Rwanda-specific AVOD channels struggle to generate sufficient revenue to fully finance original long-form content. This reinforces a broader continental pattern: the platforms that best match African consumer economics are those that currently capture the least value per viewer, while premium SVOD and Pay TV models capture more value but reach narrower audiences.

Pay TV and OTT Revenue

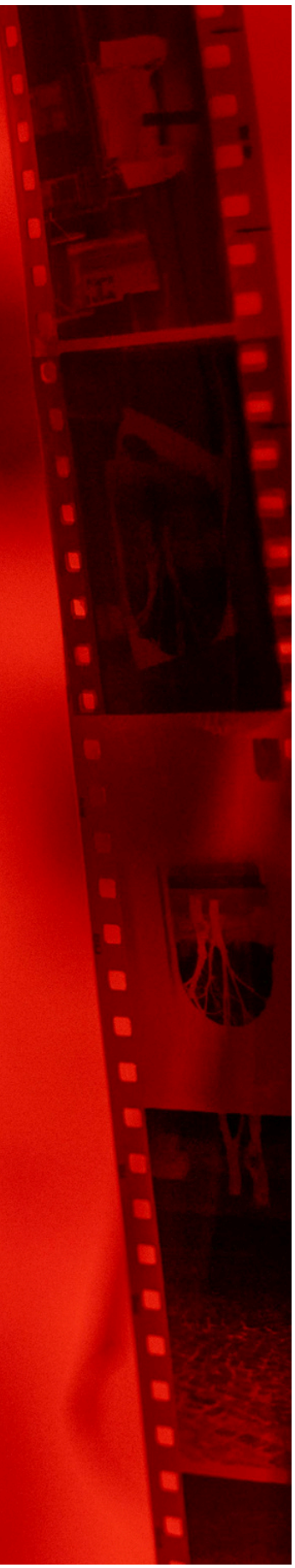
GMI projects that Rwanda's Pay TV and OTT market is growing from USD 69.1 million (2022) to USD 94.4 million (2030) at 4.9% CAGR, though the trajectory is uneven for filmmakers. Pay TV still dominates at nearly 78% of revenue by 2025 but remains the slowest-growing segment (3.2% CAGR), driven mainly by satellite TV. It offers stable but low upside returns, with predictable licensing revenues, limited commissioning budgets, and a weak appetite for high-risk independent films. The structure favours externally acquired, repeatable content over local production, positioning Pay TV as a downstream monetisation layer rather than a growth engine.

OTT concentrates incremental growth, rising from USD 12.2 million to USD 20.5 million (10.4% CAGR), over three times Pay TV growth. Expansion is driven not only by SVOD constraints but also by AVOD, FAST, TVOD, and hybrid models growing at CAGRs ranging from high single to low double digits. This reflects a shift to multiwindow monetisation across licensing, advertising-supported views, and transactional access, though revenues remain fragmented and backended, requiring stronger rights management and longer recoupment horizons.

Prepaid models account for nearly 70% of revenue by 2025, reflecting the willingness to pay with demand for flexibility. Movies and entertainment grow faster than the market (5.3% CAGR), while regional content outperforms international (5.1% vs. 4.5%). These dynamics are reflected in telco bundles, AVOD platforms like YouTube, and broadcaster streaming services, with sustainability depending on rights retention, library value, serialisation, and platform-agnostic distribution.

Policy and Regulatory Environment Impacting Distribution

The stakeholders highlighted the Rwanda policy and regulatory environment being governed by IP protection and licensing requirements from the Rwanda Culture and Museum Institution, the City of Kigali and the aviation authorities for drone usage. An official from a government entity remarked that regulations existed to prevent content that might negatively influence society or mislead the public. Stakeholders pointed out that enforceable local film quotas in commercial cinemas were lacking. Tax incentives existed for large-scale international productions but were inaccessible to local film productions.



Data on Reach and Revenues Where Available

A significant data constraint exists across Rwanda's film exhibition and distribution ecosystem, particularly regarding theatrical performance. Recorded box office data for cinema releases is largely inaccessible or incomplete, in part due to distributor transitions, informal exhibition arrangements, and the absence of mandatory reporting requirements for cinemas. While third-party market intelligence providers such as GMI publish estimates of aggregate Pay TV and OTT revenues and subscriber numbers, this data is modelled rather than transaction-based and does not capture film-level theatrical grosses or title-specific revenue performance. As such, although useful for market sizing and trend analysis, third-party data does not substitute for a functioning box office or audience measurement system.

By contrast, digital platforms, most notably YouTube, provide transparent, real-time dashboard data on views, audience geography, and demographic breakdowns, making them one of the few distribution channels where creators can directly observe reach and engagement. Audience research bodies such as the RBA conduct periodic surveys to assess programme popularity, with local series such as *City Maid* and *Indoto* consistently ranking among the top-viewed titles. However, these rankings are not linked to publicly available revenue data, as Rwanda lacks a centralised system for tracking Pay TV viewership or advertising yield. Filmmakers also report difficulty accessing data from distributors such as Canal+, reinforcing the absence of an integrated audience and revenue measurement infrastructure for film and television. This structural opacity leaves policymakers, funders, and creators reliant on proxy indicators and qualitative assessments rather than verifiable performance data, constraining evidence-based decision-making and investment planning.

Gaps and Opportunities (Underserved Regions, Genres, Languages)

Geographical concentration and underserved markets: The industry remains heavily concentrated in Kigali, creating access gaps for audiences in secondary cities and rural areas. While demand is high outside the capital, lack of affordable screening infrastructure pushes audiences to rely on television and mobile internet. Some stakeholders noted rural audiences may consume even more content than urban populations, indicating an underdeveloped exhibition market. Digital access as default rather than choice: In the absence of cinemas, digital platforms particularly YouTube, have become the primary mode of access due to convenience and affordability, often substituting rather than complementing formal exhibition infrastructure.

Language as a strength and barrier: Language emerged as a dual-edged factor in audience development. Content produced in Kinyarwanda was highly relatable and effective in driving local engagement but limited cross-border distribution and international market access. Key informants identified translation and dubbing into Swahili and English as an opportunity to scale regional reach across East Africa. Expanding multilingual accessibility was therefore seen as a critical strategy for unlocking audience growth and revenue diversification.

Film Distribution Through Cinemas

Cinema access in Rwanda remains limited. Among audiences who reported attending cinemas, mainstream cinema venues were cited by 68%, with stakeholders reporting a total of 3, of which 1 was functioning. Makeshift estate cinema rooms were mentioned by 44%. The presence of these informal screening spaces suggests that audiences may rely on alternative venues when formal cinema infrastructure is scarce. Audiences reported a median of two cinema visits in the past twelve months. Reported visits range from one to eight per year. Spending patterns, on the other hand, indicate moderate ticket costs relative to income levels. The median amount spent per cinema visit is RWF 10,084 (USD 6.90), with values ranging from RWF 5,042 (USD 3.45) to RWF 40,337 (USD 27.60).

The most cited barrier for cinema attendance is the absence of nearby venues, mentioned by 52% of audiences, highlighting limited physical access. Ticket prices are also a key concern, with 39% indicating they are expensive, suggesting that both availability and affordability shape attendance decisions. Other barriers are less prominent but reflect practical constraints, with 19% reporting lack of time and 13% preferring to watch films on other platforms at their convenience, while very few cited issues such as poor cinema quality, piracy, or lack of awareness. Taken together, these responses suggest cinema attendance occurs occasionally rather than frequently. Cinema attendance is influenced less by lack of interest and more by infrastructure and convenience. This shift toward home-based viewing also creates a vacuum filled by informal distribution networks. When formal channels fail to meet demand for specific titles or affordable price points, the market pivots to local intermediaries.

Informal distribution and piracy

Reflecting this move toward alternative access points, a segment of the audience utilizes informal distribution channels as a primary or fallback option. While only a small proportion of respondents (4%) explicitly confirmed using pirated digital sources, these platforms act as critical gap-fillers in the ecosystem. They often provide access to films that may not be available on mainstream platforms or that appear on official platforms later. In markets where formal distribution channels are limited, such platforms can become an alternative pathway for audiences seeking specific titles.

Physical rental/selling sources also appear as a film access platform, mentioned by 23% of film audiences. The leading channels of renting/selling films are the local video shops (91%), suggesting that offline circulation continues to exist alongside digital distribution. Other channels include through friends or informal sellers (18%), digital rentals (18%) and street vendors at 9%. These findings suggest that unlocking potential is not just about building more cinemas or launching new apps. It requires acknowledging that informal vendors are highly agile, demand-driven intermediaries. Instead of viewing them solely as a threat (piracy), there is an opportunity to explore how these local video shops and informal networks could be formalized or leveraged as legitimate last-mile touchpoints to reach the price-sensitive and underserved mass market.

Festivals and Community Screenings as Alternative Distribution Channels

Festival and community screenings appear rarely in the survey responses. Only two respondents reported attending such events. While these screenings can play a role in cultural programming and industry networking, the survey suggests that they currently reach only a small portion of the audience. Reported spending for these events is also limited, with audiences indicating a median cost of USD 3.45 per event. These figures suggest that festivals and community screenings operate as niche exhibition spaces rather than large-scale distribution channels for audiences. Festivals such as Kigali Cine Junction, Mashariki and the Rwanda International Movie Festival were instrumental in audience development by showcasing local work and creating a cinema-going culture. Cultural institutes like the Goethe-Institut provided essential screening spaces and facilitated focus group discussions to understand audience tastes. These events allowed filmmakers to interact directly with audiences, though their reach was often limited to urban groups.



Audience Development

Audience development in Rwanda is currently shaped by a young, urban, and tech-savvy demographic that predominantly consumes content via mobile devices. While there is a documented demand for Rwandan stories, local content often struggles to compete with the availability and marketing of global Hollywood and Indian productions. Marketing practices are generally inconsistent and heavily reliant on international distribution partners or the festival circuit rather than sustained, production-owned engagement. Among the festivals the Kigali Cine Junction plays a vital role in building audience appreciation. The low number of dedicated social media channels represents a significant missed opportunity for fostering long-term audience loyalty and community building.

Demographic Profile of Rwanda Film Viewers

The Rwanda audience survey identifies three distinct audience segments shaped by content preference, platform use, and viewing context. Local Loyalists (42%) show a strong commitment to African storytelling, with 99% preferring local content; they are predominantly male (62%) and older (56% aged 35–54) and mainly watch via YouTube (93%) and Pay TV (49%) on shared Smart TVs, driven by cultural connection (75%) but constrained by high subscription costs. Value-Seeking Family Streamers (36%) are defined by affordability and household viewing, relying heavily on Canal+ Online (90%) and Smart TVs (75%), with preferences for Romantic Comedy (73%) and Comedy (65%), strong price sensitivity (68%), and the highest NPS (+42%), often waiting for content within existing subscriptions rather than paying extra. Global Digital Enthusiasts (22%) are younger and male-dominated (81% male, 58% aged 25–34), oriented toward international content, especially Action (86%), with viewing centred on Netflix (78%) via smartphones and tablets (58%); local content is less important, reflected in an NPS of -67%, and engagement with African films depends on improved production quality and better platform visibility (See Table 16).

> The main audience right now it's going to be Gen Z, it's between 16 and 25 age. The older ones do watch the documentaries, and TV series. The dramas and then comedy are for the 20 something's.
>
> *Filmmaker, Rwanda*

Table 16 Rwanda film consumer segments | Source: Audience Survey

Dimension	Segment 1: Local Loyalists	Segment 2: Value-Seeking Family Streamers	Segment 3: Global Digital Enthusiasts
Segment distribution	n = 69 (42%)	n = 60 (36%)	n = 36 (22%)
Gender	62% male	55% male, 45% female	81% male
Age distribution	35 - 54 years - 56%	25 - 44 years - 68%	25 - 34 years - 58%
Content preference	Local - 99%, regional - 59% and international films - 54%	Local - 98% and regional - 85%	International content - 100%.
Top genres	Drama (57%) and comedy - 49%	Romantic comedy (73%) and comedy - 65%	Action (86%)
Primary device	Smart TV - 52% and Pay TV - 49%	Smart TV - 75% and Pay TV - 72%	Smartphone / Tablet - 58% and laptop - 42%
Main platforms	YouTube - 93% and Canal+ online - 48%	Canal+ online - 90% and YouTube - 56%	Netflix - 78% and YouTube - 63%
Fallback option	DVDs/USB sticks - (41%)	DVDs/USB sticks - (63%)	DVDs/USB sticks - (64%)
Main motivations	Cultural Connection - 75% and Entertainment (64%)	Entertainment (77%) and Affordability / Accessibility	Entertainment (78%)
Key barriers to watching local films	High cost of subscriptions - (30%)	High cost of subscriptions - (68%)	Difficulty in finding where to watch (28%)
Median monthly streaming spend	~$6.90	~$4.10	~$6.90
Avg. streaming platforms	1	2	2
Cinema willingness to pay	~$4.80	~$4.80	~$5.20
Net Promoter Score	African local films is 0%	African local films is +42%	African local films is -67%
Growth triggers	Lower subscription prices - 29%	Lower subscription prices - 55%	Higher-quality films - 42% and Better personalization and recommendations - 33%

The diversity of these segments highlights why a standardized approach to reaching the Rwandan audience is ineffective. While local content has a strong base among household and value-driven viewers, broader engagement with digital enthusiasts depends on improving perceived production quality and platform visibility. Insights from stakeholder interviews reinforce these findings, noting a sharp age-based skew in consumption habits. Youth are the primary consumers of digital content on YouTube and social media while the older demographics, including retirees and household workers, consistently followed television series. Consumption patterns reflected a preference for relatable local stories. In support with the audience survey, the urban audiences benefitted from better internet and Pay TV access, while rural audiences were seen relying on community viewing or low-cost data bundles.

These profiles show that how audiences encounter content is shaped by their social and digital environments, making it essential to align distribution channels with device access and connectivity levels across segments.

Film Discovery and Marketing Channels

Reflecting these segmented behaviours, film discovery in Rwanda is largely driven by social networks and informal recommendations rather than centralized marketing. A significant 72% of audiences report hearing about films through friends and family, making word-of-mouth the dominant awareness channel across all demographic groups. Social media follows at 36%, while streaming platforms account for 19%, influencers/bloggers 8%, media advertisements 6%, and out-of-home advertising only 3%. This pattern shows film awareness is primarily community-driven rather than marketing-driven, with audiences relying more on trusted personal recommendations than formal promotion. Distributors and filmmakers should therefore focus on strategies that stimulate word-of-mouth, such as community screenings, social media campaigns encouraging sharing and discussion, and peer-led promotion, while using traditional advertising as a supporting tool. Stakeholder insights also show marketing relies on TikTok, Facebook, Instagram, and radio for low-cost reach, with influencers used to generate viral momentum. International festival recognition and awards also boost visibility and pride. However, most local productions lack dedicated marketing budgets and depend on organic word of mouth and TV trailers. This reliance on organic, community-driven discovery is reinforced by the industry's grassroots approach to professional development. In a market where formal marketing budgets are rare, the individuals trained within the ecosystem often become the primary engines of both production and promotion.

Education and Training Actors

The industry relied on YouTube tutorials and donor-funded education programs to build professional capacity and a knowledgeable audience base. One filmmaker highlighted the self-taught nature of the sector, stating, "my film school was Google", while noting that journalism played an early role in building cinema awareness. The Rwanda Media Project was identified as a key driver of technical training, with an ecosystem player reporting that they had "trained more than 200 plus alumni" who went on to populate various sectors of the industry. These trained professionals often served as the initial audience and promotional engine for new productions; a filmmaker remarked that workshop participants were essentially "our first marketers" who would "spread the word" within their networks. University studies also provided a niche but profitable audience for educational content, with one producer noting their film was used in university studies and generated three times the production cost in returns.

What Drives Audiences to Watch Films

The success of these trained professionals and their productions depend on their alignment with the core motivations of the Rwandan public. Audience survey indicates that while audiences primarily watch films for entertainment and relaxation (72%), these choices are strongly positioned as a leisure and escape activity. Cultural connection and identity (44%) also play a major role, suggesting that audiences value stories that reflect their culture and experiences. Practical considerations such as affordability and accessibility (30%) and high-quality storytelling (29%) further influence viewing choices, while family-friendly content (25%) also has notable appeal. Motivations linked to education (17%), national representation (15%), or specific actors/directors (12%) are present but less dominant, and social discovery through recommendations remains relatively low (8%). Filmmakers and distributors should prioritize entertaining narratives that incorporate authentic Rwandan cultural elements, while ensuring films remain accessible through affordable platforms and community viewing channels. Policymakers and industry bodies can support this by investing in local storytelling capacity and distribution infrastructure, while producers may benefit from developing family-friendly and culturally grounded content that resonates with national identity.

Important factors when choosing film to watch in Rwanda: Audiences in Rwanda place the strongest emphasis on acting quality (96%), technical quality such as sound and visuals (93%), genre (92%), and both plot/theme (91%) and popularity or trending films (91%), which shows that viewers prioritize well-produced films with compelling stories and clear genre positioning. Language/subtitles (88%), actors (85%), and representation of African cultures (85%) also rank highly, suggesting audiences value both accessibility and cultural relevance. While marketing campaigns and peer recommendations (both 78%) remain influential, they are secondary to the film's intrinsic quality and storytelling elements. Filmmakers and producers in Rwanda should focus on strong scripts, skilled acting, and high production quality, while ensuring accessibility through subtitles or local languages. Cultural institutions and policymakers can aid the industry by investing in capacity building for production and talent. Successful films will blend engaging storytelling with authentic cultural representation. Marketing efforts should highlight story, genre, and cultural relevance. Accessibility to preferred viewing platforms is crucial for translating production quality into viewership.

Audience viewing platforms and access to films

High expectations for technical and acting quality require robust access points that can deliver a high-definition experience. Device usage shows televisions are the most reported viewing device (75%), rising to 63% for African films. Smartphones and tablets are used by 28% of audiences, with higher use for international films (46%), while laptops account for 13%, skewed toward international content (33%). These patterns indicate that viewing largely takes place on home-based digital screens, with Smart TVs and Pay TV central to the experience. Reinforcing this, VOD services are the most common access point (89%), followed by television (57%). Other channels are less prominent: video rentals (23%) still exist at smaller scale, cinema viewing is limited (11%), social media accounts for 7%, and film festivals just 1% (See Figure 24).

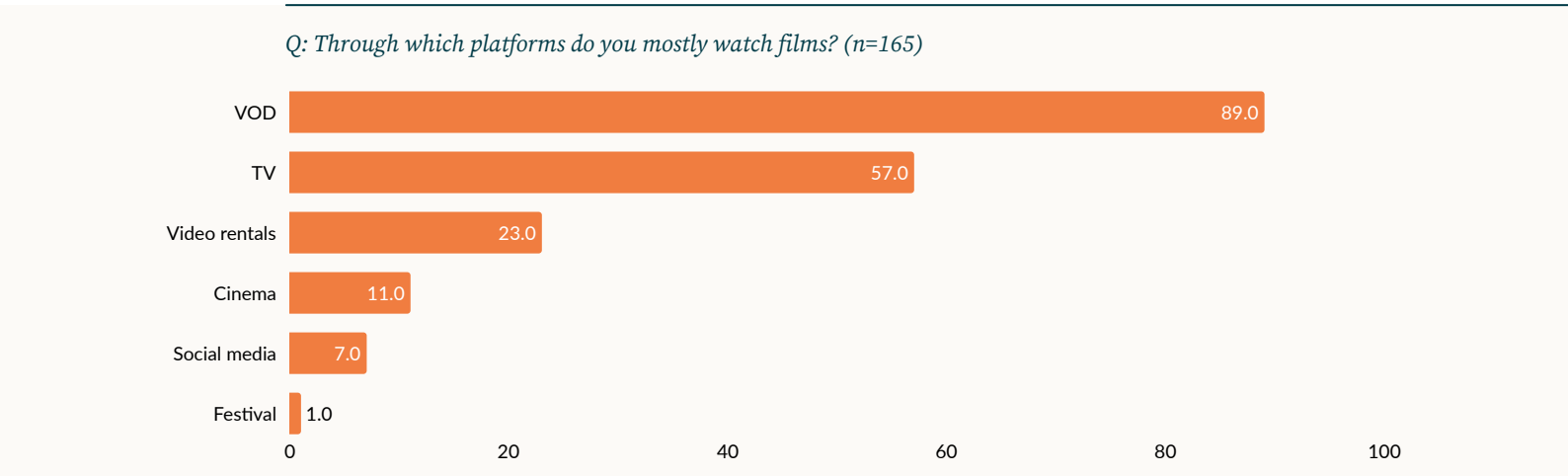


Figure 24 Primary viewing platforms in Rwanda | Source: Audience Survey

These patterns highlight the central role of digital distribution in Rwanda's film ecosystem, with most audiences accessing films through on-demand platforms or television rather than cinemas. This suggests that reaching audiences increasingly depends on digital platforms rather than traditional cinema circuits. Within streaming, YouTube is the most widely used platform (73%), followed by Canal+ Online (53%) and Netflix (36%). Pirated websites account for 4%, while Amazon Prime Video and others account for 1% each. This mix shows reliance on both global and regionally accessible services, with free or low-cost platforms like YouTube widely used alongside subscription services. Television remains an important access point, with Pay TV dominating (94%) compared to free-to-air (10%), highlighting the role of subscription TV as a gateway to film content (See Figure 25). Terrestrial and cable channels such as Zacu TV and Rwanda Broadcasting Agency (RBA) continue to reach mass audiences. Mobile consumption is high, with viewing occurring on phones during daily activities. In the absence of cinema infrastructure, alternative distribution includes flash drives and community screenings.

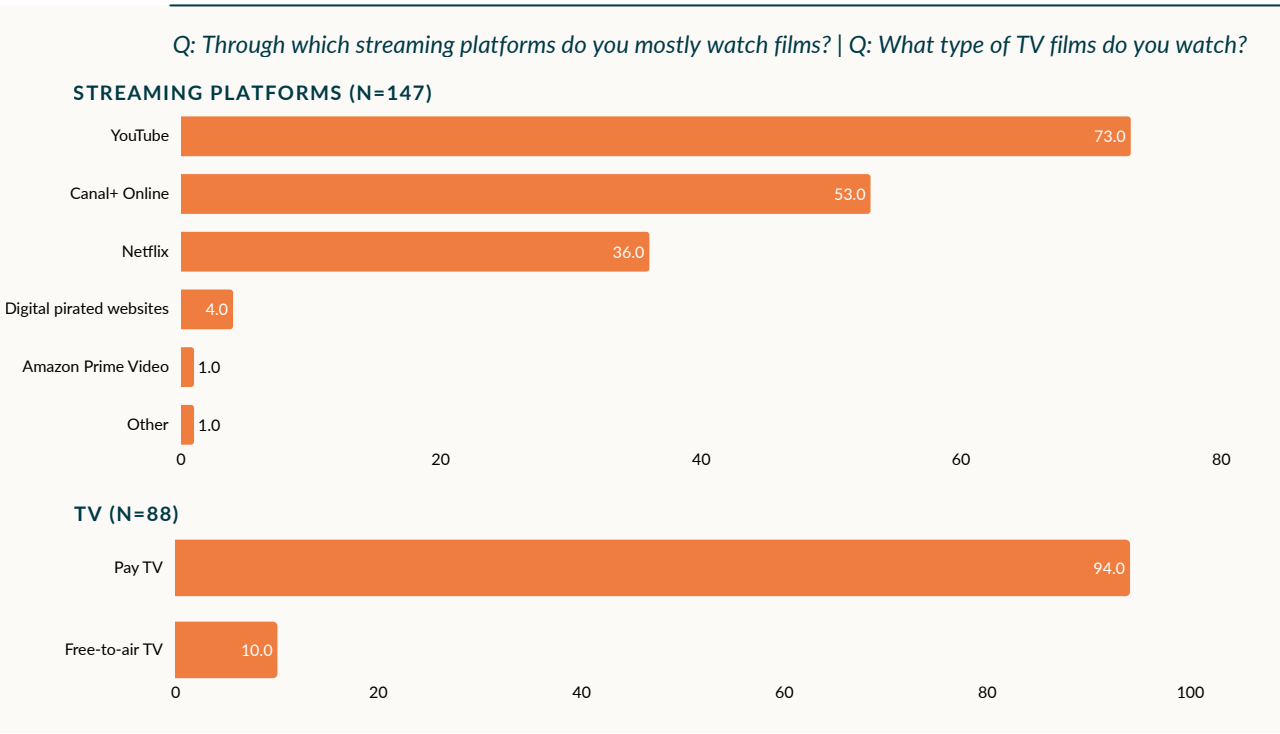


Figure 25 TV & streaming platforms used in Rwanda | Source: Audience Survey

Moreover, qualitative results affirm that distribution channels are currently dominated by television and digital platforms. YouTube emerged as a vital tool for the free circulation of web series and sketches, allowing creators to reach audiences despite limited theatrical infrastructure, A further inquiry was carried out into those who mentioned having consumed films through TV to understand the specific devices used. Among audiences who watch films through television, Pay TV services are the most used channel, cited by 68% of viewers. Smart TVs follow at 58%. Smartphones account for 22% of television viewing access, while laptops represent a smaller share. Free-to-air digital television does not appear in the responses. This may suggest that subscription television and internet-enabled devices are more commonly used for film viewing among the surveyed audience. The dominance of household screens like Smart TVs and Pay TV systems creates a distinct environment for film consumption. Unlike mobile-centric markets, the Rwandan surveyed audience appears to prioritize a lean-back experience, which significantly influences which streaming platforms gain the most traction.

Streaming Behaviour and Platform Preferences

This preference for household-based streaming is further reflected in the specific origins of the content hosted on these platforms. Local Rwandan films are the most widely watched category, cited by 70% of audiences. Films from other African countries follow at 45%. This is notably higher than the pan-African content share reported in the other five markets except Kenya, plausibly reflecting Rwanda's comparatively smaller domestic production base, which leaves more room in viewing habits for content from other African countries. American productions are mentioned by 34%. Other regions appear less frequently in viewing habits. Korean dramas account for 16% of responses, while films from India, China, Europe, and Turkey appear in smaller shares.

Interviews with audiences show strong engagement with locally produced stories alongside sustained interest in regional and international content, indicating that both local and cross-border distribution remain important in reaching Rwandan viewers. Platform differences are significant. YouTube and Canal+ Online are strongly dominated by local films, with 90% and 92% of users respectively watching Rwandan content, compared to only 8% on Netflix. Canal+ Online leads in African (non-Rwandan) films at 59%, followed by YouTube at 48%, while Netflix records 21%. In contrast, Netflix is heavily skewed toward international content, particularly American films, watched by 68% of users, compared to 37% on YouTube and 5% on Canal+ Online. Other international genres such as Korean, Indian, Chinese, Turkish, and European films remain smaller across platforms, though Netflix shows slightly higher engagement. Overall, the pattern highlights that local and regional content thrives on YouTube and Canal+. Streaming is also a regular activity, with films consumed mainly on a weekly basis across categories, indicating that streaming platforms have become a routine channel for film access among audiences.

Device preference: Device preferences further illustrate how streaming takes place. Smart TVs are the most used devices for streaming films, cited by 58% of audiences. Pay TV-connected devices follow at 48%, while smartphones and tablets account for 33%. Laptops appear less frequently, used by 16% of viewers. The distribution of devices indicates that streaming in Rwanda often occurs on larger household screens rather than exclusively on mobile devices. Smart TVs and Pay TV systems appear to play an important role in enabling access to streaming platforms within the home. Subscription patterns also provide further insights into platform usage. Audiences reported a median of one paid streaming subscription, while the average number of subscriptions is two. Some audiences reported using up to eleven services, though this represents a small share of the sample. Monthly spending on streaming platforms remains moderate. The median monthly expenditure is RWF 10,084 (USD 6.90), with responses ranging from RWF 2,016 (USD 1.38) to RWF 30,253 (USD 20.70). These subscription and device patterns are a direct reflection of how Rwandan viewers prioritize their spending to access specific types of stories. The limited number of paid subscriptions suggests that audiences are highly selective, choosing platforms that best align with their cultural interests. This selectivity provides a clear window into the underlying demand for content that resonates on a personal and regional level.

Demand for Local and African Content

This selective platform usage, as evidenced by the high engagement on YouTube and Canal+ Online, is a direct manifestation of a film consumption habit that is strongly centred on local productions (88%), with a substantial interest in films from other African countries (62%), suggesting a strong appetite for culturally relevant and regionally relatable storytelling. American films (36%) still maintain moderate visibility, while other international industries such as Indian (13%), Chinese films (7%), European (6%), Turkish (6%), Latin Korean (4%) and Japanese (4%) remain niche. For stakeholders, this is a strong opportunity to invest in strengthening the Rwandan film industry and regional African co-productions, while distributors and streaming platforms should prioritize local and African catalogues to align with audience preferences. Rwandan audiences show a strong preference for locally produced films, with 60% reporting that the films they watch most often are local productions, followed by 19% who most often watch American films; only 7% most often watch films from other African countries. Interest in other global industries remains minimal (each under 7%).

This preference is reinforced by audience attitudes, with 89% considering it important that a film is locally made (62% very important, 27% somewhat important). This suggests a strong alignment between national cultural identity and viewing habits. Local filmmakers and producers should continue prioritizing authentic Rwandan stories and culturally relevant narratives, while policymakers and industry bodies should invest in strengthening production capacity, distribution channels, and funding mechanisms to sustain the growth of the local industry and expand its regional reach.

Film consumption: Film consumption in Rwanda is primarily focused on local productions, with a significant preference for culturally relevant storytelling that reflects national identity. Although international films have limited visibility, there is a robust demand for regional content. This trend offers opportunities for investment in the Rwandan film industry and enhanced African collaborations. Filmmakers are encouraged to prioritize authentic narratives, while distributors and streaming services should broaden their offerings of Rwandan and African films. Additionally, government support in production capacity and distribution could help scale local content. However, a notable challenge persists: the discrepancy between the audience's desire for local stories and the economic factors affecting their viewing habits.

Barriers to Audience Growth for Local Films

Among Rwandan audiences, the primary barrier to watching local or African films is clearly content relevance rather than access or quality. A majority (56%) report a lack of interest in the stories or themes, indicating a disconnect between local content and audience preferences. While a preference for international films is present (33%), this suggests less dominance of foreign content and more opportunity for local films if relevance improves. This disconnect in storytelling exists alongside a significant layer of structural and economic obstacles. Beyond the themes of the films themselves, the practicalities of hitting play remain a challenge for the average viewer. Interviews with the audience highlights the high cost of subscriptions or pay-per-view (41%) as a key barrier, indicating that affordability remains a primary constraint. Secondary obstacles include the difficulty of finding where to watch films (18%), poor internet connectivity or high data costs (13%), and a lack of awareness regarding new releases (12%), even though 22% of respondents report no significant barriers. These results suggest that structural access issues, specifically cost, discoverability, and connectivity, limit consumption more than content quality or storytelling alone. Stakeholders should therefore focus on improving affordability through lower-cost streaming models, partnerships with telecom providers, and heightened promotion to increase the visibility of new local releases.

Perception of local African films: Rwandan audiences generally hold positive perceptions of local and African films, particularly around storytelling and improving production quality. A majority agree that local films tell authentic and relatable stories (61% agree/strongly agree) and that production quality has improved significantly (58%). There is also moderate willingness to pay for high-quality local content (47%), indicating growing value recognition. However, audiences also highlight structural barriers: nearly half (49%) say it is difficult to find local films on mainstream platforms and 51% believe local films are not well promoted or marketed. For stakeholders, this suggests that while audience perception of content quality is improving, distributors, streaming platforms, and marketers should focus on increasing visibility and discoverability of Rwandan and African films through stronger marketing campaigns and better placement on mainstream platforms.

Audience growth for local and African films in Rwanda is hindered by barriers related to engagement and visibility rather than negative perceptions. Although improvements in storytelling and production quality are noted, there is still low awareness of local titles and limited interest in certain themes. Structural issues like high subscription costs, difficulty in discovering films, and connectivity challenges further restrict consumption. Additionally, local films lack sufficient promotion on mainstream platforms. Stakeholders are encouraged to adopt a multifaceted approach that includes creating more engaging narratives, enhancing marketing strategies, and addressing affordability through partnerships. The Rwandan audience remains inherently proactive once they successfully access a film. This transition from 'passive viewer' to 'active advocate' suggests that the community itself is the most underutilized tool in the distribution chain.



Audience Engagement and Word-Of-Mouth

This proactive behavior among Rwandan audiences is evident in their engagement after viewing films, with 44% seeking more films from the same country and 28% recommending the film in person. However, 20% do not take any specific action, while a smaller number explores further by searching for actors/directors (14%), sharing on social media (8%), investigating social issues presented in the film (7%), or reading related reviews/articles (5%). This highlights the significance of discovery pathways and recommendations over digital sharing. Stakeholders should enhance recommendation algorithms, curate collections, promote cross-similar films, and support social sharing campaigns to boost online audience engagement.

Rwandan audiences show relatively strong intentional engagement with films. Nearly half (49%) reported paying for or buying films on digital platforms, while 28% actively searched for and downloaded films, indicating a willingness to invest effort and money to access content. However, deeper engagement with the film ecosystem remains limited, only 5% purposely went to cinemas, followed film talent on social media, or attended film festivals, and just 1% joined film-related communities. Industry stakeholders should prioritize strengthening digital distribution and monetization strategies while simultaneously building audience engagement through social media campaigns, fan communities, and accessible community screenings to deepen the relationship between audiences and local films.

Willingness to recommend African films: Audience sentiment in Rwanda towards recommending African films is neutral, with promoters at 33% and detractors at 32%, yielding a slight positive NPS of 1. This highlights a need for improvement in perceived quality and engagement. Filmmakers should enhance storytelling and production values, while distributors and platforms must ensure better accessibility and targeted marketing. Government agencies are encouraged to support local productions and audience development through various programs. Funders should focus on talent development and marketing initiatives to foster loyalty among viewers.

Audience engagement with films in Rwanda is primarily influenced by discovery and personal recommendations, leading viewers to seek out more local films and share experiences. Although positive viewing experiences may encourage interest in similar content, deeper engagement, such as participation in cinemas or online communities, is limited. Viewers are willing to pay for digital access, suggesting openness to content investment, but there is a lack of films that inspire strong advocacy. Stakeholders are encouraged to enhance audience engagement through improved discovery tools, curated collections, social media campaigns, community screenings, and initiatives that foster sharing and discussion of local and African films.

Barriers focusing on impact of pricing, availability of distribution channels and technological access

1. **Pricing and economic constraints:** The "Hollywood premium" pricing model for cinema tickets was seen as a failure, as high fees discouraged audiences. Many viewers preferred freemium content on YouTube, but this was constrained by expensive data, where a single episode could consume a full 200 RWF daily bundle. Theatrical distribution was also costly, with producers facing high release costs and minimum marketing budgets of around 1,000 EUR for premieres.

2. **Limited distribution channels:** The closure of Rwanda's major theatrical venues (see Section 3.4.2.1 above) has created a major gap in screening infrastructure. Filmmakers have also been noted to limit access by prioritising international festival runs, restricting local audience availability.

3. **Technological access and knowledge gaps:** Rwanda faces limited access to specialized film equipment, forcing costly rentals from abroad. Requirements from international streamers for high-end production standards further restrict participation. On digital platforms, YouTube monetization remains difficult, with creators often needing foreign-based accounts to receive payments.

Solutions to the Barriers

Infrastructure and accessibility fixes: Stakeholders recommended establishing affordable screening rooms in existing youth centres across Rwanda to expand district-level access. Alternative venues such as community streets, parking lots, and drive-ins were proposed to bypass the lack of formal cinema halls, alongside increased focus on rural infrastructure and promotions.

Pricing and market sustainability: Stakeholders suggested small, symbolic pricing (100–500 RWF) for community screenings to shift away from free content and build a paying culture. Filmmakers were also encouraged to adopt lower-cost, viral content formats to remain viable.

Technological and collaborative innovations: AI tools were proposed to reduce production costs and support multilingual translation into Swahili, English, or French. Regional collaboration through pooled African distributors and distribution networks was seen as key to strengthening bargaining power. Integrating technical film skills into TVET centres was identified as a long-term solution to capacity gap.

Audience data systems and Evidence Gaps

The industry suffered from a massive gap in reliable, quantitative audience data. A distributor remarked that there has been a massive gap in research, noting that creators were often left to speculate on tastes. Government and institutional data were described as unavailable, the insights revealed lack of specific data to track social impact or long-term behavioural changes. Filmmakers typically relied on platform-specific dashboards for data, with one audience noting that *"YouTube is transparent and they give you the back end"* to see age and location data. However, for traditional theatrical or international runs, data was nearly non-existent; one filmmaker mentioned they *"never had access on those numbers*" when their film screened across Africa through a major distributor. The audiences emphasized that the industry needed better research on *"how much people would be willing to pay to watch a film"* to inform future distribution models.

Social Impact

Filmmaking in Rwanda has long served as a powerful medium for addressing social narratives and fostering national identity. The industry's early maturation was deeply intertwined with the theme of peacebuilding and reconciliation following the 1994 genocide against the Tutsi, a focus that remains prevalent in modern feature films. Recent productions have expanded this impact by tackling diverse issues such as the traditional practice of bride abduction and the complexities of immigration and NGO dynamics. These socially driven themes are often leveraged to secure institutional partnerships with organizations like the United Nations Population Fund or various international donors, which provide both financial support and professional validation. Public sentiment, as measured through social media monitoring, suggests that film is highly valued as a reflection of Rwanda's development, responsibility, and collective community values.

Defining and Measuring Social Impact Through Behaviour

Audiences view social impact in the Rwandan film industry as a means of education, community empowerment, and promoting social change. Distributors emphasize that social impact emerges when films inspire communities to share their stories and address social issues, such as projects aimed at educating youth about drug avoidance. Measuring this impact is described as an emotional process, with success indicated by participant healing and reopened legal cases. However, there is a lack of official tracking frameworks, as current surveys focus more on general audience preferences than on behavioral changes. This strategic view of film as a tool for social transformation relies heavily on how audiences prioritize their viewing choices. For social impact to move from a distributor's agenda to a community's reality, it must compete with the fundamental drivers of audience demand.

> I think, because film has always been this tool that can educate as much as it can entertain, social impact just seems to make sense. When you look at Rwanda and its efforts to build an audience for films and that cinema-going culture, it seems natural that it would be a strategy to apply.
>
> *Distributor, Rwanda*

Audience Interest in Socially Relevant Storytelling

Audience survey participants showed strongest interest in stories about young people pursuing opportunities, education, or a better future (38%). Economic themes such as money, business, and survival were also prominent (27%). Governance and social justice themes, including power, politics, and corruption, attracted 24%, while 23% showed interest in stories about women overcoming challenges. Themes around relationships, family, health, and identity were mentioned by about one in five audiences. Social cohesion themes were also present, with 16% interested in stories about different cultures or religions coexisting, and the same share citing stress, trauma, or mental health. Environmental themes, including nature protection and climate change, were noted by 14%. Only 6% preferred films purely for entertainment without social themes.

Hence, the findings suggest that audiences are open to films engaging with social realities, especially those focused on everyday aspirations such as education, economic opportunity, and personal resilience. These themes resonate more strongly than abstract or policy-focused issues, indicating that socially relevant storytelling gains traction when grounded in personal and community experiences. This preference aligns with areas where the industry observes strong social influence, as films rooted in Rwandan realities such as history, unity, and family shift from entertainment to tools for national discourse.

Thematic areas Where Film has Strongest Perceived/Observed Impact

Reflecting these audience preferences, the strongest perceived impacts of film in Rwanda are observed in themes related to national history, unity, and reconciliation. Documentary projects concerning the genocide against the Tutsi were highlighted for their role in helping victims' families relieve their pain by providing a platform for their testimonies. Beyond historical narratives, films that portrayed modern Rwandan realities including family issues, daily struggles, and cultural identity resonated deeply with local audiences because they mirrored their lives. Other impactful areas included gender-based violence (GBV) and women's empowerment, which were frequently featured in local dramas to create awareness and foster discussion.

> For the social impact, I feel films that still… there's still room to talk about the History of Rwanda, the History of Unity, the History of Rwanda's Emergence, you know. And I think we can still impact the continent through our films as Rwandans because I think we are a model country in showing all those things, as I said: Unity, progress, yeah.
>
> *Filmmaker, Rwanda*

Priority and Underexplored Film Themes/Genres and their Potential for Growth and Impact

Stakeholders identified priority areas for future growth, including climate justice, land rights, and mental health. While historical dramas are well established, there is a gap in genre diversity, particularly in action, thrillers, and horror rooted in the Rwandan context. Underexplored themes include morality, spiritual conflict within a deeply religious society, and the ongoing influence of colonialism on identity, culture, language, and systems. Additionally, the cultural clash between Gen Z and older generations around traditional taboos was highlighted as a theme with strong potential for engagement, especially on digital platforms.

> I see mental health and culturally based themes, like the contradiction in perception between culture and taboo in the eyes of Gen Z. It's a theme that I think is not well represented, like creators have not tapped into it. When I look at trends online now, there is that big divide between Gen Z and millennials or other generations when it comes to talking about culture.
>
> *Distributor, Rwanda*

Examples of Socially Impactful Films and Campaigns

Several films were cited for their social impact. *The 600: The Soldiers' Story* (2019) was recognized for its patriotic and historical significance, drawing large local audiences and promoting national unity. *Le silence des mots* (2021) contributed to reopening a long-closed legal case in France related to genocide survivors. Local TV series such as *Seburikoko* and *City Maid* were also noted for their wide reach and ability to communicate consistent messages on family values and community behaviour.

> If I look at Le silence des mots (film name), the film we did with [name of person mentioned], we were talking about…There were these women who had their case in France about the French soldiers who raped women in Rwanda; their case had been closed for 11 years. And when we did the film, the case was opened again.
>
> *Ecosystem partner, Rwanda*

Role of Public Broadcasters, NGOs, Donors and Foundations in Impact-Oriented Content

Public and non-profit institutions were central to funding and disseminating impact-oriented content. The Rwanda Broadcasting Agency supported films promoting social values, while organisations like the Imbuto Foundation backed youth-focused series on issues such as sexual health and drug abuse. NGOs also served as key distribution partners, financing impact tours and workshops and supporting films aligned with development priorities. However, reliance on donor funding sometimes risked compromising artistic vision due to required approval messaging.

Financing and Enabling Environment

Rwanda's film financing is shifting from a traditional NGO grant model toward a more commercial and institutionalised framework. The 2024 Creative Grants Initiative, which provided €360,000 in domestic production funding, marks a significant change in how local projects are supported. International co-financing from partners like GIZ and OIF remains central, while local "anchor budgets" are increasingly important for attracting foreign investment. However, gaps persist, including limited development capital for pre-production, the absence of domestic private equity, and shortages of specialised film equipment and studios. The regulatory environment includes competitive tax incentives and a modern intellectual property law enacted in 2024, though enforcement and transparency in content classification by the Censorship and Viewership Board remain in early stages.

Overview of Public, Private, and International Financing for Film

Financing in the Rwandan film industry was characterized by a heavy reliance on international sources, limited public funding, and a cautious private sector. Key informants estimated that approximately 80% of film financing originated from Europe and the United States, raising concerns about neocolonialism and the influence of external narratives on local storytelling. At the national level, institutions such as the Rwanda Film Office and the Ministry of Youth and Arts provided some support through production and travel grants, although these were described as limited and inconsistent. The Rwanda Broadcasting Agency also played an indirect financing role by purchasing locally produced content, enabling select producers to recover part of their investment. Private investment remained minimal, as financial institutions and high-net-worth individuals often lacked confidence in film as a viable commercial sector. It was widely perceived as high-risk, with underdeveloped and unproven distribution channels limiting its attractiveness as an investment opportunity.

> The gap is first…I will tap on the private sector, because there is no, say, trust that filmmaking could be a business that can generate money or can be profitable is still low; like the people who have money, the investors, they don't trust the filmmakers to give them the money.
>
> *Distributor, Rwanda*

Incentives, Grants, Tax Credits, Funds, and Coproduction Schemes

The enabling environment in Rwanda is characterized by emerging but largely untested fiscal incentives and highly competitive grant structures. The government has introduced tax incentives for international co-productions exceeding USD 500,000, including VAT exemptions and other production-related costs, though many local filmmakers remain unaware or have not seen successful uptake. Public funding through the Rwanda Film Office is highly competitive, with demand far exceeding available resources. As a result, co-production has become a key pathway for accessing financing, equipment, and post-production facilities, but often comes with restrictive conditions such as hiring foreign technical teams or ceding distribution rights to international, particularly European, partners.

> Grants, for example, are very competitive. There are far fewer grants available than the number of filmmakers applying for them.
>
> *Filmmaker, Rwanda*

Business Models and Revenue Mixes Across Distribution Channels

Key informants revealed revenue generation being primarily split between digital platforms, national television, and specialized licensing. YouTube served as the dominant business model for "underground" filmmakers, allowing them to monetize content through views, although local monetization in Rwanda remained a challenge that forced some to register accounts abroad. Zacu TV and RBA were the most effective local channels for content acquisition, with Zacu TV evolving from a VOD platform into a major Canal+ owned cable channel airing 100% Kinyarwanda content. Beyond traditional media, some filmmakers found success through niche licensing, such as selling content for in-flight entertainment on airlines like RwandAir or producing films used in university studies, which generated higher returns than traditional theatrical releases. Theatrical models were described as failing due to high costs and the lack of operational cinema screens.

Key Constraints and Promising Innovations

Significant infrastructure gaps and the high cost of marketing were cited as the primary constraints, while digital adaptation and AI emerged as promising innovations. The industry suffered from a near-total lack of operational cinemas, which limited local audience engagement. Additionally, a critical shortage of high-end equipment and post-production studios forced many to rent gear from neighbouring countries like Kenya at high expense. To counter these hurdles, filmmakers began adopting AI tools to speed up production and reduce costs, as well as exploring self-distribution through personal websites to avoid unfair deals with global streamers. Collective action through regional pan-African networks was also proposed as a way to share distribution costs.

Film Ecosystem Development in Capacity Building, Collaborations and Mentorships

Professional collaboration was predominantly informal, rooted in peer networks and collectives, where practitioners leveraged each other's expertise in areas such as sales, marketing, and legal affairs. Mentorship typically followed a "learning by doing" model, reflecting the limited availability of formal film education, with many practitioners relying on online resources and short-term workshops. Emerging opportunities, including internships at Zacu TV, were also noted as important pathways to gain full-time industry experience and contribute to quality control processes.

> One thing we managed to establish like within the network of local production. We have like up to seven linked people who got the internship professional, six months internship with Zacu entertainment.
>
> *Ecosystem partner, Rwanda*



Country-Specific Priorities and Opportunities

The Rwandan film sector is positioned as a "blank slate" market with significant potential for growth in animation, documentaries, and experimental film. A priority for the industry is the reduction of "revenue leakage" caused, for instance, by the current necessity of hiring technical equipment and crews from neighbouring countries. Opportunities for scaling include the full operationalisation of a National Film Fund, introduction of a data collection system and the harmonisation of content regulations with regional partners to streamline cross-border releases. Additionally, leveraging the rapid growth in social media usage for direct-to-audience marketing could help filmmakers bypass traditional gatekeepers and build a more sustainable local revenue base. By bridging the gap between high-level policy incentives and the practical availability of technical infrastructure, Rwanda has the potential to become a leading continental hub for high-quality, narratively rich cinema.

Priority Opportunities in Distribution

The qualitative findings indicated that audiences viewed pan-African collectives and regional distribution networks as the most critical priority for expanding the reach of Rwandan film. Establishing regional distribution frameworks and partnerships that enable films to circulate across East African markets particularly between Rwanda, Uganda, Kenya, and Tanzania was seen as a strategic approach to sharing the high costs associated with marketing and distribution. Emerging self-distribution models, such as filmmaker-owned websites, were also highlighted as viable alternatives for bypassing unfavourable agreements with global streaming platforms, as mentioned by a distributor, though these are better understood as a complementary channel within a broader distribution strategy rather than a standalone solution at scale. Independent creators nonetheless face considerable structural barriers in this space including audience acquisition, payment processing, piracy protection, and discoverability that require substantial marketing capacity to overcome.

> I've been looking closely at Kenya and I've noticed that the Kenyan, some Kenyan productions like Phil, he's distributing his own work on his own website, right and charging people. So maybe it is a possible avenue that filmmakers can start to think of self-distribution.
>
> *Distributor, Rwanda*

In addition, auxiliary markets, including in-flight entertainment on national airlines and content licensing for inter-city bus systems, were identified as underutilised revenue streams with strong growth potential. To overcome the scale limitations of its domestic market, Rwanda can position itself as a regional coordination and distribution hub in East Africa by leveraging partnerships, mobility, and niche digital strategies. At the policy level, this would mean establishing grants to support digital channel promotion and introducing tax exemptions for local streaming platforms, enabling them to reinvest in content development and scale their operations sustainably.

Priority Opportunities in Audience Development

Audience development priorities focused on responding to the preferences of Gen Z and Gen Alpha, who reportedly favoured shorter, "unserious" and more entertaining content over heavy historical dramas. Creating a cinema-going culture was proposed through the establishment of affordable screening spaces in secondary cities like Musanze, which could leverage tourism to sustain arts infrastructure. Another key opportunity involved activating communities at the inception of a project, allowing them to participate in development and ensuring a built-in audience upon release. Expanding screenings to the national network of youth centres was also recommended to capture the demographic that constitutes the majority of the population.

> I firstly recommend establishment of affordable many screening cinema halls in Kigali, but also out of Kigali. For instance, a city like Musanze is not as large as Kigali, but it can be a great place to invest because it is the first city in tourism.
>
> *Filmmaker, Rwanda*

Priority Opportunities in Social Impact

The primary opportunity for social impact films lay in tapping into the MICE (Meetings, Incentives, Conferences, and Exhibitions) sector, where filmmakers could align their stories with the themes of international conferences held in Rwanda. Climate action and youth empowerment were identified as the most resonant and fundable topics for social change campaigns. A key informant emphasized that Rwanda's unifying language (Kinyarwanda) provided a unique opportunity for nationwide impact campaigns that could foster social cohesion and "decolonize the mind". There was also a priority to explore underexplored themes such as morality, religious conflict, and mental health to better reflect the modern Rwandan reality.

> Rwanda is a nice country, and it has an advanced MICE sector, if you can tap into each and every conference happening here, potentially have partners that would work with you, and a storyline that relates to or aligns with that theme.
>
> *Filmmaker, Rwanda*

Scaling Potential Recommendations

Integration of technical film training into national TVET systems: Acknowledging that infrastructure access and industry demand are critical, since people could be trained with nowhere to work, stakeholders recommended embedding specialized film skills such as sound engineering, editing, and lighting into Rwanda's national TVET system to create a sustainable talent pipeline. While existing centres already train in areas like electricity and carpentry, they missed an opportunity to expand into intensive three-year film-related technical training.

Rwandan-owned infrastructure and film mandates: Scaling industry reach requires breaking the dominance of foreign-owned cinema chains by investing in locally owned exhibition spaces that can mandate screenings for Rwandan content, enabling self-regulated programming to protect domestic productions and expand the market for local stories.

Inclusion of working filmmakers in funding design: It was strongly recommended that the government involve active filmmakers in shaping funding criteria to reflect local production realities such as limited equipment access and informal production models, rather than replicating Western frameworks. Formalization of collective management organizations (CMOs): Policy-level recommendations emphasized establishing CMOs to ensure filmmakers receive consistent royalties from digital and broadcast exploitation, providing a legal basis for recouping investments across multiple platforms.

Read the full Rwanda Country Report





Senegal

Country Context

Current State of Film

Senegal is a vibrant West African nation undergoing steady demographic expansion, with a population projected to reach 19.4 million people in 2026 and a youthful median age of 19.8 years. The national economy, which boasts a nominal GDP forecast of USD 36 billion for 2025, is increasingly diversified across services and agriculture as it shifts away from hydrocarbon-driven expansion.

Approximately 53% of the population is urbanised, with the capital city of Dakar serving as the primary hub for economic and cultural activities. Digital connectivity is accelerating rapidly, with 11.5 million internet users as of late 2025 representing a 60.6% penetration rate supported by near total 4G coverage and expanding 5G networks[44].

The national film ecosystem is rooted in a prestigious auteur tradition pioneered by figures such as Ousmane Sembène and continues to achieve international acclaim through contemporary filmmakers like Mati Diop and Alain Gomis. Historically, Senegal experienced a "Golden Age" from the 1960s to the early 1980s, during which it maintained the most robust cinema network in West Africa. However, the late 20th century saw a catastrophic collapse of the theatrical sector due to economic crises and the rise of digital piracy. Today, the industry is in a state of "industrial-creative" revival, though it remains characterised by a niche focus on quality over volume, producing an average of 15 to 20 total projects annually, including documentaries and series[45]. FOPICA's 2023 allocation of approximately USD 2.1 million across 49 supported projects implies an average grant of roughly USD 40,000–50,000 per project. This reflects FOPICA-funded projects specifically, not an industry-wide average across all budget tiers.

According to stakeholder Insights, the macro environment in Senegal was characterised by a nascent economy, with the audiovisual sector increasingly prioritised for job creation and revenue generation under the government's "Vision 2050" strategy. However, the COVID-19 pandemic had a significant negative impact, drastically reducing attendance and delaying major infrastructure projects such as the opening of the Pathe Dakar cinema. Mobile distribution units like MobiCine also faced heavy losses, cutting permanent staff from ten to two or three due to unsustainable fixed costs. During the recovery period, the industry experienced a digital boom, with online platforms and YouTube becoming central to content circulation.

The national film ecosystem was rooted in the legacy of pioneers like Ousmane Sembene and Djibril Diop Mambety, but for a long period lacked formal institutional structures and training schools. A key milestone was the establishment of FOPICA in 2014, which revitalised production and supported the emergence of young talent. Despite this progress, challenges persisted, including irregular funding cycles and the absence of a centralised film centre to oversee the value chain. Informal collectives such as Cine Banlieue helped bridge training gaps by mentoring youth in the suburbs as mentioned by a distributor.

> Over the last five years, the creation of our fund, FOPICA (Fund for the Promotion of Cinema and Audiovisual), has also boosted everything. It has truly revitalized production. There are many productions in Senegal today... this fund has greatly helped to propel Senegalese cinema forward, truly.
>
> *Film Distributor, Senegal*

[44] DataReportal. The "state of digital" in Senegal in 2026. Link
[45] A catalogue of Senegal films produced between 2020-2025 archived on IMDb

Film Distribution

The current distribution landscape in Senegal is defined by a sharp divide between a narrow theatrical pipeline and a booming digital sector. Cinema exhibition infrastructure is extremely limited compared to advanced markets such as Nigeria and South Africa. This infrastructure is heavily centralised, with most of the screens located in Dakar, making traditional theatrical releases inaccessible to most of the population. To address these gaps, alternative models such as MobiCiné utilise mobile projection units to bring African content to rural schools and public spaces, though these initiatives often generate insufficient revenue to finance large-scale production.

Digital disruption has fundamentally altered the market structure, with 58% of films from a catalogue of films produced between 2020 and 2025 distributed via digital platforms compared to just 21% in theatres. YouTube has emerged as the dominant force, with major production houses like Marodi TV and EvenProd attracting millions of subscribers and generating significant revenue through advertising and partnerships with global players such as Canal+ and Amazon Prime. The regulatory environment is also evolving; in January 2026, the National Media Regulation Council (CNRM) was established to regulate digital streaming platforms and enforce local content quotas. Despite these advancements, piracy remains a critical barrier, with industry stakeholders reporting that up to 75% of potential revenue is lost to unauthorised circulation.

Distribution Channels

Cinemas

Historical Evolution and Current Landscape

Following the "Golden Age" of the 1960s and 70s, the late 1980s ushered in a "Great Decline". Economic crises forced state disengagement, while the proliferation of television, DVDs, and digital piracy eroded the profitability of traditional venues. By the early 2000s, almost all historic cinemas had been shuttered or converted into shopping malls and religious centres, leaving Dakar, the historic capital of African film, without a single commercial screen for nearly a decade.

The contemporary "Renaissance" began around 2015 with the financial endowment of FOPICA, sparking a return of infrastructure through corporate expansions. Despite this growth, the exhibition landscape remains extremely limited and highly centralised. As of December 2025, Senegal operates only 19 screens across nine venues, a figure that reflects both a recovery and enduring structural constraints.

This infrastructure is overwhelmingly concentrated in the capital, where 16 screens, 83% of national capacity, are located. The market is dominated by the Ciné Pathé Dakar, which features 7 screens and accounts for nearly 40% of national capacity. Other Dakar venues include the 3-screen Cinéma Ousmane Sembène, the 3-screen Seanema at Sea Plaza, and single-screen venues at Canal Olympia Dakar, Cinema Medina and the Institut Français de Dakar. This leaves a meager regional reach of only 3 screens: Canal Olympia Saint-Louis, Alliance Française Thiès, and Alliance Française Ziguinchor, each operating a single screen. This geographic imbalance creates a narrow pipeline that dictates market entry and limits the commercial potential for filmmakers and audiences outside the capital.

Local Content and Box Office Performance

The share of local versus international titles on Senegalese screens is gradually improving, though it remains a work in progress. Between 2020 and 2025, approximately 21% of total local productions (26 out of 124 catalogued films from IMDb) secured a theatrical release. Notably, 2025 saw a significant spike, with 38% of produced films reaching the big screen, signalling a strengthening bond between local producers and new exhibitors.

However, revenue data underscores the limitations of the domestic market. High-earning titles like *Father & Soldier* (USD 8.5 million) achieved success primarily through wide European distribution and major international partnerships (Gaumont). In contrast, films distributed purely through the local 18-screen circuit, such as *Take It or Bleed It* (USD 2,000), see significantly lower earnings (See Table 17).

Title	Release Date	Release Country	Box Office
Father & Soldier	4 January 2023	France	USD 8,500,000
Twist à Bamako	5 January 2022	France	USD 995,704
Dahomey	11 September 2024	France	USD 593,052
Banel & Adama	30 August 2023	France	USD 165,366
Lingui, The Sacred Bonds	14 April 2022	Germany	USD 37,685
Tukki	22 January 2023	Senegal	USD 23,446
Yoon	4 May 2023	Portugal	USD 5,952
Saloum	5 August 2022	Senegal	USD 5,078
Take It or Bleed It	31 October 2023	USA	USD 2,000
L'argent, la liberté, une histoire du Franc CFA	9 November 2022	Netherlands	USD 107
Sira	21 February 2023	Germany	USD 68

Table 17 Gross Box Office for a sample of films from the catalogue | Source: IMDb pro, Box Office Mojo

The Impact of Cinema as a Distribution Channel

For Senegalese filmmakers, the theatrical channel remains more of a prestige and visibility platform rather than a reliable revenue driver. Cinema releases remain important for festival recognition, critical visibility, and international positioning, but their domestic economic impact is limited. This reflects structural constraints, including a very small number of screens, their concentration in Dakar, and high multiplex operating costs that translate into ticket prices beyond the reach of most of the population. As a result, theatrical audiences are largely confined to the urban middle class.

Consequently, cinema operates less as a mass distribution channel and more as a symbolic gateway, offering visibility without scale. This has contributed to a gradual shift in distribution strategies. Importantly, this shift is driven not by higher revenues in alternative channels, but by the need for greater reach and accessibility. Filmmakers increasingly turn to streaming platforms and, mainly, YouTube to engage national audiences and the Senegalese diaspora. While these channels do not necessarily deliver higher per-film revenues, they allow for significantly broader audience access in a context where affordability is a key constraint.

At the same time, it is critical to distinguish between feature films and television series, which operate in fundamentally different ecosystems in Senegal. Stakeholders highlight that feature films remain predominantly auteur-driven, characterised by long development cycles, higher production values, and a strong orientation towards festivals and theatrical exhibition. However, they have yet to establish a viable domestic commercial distribution model beyond limited cinema screenings. In contrast, television and web series have proven more economically dynamic, particularly through YouTube, where Senegalese productions have built substantial audiences based on free access, rapid production cycles, and strong cultural relatability. This divergence has important implications for audience behaviour. The widespread success of series on free digital platforms has contributed to a consumption environment in which audiences are accustomed to zero-cost access, lowering willingness to pay for cinema tickets or premium digital content. As a result, the challenge facing the sector is not a lack of demand, but the difficulty of converting that demand into sustainable revenue streams—reinforcing the broader Value Gap identified across African film markets.

Stakeholder interviews further reveal a distribution system that remains deeply fragmented between formal and informal channels. Modern multiplexes in Dakar, particularly Pathé Dakar, represent the largest commercial exhibition infrastructure but are overwhelmingly concentrated in the capital, leaving the 14 regions underserved. This results in a highly uneven spatial distribution of access, where cinema consumption is effectively restricted to a limited urban radius. As one Senegalese filmmaker noted:

> So, releasing a film and distributing it only within a 10-kilometer radius, for me that's not distribution when you know we have 14 regions. Because there are 2 cinema hubs that are less than 5 kilometres apart. So, if it's only there that we can see a Senegalese film, and even then, if it's programmed, for me the distribution, I can consider it to be non-existent, in fact, at least in Senegal.
>
> *Filmmaker, Senegal*

Outside of Dakar, informal and alternative distribution mechanisms attempt to fill this gap. Mobile and community-based exhibition models, such as MobiCine and Cinema Numerique Ambulant (CNA), deploy touring cinema units to reach rural and peri-urban populations. While these initiatives demonstrate strong alignment with local demand and geographic realities, they remain constrained by operational instability, limited funding, and challenges in achieving consistent profitability.

To address these systemic constraints, the industry is increasingly exploring decentralised, low-cost distribution models that better reflect Senegal's economic and spatial realities. Solar-powered mobile cinemas and community-based digital hubs represent promising approaches, offering a means to expand access beyond the capital while rebuilding film culture at the local level. However, for these models to contribute meaningfully to long-term sustainability, they will need to be integrated into broader distribution strategies that combine reach with viable monetisation pathways.

Cinema attendance and barriers

Audience surveys and stakeholder insights reveal that while cinema remains a recognized cultural activity, it is not a central or routine leisure choice for most Senegalese. Mainstream cinemas are used by 63% of respondents, but the high usage of makeshift screening spaces (54%) highlights a reliance on semi-formal alternatives where formal infrastructure is absent. With a median of only three visits per year, theatrical attendance is treated as an occasional event rather than a habit.

Audience Survey further suggests that limited cinema attendance is driven primarily by access barriers rather than a lack of interest. The main hindrances identified are time (46%) and distance (35%), while 16% of respondents prefer the convenience of waiting for digital platform releases. Although individual ticket costs are a secondary concern for some (11%), the geographic and cumulative financial burdens remain significant (See Figure 26).

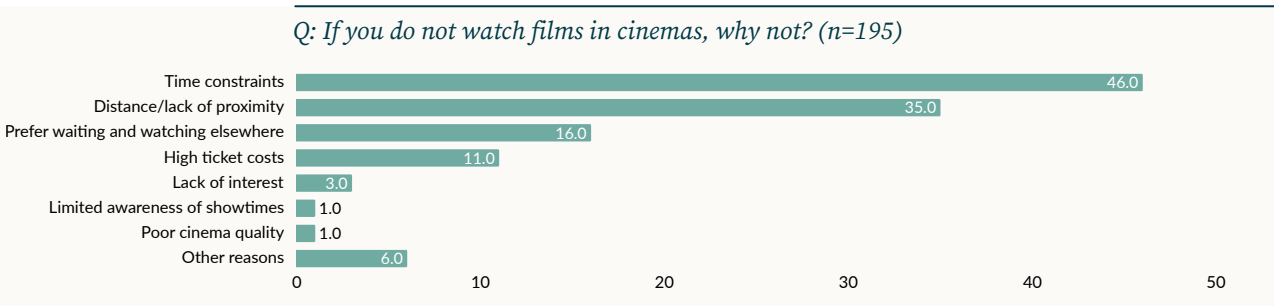


Figure 26 Reasons for not going to cinemas, Senegal | Source: Audience Survey

Stakeholders confirmed that modern theatres are heavily concentrated within a 10-kilometer radius in Dakar, leaving the remaining 14 regions as a shortage zone. Furthermore, while a single ticket may appear accessible, the total cost of a family outing, including transportation, ranges between 25,000 and 30,000 CFA. This prohibitive expense effectively restricts the formal theatrical experience to a narrow, urban demographic. Consequently, while cinema demand clearly exists, these access limits suppress frequency, ensuring that theatrical distribution remains secondary to digital channels without broader geographic coverage.

Digital platforms - Pay TV and OTT

Market Size and Platform Structure

Senegal's Pay TV and OTT ecosystem represents a mid-sized but strategically important audiovisual market within Francophone West Africa. While smaller than continental production hubs such as Nigeria or South Africa, the country plays a significant role as a regional circulation territory linking domestic audiences with wider Francophone African and European screen markets.

Between 2022 and 2025, GMI estimates Senegal's combined Pay TV and OTT market grew from approximately USD 164.9 million to USD 183.7 million. Pay TV continues to dominate the sector, accounting for roughly USD 151.2 million in revenues in 2025 compared with USD 32.5 million generated by OTT services. Satellite broadcasting alone represented most platform revenues, reflecting its continued accessibility across both urban and peri-urban areas where fixed broadband infrastructure remains uneven.

For film distribution, this structure means that satellite television, particularly through regional bouquet operators such as Canal+ Afrique and StarTimes, continues to function as the primary non-theatrical circulation channel for international and African films across Senegal. Table 18 shows the Pay TV and OTT market in Senegal.

Market Value	2022	2023	2024	2025	2026	2027	2028	2029	2030	CAGR
USD Million	164.9	174.6	178.6	183.7	187.0	191.0	195.1	201.6	209.9	5.1%
By Platform Type										
Pay TV platform	138.3	146.5	149.0	151.2	151.8	152.8	154.2	156.1	158.5	2.2%
Cable TV	17.6	18.5	18.7	18.9	18.8	18.8	18.9	19.0	19.2	1.5%
Satellite TV (DTH)	112.2	118.6	120.5	122.0	122.4	123.0	123.9	125.2	127.0	2.0%
IPTV	8.6	9.4	9.8	10.3	10.6	11.0	11.4	11.8	12.3	4.7%
OTT platform	26.5	28.1	29.6	32.5	35.2	38.2	40.9	45.5	51.5	13.4%
SVOD	21.4	22.6	23.8	26.1	28.2	30.6	32.7	36.3	41.0	13.3%
AVOD	3.3	3.6	3.8	4.2	4.5	4.9	5.3	5.9	6.7	13.9%
FAST	0.7	0.8	0.8	0.9	1.0	1.1	1.2	1.4	1.6	14.7%
TVOD	0.5	0.5	0.5	0.5	0.6	0.6	0.6	0.7	0.8	11.6%
Hybrid OTT Models	0.6	0.7	0.7	0.8	0.9	1.0	1.0	1.2	1.4	15.2%

Table 18 Senegal Pay TV and OTT Market 2022-2025 with projections from 2026-2030 (USD Million) | Source: GMI,

Digital Transition and the Rise of Platform-First Distribution

Despite Pay TV's continued dominance, Senegal's audiovisual sector is undergoing a rapid digital transition. Between 2020 and 2025, more than half of a sampled catalogue of 124 Senegalese films (58%) were released through digital platforms compared with only 21% that received theatrical distribution. This represents a major structural shift in the national distribution ecosystem and confirms that streaming platforms are increasingly functioning as the primary exhibition pathway for locally produced screen content.

During this transition, YouTube has emerged as the most important platform for the distribution of Senegalese films and series. Of the 72 films released digitally in the sample, 60% premiered on YouTube channels such as Marodi TV, EvenProd and Pikini Production. Series including *Baabel, Debbo, Doomu Baay,* and *Marie & Momo* attracted millions of views both within Senegal and among diaspora audiences in Europe and elsewhere in Africa.

Unlike subscription streaming platforms, YouTube combines free access with advertising-based monetisation and immediate audience feedback mechanisms. This hybrid accessibility model makes it particularly well-suited to Senegal's viewing environment, where affordability constraints continue to shape platform adoption patterns.

Platform	Active subs (K)	Total hours	Local titles	Local hrs.	Local %	Regional titles	Regional hrs.	Regional %	International titles	International hrs.	International %
Canal+ Senegal	120	73,980	-	4,380	5.9	-	61,380	83	-	8,220	11.1
MyCanal OTT	850	8,890	85	170	1.9	3,450	6,900	77.7	665	1,820	20.5
Showmax	168	5,480	12	24	0.4	285	570	10.4	4,103	4,886	89.2
SenTV Plus	121.5	8,190	107	5,493	67.1	24	2,351	28.7	8	346	4.2
Netflix	112	15,200	6	12	0.1	220	440	2.9	7,374	14,748	97
Prime Video	280	12,000	4	8	0.1	185	370	3.1	5,811	11,622	96.8
YouTube Premium	150	-	-	-	-	-	-	-	-	-	-
Marodi TV	8,670	220	68	204	95.3	4	12	3.5	0	4	1.2
Wawaw	420	537	165	495	92.2	12	36	6.7	3	6	1.1
Wassa	150	123	38	114	95	4	8	4.2	0	1	0.8

Table 19 Content Library Breakdown | Source: GMI, 2025

Marodi TV and the Expansion of Digital Audience Reach

Marodi TV exemplifies Senegal's platform-led transformation, reaching 8.67 million YouTube subscribers and over 4.6 billion views by April 2026[46]. Its audience is predominantly young and mobile-first, with 70% aged 18–34. Critically, the platform maintains a massive transnational reach: while 60% of viewers are in Senegal, 20% are across Africa and 8% in France, highlighting the importance of the diaspora[47].

Marodi TV's business model combines YouTube advertising revenue with licensing partnerships involving Canal+ and Amazon Prime Video, as well as direct sales to Senegalese television channels. Although advertising income per production remains modest by international standards, the scale of viewership achieved by popular series demonstrates that locally produced content can reach large audiences when distributed through accessible digital platforms. For film distributors, this model illustrates a viable alternative pathway to theatrical release, particularly for lower-budget productions targeting domestic and diaspora viewers simultaneously.

[46] Marodi TV YouTube Channel statistics. Link
[47] Africanews (August 2024). Senegalese film industry seeing notable evolution. Link

Film Content within the Platform Economy

Film and entertainment programming remain central components of Senegal's platform ecosystem. In 2025 alone, GMI estimates that these categories generated approximately USD 45.6 million in platform revenues, second only to sports broadcasting within the Pay TV sector.

Audience demand also strongly favours regionally relevant content. Regional programming accounted for approximately USD 102.9 million in consumption value compared with USD 80.7 million for international catalogue titles. This preference reinforces Senegal's role within a wider Francophone African distribution corridor linking markets such as Côte d'Ivoire, Mali and Cameroon through shared linguistic audiences and satellite broadcast infrastructure.

At the same time, Senegalese films increasingly circulate through multi-platform release strategies. Recent titles such as Banel et Adama have appeared across Canal+ Afrique, Apple TV and Amazon Prime Video, while productions including Xale have reached global audiences through specialist streaming services such as MUBI. Other titles have built audience primarily through YouTube-first release strategies. Together, these examples illustrate the growing diversification of distribution pathways available to Senegalese filmmakers.

Local Platform Development and Structural Financing Constraints

Alongside international platforms, Senegal is also witnessing the emergence of locally developed streaming services. The Dakar-based platform Wawaw, launched in 2024 with government seed funding of approximately CFA 7 million (around USD 11,000), aims to become a dedicated streaming hub for African films.

However, Wawaw also illustrates the structural financing challenges facing domestic OTT development across much of West Africa. Limited capital investment and infrastructure constraints continue to restrict the scalability of locally owned streaming platforms, reinforcing the importance of partnerships with regional broadcasters and global digital distributors.

Senegal as a Regional Circulation Node for Francophone Screen Content

Taken together, these platform dynamics position Senegal less as a large-scale production centre than as an increasingly important circulation node within Francophone Africa's digital screen economy. Satellite Pay TV operators continue to anchor regional catalogue distribution, while YouTube-based release strategies are expanding access to domestic productions among younger and diaspora audiences.

As OTT adoption continues to grow and mobile-first viewing becomes more widespread, digital platforms are likely to play an increasingly central role in determining how Senegalese films reach audiences both within the country and across the wider West African region.

Informal Distribution and Piracy

The audience survey suggests low piracy in Senegal, but the reality is a deeply rooted culture of normalised unauthorised sharing. Audiences no longer see these methods as illegal. This creates a sharp contradiction: filmmakers lose up to 75% of their revenue, yet viewers believe they are acting legally because they are paying for a service. Much of this consumption happens through an informal, fragmented network of informal channels.

Unauthorised consumption is frequently masked by the widespread presence of informal neighbourhood networks that redistribute content through community-based cable systems or MMDS networks. Consumers in these models pay a subscription fee to a local informal provider, leading them to view the service as a legitimate commercial product. Canal+ Senegal has previously estimated that roughly 400,000 households pay for these pirated TV bundles, diverting billions in potential revenue away from the state and legitimate rights holders[48].

Mobile-first consumption patterns have transformed piracy into a social activity rather than a clandestine one. The use of peer-to-peer applications like Xender or messaging platforms like Telegram to swap film files is predominantly viewed by the youth as "sharing with friends" rather than engaging in digital piracy. Audience Survey reinforces this fragmentation, with platforms like MovieBox (2%) and Telegram (2%) listed as distinct categories from "Digital Pirated Sites" (2%), confirming that audiences do not equate these tools with formal theft.

The challenge for the Senegalese film industry is less about strict legal enforcement and more about addressing the convenience and cost-effectiveness of these informal systems. Because audiences are already demonstrating a willingness to pay for content, albeit through unauthorised providers, the most viable pathway to reclaiming lost revenue is to expand affordable legal access and integrate digital wallets to align with the population's existing financial behaviours.





[48] Ecofin agency. Senegal: Canal+ notes that 400,000 households are paying for pirated channels. Link.

Audience Development

Senegal's audience landscape is defined by a digitally savvy generation, with 70% of digital platform viewers aged 18 to 34. Consumption habits reveal a clear bifurcation in aesthetic preferences: while urban youth gravitate toward high-budget, American-style visuals, older viewers favour social dramas and literary adaptations. Across all demographics, localised and serialised content in languages such as Wolof and Pulaar serves as a primary driver of emotional engagement and retention.

Educational institutions and community hubs, such as the Kourtrajmé film school, the Yennenga Centre, and Cine Banlieue, have become essential pillars for audience development. These spaces transcend technical training, functioning as ciné-clubs that foster sophisticated film cultures through post-screening discussions and image education. Stakeholders view these as the bedrock of the industry.

> Cine clubs have now become schools of cinema, a foundation for building audiences, just like image education in schools.
>
> *Film Distributor*

However, marketing remains a structural vulnerability. Most local productions lack an independent digital footprint, relying instead on European festival circuits for visibility. This dependence on international infrastructure prevents filmmakers from cultivating direct relationships with domestic audiences and limits their access to the critical data necessary for sustainable market growth. While digital strategies are emerging, industry insiders note that success still often hinges on traditional social dynamics.

Senegal Film Audience Segments

The Audience Survey revealed three distinct viewer profiles within the Senegalese market (See Table 20). These segments provide a framework for understanding how different demographics navigate the film ecosystem and where the most significant barriers to engagement exist.

- International-leaning action viewers. This is a tech-forward, urban segment with a strong preference for international, high-energy content. Viewing spans multiple devices and platforms, with action and sci-fi leading. Engagement with African films is limited by concerns around production quality, though openness exists if quality improves.
- Local content cultural loyalists. This segment shows the strongest attachment to African storytelling. Viewing is mobile-first, centred on YouTube and free-to-air TV, reflecting cost sensitivity. Cultural relevance and relatability drive engagement, but discovery of new content remains a challenge.
- High-engagement family streamers. This group is family-oriented and consumes films frequently across shared devices. Preferences lean toward accessible, uplifting genres such as comedy and romance. Barriers are practical, data costs, content discovery, and inconsistent quality. Engagement improves with easier access and family-friendly content.

The distinct nature of these groups confirms that the Senegalese market is not a uniform block. Instead, it is a fragmented landscape where distribution success depends on matching specific technical and cultural standards to the economic realities of each segment.

Table 20 Senegal film consumer segments | Source: Audience Survey

Dimension	Segment 1: International-Leaning Action Viewers	Segment 2: Local-Content Cultural Loyalists	Segment 3: High-Engagement Family Streamers
Segment distribution	n = 65 (31%)	n = 73 (35%)	n = 72 (34%)
Gender	74% male	52% female and 48% male	64% male
Age distribution	18 - 44 years	25 - 44 years	25 - 44 years
Content preference	Local (77%), regional (63%) and international films (99%)	Local (99%), regional (56%) and international films (47%)	Local content (100%)
Top genres	Action (88%) and drama (55%)	Action (88%) and romantic comedy (47%)	Comedy (89%) and drama (47%)
Primary device	Smartphone / Tablet (78%)	Smartphone / Tablet (86%)	Smartphone / Tablet (89%)
Main platforms	YouTube (93%) and Netflix (59%)	YouTube (100%)	YouTube (100%) and Netflix (42%)
Fallback option	Free-to-air TV (63%)	Free-to-air TV (82%)	Free-to-air TV (63%)
Main motivations	Entertainment (60%), High-Quality Storytelling (46%), Education (45%)	Cultural Connection (69%), Entertainment (62%), Education (45%)	Entertainment (68%), Cultural Connection (61%), Education (57%)
Key barriers to watching local films	Storylines that are not engaging (26%), Low production quality (25%), Storylines that are not original (25%)	Data/connectivity (33%), Difficulty in finding where to watch (32%)	Difficulty in finding where to watch (35%), Data/connectivity (28%)
Median monthly streaming spend	USD 10.80	USD 9.00	USD 10.50
Avg. streaming platforms	1	1	1
Cinema willingness to pay	USD 9.00	USD 3.60	USD 5.40
NPS African films	21%	-1%	11%
Growth triggers	Better content recommendations and discovery, Higher-quality original African films, Reliable offline download features	Reliable offline download features, 'Free with ads' tiers on major platforms, Higher-quality original African films	Better content recommendations and discovery, Higher-quality original African films, Reliable offline download features

Film Discovery and Marketing Channels

Film discovery among audiences in Senegal appears to be digitally driven, with social media emerging as the leading source of awareness at 67%. This indicates that online platforms play a central role in how audiences learn about films, likely through shared content, trailers, and discussions circulating on social networks. Friends and family remain an important secondary channel (57%), suggesting that interpersonal recommendations still reinforce what audiences see online. Other channels play a much smaller role: streaming platforms account for 20%, indicating some influence from platform recommendations, while out-of-home advertising such as billboards contributes 13% and traditional media advertising like radio or TV accounts for 10%. Influencers/bloggers represent only 3% (See Figure 27).

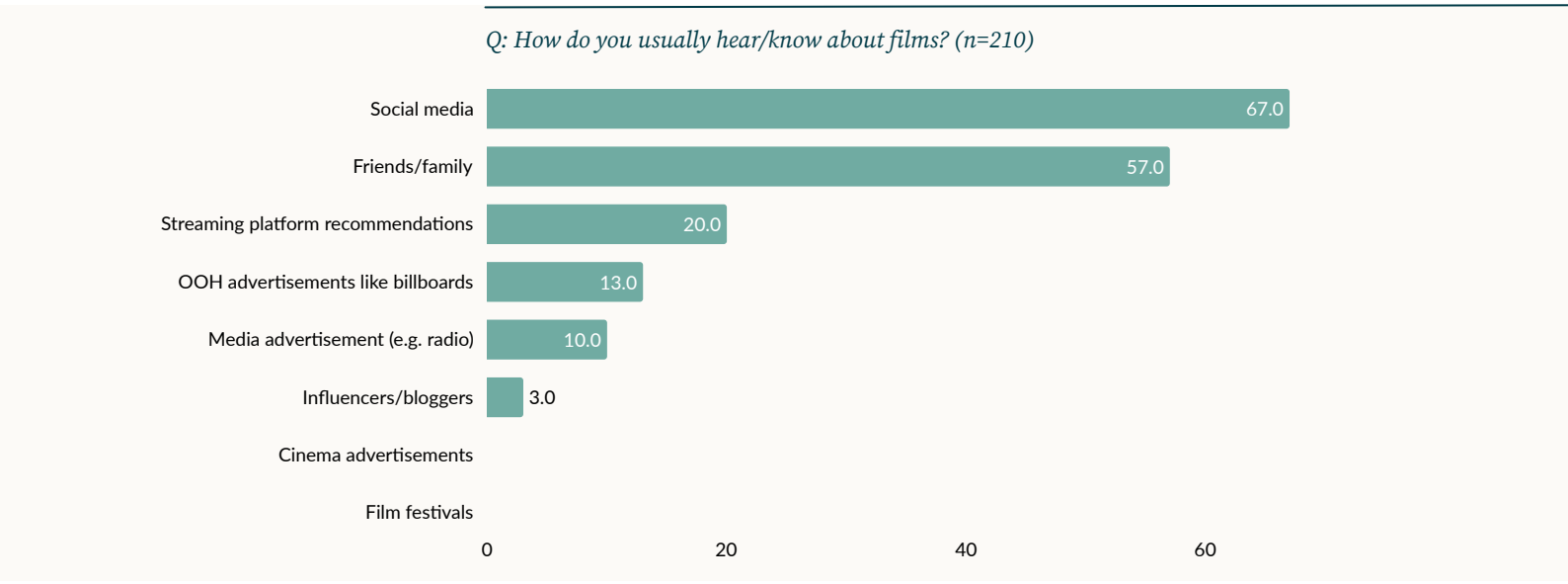


Figure 27 How audience in Senegal know/hear about new films | Source: Audience Survey

Key informant interviews support the survey findings: marketing and promotion in Senegal are increasingly defined by a digital-first strategy, as stakeholders recognized that the majority of the audience was connected via mobile devices 24/7. Social media platforms (Instagram, TikTok) and YouTube served as the primary engines for generating engagement through trailers, vertical clips, and behind-the-scenes content. Influencers played a pivotal role in this ecosystem; casting public figures with large followings was seen to *"cut marketing budgets in half"*, as a single post could drive substantial ticket sales and "*crazy audiences*". Beyond digital noise, controversy and gossip/rumours were frequently leveraged to spark public debate and compel attendance. However, in rural areas, traditional methods remained essential, including word-of-mouth and the recruitment of griots to beat drums and spread news of film screenings through neighbourhoods.

Audience Viewing Platforms and Access to Films

The Audience Survey suggests that film viewing in Senegal is overwhelmingly mobile, with smartphones dominating at 85%. This reliance on mobile devices sets Senegal apart from more TV-centric markets, though television remains a strong second at 78%. In contrast, laptops are used by a much smaller share of the audience, at 13%. These findings confirm a decisive shift toward personal, portable, and web-integrated screens as the primary way people engage with content.

When looking at platforms, streaming services leads at 85%, followed by broadcast (TV) at 74%. Social media (13%) and cinema (8%) remain limited as a primary viewing channel. This confirms that digital platforms are not just growing, they are already the main access point (See Figure 28).

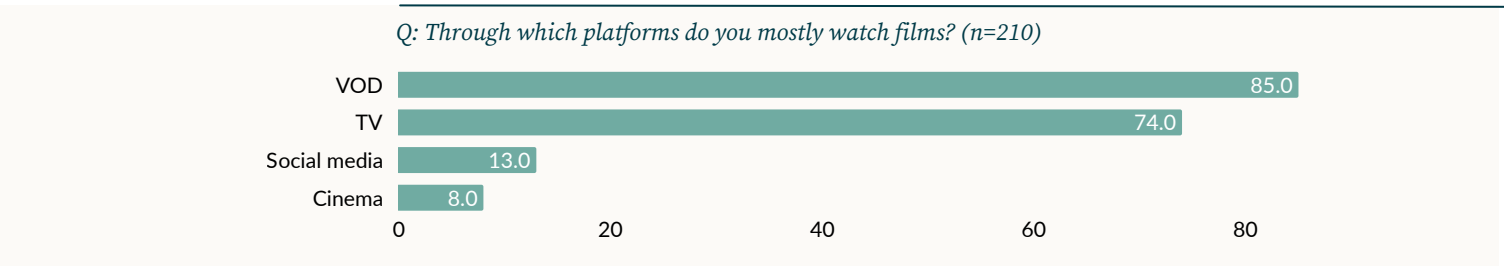


Figure 28 Primary viewing platforms in Senegal | Source: Audience Survey

Within streaming, YouTube is near-universal (98%). No other platform comes close. Netflix reaches 43% (which predominantly offers international films and a few local films such as *Atlantics* (2019)), while Canal+ Online and others remain niche. Television still holds relevance. Free-to-air TV (70%) and Pay TV (55%) continue to provide access, particularly where streaming is constrained (See Figure 29).

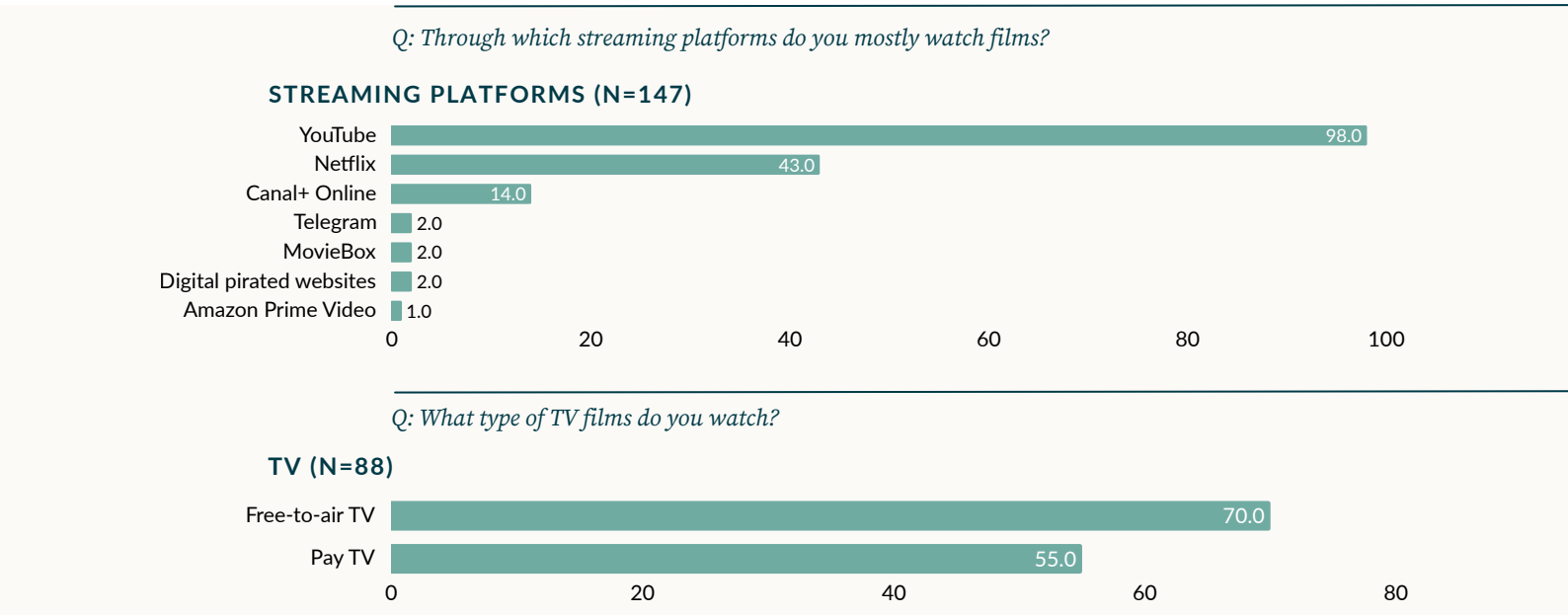


Figure 29 TV & streaming platforms used in Senegal | Source: Audience Survey

TV viewing itself is increasingly hybrid. Smartphones are the most used device for TV content (64%), followed by Pay TV connections (48%). Traditional screen-based viewing is less dominant. This suggests that broadcast content is often accessed through digital or mobile interfaces.

These findings suggest that in Senegal, access is defined by flexibility. Viewers move between TV and streaming, but mobile remains the anchor. Platforms that optimise for mobile delivery are, therefore, better positioned to scale.

Streaming Behaviour and Demand for Local Content

Content consumption is balanced between local and global. Senegalese films lead (63%), followed by other African content (41%). American films are close behind (39%), indicating strong exposure to international content. No single category dominates completely. Instead, audiences navigate across content types depending on availability and platform.

Platform behaviour creates a clearer divide. On YouTube, local films dominate (91%), making it the primary channel for African content. On Netflix, the pattern reverses: American films lead (68%), while locally produced Senegalese content remains minimal, limited to a small number of auteur films, with no popular or commercial local productions currently available. It is therefore difficult to interpret this gap as a straightforward reflection of audience preferences, as the comparison is complicated by a significant asymmetry in content availability across platforms (See Figure 30). This suggests that platform segmentation may be driven as much by catalogue composition as by audience demand.

Q: Which types of films do you watch on...?

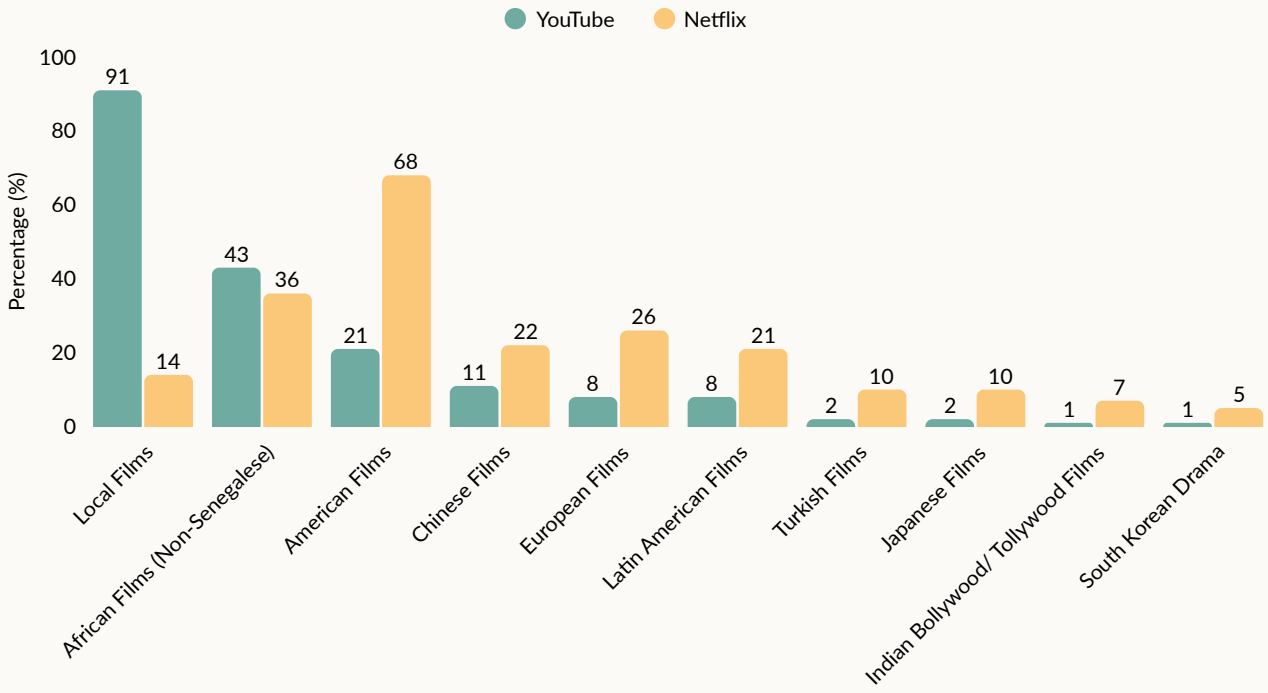


Figure 30 Films streamed on YouTube & Netflix in Senegal | Source: Audience Survey

Local films dominate viewing habits, with 69% of audiences most often watching locally produced content, followed by 18% who most often watch American films and 5% European films; only 3% most often watch films from other African countries (See Figure 31). Audience attitudes strongly support local production, with 91% stating that it is important that films are locally made (67% very important; 24% somewhat important). Stakeholders should focus on strengthening Senegal's local production and distribution ecosystem while also promoting regional African collaborations. Expanding access to local films across cinemas, television, and streaming platforms could further capitalize on the strong audience preference for domestic storytelling. The high value placed on made-in-Senegal content, combined with an openness to international aesthetics, presents a clear opportunity for stakeholders. Future strategies should prioritize the visibility of local films on premium platforms like Netflix, where they are currently underrepresented, while leveraging YouTube to sustain mass-market engagement.

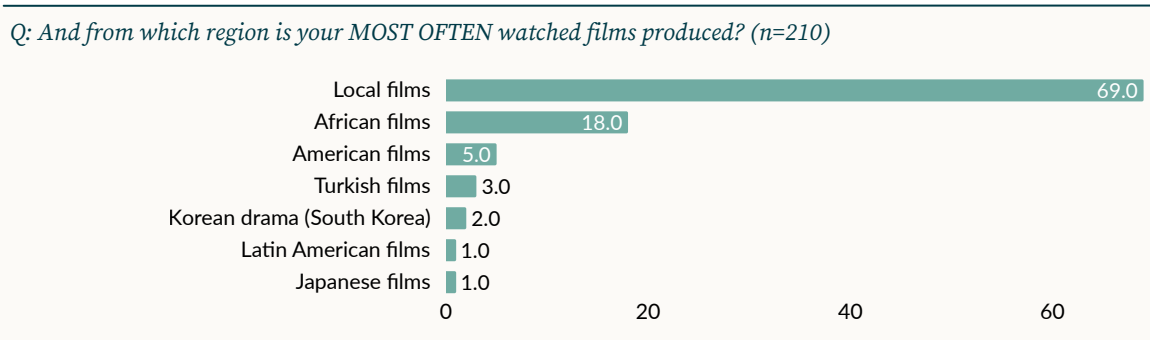


Figure 31 Most frequently watched region in Senegal | Source: Audience Survey

Barriers to Audience Growth for Local Films

Among Senegalese audiences, the dominant barrier is a strong disconnect with local content, as lack of interest in the stories or themes was the most cited reason among the few respondents who do not watch local or African films (indicative only, given the very small base). Production quality is also a significant concern (33%), reinforcing the need for stronger technical and narrative execution. Preference for international content is comparatively lower (25%), suggesting that the issue is less about competition from global films and more about shortcomings within local offerings (See Figure 32). Awareness is a moderate barrier (25%), pointing to gaps in visibility and promotion, while language and subtitles (17%) are a notable constraint, likely reflecting linguistic diversity and accessibility challenges. Overall, the data suggests that Senegal requires a dual focus on improving storytelling relevance and production quality, alongside strengthening discovery and localization efforts to better connect with audiences.

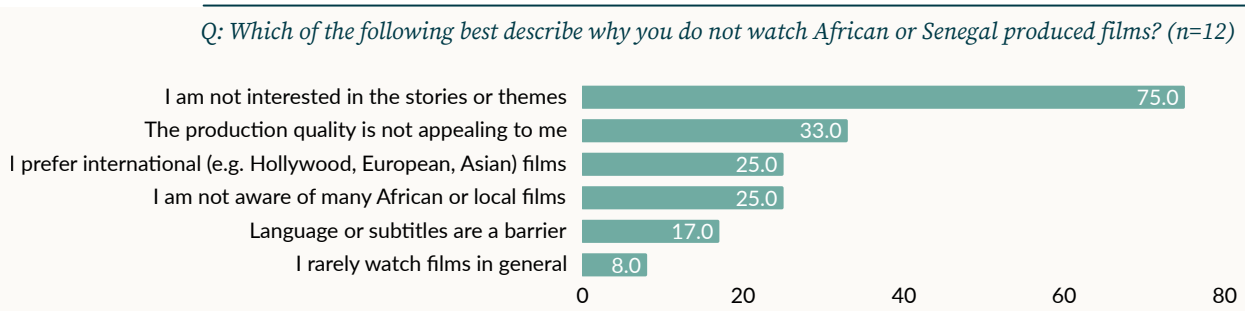


Figure 32 Why audience do NOT watch Local or African films | Source: Audience Survey

Beyond content quality, difficulty finding where to watch African films (28%), poor internet connectivity or high data costs (26%) and lack of awareness about new releases (23%) are the primary barriers that limit how often the audiences watch African films. Secondary concerns include production quality (17%) and story originality or engagement (13–12%). This suggests that access, infrastructure, and discoverability, rather than audience resistance, limit consumption. Stakeholders should therefore prioritize expanding distribution channels, improving digital access through telecom partnerships, and strengthening marketing efforts to increase awareness of African film releases (See Figure 33).

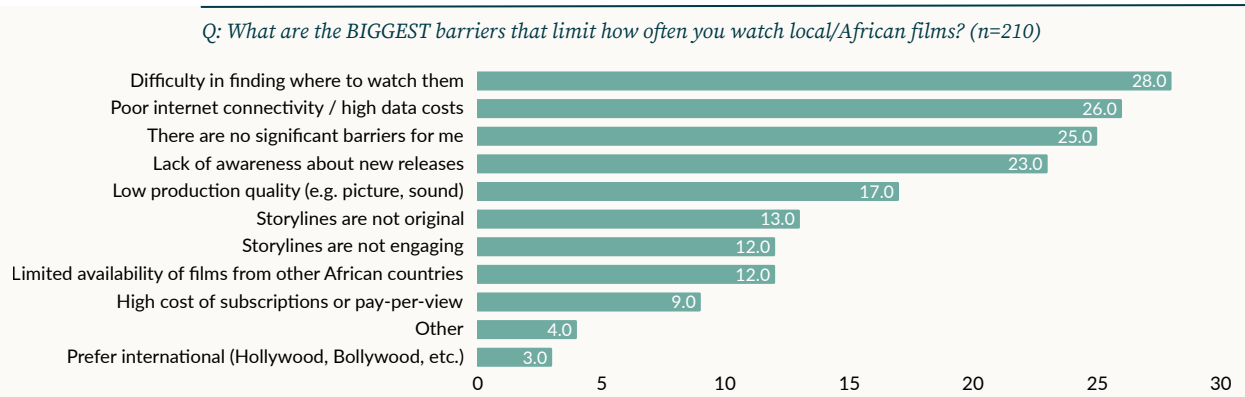


Figure 33 Barriers to watching Local or African films | Source: Audience Survey



Domestic audiences are noticing a real shift in quality. Roughly 69% of viewers find recent stories relatable, and 59% are now willing to pay for high-quality local productions. However, a major disconnect remains. Most people simply cannot find these films. About 76% of viewers feel local movies are poorly marketed, while 38% struggle to locate them on popular platforms. The interest is there, but the bridge to reach the content is broken.

Technology and cost create further hurdles. High data prices and a reliance on credit cards for subscriptions lock out a huge portion of the public. Most people use digital wallets like Wave or Orange Money, but many streaming services don't accept them.

To fix this, the industry needs a two-pronged approach. First, creators must keep improving their storytelling. Second, leaders need to modernize how films are delivered. This means building cinemas in more regions and offering tax breaks for new theatres. Most importantly, it requires making digital payments easy for everyone.

> The average person who doesn't have a bank card won't be able to pay for Netflix... they need to integrate digital wallets to allow people to purchase content.
>
> *Filmmaker, Senegal*

Audience Data Systems and Evidence Gaps

A glaring evidence gap existed regarding concrete audience statistics and revenue transparency, described by one official as a puzzle. There was no centralized ticketing system in Senegal, meaning box office figures provided by exhibitors were often unverifiable and not shared transparently with producers. While digital platforms like YouTube provided basic metrics on view counts and duration, stakeholders lacked data on regional preferences and the long-term economic impact of films on communities. To address these gaps, some platforms began exploring AI-driven recommendation systems and data collection tools to track real-time user interaction, while distributors advocated for the creation of a dedicated Senegalese Box Office to provide a scientific barometer for the industry.

> In Senegal, I think what would be good is to have a Senegalese box office that tracks the impact of cinema, but in a Senegalese way.
>
> *Film Distributor, Senegal*



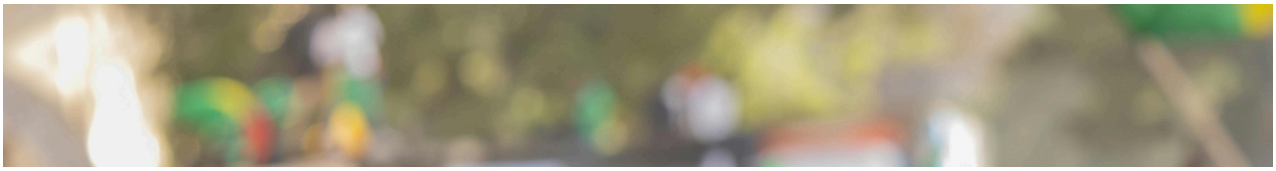
Social Impact

Film in Senegal is a powerful medium for social reflection and debate, with the strongest perceived impacts found in themes of cultural identity, feminism, and environmental resilience. Cinematic works frequently explore national history and the struggle for dignity, as seen in the public engagement with biopics and adaptations of classic Senegalese literature. Emerging genres, such as ecological thrillers, have begun to address the impact of climate change on coastal communities, sparking conversations about adaptation and social cohesion.

Examples of socially impactful films include The Waste Commons, which implemented a structured campaign with NGO partnerships to advocate for the livelihoods of waste pickers in Dakar. While documentaries and fiction films addressing youth protection and gender equality are common, the broader ecosystem lacks institutional support for sustained advocacy programming. Public broadcasters and international donors, such as the AFD and the Goethe-Institut, play a significant role in supporting impact-oriented content, yet there remains a gap in translating thematic relevance into organized social mobilization.

The stakeholder insights revealed that social impact was defined by the industry's ability to change behaviours and spark debate on sensitive cultural issues. Respondents observed that film had the strongest perceived impact in thematic areas such as migration (Io Capitano, Canoe), women's rights (Mistress of a Married Man), and public health (Yaay2.0). The series Yaay2.0, which addressed infertility, reportedly prompted men to seek sperm analyses, a procedure many had previously refused. Policy influence was explicitly demonstrated by the documentary L'utilité et l'attachement, which prompted the Head of State to issue formal instructions regarding unpaid compensation for the Regional Express Train project after a screening.

Priority themes for sector growth included mental health, pre-colonial African history, and addressing rising societal violence. However, several genres remained under-explored, particularly children's programming, animation, and thrillers that move beyond "miserabilist" narratives. Social impact initiatives were often driven through partnerships with NGOs and development agencies such as GIZ, UNFPA, and UNESCO, as well as public institutions, with films frequently utilized in educational settings, community screenings, and focus group discussions. Despite these efforts, evidence of impact remained largely qualitative, relying on testimonials and social media engagement metrics rather than robust, structured systems for measuring behavioural change.



Audience Interest in Socially Relevant Storytelling

The audience survey indicates that viewer interests are strongly concentrated around issues that reflect everyday realities and future aspirations. Demand is highest for stories about youth pursuing opportunities (61%), women overcoming challenges (54%), and themes of political corruption (42%). This suggests that viewers are not just looking for escapism; they want to see structural and societal changes reflected on screen (See Figure 34).

Secondary themes like community coexistence (40%) and livelihoods (36%) further highlight an interest in how individuals navigate daily economic pressures. Notably, only 7% of viewers prefer entertainment-only content. In the local context, social relevance is not an optional layer; it is the core value proposition. The most successful content blends high production value with urgent themes like youth aspirations and gender dynamics.

Q: Which of the following social impact themes would you be MOST interested in watching a film for? (n=210)

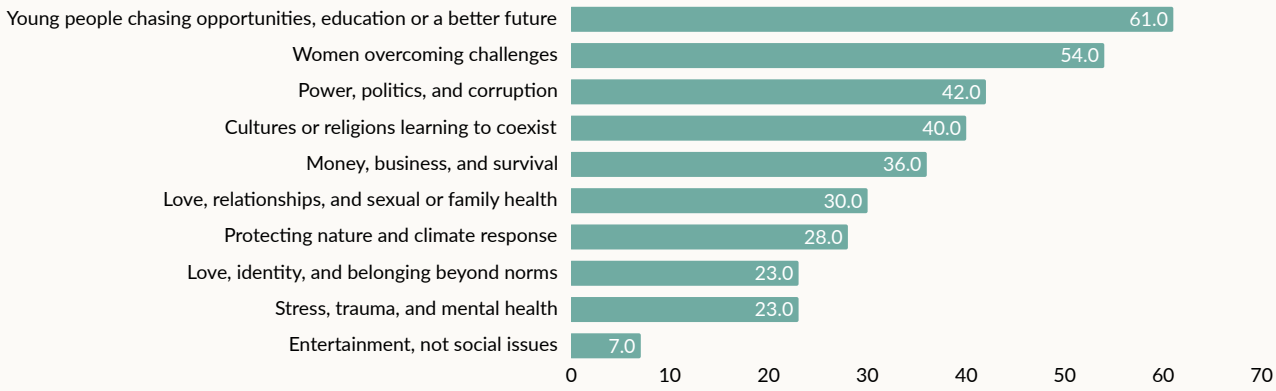
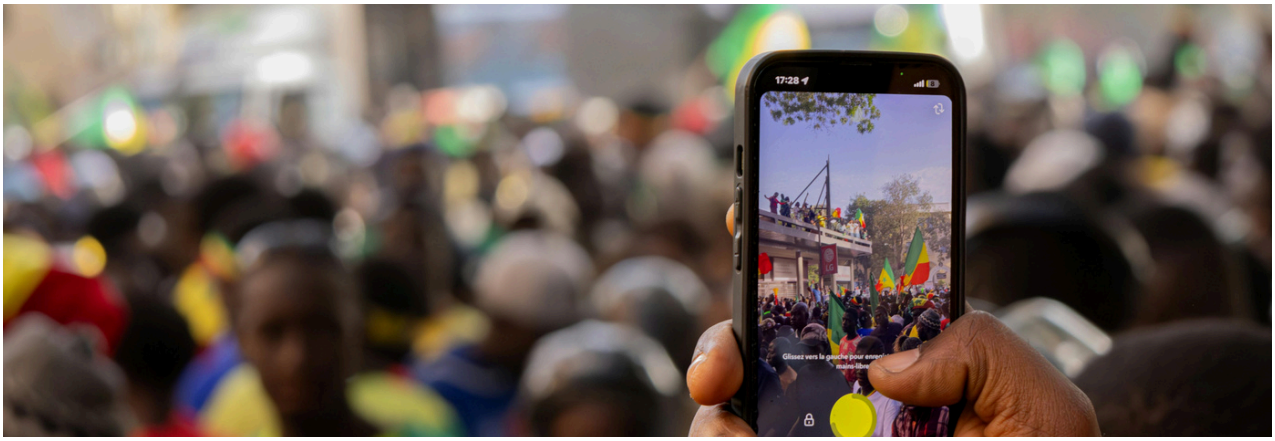


Figure 34 Social impact themes Senegalese audiences want to watch | Source: Audience Survey

This means that audiences don't just accept socially relevant content, but they demand it. It is part of the core value proposition. The strongest opportunity lies in stories that combine entertainment with clear social relevance, especially those grounded in youth aspirations, gender dynamics, and everyday economic realities.



Financing and Enabling Environment

The financing landscape in Senegal is a hybrid of public support, international co-productions, and emerging private investment. The primary domestic source is the Fund for the Promotion of Cinematographic and Audiovisual Industry (FOPICA), which allocated approximately USD 2.1 million across 49 projects in 2023[49]. While FOPICA is a crucial catalyst, its resources are often insufficient to cover the full costs of commercial features, leading to a continued dependence on European co-production treaties. The 2016 agreement with France remains one of the most active bilateral film treaties in Africa, allowing Senegalese films to access French funds and international distribution networks. It has recently supported major international successes like Ramata-Toulaye Sy's *Banel & Adama* (2023) and Mati Diop's *Dahomey* (2024), which won the Golden Bear at the Berlinale. Additional treaties exist with Belgium (Wallonia-Brussels), Canada and Morocco.

The private sector is increasingly active, notably through the Canal+ Group, which has acquired stakes in local production houses and commissioned numerous original series. However, the commercial ecosystem remains constrained by high levels of informality across the creative sector. Industry stakeholders estimate that a substantial (80%) share of creative enterprises—particularly smaller production companies and independent studios—operate without fully formalised corporate structures, audited financial systems, or long-term contractual frameworks. In practice, this limits access to commercial financing, insurance products, tax incentives, and institutional investment, while also complicating rights management and revenue tracking across distribution windows.

Informality additionally affects the sector's ability to scale sustainably. Many producers continue to rely on project-based operations, informal labour arrangements, and short-term financing structures rather than permanent institutional capacity. This creates challenges for international co-production eligibility, investor due diligence, and copyright enforcement, particularly in digital distribution environments where revenue transparency remains limited. Stakeholders further noted that the absence of large-scale studio infrastructure and weak intellectual property enforcement continue to deter risk capital and constrain the development of scalable commercial business models.

Overview of Public, Private and International Financing for Film

Financing for film and audiovisual content in Senegal is a fragmented landscape where public funds, international grants, and private sponsorships play distinct roles. FOPICA (Fund for the Promotion of the Cinematographic and Audiovisual Industry) serves as the primary local public funding mechanism, aimed at helping filmmakers secure local legitimacy. FOPICA often covers 30-40% of feature film budgets which stakeholders mention is broadly in line with typical public-fund co-financing shares seen internationally, rather than an unusually low level of support. International financing was dominated by the OIF (International Organization of La Francophonie) and European funds, but a major shift occurred as Gulf-based capital from the Red Sea Film Fund and Doha Film Institute began to outpace combined African government investments. Private financing through the traditional banking sector is described as virtually non-existent. Banks do not understand the industry's cash-flow cycles and often refuse to provide advances even against signed contracts.

> When you produce a film, can you go and ask your banker to give you 50 million? That's not possible. While you might bring 100 million into your account, you can present that; they see it that way. But when you need a loan, they won't grant it, because the film industry isn't guaranteed right now.
>
> *Film Distributor, Senegal*

[49] Tambay Obenson. News Brief: Senegal's State Film Fund Publishes Long-Awaited 2023 Results. Link.

Incentives, Grants, Tax Credits, Funds and Co-Production Schemes

Senegal currently lacks a robust system of tax credits or fiscal incentives. Industry stakeholders see this gap as a major barrier to investment. This puts the local market at a disadvantage compared to regions like South Africa. Public funding through FOPICA remains the primary support mechanism, but it is strictly project-based. The fund faces significant operational hurdles. Calls for proposals are infrequent, with only three occurring over the last decade. Furthermore, actual disbursements often fall short of the promised 2 billion CFA allocation.

> There is this FOPICA mechanism, which is to be commended, but unfortunately 1 billion (CFA) is not enough. Beyond the funding shortfall, FOPICA has a real organizational problem. This is a fund that was created in 2014, it is now 2026, and there should typically have been at least one call for projects per year. From 2014 to 2026, there have only been 3 official calls for projects. I'd even say 2. The 3rd was published, but the call for projects was not clear. Effectively, the success rate is three calls out of twelve years, which poses a significant problem despite the fund's existence.

Co-production arrangements remain critical for financing feature films. However, they frequently introduce power imbalances. International partners often contribute up to 80% of project budgets, positioning local producers as minority stakeholders and, in many cases, necessitating the inclusion of Global North talent to meet external funding requirements.

Business Models and Revenue Mixes Across Distribution Channels

Business models for content in Senegal varied widely between television series and feature films. The successful Marodi model for TV series relied on securing private sector sponsorships from industries like real estate and telecommunications, effectively bypassing TV channels that were unwilling to pay market rates. For theatrical distribution, the standard model was a 50/50 revenue split between exhibitors and distributors, which many stakeholders found *"unfair"* as it failed to account for the distributor's marketing costs, often leaving producers with zero profit. Streaming platforms like Wido utilized a mix of subscription and pay-per-view models (charging as little as 100 CFA per day) and experimented with revenue sharing, though they struggled with high rates of piracy that leaked potential earnings.

> If Wido distributes your product today, tomorrow you wake up and your product is everywhere, pirates are using it, and that's lost revenue that Wido doesn't pay you for.
>
> *Filmmaker, Senegal*

Key Constraints and Promising Innovations

According to stakeholders, the key constraints to a thriving audiovisual ecosystem included high technical production costs and the concentration of infrastructure in Dakar, which left regional areas significantly underserved. Industry stakeholders also noted that the influx of foreign productions and large-scale co-productions had driven up technician fees, making it increasingly difficult for low-budget local films to remain viable. At the same time, several promising innovations were emerging. These included the use of AI tools to support due diligence, analyse market trends, and strengthen business planning processes to better attract investors. In distribution, hybrid models were gaining traction, combining video-on-demand (VOD) services with live event streaming such as concerts and fashion shows. Additionally, digital wallet solutions like Wave were being leveraged to address low credit card penetration and facilitate more accessible streaming payments.

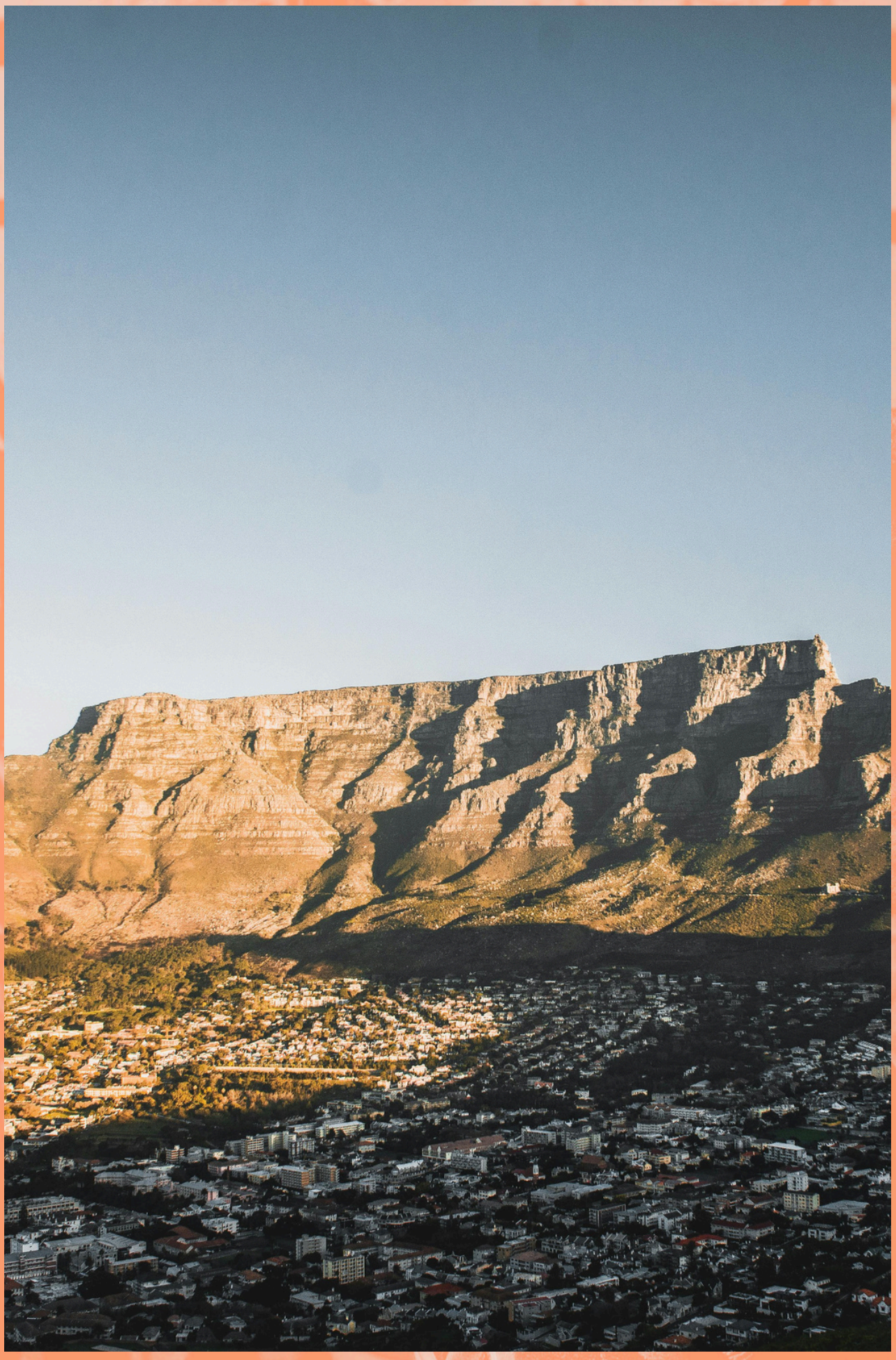
Country-Specific Priorities and Opportunities

The following priorities have been identified as critical to unlocking Senegal's full economic potential as a film and audiovisual production and distribution hub:

- Develop commercially appealing, genre-oriented content (action, comedy, romance) that resonates with mainstream domestic and regional audiences, addressing the identified relevance gap and production quality concerns.
- Decentralise distribution infrastructure through low-cost models, including solar-powered mobile exhibition units (MobiCiné) and community-based digital hubs, to serve Senegal's 14 regions beyond the Dakar corridor. These initiatives need sponsorship to be viable.
- Strengthen intellectual property enforcement through SODAV and develop an industry-wide anti-piracy strategy focused on expanding affordable legal access and integrating digital wallet payment solutions (Wave, Orange Money).
- Invest in independent digital marketing infrastructure to enable filmmakers to build direct audience relationships, collect data, and reduce reliance on European festival infrastructure for domestic visibility. This should be supported by short courses that give filmmakers foundational digital marketing skills.
- Reform FOPICA through planned mergers with other state bodies to improve transparency, increase the frequency of calls for proposals, and create blended finance vehicles more attractive to private capital.
- Establish a centralised ticketing and data system (Senegalese Box Office) to enable verifiable box office reporting, build investor confidence, and support evidence-based decision-making across the value chain.
- Leverage Senegal's Francophone African positioning as a regional circulation node by developing co-production and distribution partnerships with neighbouring markets (Côte d'Ivoire, Mali, Cameroon) and building on existing relationships with Canal+ Afrique and diaspora audiences in Europe.
- Expand mobile-first platform strategies and integrate digital wallets to broaden the paying audience base beyond those with access to formal banking, directly addressing the largest access barrier in the streaming ecosystem.
- Prioritise development of under-represented genres, particularly children's programming, animation, and thrillers, and socially resonant storytelling around mental health, pre-colonial African history, and youth aspirations to diversify the content slate and capture emerging audience demand. However, animation and premium content remain capital intensive despite recent advances in AI, therefore success in these genres will depend heavily on securing viable distribution and merchandising opportunities.

These priorities are interconnected. Progress on content quality and decentralised distribution must be supported by a stronger financing architecture and more transparent market data systems. With the right institutional reforms and private sector engagement, Senegal is well-positioned to consolidate its status as a leading Francophone African audiovisual market.

Read the full Senegal Country Report



South Africa

Country Context

South Africa is one of Africa's largest and most diversified economies, with a population of over 64 million and a nominal GDP of approximately USD 426 billion as of 2025[50]. The economy is heavily service-driven, with the creative industries playing an increasingly important role. Urbanisation is high, with nearly 70% of the population concentrated in key provinces such as Gauteng, Western Cape, and KwaZulu-Natal; these regions serve as the core hubs for film production and exhibition. High digital penetration (around 80%) and extensive daily internet usage (over 9 hours per user) have created a large, accessible digital audience for audiovisual content[51].

The film sector operates within the broader Cultural and Creative Industries (CCI), which contributed approximately R 271 billion (around 4% of GDP) in 2023[52]. The audiovisual and interactive media sub-sector alone contributed R 53.7 billion. The ecosystem is supported by key institutions, including the National Film and Video Foundation (NFVF), which is responsible for industry development, and the Department of Trade, Industry and Competition (DTIC), which provides financial incentives and policy support.

Overview of the National Film Ecosystem: History, Milestones, and Institutional Landscape

South Africa's film industry has transitioned significantly from its apartheid-era structure, which excluded Black filmmakers from authorship despite strong audience engagement in township cinemas. Post-1994 reforms opened opportunities for more inclusive participation, supported by public institutions such as the NFVF and increased private sector investment, particularly from broadcasters.

The 2000s marked a period of expansion driven by television content such as soap operas and telenovelas. While this created employment and expanded audiences, it also shifted focus toward high-volume production, sometimes at the expense of cinematic quality and innovation. Nonetheless, the industry has demonstrated global competitiveness through notable successes.

Today, the ecosystem is characterised by a dense but fragmented institutional structure. Key public bodies, including the Department of Sport, Arts and Culture, NFVF, DTIC, and Industrial Development Corporation (IDC), whose Audio-Visual Department offers up to 49% financing[53]. They play central roles in funding and policy but face criticism for inefficiencies and lack of coordination. Provincial film commissions provide additional support, though unevenly distributed. Meanwhile, public broadcasters have weakened financially, allowing private players such as MultiChoice to dominate content production, particularly in television.

[50] African National Congress (19 February 2026). South Africa reclaims its position as Africa's largest economy, a clear demonstration of ANC policy working. Link
[51] Meltwater (2025). South African Digital & Social Media Statistics 2025. Link.
[52] Capstone Report (2025). The SA Cultural Observatory - Measuring and Valuing SA's Cultural, Creative and Sports Industries. Link.
[53] Industrial Development Corporation (IDC). Link.

Recent shifts in the industry are being driven by digital platforms, funding constraints, and structural inefficiencies. Streaming platforms such as Netflix and Showmax, which was shut down on 30th April 2026, have expanded global reach and distribution opportunities, but access remains limited, often favouring established production companies. Alternative funding sources exist (e.g., National Lottery Commission) but are difficult for independent filmmakers to access due to structural barriers.
The ecosystem also faces a mismatch between talent supply and industry absorption capacity, resulting in a growing pool of underutilised creative professionals. While film festivals and markets provide important opportunities for visibility, networking, and financing, they remain episodic and insufficient to address systemic challenges.
A key overarching issue is the lack of coordination across stakeholders. Fragmentation among government bodies and industry players limits the effective pooling of resources and weakens the sector's ability to respond collectively to challenges, as highlighted by industry stakeholders.



Film Distribution

Distribution Overview

South Africa's film distribution landscape is shifting from a cinema-led model to a digital-first ecosystem. While it remains one of the most mature markets on the continent, theatrical distribution for local films is highly constrained. Despite 246 films released in 2024, only 18 (about 7%) were South African, generating less than 1% of total box office revenue[54]. Furthermore, the number of cinemas and cinema screens has been declining since 2015, primarily driven by the explosion of digital streaming platforms, severe local economic constraints, disruptive power outages, and shifts in international content delivery.

In contrast, digital distribution is rapidly expanding, driven by growing streaming adoption. MyBroadband reports that there were 3.4 million OTT subscribers in 2023 in South Africa, a roughly 150% increase from five years earlier. GMI reports an estimate of 7.6 million OTT users across SVOD, AVOD and FAST platforms by 2026, indicating a strong demand for on-demand, mobile-first content. Moreover, GMI highlights that the broader Pay TV and OTT market is also growing, projected to exceed USD 2.2 billion by 2030. PwC's Media and Entertainment Outlook[55] highlights that OTT video revenue is estimated at USD 291 million and is projected to grow to USD 360 million by 2029 with a CAGR of 6.7% compared to Kenya's 11.2% and Nigeria's 8.0%.

However, access to distribution channels and revenues remains concentrated among a few players, and structural inequalities persist, particularly in rural areas where infrastructure and affordability limit both cinema and digital access.

[54] NFVF. 2024 Box Office report.
[55] PwC. Africa Entertainment and Media Outlook 2025–2029. Link.

Distribution Channels

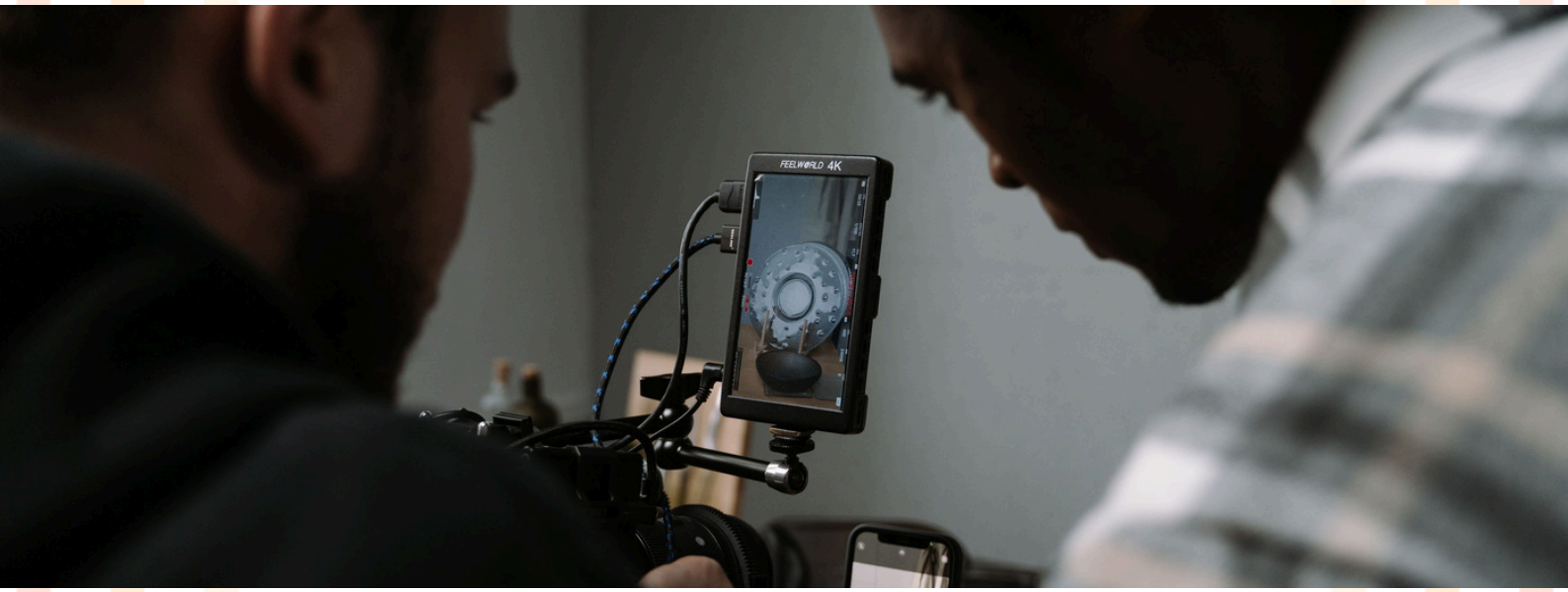
Cinemas

South Africa has historically had the largest cinema exhibition market in Africa; however, the sector has contracted significantly over the past decade. The number of cinema sites declined from 76 in 2015 to 51 in 2025[56] (a 33% reduction) across major cinema chains such as Ster Kinekor and Nu Metro. Current estimates place total screen capacity at 450-500, with closures concentrated in lower-income and regional areas. By comparison, industry sources such as Numero report approximately 69 cinema locations, highlighting discrepancies in market tracking but confirming an overall downward trend.

This contraction is reflected in box office performance. In 2024, NFVF reports that the total gross revenue declined by 4.5%, from R 575.0 million in 2023 to R 549.3 million[57]. Cinema attendance dropped even more sharply by 34.5%, falling from 8.3 million to 5.4 million admissions over the same period. The number of films released also declined slightly, from 253 titles in 2023 to 246 in 2024 (a 2.8% decrease). Together, these trends point to weakening theatrical demand, driven by economic pressures, increased competition from streaming platforms, and shifting audience preferences.

Despite the overall decline, the NFVF 2024 box office report also indicates that there are signs of recovery in local film production. The number of domestic South African films released increased from 8 in 2023 to 18 in 2024 a 125% rise. However, this growth has not translated into a significant commercial impact. Local films contributed just 0.75% of total box office revenue, generating R 4.12 million in 2024, down from R 5.2 million in the previous year.

Theatrical performance remains heavily dominated by international content. All top 20 highest-grossing films in 2024 were global releases, led by *Moana 2* (R 47.9 million), followed by *Deadpool & Wolverine* (R 46.2 million) and *Inside Out 2* (R 43.6 million). In contrast, the highest-earning domestic titles generated substantially lower revenues, with *Gracie and Pedro: Pets to the Rescue* leading at approximately R 1.086 million, followed by *Broken Promises 5* and *Highway Sheila: Resurrection* at R 802,379 and R 734,548 respectively.



[56] MyBroadband (29 December 2025). Ster-Kinekor closes cinemas in major South African malls. Link.
[57] National Film and Video Foundation (NFVF) Box Office Reports. Link.

From a distribution perspective, the NFVF 2024 box office report also highlights that market shows a diverse spread of titles across multiple distributors rather than dominance by a few players. Independent distributors released the highest number of films, accounting for 52 titles (21%). Empire Entertainment followed with 29 films (12%), closely followed by United International Pictures (UIP) with 28 films (11%). Filmfinity and Ster-Kinekor each distributed 26 films, also representing 11% apiece. Additional contributions came from Filmfinity (Sony) with 18 titles (7%), Empire (Warner Bros.) with 13 titles (5%), and Filmfinity (Disney) and Gravel Road, each releasing 10 films (4%). Other smaller distributors collectively accounted for 27 films (11%), while Trafalgar Releasing, SK Select, and Indigenous Films contributed marginal shares of 2%, 1%, and less than 1%, respectively. This indicates a fragmented supply landscape despite dominance of international content.

Cinema attendance and barriers

Beyond market structure, audience access and behaviour further constrain the theatrical sector. Audience Survey shows that cinema attendance is relatively low, with audiences visiting a median of four times per year. Cost and convenience are key barriers: 41% cite high ticket prices, reinforcing that cinema has become a luxury, while 39% prefer alternative platforms like streaming and mobile viewing (See Figure 35). Overall, both audience data and stakeholder insights indicate that cinema is becoming increasingly inaccessible, highlighting the need for more inclusive and alternative exhibition models.

Independent national evidence confirms how limited cinema participation has become. In the NFVF's 2026 national audience survey, 58% of respondents said they never or no longer go to the cinema and only 5.5% had attended in the past month; among those who do attend, most (59%) go only once or twice a year. More than half (53%) described cinema location as a barrier, reflecting the concentration of screens in urban malls. Price appears to be only part of the problem: two-thirds (66%) said they would pay the same ticket price for a South African film as for an international one, and those who would not pointed to concerns about quality, trust and awareness rather than cost. Only 6% expect to go to the cinema more over the next two to three years (NFVF, 2026)[58].

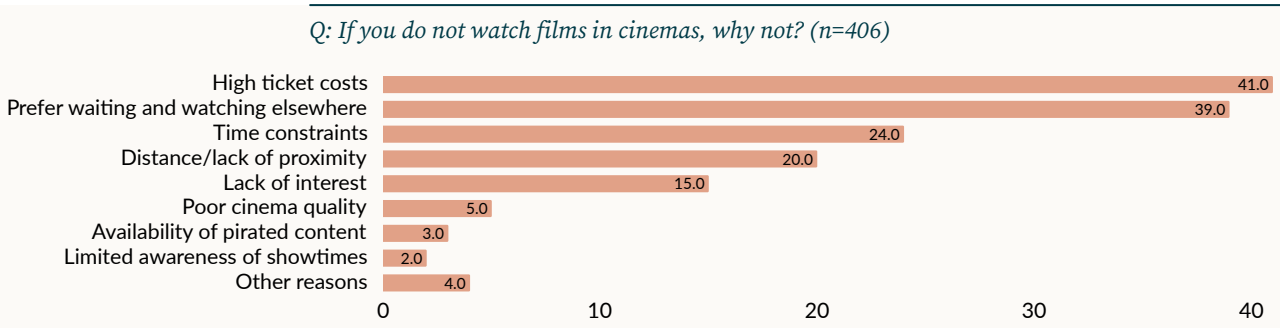


Figure 35 Reasons for not watching films in cinemas, South Africa | Source: Audience Survey

Digital platforms - Pay TV and OTT

South Africa's video entertainment market has undergone rapid transformation, with traditional Pay TV facing subscriber erosion while OTT platforms gain traction. Economic pressures have driven cord-cutting yet rising broadband penetration and affordable mobile data have fuelled streaming adoption. South Africa remains one of the largest and most mature Pay TV and OTT markets in Africa. In 2025, GMI reports that the market generated approximately USD 1.77 billion in revenue, a drop from USD 1.93 billion in 2022, though it is projected to expand beyond USD 2.2 billion by 2030 at a 6.8% CAGR, driven primarily by OTT and hybrid consumption models. In African film distribution, South Africa plays a dual role: domestically, it is the highest-ARPU market and the most commercially reliable outlet for premium African films; regionally, South African platforms serve as gateways to pan-African visibility.

[58] Birguid (2026). South African Audience Research (Cinema, Digital, Film and Video Content). Report prepared for the National Film and Video Foundation (NFVF), RFP19 2025-2026, 27 May 2026. National face-to-face intercept survey of audiovisual consumers aged 18 and over (n=379 completed interviews across all nine provinces), complemented by 17 stakeholder interviews.

Pay TV: Large Base, Slowing Momentum

Pay TV remains the dominant revenue pillar, though subscriber volumes have stabilised rather than expanded. DStv remained the Pay TV leader but lost subscribers, with South African active linear subscribers falling from approximately 8.6 million in March 2024 to 7.9 million by March 2025, while DStv Stream grew strongly, 139% in one period and 38% year-on-year in FY25. Blended South African ARPU hovered around ZAR 280–292 in FY25[59]. Pay TV remains the most reliable source of licensing revenue for filmmakers, but its commissioning increasingly favours commercially proven formats, limiting opportunities for independent films. Concurrently, broadcast television is declining due to financial instability and a shift toward lower-risk licensing models. Overall, both Pay TV and broadcast are becoming increasingly commercialised, focusing on formulaic genres and underrepresenting diverse content.

OTT: Growth Engine, But with Structural Concentration

South Africa's OTT market has shifted from high-cost SVOD to more accessible AVOD/FAST models. High data costs and subscription fatigue are driving demand for affordable, locally relevant content. By user share, GMI reports that the AVOD/FAST accounts for 55.2% of the market (4.22 million users), SVOD for 43.4% (3.32 million users), and TVOD for under 2% (100,000 users), (see Table 21). SABC Plus has emerged as a leading hybrid AVOD/FAST platform, scaling to 2 million users by early 2026, adding about 111,000 users monthly[60]. eVOD offers over 9,000 hours of free content, reaching 2.2 million users by late 2025, with a 56% increase in watch time, built on "data-conscious" features such as offline downloads. For filmmakers[61], eVOD's investment in Originals creates a pipeline for locally produced, digital-first content. Both platforms highlight a structural shift where accessibility, local relevance, and mobile-first design matter more than large international content libraries.

Table 21 Breakdown of South Africa OTT by Subscription Model | Source: GMI

Subscription Type	Platforms	Total Users	% of Market
SVOD	Showmax, Netflix, Amazon Prime, YouTube Premium, eVOD, Viu	3,320,000	43.4%
AVOD/FAST	SABC Plus (free tier), eVOD (free users), AfriForumTV	4,222,000	55.2%
TVOD	MyMoviesAfrica, Circuits TV	100,000	<2%
Total Unique Users	All platforms	7,642,000	100%

Content Strategy and Film Distribution Implications

South Africa's film content strategy is largely risk-driven, with distributors prioritising commercially proven genres such as action, drama, and reality TV. While this reduces financial uncertainty, it limits diversity, sidelining documentaries, indigenous language films, and socially driven narratives. This has created a growing disconnect between content and local audience realities, as productions increasingly mirror global formats rather than reflecting authentic local stories.

At the same time, distribution power is concentrated among a few gatekeepers, restricting access for independent filmmakers and reinforcing dominance by established players. Streaming platforms further entrench this dynamic through IP ownership models that limit long-term value for creators, despite providing funding and visibility.

However, emerging digital platforms and potential policy interventions, such as local content quotas, offer opportunities to diversify access and representation. Building a more inclusive ecosystem will require moving beyond risk-averse approaches to support authentic, locally grounded storytelling.

[59] MultiChoice Group. Integrated annual report for the year ended 31 March 2025. Link
[60] Tech Central (20 February 2026). SABC Plus tops two million registered users. Link.
[61] IT Web (13 February 2026). eMedia's eVOD streaming platform racks up 2.2m users. Link.

Pay TV and OTT Revenue

A structural shift in South Africa's Pay TV and OTT market has important implications for filmmakers. While total market revenue declines between 2022 and 2025, projections show growth resumes from 2026, driven overwhelmingly by OTT platforms, with a projected 12.8% CAGR that far outpaces Pay TV. For filmmakers, this suggests growing demand for platform-ready, digitally distributed content, particularly in SVOD, AVOD, FAST, and hybrid models that rely on content scale rather than long exclusivity. The steady growth in regional content (7.1% CAGR) signals rising appetite for local stories, while movies and entertainment outperform most genres, reinforcing film's central role in platform value strategies. However, stronger platform growth does not automatically translate into improved creator income, and the market expansion occurs within a structurally constrained revenue environment for filmmakers.

Revenue generation in South Africa's film industry is viewed as fragmented, opaque, and generally insufficient, with most filmmakers unable to fully recover production costs. Returns vary widely across channels, forcing reliance on blended financing models (grants, licensing, deferred payments). Key dynamics across channels:

- **Theatrical:** Commercially unviable for most local films due to limited screens willing to programme African stories, theatrical runs are often short, and competition from international titles; box office returns are typically modest relative to budgets.
- **Broadcast TV:** More predictable but constrained; budgets vary by genre, and the shift from commissioning to licensing, often with broadcaster ownership, reduces long-term earnings. Limited transparency in viewership data further weakens monetisation.
- **Streaming platforms:** Provide upfront licensing fees and global exposure but offer low transparency on performance and little participation in downstream revenues, resulting in modest, non-recurring income for creators.

Additional constraints:

- High marketing and distribution costs limit profitability, with many filmmakers relying on low-cost digital promotion.
- Film festivals support visibility and potential international sales but rarely generate direct financial returns.

Overall, the ecosystem offers limited, inconsistent income streams, making financial sustainability a major challenge for filmmakers.

Informal Distribution and Piracy

Unofficial streaming platforms serve as a complementary rather than dominant channel in South Africa's film ecosystem, with 75% of audiences using them occasionally and 20% frequently, indicating that piracy coexists with rather than replaces legal distribution. Informal distribution also plays a significant role, particularly through peer-to-peer networks, as 92% of audiences source films from friends or informal sellers, while other channels include digital rentals (42%) and local video shops (33%), highlighting a hybrid ecosystem of formal and informal access (See Figure 36 & 37).

Film circulation in South Africa, therefore, operates through a hybrid system of digital platforms and informal networks, with piracy largely driven by accessibility constraints rather than consumer preference. While physical piracy has declined since the DVD era, illegal streaming persists due to high subscription costs, geographic restrictions, and limited availability of legal content, particularly affecting rural and lower-income audiences.

Stakeholders emphasise that addressing piracy requires improving access rather than relying solely on enforcement, with key solutions including affordable legal alternatives, reduced data costs, expanded community screenings, and better discoverability of local content.

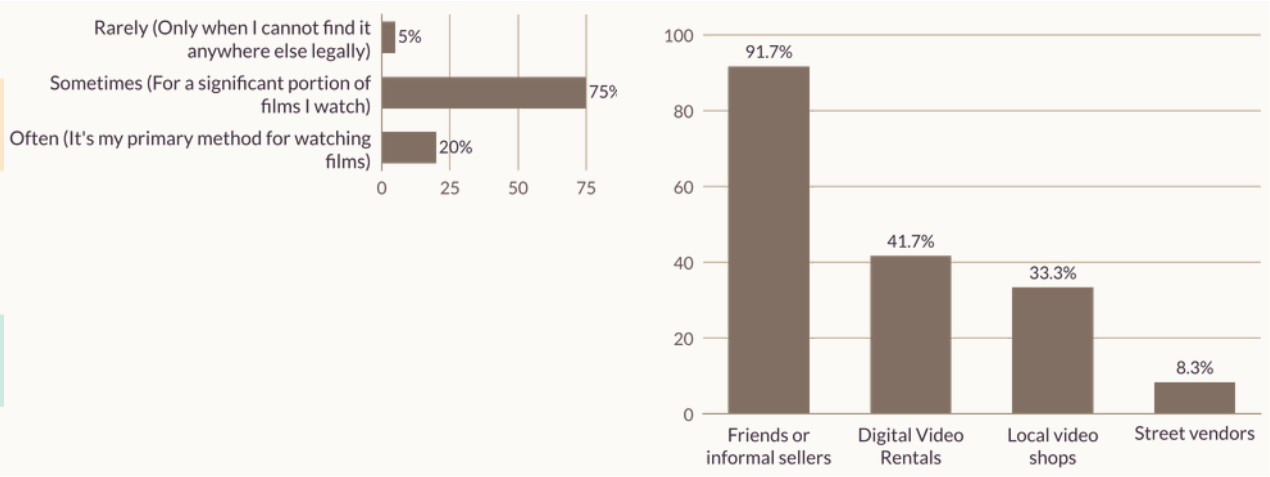


Figure 36 Frequency of consuming unofficial or pirated websites/apps in South Africa | Source: Audience Survey

Figure 37 Video rental sources in South Africa | Source: Audience Survey

Festivals and Community Screenings as Alternative Distribution Channels

The audience survey revealed that a very small proportion (less than 1%) of film consumers have attended film festivals or community screenings, with a median spend of R 219.92 (USD 13.44) among those who did. This points to the limited reach of these channels in the broader population. Yet, this low attendance does not reflect a lack of value; rather, it underscores the structural marginalisation of these alternative distribution pathways. Stakeholders' interviews reveal that festivals, particularly the Durban International Film Festival and the Durban FilmMart, are regarded as essential nodes for networking, deal-making, and showcasing work to international buyers. Community screenings, while often small-scale, generate deep audience engagement in underserved areas, yet they remain episodic and underfunded.

> We do have community screenings... where people are not able to gain access to cinemas, people will just put up a marquee, throw up a screen and have their showings.
>
> *Distributor, South Africa*

Audience Development

Overview

South African audiences are highly engaged on digital platforms (e.g., YouTube, TikTok, Facebook), creating strong opportunities for film marketing. However, marketing for local films remains weak and inconsistent, with fewer than half maintaining dedicated social media presence and most relying on distributors or global platforms, limiting direct audience relationships and access to data.

Audience interest is strongly driven by authentic cultural representation, while festivals provide visibility for niche films. However, high cinema costs and urban concentration of theatres restrict broader audience access. Although initiatives like film schools and NFVF funding support emerging talent, there is a gap in progressing filmmakers into more established tiers.



South Africa Film Audience Segments

The South African audience segments reflect differences in platform use, content preference, and the balance between local and global viewing (See Table 22):

1. **Urban African story loyalists:** This segment is urban and female-led, with viewing shaped by shared, family-oriented habits. They consume both local and international films, but African content, especially Nigerian titles, features strongly. Viewing is TV-centred, with high use of Smart TVs, Pay TV, and multiple streaming platforms. Despite high spending, discovery and subscription costs remain key constraints.

2. Trend-driven global streamers: This is a younger, male-skewed, digitally connected audience. Viewing is individual and mobile-first, with strong influence from social media and peer recommendations. They favour international, high-intensity genres such as action and sci-fi. Engagement is driven by trends, convenience, and content visibility.

3. Culturally African story loyalists: This segment shows the strongest cultural attachment to African content. Viewing is anchored on Pay TV and established streaming platforms, with less experimentation across newer channels. They are more critical of production quality, particularly acting and technical execution. Engagement depends on both cultural relevance and consistent quality.

The segments show strong demand for African storytelling alongside a parallel pull toward global content. Improving discovery and maintaining production quality are central to expanding local viewership.

Segment	Segment distribution	Gender	Age distribution	Content preference	NPS African films
Urban African Story Loyalist	n = 153 (35%)	69% female	25–54 years (77%)	African and international films (88%), local (66%)	57%
Trend Driven Global Streamers	n = 152 (35%)	56% male	25–44 years (68%)	African and international films (72%), American films (86%)	26%
Culturally African Story Loyalist	n = 129 (30%)	77% female	25–44 years (75%)	Local films (74%)	36%

Table 22 South Africa film consumer segments | Source: Audience Survey

Film discovery and marketing channels

Word-of-mouth is the primary driver of film discovery, with 70% of audiences learning about films through friends and family. Digital channels also play a significant role: social media (48%) and streaming platforms (37%) heavily shape viewing choices (See Figure 38).

These film-specific results differ from national evidence on television content, where discovery is more strongly social and creator-led. In the NFVF's 2026 survey, 75% of television viewers discovered content through social media and 42% through influencers or TikTok clips, compared with 41% through friends and family and 21% through platform recommendations. The difference partly reflects content type and sample: the Dalberg survey focused on film audiences, while the NFVF survey covered all audiovisual consumers. Taken together, the evidence suggests that personal recommendation remains the most trusted signal for films, while social media and short-form clips play a growing role in first awareness.

Traditional and offline channels have a limited impact. Billboards provide some visibility (21%), while radio/TV (11%), influencers (3%), cinema ads (2%), and film festivals (1%) contribute minimally. Film discovery relies on a diversified ecosystem centred on social and platform-driven mechanisms. Marketers should adopt integrated campaigns combining strong social media promotion, streaming platform visibility, targeted outdoor advertising, and strategies that encourage organic sharing and discussion to amplify reach.

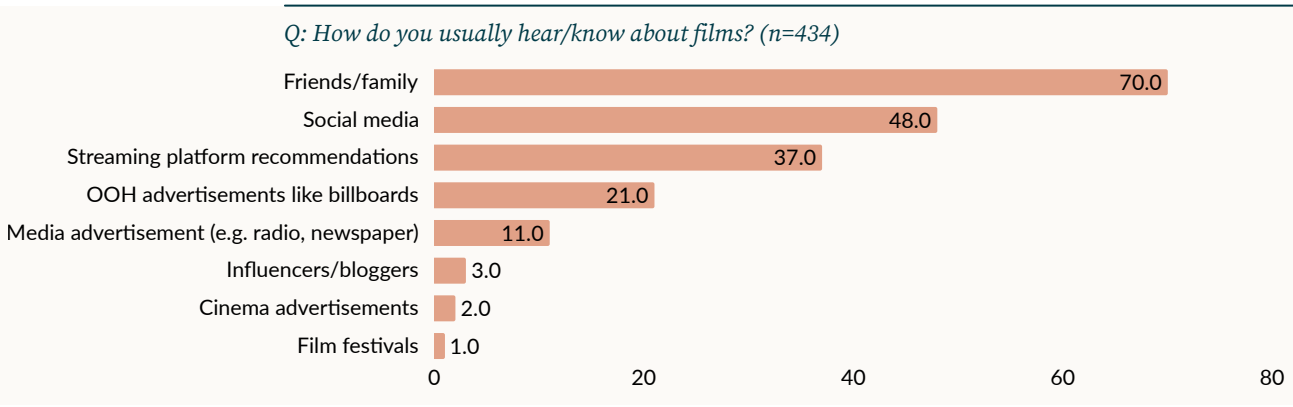


Figure 38 How audience in South Africa know/hear about new films | Source: Audience Survey

What Drives Audiences to Watch Films

Film consumption in South Africa is primarily driven by entertainment and relaxation (57%), but audiences place strong emphasis on content quality (49%), highlighting the importance of storytelling and production value. Practical considerations such as affordability and accessibility (38%) and family-friendly content (33%) also shape viewing choices (See Figure 39).

Audiences show relatively higher interest in educational and socially relevant themes (32%), as well as actors/directors (32%), alongside cultural identity and social recommendations (29%), reflecting a diverse and mature consumption landscape. Overall, this suggests the need for high-quality, locally relevant content, supported by strong talent and storytelling, to drive audience engagement.

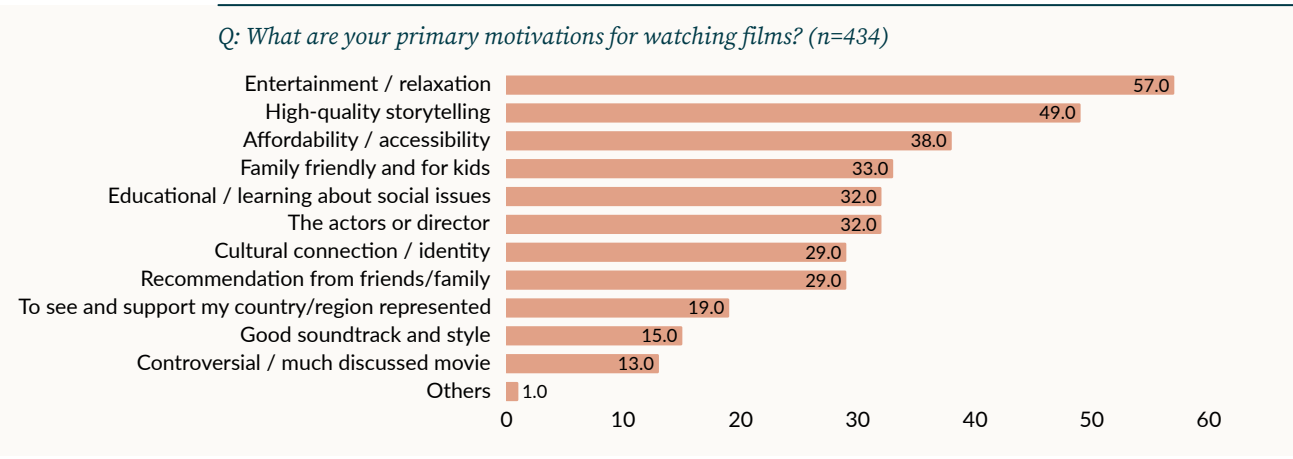


Figure 39 Primary motivations for watching films in South Africa | Source: Audience Survey



South African audiences (Audience Survey), have very high expectations when selecting films, prioritising acting quality (98%), technical quality (96%), plot/theme (96%), movie type (95%), and genre (94%). Social influence is also critical, with word-of-mouth (96%), actors (92%), and trending popularity (92%) strongly shaping choices. Marketing and information signals further guide decisions, including reviews/ratings (90%) and campaigns (88%), indicating a highly informed and multi-channel decision-making process. Overall, this underscores the need for high-quality production, strong storytelling, and strategic marketing, supported by effective use of star power and audience engagement mechanisms.

South Africa is a mature and highly discerning film market, where audiences seek entertainment but demand high production quality, strong storytelling, and cultural relevance. Success depends not on volume, but on delivering technically strong, engaging, and resonant content. At the same time, film discovery is heavily shaped by social validation, marketing, and visibility, making promotion as important as the content itself. Overall, success requires an integrated approach combining quality production, effective use of talent and audience trust signals, and strong distribution and marketing strategies.

The NFVF's 2026 national audience survey points in the same direction. Respondents rated South African content close to international content on storytelling (3.9 versus 4.0 on a five-point scale) and audience alignment (3.8 versus 4.0), but notably lower on production quality (3.7 versus 4.3), post-production (3.8 versus 4.2) and marketing and distribution (3.8 versus 4.2). Asked what would make them watch more South African content, respondents most often cited better stories (72%) and better acting (66%), followed by greater language diversity (43%) and better marketing (35%). The gap is therefore one of execution and visibility rather than cultural relevance.

Audience Viewing Platforms and Access to Films

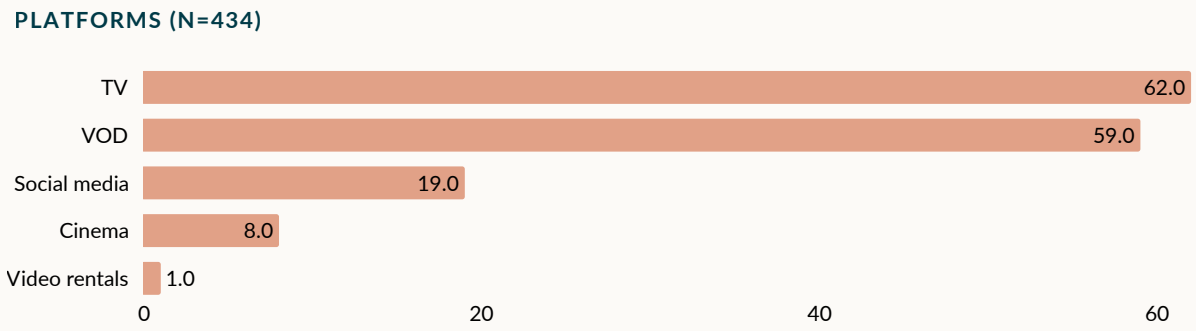
Film viewing in South Africa is multi-device and platform-driven, with smart TVs (55%) and smartphones/tablets (47%) as the most used devices, followed by Pay TV-connected devices (37%). Viewing patterns vary, with smartphones more associated with international content (57%), while Pay TV skews toward African films (41%).

In terms of access points, television (62%) and streaming platforms (59%) dominate film consumption, while social media (19%) and cinemas (8%) play smaller roles. Within streaming, Netflix (67%), YouTube (61%), and Showmax (56%) lead usage, with DStv Stream (38%) reflecting the continued relevance of Pay TV in the digital space. Other platforms (e.g., Disney+, Amazon Prime) and piracy (4%) remain limited (See Figure 40).

Pay TV remains highly influential (94%), reinforcing its central role alongside streaming in film distribution, while traditional channels like video rentals (1%) are largely marginal.

Figure 40 Primary viewing platforms in South Africa | Source: Audience Survey

Q: Through which platforms do you mostly watch films? (n=434)



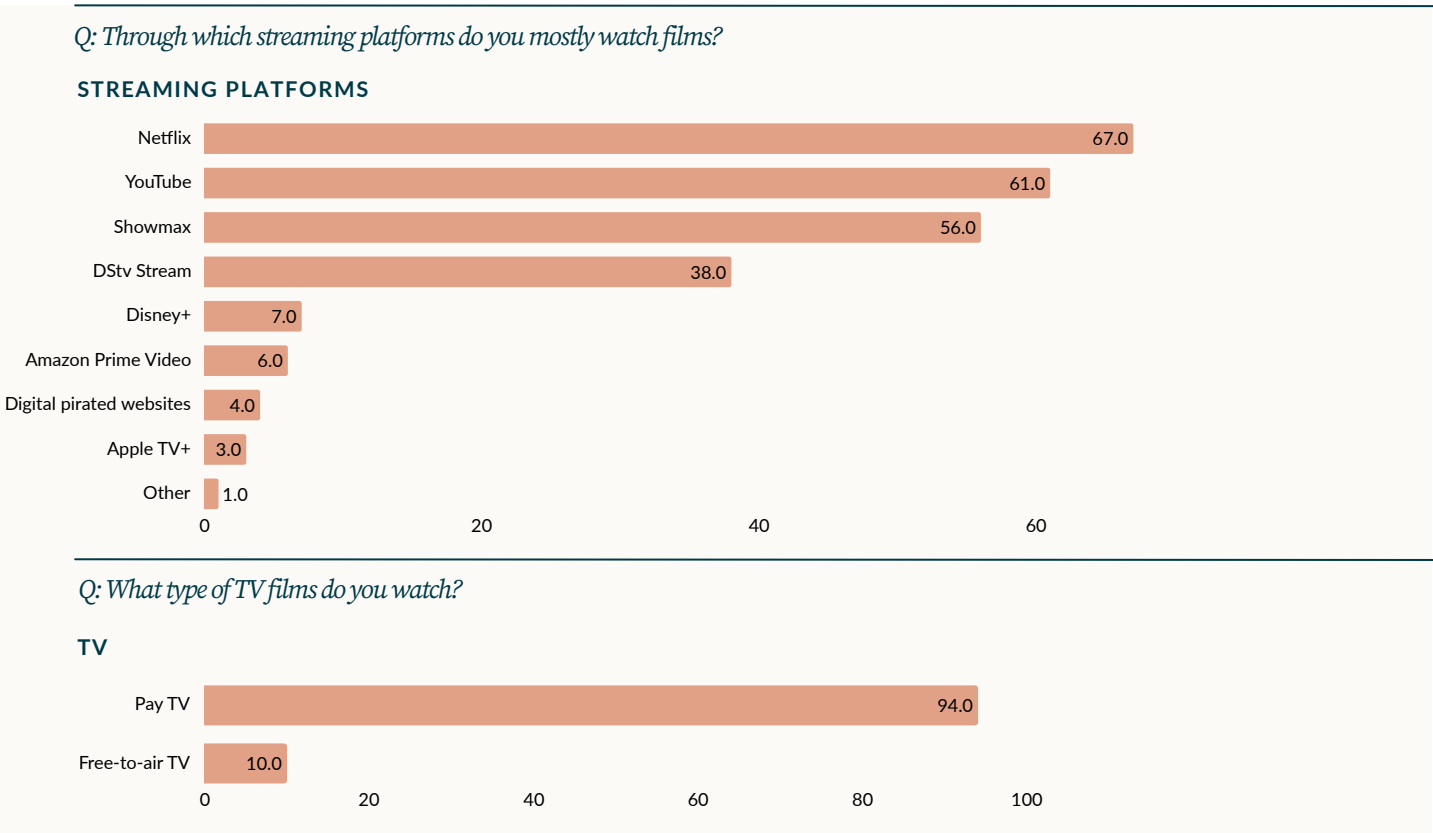


Figure 40 Primary viewing platforms in South Africa | Source: Audience Survey (continued)

Television viewing in South Africa is device-diverse but led by connected screens, with smart TVs (55%) most common, followed by smartphones/tablets (47%) and Pay TV systems (37%), highlighting the continued relevance of subscription services. Other devices such as laptops (15%), free-to-air TV (10%), and satellite TV (7%) play smaller roles. Overall, this reflects a hybrid distribution ecosystem, where streaming platforms and Pay TV coexist as the primary channels for film access.

National evidence shows that access to digital content is broad but cost-managed. In the NFVF's 2026 survey, which covered all audiovisual consumers rather than film audiences alone, 95% of respondents used the internet at least weekly, but a quarter (25%) relied on mobile data only, 31% described data for video as expensive and just over half (52%) spent less than R 300 a month on data or internet. Nearly half downloaded content over public Wi-Fi (48%) or used data-free platforms (46%) to manage costs, and among respondents who paid for no content service, 71% cited lack of money as the main reason. The Dalberg sample, in which smart TVs and multiple streaming subscriptions are common, is therefore likely to reflect the better-connected end of the market; offline downloads, zero-rated access and low-cost tiers remain essential for reaching the wider audience.

Looking ahead, audiences expect gradual rather than rapid change. In the same survey, 34% expected to stream more over the next two to three years, while 39% expected their viewing habits to stay the same and 21% expected to watch more television. Younger, urban and middle-income respondents were most likely to expect more streaming, while older, rural and lower-income respondents were more likely to remain anchored in television (NFVF, 2026).

Streaming Behaviour and Platform Preferences

Audiences in South Africa consume a diverse mix of film origins, with local films leading at 32%, followed by American at 28% and other African films at 17%. Platform usage varies: Netflix balances local (70%) and American (66%) content, while Showmax is strongly local-focused (76%), and YouTube serves a broader role hosting both local films (70%) and other African content (43%) (See Figure 41).

Overall, audiences use multiple platforms to access different types of content, reflecting a segmented but complementary viewing ecosystem. Streaming appears to be a frequent activity, with local and American films most watched either daily or weekly, while African and European films follow similar patterns with slightly lower daily viewing levels. The distribution indicates that streaming platforms form part of regular viewing habits for many audiences.

Streaming in South Africa is primarily screen-based, with smart TVs (71%) as the dominant device, followed by smartphones or tablets (59%) and Pay TV-connected devices (36%), while laptops are less common at 18%, indicating that viewing is centred on household screens complemented by mobile access.

Audiences subscribe to an average of two streaming services, with a median monthly spend of R 293.23 (USD 17.92), suggesting that streaming is a structured and recurring component of household entertainment, with multiple subscriptions used to access varied content.

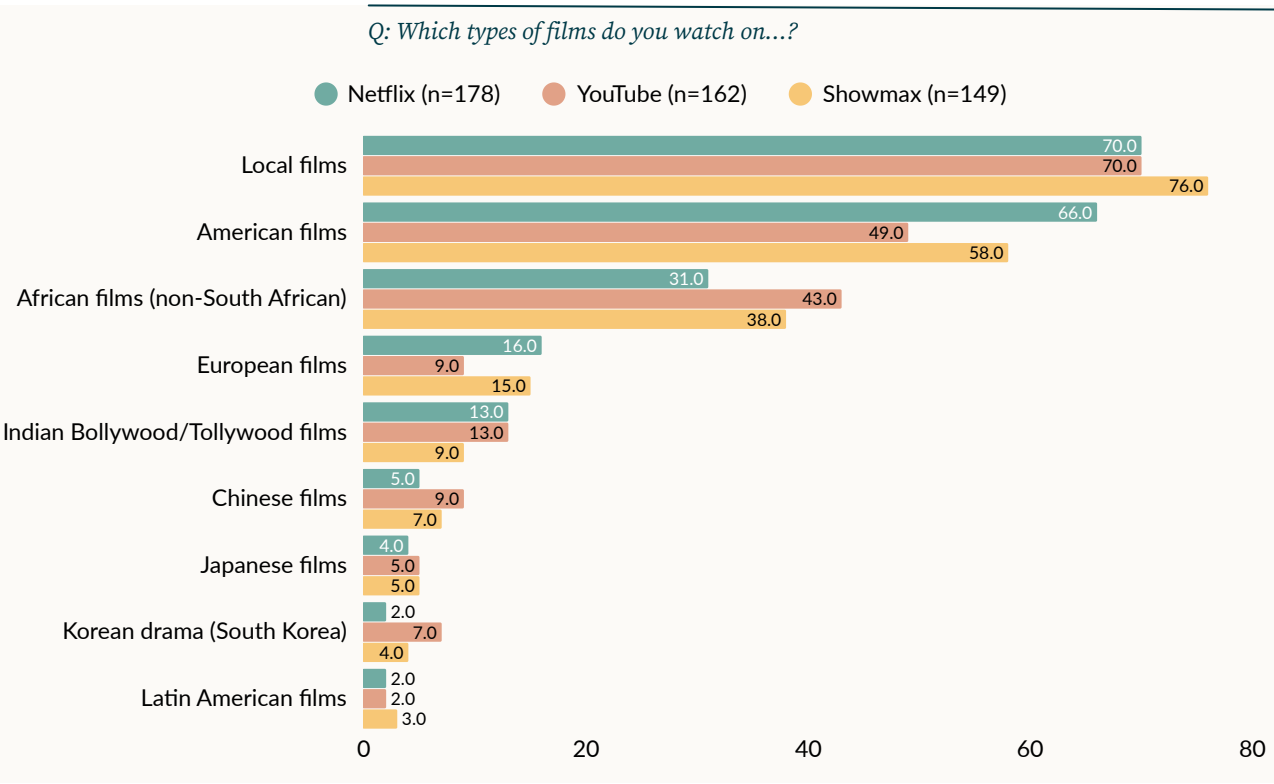


Figure 41 Type of films streamed on Netflix, YouTube & Showmax in South Africa | Source: Audience Survey

Campus Circuits and University-Based Screenings Role in Audience Building

Campus and university screening circuits play a valuable but underdeveloped role in building future audiences and filmmakers, with institutions like AFDA, DUT, and UKZN supporting student screenings and competitions. However, these initiatives remain fragmented and underfunded, limiting their long-term impact despite their potential to cultivate demand for local content.

International cultural institutes provide consistent support through funding, co-productions, and festival access, enhancing skills, global visibility, and artistic quality. However, their focus on cultural exchange over commercial pathways means this support does not always translate into strong local distribution.

Similarly, film festivals, while important for visibility and networking, are episodic and niche, with limited ability to sustain audience reach or extend a film's lifecycle. Overall, these channels contribute to visibility and development but are constrained in driving large-scale distribution and audience growth.

Education and Training Actors as Audience Builders

South Africa's film schools produce a large number of graduates (over 10,000 annually), but the industry cannot absorb them, creating a paradox where many do not enter the sector. However, these graduates form a highly engaged and discerning audience, acting as tastemakers who value quality and authenticity, effectively making film schools important audience-building institutions.

Programmes such as the MultiChoice Talent Factory and NFVF initiatives help bridge training and industry exposure, while campus competitions encourage early participation in filmmaking.

A key gap remains the disconnect between training and distribution, as most programmes focus on production skills but neglect marketing, distribution, and audience development. Addressing this requires integrating practical industry exposure and distribution literacy into training to better prepare graduates and strengthen the overall ecosystem.

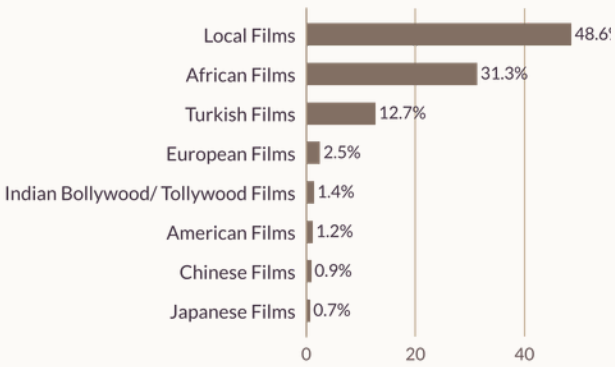
Demand for local and African content

South African audiences exhibit a dual consumption pattern: strongly local yet globally exposed. While 82% watch local films, there is significant engagement with American (63%) and other African content (44%). This reflects structural availability more than pure preference. International content dominates distribution channels, while local films face limited visibility. Interest in Pan-African content signals latent demand, though it often requires external validation (e.g., awards or viral traction) to gain traction.

Audiences show a diversified profile: 49% primarily watch local films, alongside notable consumption of African (31%) and Turkish content (13%). Coupled with the fact that 79% value locally produced films, this highlights a market rooted in local identity but open to diverse storytelling (See Figure 42).

Language plays a central role in these choices. In the NFVF's 2026 survey, language was the strongest single driver of content choice, rated very or extremely important by 79% of respondents. Among television viewers, English was the main viewing language (81%), with isiZulu (10%) and Sesotho (5%) also cited; 70% were comfortable watching subtitled content and a further 20% said it depended on the language. This supports investment in subtitling and dubbing as a relatively low-cost way to widen the audience for local and African films.

Key opportunity: Strengthen local production and visibility while leveraging regional collaborations to meet both domestic demand and broader African/global appeal. South Africa functions as both a strong domestic market and a strategic regional gateway, with the key opportunity lying in investing in high-quality local content alongside co-productions and global partnerships.



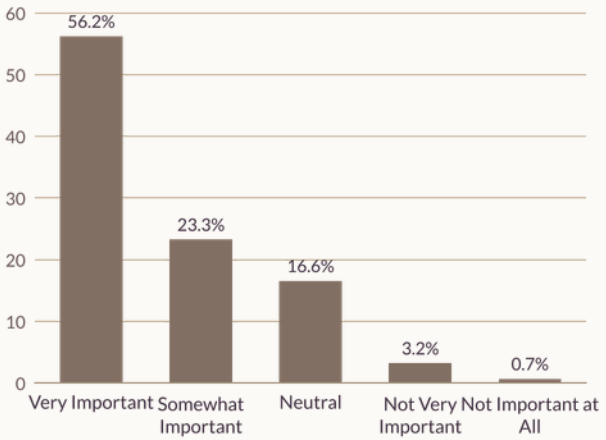


Figure 42 Most frequently watched region in South | Source: Audience Survey

Figure 43 Importance of films being locally produced in South Africa | Source: Audience Survey

Barriers to audience growth for local films

South African audiences demonstrate strong confidence in local and African film quality, with 54% believing production quality has improved in the last 5 years and 69% agreeing that local films tell authentic, relatable stories. Importantly, willingness to pay for high-quality local content is high at 65%, suggesting clear commercial potential for premium African productions (See Figure 44).

However, significant barriers prevent this positive sentiment from converting into viewership and revenue: 51% of audiences find it difficult to locate local films on mainstream platforms, and 60% believe these films are not sufficiently marketed. Additional constraints include competition from international films, inconsistent perceptions of quality, fragmented discovery mechanisms, and costs related to subscriptions and data. The core issue is therefore not a lack of demand but a failure of conversion, audiences are open and willing, yet face friction in finding, accessing, and consistently valuing local content. For stakeholders, this underscores the need to simultaneously strengthen production quality, invest in targeted marketing and discovery, improve platform distribution and partnerships, and enhance localization to ensure African films are visible, accessible, and competitive within a crowded global content landscape.

The NFVF's 2026 survey found a more positive picture on discoverability, with 79% of respondents saying South African content was easy to find and 10% finding it difficult. The difference is likely to reflect question scope: the Dalberg survey asked specifically about local films on mainstream platforms, whereas the NFVF survey asked about South African content in general, including television, where local programming is widely available. Both surveys nonetheless point to strong willingness to pay, with 76% of NFVF respondents agreeing they would pay for South African content.

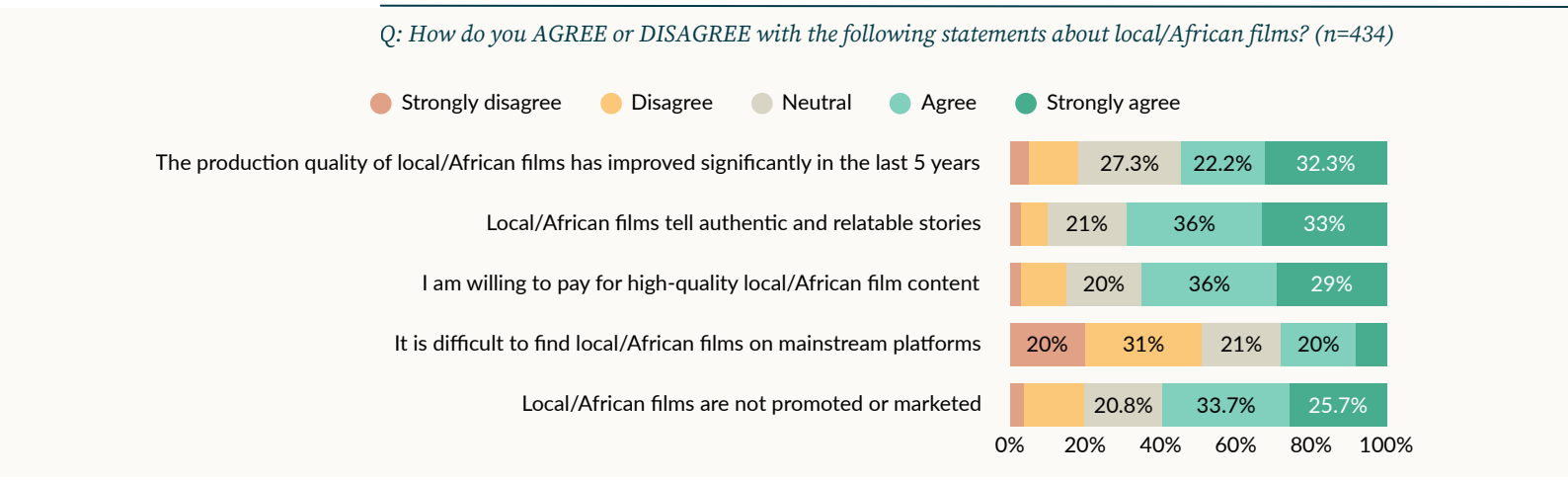


Figure 44 **Perceptions on local/African films from South African audience | Source: Audience Survey**

Audience engagement and word-of-mouth

South African audiences demonstrate active and multi-layered post-viewing engagement, with 48% recommending films, 38% exploring more films from the same country, and 26% reading reviews, indicating a research-driven and discussion-oriented audience. Additional engagement includes social sharing (18%) and searching for actors or directors (20%), reflecting a broader discovery ecosystem. This suggests strong potential to amplify visibility through marketing, reviews, media coverage, and talent branding (See Figure 45).

However, audiences also display moderate curiosity but relatively low proactive engagement, as a notable 38% reported doing none of the listed activities in the past three months, suggesting a passive consumption pattern. While 33% actively searched for films and 30% followed actors or directors online, only 16% purposely went to cinemas, 11% attended a community screening or festival, and just 8% paid for a film on a digital platform (See Figure 46).

Despite this conversion gap, South Africa has strong audience advocacy for African films, with 54% willing to recommend them and a high NPS of 41%, indicating a receptive and supportive market. Overall, audiences show strong advocacy and engagement, actively recommending, exploring, and discussing films, particularly African content, yet many remain passive in terms of paid viewing and consistent participation. The key opportunity for stakeholders is to convert interest into sustained engagement through targeted marketing, talent-driven promotion, improved viewing experiences, and curated discovery pathways.



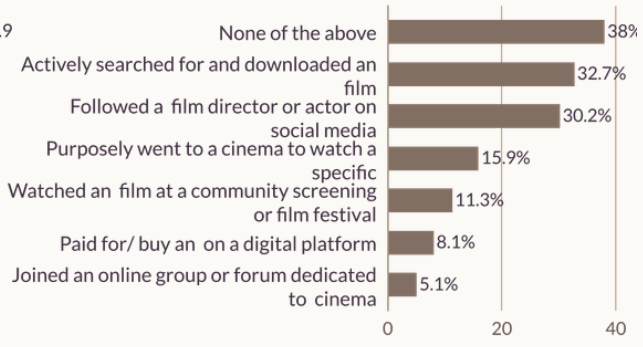


Figure 45 Actions after watching a film in past 3 months | Source: Audience Survey
Figure 46 Engagement in past 3 months in South Africa| Source: Audience Survey

Social Impact

Overview

Film in South Africa is increasingly recognised for its potential to drive social discourse and highlight critical national issues, with themes such as housing, homelessness, contemporary apartheid, and race-based laws sparking significant public conversation. However, the formal measurement of social impact remains limited, and few films deploy structured advocacy or education campaigns. While productions like *I Am All Girls (2021),* address themes such as human trafficking, they often lack the multi-sector NGO partnerships and sustained community engagement seen in other markets like Nigeria.

Films addressing cultural heritage and local history generate high levels of pride and relatability among viewers, but the transition from audience sentiment to measurable policy influence or behaviour change requires further exploration. The enabling environment for social impact is further complicated by unresolved legislative issues, such as the Copyright Amendment Bill and the Performers' Protection Amendment Bill, which impact the rights and remuneration of local creators.

Definition and Measuring of Social Impact Through Behaviour

Social impact in South Africa's film industry is understood differently across stakeholders. Filmmakers focus on authentic storytelling that drives awareness and dialogue, funders prioritise tangible outputs like jobs and skills development, while broadcasters and streaming platforms emphasise commercially viable entertainment, often sidelining socially driven content. A major challenge is the lack of robust impact measurement, most rely on anecdotal feedback and social media engagement rather than systematic tools, leading to a gap between intended and demonstrated impact. Strengthening this area requires integrating audience feedback, digital analytics, and partnerships with NGOs, as well as embedding impact evaluation into funding processes. Ultimately, the sector needs to move beyond reach to better understand how films influence attitudes, conversations, and behaviour.

> Social impact movies are created not just to entertain, but to raise awareness, inspire dialogue, and encourage positive change in society. We are not here just to entertain. We're here to raise awareness, inspire dialogue and we want people to sit up. If you write a song, make sure it has meaning to it. We want to make movies that change things.
>
> *Distributor, South Africa*

Audience Interest in Socially Relevant Storytelling

The audience survey reveals strong demand for socially relevant storytelling, with viewers most drawn to stories about youth pursuing opportunities (50%) and women overcoming challenges (47%), followed by relationship and family health narratives (34%), identity and belonging (32%), and politics and social justice (29%). Stakeholders amplify these findings, noting that films exploring themes such as masculinity, fatherhood, gender-based violence, and marginalised languages, exemplified by The *Heart is a Muscle (2024)* and *Elelwani (2012)*, generate profound community engagement and serve as catalysts for dialogue, pride, and validation among underserved communities. However, a stark gap exists between audience interest and available content, as broadcasters and streamers often dismiss these genres as "not exciting," preferring action, thriller, and romantic comedy. While 50% of audiences want stories about youth pursuing opportunities, filmmakers observe that relatable narratives are particularly underserved in rural and township areas where distribution is weakest.

> If someone had to include that into a film… for example, our ESKOM, our electricity initiative, you know, we used to have so much of load shedding and stuff. So, if someone had to include that into a film, it will take off.
>
> *Filmmaker, South Africa*

Only a small share of audiences (9%) indicated they prefer films purely for entertainment without social themes, suggesting that viewers are broadly open to films that engage with social realities, especially when stories focus on personal experiences, aspirations, and everyday challenges.

Priority and Underexplored Film Themes/Genres and their Potential for Growth and Impact

The South African film market is heavily skewed toward a narrow set of commercially successful genres, action, crime thriller, romantic comedy, and reality TV, driven by streaming platforms and broadcasters. This has created a self-reinforcing cycle where funded and distributed genres are those that already command the largest audiences, leaving little room for experimentation or stories reflecting the full diversity of South African life. However, several underexplored genres hold significant potential for both audience growth and social impact. Animation is a major opportunity, as international studios already outsource to South Africa, yet locally produced animated content remains scarce. Indigenous language films, such as the Venda feature *Elelwani* and the *BraZulu* model (Brazilian films dubbed into isiZulu), have proven commercially viable and capable of mobilising audiences, yet few films are made in languages beyond English and isiZulu. Historical redress and Pan-African stories remain largely untapped, with stakeholders noting that South African filmmakers have moved on from the apartheid era without fully exploring its complexities.

> If you look at American films, they still tell the Djangos, 12 Years a Slave… but in South Africa, I feel like we are saying, 'that's the past'.
>
> *Funder, South Africa*

Social impact genres, including documentaries, gender-based violence narratives, mental health, and disability representation, have strong audience interest but struggle to secure funding, often dismissed as "too arthouse" despite generating intense community engagement through alternative screening models.

Finally, youth-focused and contemporary governance themes offer growth potential, as young South Africans are the most engaged demographic, yet much of the content targeting them is imported, leaving local stories about education, unemployment, digital culture, and topical issues like the electricity crisis deeply underserved.

Examples of Socially Impactful Films and Campaigns

Several films and campaigns cited in the interviews illustrate the potential of South African cinema to spark dialogue, shift perceptions, and engage communities.

Films with strong social impact

The Heart is a Muscle (2024) - This feature film about fatherhood, trauma, and male friendship had a particularly profound impact through community screenings. In Wynberg, where it was shot, audiences responded with emotional discussions about providing safe spaces for men to share their feelings. The film won Best Feature Film and was selected for Academy Award consideration.

Inxeba (The Wound) (2017) - A drama exploring masculinity and contested Xhosa initiation rituals, Inxeba generated national controversy and widespread debate. Though it faced protests, it demonstrated how film can force society to engage with sensitive cultural traditions.

Yesterday (2004) - This landmark film about an HIV-positive woman in rural KwaZulu-Natal was repeatedly cited as a powerful example of a social impact film. One ecosystem partner noted that it "*educated and informed people about HIV & AIDS, creating awareness*" at a time when stigma was pervasive.

Campaigns and initiatives

Presidential Employment Stimulus Programme (PESP) - This government initiative, running for six editions since 2020, provided economic stimulus funding to filmmakers and artists during and after COVID-19, supporting projects with social impact goals.

NFVF Community Screenings - The National Film and Video Foundation invests in audience development by funding screenings in rural and township areas, including workshops and panel discussions that accompany film showings to deepen engagement.

Role of Public Broadcasters, NGOs, Donors, and Foundations in Impact-Oriented Content

Public broadcasters in South Africa occupy a contradictory space. While entities like the SABC are mandated to serve the public interest and remain key outlets for culturally and socially impactful content, financial constraints have severely limited their commissioning capacity. Mzansi Magic, though more active in production, prioritises high-rating genres and incorporates social themes only sporadically, often within telenovelas rather than dedicated impact-driven projects. Consequently, while broadcasters can provide essential support, their focus on ratings and entertainment value constrains the scope and consistency of meaningful storytelling.

NGOs and foundations play a critical but often underappreciated role. European cultural institutes such as the French Institute, Goethe-Institut, and British Council provide consistent funding for workshops, co-productions, and festival participation, while local NGOs facilitate distribution of social impact films. However, these collaborations are typically ad hoc, and international co-productions often prioritise cultural exchange over commercial distribution, leaving many films without sustained local audience access.

Donors and foundations, particularly international ones, fill gaps left by government and the private sector. The National Lottery Commission funds social impact projects but requires applicants to be registered as non-profits, excluding many individual filmmakers. The Presidential Employment Stimulus Programme has provided critical relief and continues to support impact-oriented projects, while international donors like the Ford Foundation are occasionally mentioned but not as a consistent presence.

Opportunities lie in stronger coordination among these actors, with several interviewees calling for partnerships to create dedicated funding streams for both production and distribution of impact-oriented content. The BraZulu model, dubbing content into local languages, demonstrates how foundations could support accessibility. Expanding the National Lottery Commission's criteria to include individual filmmakers and linking public broadcasters with donor-funded projects could ensure that impact films move beyond festivals and into the communities where they can effect change.

Financing and Enabling Environment

The financing of South African film is a mix of public grants, tax incentives, and increasingly, international licensing. The DTIC rebate is the cornerstone of this environment, providing a rule-based and auditable incentive that reduces risk for both domestic and international investors, while NFVF grants serve as catalytic funding for development and early production stages, though the total annual budget is often insufficient to meet high demand. Private sector participation is significant, accounting for roughly 32% of production funding in the mid-2010s, yet the market remains sensitive to macroeconomic shocks. A major shift occurred in early 2024 when international streamers like Amazon Prime Video pivoted away from commissioning original African content toward licensing existing titles, widening the "funding gap" for mid-tier projects. Emerging regional capital, such as Afreximbank's USD 1 billion Africa Film Fund, represents a promising future catalyst for infrastructure and production support. However, the efficiency of the enabling environment is often hampered by administrative delays in funding disbursements and rising production costs that outpace existing support structures.

Overview of Public, Private, and International Financing for Film

Public financing remains the cornerstone of funding for South African film, but it is marked by instability, bureaucracy, and concentration among established players. The National Film and Video Foundation (NFVF) provides annual grants for development, production, distribution, and training, though the process is slow and highly compliance driven. The DTIC's South African Film and Television Production Incentive, has been crucial for attracting productions, but sudden freezes have caused industry-wide disruption and job losses. Provincial film offices, such as the Durban Film Office, offer smaller targeted grants, yet only a fraction of funded films (about 10% in one example) reach mainstream broadcasters, highlighting a persistent gap between production support and distribution success.

Private financing is limited and largely inaccessible to grassroots filmmakers. Banks rarely lend without substantial collateral, and investment is concentrated among a few established production houses with broadcaster relationships. Emerging filmmakers depend on personal savings, family contributions, or informal networks, an often-unsustainable model. Corporate sponsorship and product placement remain underutilized, despite their potential as alternative funding streams.

International financing plays a critical role, especially for films with cross-border or continental appeal, but it often prioritises cultural recognition over commercial viability. European cultural institutes (French Institute, Goethe-Institut, British Council) consistently fund workshops, co-productions, and festival participation. International funds and foundations, such as the Ford Foundation and Hubert Bals Fund, provide additional support, while initiatives like the African Development Bank and Afreximbank's Next Africa Fund generate strong interest in Pan-African storytelling.

Incentives, Grants, Tax Credits, Funds, and Co-Production Schemes

South Africa's film financing landscape is supported by a patchwork of public incentives, grants, and co-production schemes, but these mechanisms are plagued by inconsistency, complexity, and a persistent gap between funding production and supporting distribution.

Government tax credits and incentives: The South African Film and Television Production Incentive administered by the DTIC, a reimbursable grant based on qualifying South African expenditure and capped at R 25 million per project, is the most important government support for film production. However, its unpredictability, particularly sudden funding freezes, has disrupted productions and weakened its effectiveness as a stable, long-term planning tool. Since late 2024, payment backlogs and delayed reimbursements have halted some productions mid-cycle and disrupted cash flow for independent producers, prompting oversight by Parliament's Portfolio Committee on Trade, Industry and Competition in February 2026. The effects extend beyond production: irregular release slates weaken broadcaster scheduling and platform commissioning and erode audience expectations of a steady flow of new local titles (NFVF, 2026).

Public grants and funds: The National Film and Video Foundation is the primary public funder, supporting development, production, distribution, training, and programmes like Sediba and PESP. Provincial bodies such as the Durban Film Office and KwaZulu-Natal Film Commission provide targeted grants. The National Lottery Commission funds social impact projects but restricts access to registered non-profits. Despite this ecosystem, complex application processes and eligibility constraints limit accessibility, especially for emerging and independent filmmakers.

Co-production schemes: South Africa has multiple bilateral co-production treaties (managed by the DTIC) that allow filmmakers to access funding and incentives across partner countries, making them key for attracting international investment. These frameworks also enable innovative collaborations, such as cross-border projects like the BraZulu model. Cultural institutions like the Goethe-Institut and the British Council further support co-productions, training, and festival participation. However, these partnerships tend to prioritise cultural exchange over commercial distribution, limiting the availability of such films to local audiences.

Gaps and challenges: Significant gaps remain - private sector investment for independent filmmakers is virtually non-existent, while distribution and marketing receive limited support. Bureaucratic complexity, including compliance requirements, lengthy adjudication periods, and an emphasis on established track records, disproportionately excludes emerging talent, reinforcing a cycle that favours established producers.

Opportunities: Stakeholders identified several concrete financing opportunities that would make the South African film industry more investable and sustainable.

- **Stabilise the DTIC Film and Television Production Incentive:** Predictable, multi-year funding cycles are needed to replace sudden freezes that create industry-wide instability and drive talent and investment away.
- **Simplify Application Processes for Public Grants:** Simplifying language, reducing documentary requirements, and creating tiered pathways for micro-budget projects would open public funding to grassroots talent currently locked out.
- **Expand Co-Production Treaties to More African Countries:** South Africa has treaties with six European nations but only one with an African country (Kenya). Expanding continentally would unlock pooled financing, shared incentives, and multiple market access.
- **Launch a Vertical Drama Development Fund:** A targeted fund to pilot local vertical drama production, including training, production support, and platform partnerships, could create a new, scalable revenue stream that bypasses traditional gatekeepers and reaches young, mobile audiences directly. National audience data support this: just over half of South African viewers now spend more time on short-form video than on full-length content, and 69% of those who answered said short-form viewing has reduced the time they spend on films and series (NFVF, 2026).

Business Models and Revenue Mixes Across Distribution Channels

Stakeholder interviews identified several business models that make South African film projects investable by providing clear revenue pathways, asset retention, and scalability for funders like banks, private equity, and impact investors.

1. The Intellectual Property (IP) Retention and Global Licensing Model prioritises owning the film as a long-term asset licensed across multiple territories and platforms; producers finance through grants, private investment, and pre-sales, then license to broadcasters or international distributors, with investors benefiting from residual value. The Venda feature *Elelwani* exemplified this by generating returns from a European deal, local licensing, and airline screenings.

2. The slate financing model pools investment across multiple projects to reduce risk through diversification, appealing to institutional investors; the Durban Film Office's micro-budget programme and the MultiChoice Talent Factory operate as quasi-slate models, and a structured slate combining commercial genres with social impact films could offer predictable returns.

3. The co-production and treaty-based model uses bilateral treaties to access funding and incentives from partner countries, doubling resources and sharing risk; the BraZulu initiative (Brazilian films dubbed into isiZulu) shows an emerging variation of cross-territory adaptation creating new revenue without full co-production

4. The corporate sponsorship and product placement model leverages brand partnerships to cover production costs in exchange for integrated marketing, though underdeveloped in South Africa; formalising such agreements could unlock private funding.

5. The vertical drama and mobile-first monetisation model produces short episodic content (60–90 seconds per episode) for mobile viewing on TikTok and YouTube, with monetisation through in-app purchases, ad revenue, and brand integrations; it is capital-efficient with direct-to-consumer revenue, and South African stakeholders note untapped potential for integrating payment with mobile data plans.

6. The community screening and social impact recovery model prioritises audience reach over direct revenue, generating indirect financial returns for impact investors through documented behavioural change, community metrics, and partnerships with NGOs or government, though scaling requires standardised impact measurement frameworks currently absent or under development.

Key Constraints and Promising Innovations in Film Ecosystem Development

The stakeholders highlight a significant mismatch between film education and industry demand. While film schools graduate thousands of students annually, sometimes over 10,000, the industry lacks sufficient opportunities to absorb them. High tuition costs, often exceeding R 120,000 per year, limit access for many aspiring filmmakers, and although public funding through NFVF bursaries and programmes like Sediba exists, it is highly competitive and insufficient to meet demand. This has created a growing pool of trained but unemployed talent, whose skills risk deteriorating when not applied within the industry.

Collaborative structures in the South African film industry are highly fragmented and often exclusionary, with opportunities concentrated within closed networks. Misalignment between government entities, broadcasters, and production houses hampers formal collaboration, leading to duplicated efforts, competing criteria, and missed opportunities for synergy, while many emerging talents remain marginalised.

Film Ecosystem Development

Emerging collaborative models in South Africa's film industry are helping grassroots talent connect with established players. Initiatives like the comedy series Bella's (with Urban Brew Studios) and cross-border projects like BraZulu (dubbing Brazilian films into isiZulu) show how partnerships can amplify new voices, expand audiences, and create revenue. Platforms such as the Durban FilmMart offer structured networking with international buyers.

Mentorship is also growing in impact. Examples include the Durban Film Office's coaching model, the MultiChoice Talent Factory's hands-on training, and filmmaker-led intensive workshops. These small but effective programs highlight the value of structured guidance and offer scalable models for supporting emerging talent.

Meanwhile, mobile-first platforms like TikTok, YouTube, and vertical dramas are driving innovation. They allow creators to bypass traditional gatekeepers, reach audiences directly, and build storytelling and distribution skills with minimal resources, even if monetisation remains a challenge.

Country-Specific Priorities and Opportunities

South Africa's film industry can strengthen performance by expanding regional distribution networks, targeting niche audiences, and leveraging digital marketing strategies that reduce reliance on major platforms. Audience growth depends on increasing local-language content and investing in community-based screenings to bridge urban–rural gaps. For social impact, stronger collaboration between filmmakers, NGOs, and broadcasters is needed to sustain advocacy beyond film releases. Scaling the industry further requires resolving IP policy uncertainties, improving incentive systems, and maintaining competitiveness to position South Africa as a hub for pan-African co-productions.

Priority Opportunities in Distribution

The focus for distribution should be twofold: first, to ensure that local content is competitive in quality and audience engagement, and second, to move away from platform dependency toward enforceable local content quotas for streaming services and broadcasters, thereby supporting South African stories. Key opportunities include:

- **Revival of Community Cinema:** Restoring the "bioskop" model, sponsored mobile screenings in community halls, schools, and townships, to reconnect filmmakers with majority audiences who lost access due to the closure of local cinemas.
- **Mobile-First Innovation**: There is also a need to balance the short-form algorithm optimization with long-form IP development by using low-cost mobile-first formats as discovery tools for durable, high-value content, rather than treating them as an end in themselves.
- **Regional Networks:** Expanding Pan-African co-production and distribution (e.g., the BraZulu dubbing model) to grow revenue streams beyond national borders.
- **Data Infrastructure:** Investing in shared research infrastructure to aggregate streaming, broadcast, and cinema data, enabling evidence-based distribution decisions.

Priority Opportunities in Audience Development

Stakeholders advocate a shift from viewing audiences as passive consumers to active participants in film culture. This involves:

- **Communal Viewing Rituals**: Using community screenings in underserved areas to create shared social moments of reflection and dialogue
- **Education and Literacy**: Integrating film literacy into schools and supporting campus screening circuits to cultivate a more discerning and engaged local audience
- **Niche Targeting:** Expanding local-language content to bridge the consumption gap between urban and rural areas

Priority Opportunities in Social Impact

For social impact filmmaking, the priority is redefining success beyond commercial metrics. Recommended actions include:

- **NGO and Government Partnerships:** Formalising collaborations with NGOs and public departments to use film as a tool for sustained advocacy campaigns on issues like gender-based violence and unemployment
- **Measurement Frameworks:** Developing tools to capture behavioural change and social outcomes, which can attract impact-oriented investment from corporate ESG budgets or foundations

Scaling Potential Recommendations

To move beyond fragmented interventions, there are three recommendations for scaling the industry that stand out:

- **Unified Government Strategy:** Aligning entities like the NFVF, DTIC, and provincial offices under a single film strategy to prevent policy shocks (such as funding freezes) and streamline incentives. Considering the complexity aligning agencies' mandates, there is a need to establish a lean, time-bound inter-ministerial task force with a rotating leadership model and a fixed, short-term deliverable such as harmonizing just one incentive process within six months, to build momentum while respecting institutional autonomy.
- **Sustainable Financing Models:** Diversifying beyond government grants by incentivising private sector investment through tax breaks and expanding co-production treaties, clear recoupment, stronger distribution and reliable audience data for decision making particularly within Africa
- **Shared Research Infrastructure**: Establishing a centralised, open-access data resource for viewership and demographic intelligence to help stakeholders match content to actual market demand.
- Overall, South Africa's next stage of growth depends less on increasing production volume and more on building coordinated institutional, financing, and data systems capable of supporting a competitive pan-African screen market

Read the full South Africa Country Report



4 INTERNATIONAL REPORT

4.1	Overview of international demand for African film
4.2	Distribution into International Markets
4.3	Audience Development Abroad
4.4	Social Impact in International Context

4.1 Overview of international demand for African film

Over the past decade, international interest in African film and screen content has grown in festivals, markets, public-broadcaster schedules, and on global streaming platforms. UNESCO's continent-wide mapping remains the most authoritative macro-baseline: the report estimates Africa's film and audiovisual sectors employ close to 5 million people and generate roughly USD 5 billion annually, with potential - if policy and market constraints are addressed - to create over 20 million jobs and contribute USD 20 billion to GDP. These figures do not measure international demand directly, but they frame why distributors, festivals, and streamers increasingly scout African titles. Existing evidence also indicates structural undersupply in theatrical exhibitions inside Africa, one screen for over 787,000 people, compared to one screen per about 8,700 people in the USA[62]. This pushes producers to seek festival discovery and international buyers earlier in their release strategies.

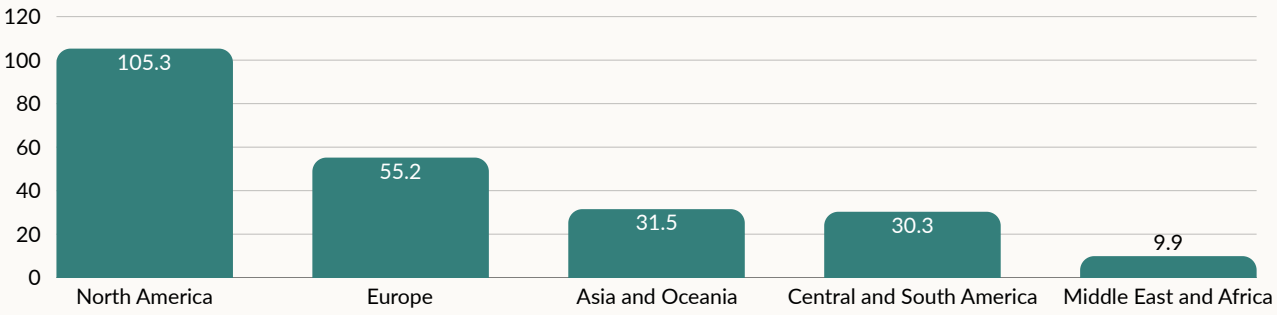


Figure 47 Global comparative screen density by region, 2023 (per mn inhabitants) | Source: UNIC Europa Cinemas[63]

According to the stakeholders' insights, international demand for African film and television content has been evolving, shaped by a combination of growing global curiosity, diaspora engagement and emerging commercial interest. While the film sector has seen periods of heightened momentum, it remains characterised by uneven market access, shifting platform strategies and increasing competition within a saturated global content landscape. Demand for African content was noted to be largely driven by two forces: individual interest from international distributors and the perception of Africa and its diaspora as untapped markets.

> So personal interest combined with, you know, a business opportunity made me go this way into the African markets.
>
> *Distributor, Germany*

Initially passion-led, distribution became more commercially viable with the entry of global platforms like Netflix and Amazon. The entry of global streamers signalled a shift toward formal commercialisation, increasing both visibility and expectations for African content worldwide.

> I would say up to 2023, it's probably fair to say that working with African films was more like a hobby, if you take a look at the commercial side of things.
>
> *Distributor, Germany*

A consistent finding across international audiences indicated that demand was strongly contingent on production quality as mentioned by one of the international filmmakers, *"the production quality, I have to stress it again, the production quality is key."*

[62] UNESCO (2021). The African Film Industry: trends, challenges and opportunities
[63] https://www.unic-cinemas.org/fileadmin/UNIC_Europa_Cinemas_CICAE_Report.pdf

While African markets were recognized for creative talent, distributors emphasized that production value was the decisive factor for global acquisition. Films meeting international technical and storytelling standards were noted to be far more likely to secure distribution. In an oversaturated global market, a "content tsunami" African films faced intense competition for visibility, requiring strong marketing hooks or unique positioning to capture audience attention.

> Because of that content inflation, or you can call it a content tsunami if you want, compared to the global marketplace, the number of avenues for African films is still somewhat limited, right? So not every platform, not every player is interested in African films.
>
> *Distributor, Germany*

Key markets

Europe remains a primary destination for African films, both culturally and commercially, due to a dense festival ecosystem and Europe's public-broadcast and arthouse circuits. Industry analyses note that European broadcasters and distributors regularly acquire African titles, with dedicated funds and coproduction avenues anchoring the pipeline. Within Europe, Germany has become a structurally important reference market because of its federal and regional film funds, the Berlinale's World Cinema Fund (WCF)[64] and WCF Africa line, and the presence of ARTE/ZDF[65] acquiring non-European arthouse and documentary works. North America (U.S./Canada) continues to offer breakout potential for festival laureled titles via Sundance/Toronto and specialty distributors, although market access is highly selective. Interest is also rising in the Middle East (Saudi Arabia's Red Sea and Gulf initiatives) and selected Asian territories (Japan, to a lesser extent China), driven by both festival curation and cultural-exchange programming[66].

The key informants revealed that regional market dynamics uncovered clear geographic disparities in the demand for African films. North America, particularly the United States and Canada, was consistently identified as the most significant international market, offering strong monetization potential and access to platforms such as Tubi, which effectively reached both diaspora and mainstream audiences through ad-supported models.

> In terms of reach, it's almost needless to say that there is YouTube, where we have a massive reach. But monetization is, yeah, it's an issue. Again, there used to be Netflix and Amazon. These days, in the US market, there is one, actually, our most important platform is a platform called Tubi, which is an ad-supported platform
>
> *Distributor, Germany*

Beyond this, the United Kingdom and other English-speaking territories emerged as key consumer bases, with language accessibility playing a central role in shaping demand. Emerging interest was also observed in India and Nordic countries, although distributors noted *"we can't really analyze it. Because we don't have enough data, except that there is growing interest outside of India, which is, to some extent surprising for us."* This limited data constrained deeper understanding of these markets. For Francophone African content, France and Belgium remained the primary distribution hubs due to linguistic and historical ties.

The German case highlighted significant market limitations. Despite its large economy, Germany was widely perceived as commercially insignificant for African films, with stakeholders reporting negligible revenues and extremely low market penetration often below 1% of cinema screenings. This was attributed to a combination of low audience interest, limited broadcaster engagement, and structural barriers within the industry. Additionally, while a diaspora population existed, it was not considered sufficiently large or active to sustain theatrical releases and did not consistently translate into meaningful box office returns.

[64] World Cinema Fund | Berlinale Link
[65] ARTE stands for Association relative aux télévisions européennes (Association for European Television), a French-German public cultural channel. ZDF stands for Zweites Deutsches Fernsehen (Second German Television), a major German public broadcaster that provides half of the ARTE programming.
[66] The International and Intra-African Market for African Films - #AkorokoInsight Link

> That is the biggest problem. In Germany, for instance, it's less than 1%. You would say less than 0.1% of African films are in cinemas. And I don't think it's any better for streaming either.
>
> *Distributor, Germany*

> Other German distributors which distribute in Germany rarely have any interest in African films. I think we can say it simply does not happen.
>
> *Distributor, Germany*

Role of festivals, markets, and funds

Recent program notes and market announcements document African projects' presence and initiatives connecting African festivals (e.g., AFRIFF/Lagos) to Cannes "Goes to Cannes"[67] showcases. On the funding side, the WCF has become a central production/postproduction lever for African films seeking European partners, complemented by national/federal German funds and the Goethe-Institut's[68] mobility/grant programs that underwrite Euro-African cocreation and circulation. At a continental policy level, the African Union's launch of the (temporary Secretariat of the) African Audiovisual and Cinema Commission in 2024 signalled renewed intent to coordinate intra African distribution and research, potentially reinforcing the sector's international readiness though the statute still awaits sufficient ratifications.

Film festivals were indicated as very crucial in the film industry and remained critical entry points for African films, providing visibility, validation and networking opportunities. However, festival success rarely translates into commercial distribution without a complementary strategy across digital or theatrical channels.

> But German Cinema is not very strong internationally. But what I can say is African cinema is very strong at film festivals. This is what I saw all over the world. But how to enter the market and how to adapt, that's a tough question.
>
> *Filmmaker, Germany*

> Let's say in Finland, it's more or less the festivals. It could be more, let's say after our program where we take… at the Hamburg Film Festival. There is a group we were guests there and, yes, there was [name of a person mentioned]. The boss came and said, 'Oh my God, I was so ashamed because I've not seen one African film in the program this year, and they are showing 200 films.
>
> *Distributor, Germany*

International co-productions were increasingly viewed as viable pathways to global markets. Collaborations such as partnerships between African and European producers which enabled filmmakers to navigate foreign business cultures and access established distribution networks.

> The biggest difference is the culture of business culture. So, in Germany and in Kenya, the roles of a distributor and the role of a producer are very different. And I think that is the biggest cultural aspect to navigate-to understand how business is being done in the respective territory.
>
> *Filmmaker, Germany*

[67] AFRIFF to Represent Lagos at "Goes To Cannes" 2026 Link
[68] Goethe-Institut: Mobility Grants for Artists and Culture Professionals in Sub-Saharan Africa and Europe | On the Move Link

4.2 Distribution into International Markets

Festivals

African films have demonstrated a powerful and escalating presence on the global festival circuit, gaining recognition for both artistic innovation and the depth of the stories being told. Coverage from Cannes, TIFF, Venice, Locarno, and other major platforms showed that African filmmakers are increasingly breaking into competitive sections, securing coveted slots such as Un Certain Regard, Directors' Fortnight, and Critics' Week at Cannes. In 2024, standout works including *Ernest Cole: Lost and Found*, *The Village Next to Paradise*[69], and *On Becoming a Guinea Fowl* earned significant festival visibility, winning awards and generating discussion on themes like migration, identity, and social justice. Industry reports highlight that 2024 marked a remarkable year in which African cinema evolved from a rising presence to a recognised global force, driven by bold narratives and increasing confidence in storytelling[70].

By 2025, African cinema continued to expand its international footprint, with a notable surge in representation at Cannes and the Berlinale. Film Africa 2025[71], for example, returned to London from 14–23 November 2025, continuing its legacy as the UK and Europe's premier festival for African and diaspora cinema. Presented by the Royal African Society, the event showcased over 50 films and special events including features, documentaries, and shorts from more than 20 countries, highlighting the incredible diversity of the continent's storytelling.

Industry reports highlight how African films were not only screening but entering prestigious competitions[72]. Nigeria's *My Father's Shadow*, for example, made history as the first Nigerian film selected for Cannes' Official Selection, screening in Un Certain Regard (2025). Coverage also showed African projects tackling urgent global themes such as migration, memory, nationhood, and justice resonating strongly with international audiences and juries. Market-oriented analysis revealed that African films at major early 2025 festivals such as Sundance, International Festival of Rotterdam (IFFR), and the Berlinale saw improved access to distribution deals and industry visibility, though challenges remained around financing and representation at film markets like the European Film Market (EFM). Critics viewed 2025 as a year when Africa's cinematic voice became increasingly impossible to overlook.

The festival ecosystem itself also demonstrated a growing institutional commitment to African cinema. Venice's 2024 and 2025 editions featured African films across multiple categories from *Orizzonti* to *Immersive to Critics' Week*. On the other hand, Locarno made a landmark announcement that its Open Doors program would focus exclusively on African filmmaking for four consecutive years, signalling longterm strategic investment in the continent's creative industries[73]. The festival is dedicating its 2025–2028 cycle exclusively to supporting and showcasing filmmaking from 42 African countries. This four-year focus (2025–2028) aims to boost emerging African talent through co-production, training, and screenings, with the inaugural year already spotlighting six projects, including works from DR Congo, Côte d'Ivoire, and Nigeria. The 2025 selection highlighted projects like *Les Bilokos* (DR Congo) and *Kachifo* (Nigeria), with a strong emphasis on first and second-time filmmakers, focusing on independent and creative storytelling.

Articles across festival events consistently described African cinema as innovative, urgent, and increasingly central to global conversations on culture and politics. The combination of rising festival selections, award recognitions, dedicated showcases like Pavillon Afronova, and structural initiatives like Locarno Open Doors underscored a sustained upward trajectory for African films on the world stage.

[69] The village next to paradise takes Vienna by storm, winning 5 awards - EgyptToday Link
[70] African Representation At The Cannes Film Festival 2024 , iMullar Link
[71] Ten days of African cinema, culture, and conversations at the BFI Southbank and venues across London | Royal African Society Link
[72] Film Africa 2025: Celebrating African cinema, voices and stories Link
[73] Locarno Film Festival. Open Doors 2025-2028 Link

Table 23 Sample of African Films in International Festivals (2025–2026)

Year	Film Title	Country	Festival (Continent)
2025	Akher Youm (The Last Day)	Egypt	Berlinale (Europe)
2025	Ne réveillez pas l'enfant qui dort	Senegal/Morocco/France	Berlinale (Europe)
2025	Mikuba (Cobalt)	DRC/USA	Berlinale (Europe)
2025	Daye: Seret Ahl El Daye	Egypt/Saudi Arabia	Berlinale (Europe)
2025	Khartoum	Sudan/UK/Germany/Qatar	Berlinale (Europe)
2025	Le Mystère de Waza	Cameroon	FIFP Cannes (Europe)
2025	Matares	Algeria	FIFP Cannes (Europe)
2025	Les Divorcées de Casablanca	Morocco	FIFP Cannes (Europe)
2026	Lady	Nigeria/UK	Sundance (Americas)
2026	Kikuyu Land	Kenya	Sundance (Americas)
2026	Clarissa	Nigeria	FIFP Cannes (Europe)
2026	Troublemaker	South Africa	Sundance (Americas)

Cinema and Admissions

The European theatrical landscape for African cinema between 2020 and 2026 has transitioned from a period of pandemic-induced volatility to a structured era of commercial viability. Data from the LUMIERE[74] database reveals that films from Egypt, South Africa, Nigeria, Senegal, Kenya, and Rwanda have collectively generated over 700,000 admissions from a total of 83 films during this window (See Table 24). This performance indicates a significant shift in market dynamics, where African content is increasingly moving beyond the festival circuit and into sustained commercial distribution, driven by co-production strategies and the rise of genre-specific exports.

Table 24 Admissions of films released in Europe | Source: Lumiere database

Country of Origin	2020	2021	2022	2023	2024	Total number of films	Total Admissions [75]
Egypt	1	7	11	10	10	39	192,773
Kenya	3	1	2	-	2	8	4,232
Nigeria	1	2	3	5	6	17	41,456
Rwanda	-	1	-	1	-	2	46
Senegal	1	2	1	2	-	6	30,346
South Africa	3	6	-	2	-	11	432,429
Overall	**9**	**19**	**17**	**20**	**18**	**83**	**701,282**

Market Segmentation and Admission Drivers

South Africa emerges as the volume leader in the European market, accounting for over 432,000 admissions. This success is primarily attributed to high-yield animation and genre-fluid titles like *Headspace* and *Seal Team*, which demonstrate that technical parity and universal storytelling are key to broad European appeal. Egypt follows as a dominant force in commercial fiction with 39 released titles, leveraging strong diaspora markets in France and the UK to secure nearly 193,000 admissions. Conversely, Nigeria has showcased a burgeoning growth model, with 17 titles reaching European screens, signalling a professionalisation of Nollywood exports from digital-only formats to tracked theatrical events.

[74] European Audiovisual Observatory database on admissions to films released in Europe
[75] For each country, the admission is filtered from 2020-2026 although the record of titles is up to 2024

Institutional Influence and Policy Implications

The data underscores a critical correlation between European co-production and commercial reach. Senegal and Kenya, while representing lower absolute admission volumes, maintain a high prestige-to-market ratio. Senegalese titles like *Toubab (2021)* and *Demba (2024)* benefit from historical co-production treaties with France and Germany, which unlock vital distribution subsidies and "European Work" status. For policymakers and funding bodies, this highlights a need to pivot from purely production-focused grants to distribution-led incentives. Ensuring that "Festival Darlings" from countries like Rwanda and Kenya have the P&A (Print and Advertising) support to reach commercial screens is essential for converting cultural capital into economic sustainability.

Investment Outlook and Distribution Strategy

For private investors, the 2020–2026 period proves that the highest ROI is currently found in "Crossover Genre" films as evidenced by data from Lumiere and 2025 Nigeria Box Office Yearbook by FilmOne. While social realism remains the hallmark of African prestige, animation and thrillers have demonstrated far greater territorial elasticity across the EU and the UK. Distributors should focus on territorial clusters rather than fragmented releases, noting that France remains the primary gateway for Francophone Africa, while the US, UK and Germany are becoming essential hubs for Anglophone and East African content respectively.

The African film industry is no longer a peripheral player but a growing exporter to Europe. The path toward 1 million annual admissions lies in strengthening co-production frameworks and professionalising the distribution pipeline. Stakeholders must capitalise on this momentum by fostering long-term theatrical windows that allow African narratives to compete directly with global mid-budget cinema, ensuring a robust future for African intellectual property on the global stage.

Digital Platforms as a Global Distribution Gateway

The digital transformation of the film industry has fundamentally altered the trajectory for African content entering international markets. While traditional theatrical and linear television models often relegated African cinema to niche "World Cinema" slots, Digital Video on Demand (VOD) has democratised access, allowing films and series to bypass traditional gatekeepers and reach global audiences directly. However, the landscape in 2026 is defined by a significant "market correction" that has shifted the power dynamics between African producers and global platforms.

This was in support with the qualitative findings which indicated that the international distribution landscape for African film was increasingly dominated by digital platforms, with traditional theatrical releases becoming less viable. Global streaming platforms such as Netflix and Amazon had initially driven a “golden period” of high-value acquisitions, although their engagement in African markets had since declined. As a result, North America emerged as the most critical region for monetization, supported by platforms such as Tubi, which leveraged ad-supported models and YouTube, which offered broad reach but limited revenue potential. Distributors also engaged with niche and specialized platforms, including aggregators and region-specific services.

A notable shift was observed toward FAST (Free Ad-Supported Streaming TV) channels, where distributors curated 24/7 linear streaming channels. This model required extensive content libraries, often hundreds of hours, to remain competitive and secure partnerships with global device manufacturers and platforms. In parallel, international film festivals such as Cannes, Berlinale and Toronto continued to serve as key entry points for visibility and prestige. However, festival success did not consistently translate into commercial distribution, as films that performed well in these spaces often catered to niche festival audiences rather than mainstream viewers.

> So, we are not only distributing because of the market circumstances of the business world; obviously, we have to be a little, let's say, like a mini broadcaster in the meantime. And if you think that- we must deliver a 24/7 linear channel.
>
> *Distributor, Germany*

The Opportunity in Public Service VOD and Cultural Bridges

The period between 2024 and 2026 has been marked by a radical restructuring of the streaming sector in Africa. This restructuring is characterised by a "flight to quality" and financial consolidation. The initial "Gold Rush", where global platforms competed aggressively for African talent, has transitioned into a more cautious, consolidated phase. As commercial giants retract, the role of public service VODs, specifically European broadcasters like ARTE (Germany/France), has become increasingly vital. Unlike commercial platforms driven by subscriber churn, these services prioritise cultural exchange and social impact. They act as a critical cultural bridge, providing African creators with high-prestige visibility in the European market through licensing deals that often allow producers to retain more intellectual property than original commissions.

While public service VODs such as ARTE offer valuable cultural exchange and IP retention for socially impactful content, they are not a viable alternative for commercial filmmakers whose work lacks a social angle. Their licensing fees are typically lower than those of commercial giants, and true commissioning of African content remains limited. Therefore, for commercial producers, the priority should be licensing finished content to commercial platforms, which continue to license despite slower commissioning, supported by collective negotiation mechanisms such as a regional licensing catalogue. To bridge the gap between public service fees and commercial rates, particularly for filmmakers who cannot access social impact premiums, a locally financed licensing top-up fund, such as via a telecom or streaming levy, is recommended to ensure equitable support across all content types.

To maximise potential, future strategies must focus on securing equitable licensing deals across a diverse portfolio of platforms, including public service VODs, to mitigate the volatility of the global commercial sector.

Case Study: Digital Performance of “Country Queen” on ARTE

The performance data for the Kenyan series *Country Queen* on ARTE, which operates both linear TV and a VOD service, provides an empirical look at how digital platforms outperform traditional linear television for African content in Europe, even amidstempirical evidence that digital platforms outperform traditional linear television for African content in Europe, even amid a volatile market.

1. Linear vs. Digital Reach: The "Digital-First" Reality

On ARTE linear TV, the series achieved a modest average of 45,000 viewers per episode with a market share of ~0.6%, audience share of ~ 1.2% and a total reach per episode of ~39,000. This was largely due to "scheduling artifacts", late-night slots and a split broadcast schedule across two Thursdays in late June 2023, which are known to diminish traditional viewership (See Table 25).

Table 25 Summary of audience reach for Country Queen on ARTE Linear TV | Source: ARTE

Episode	Start time		Duration	Market Share (%)	Avg Viewers (k)	Audience Share (%)	Total Reach (k)
	German	French					
Episode 1	22:57	23:41	0:58	0.6	69	1.7	94
Episode 2	23:57	0:40	0:57	0.5	39	1.2	33
Episode 3	0:55	1:39	1:00	0.7	32	1.5	24

Table 25 Summary of audience reach for Country Queen on ARTE Linear TV | Source: ARTE (continued)

Episode	Start time		Duration	Market Share (%)	Avg Viewers (k)	Audience Share (%)	Total Reach (k)
Episode 4	22:58	23:42	0:56	0.6	78	1	57
Episode 5	23:56	0:41	0:57	0.4	30	0.7	19
Episode 6	0:55	1:39	0:58	0.5	20	0.7	11
Average				**0.6**	**45**	**1.2**	**39**

In contrast, the ARTE.tv (VOD) platform served as the primary engine of reach. The series was available on arte.tv between 13 June 2023 and 25 January 2026, with rights restricted to Germany and France. The series accumulated over 531,000 cumulative views across Germany and France (See Table 26). This confirms that for African narratives, the true impact and audience resonance occur digitally, where viewers can engage with the content on their own terms.

Table 26 Summary of audience reach for Country Queen on arte.tv (video-on-demand) | Source: ARTE

Title	Video Views by Language			Video Views by Country	
	German Views	French Views	Total Views	Germany	France
Country Queen (1/6)	85,735	90,961	**176,696**	85,856	90,515
Country Queen (2/6)	37,899	48,952	**86,851**	38,017	48,692
Country Queen (3/6)	31,123	42,970	**74,093**	31,234	42,747
Country Queen (4/6)	30,378	40,374	**70,752**	30,437	40,193
Country Queen (5/6)	26,323	36,040	**62,363**	26,424	35,832
Country Queen (6/6)	25,965	34,681	**60,646**	26,032	34,522
Total	**237,423**	**293,978**	**531,401**	**238,000**	**292,501**
% share				**45%**	**55%**

2. Regional Resonance and the "Long Tail" Effect

The data highlights critical strategic insights:

- **Francophone Receptivity:** French-language views (~294,000) slightly outperformed German-language views (~237,000), suggesting a robust appetite for African stories within the French cultural ecosystem, or ARTE's editorial positioning in France may have been stronger.
- **High Initial Episode Reach with Expected Drop-Off**: Episode 1 significantly outperformed later episodes (176k views), with a decline across subsequent episodes. This pattern is normal for serialized content, especially in VOD environments where casual viewers sample the first episode without completing the series. It is important to note that drop-off does not necessarily indicate negative reception. It reflects typical audience funnel behaviour.
- **Sustained Impact:** Because the series remained available online for over two years, it achieved a "long-tail" effect. For impact-oriented storytelling, this digital longevity is far more valuable than a high-rated single broadcast, as it allows themes of land rights and social justice to permeate the target market over time.

3. Strategic Implications for African Producers

The *Country Queen* case study demonstrates that while global SVODs are retracting, audience demand remains high. The primary lesson for distributors is that VOD is not a secondary channel but the primary gateway. Success in the international market is increasingly measured by digital accumulation rather than overnight linear ratings. The key strategic takeaways from Country Queen include:

- Digital platforms are the primary driver of reach for African series in Europe.
- The series achieved substantial cumulative reach (>530k) despite limited territorial rights.
- Audience drop-off across episodes is structurally normal and not a proxy for quality or impact.
- Francophone markets may offer particularly strong entry points for African narratives.
- Long-term availability on VOD significantly increases impact compared to one-off linear broadcasts.

4. Barriers

Weak domestic distribution system

A key structural barrier identified was the lack of organized and sustainable distribution infrastructure within African countries. Audiences noted that without strong domestic markets where audiences consistently paid for cinema it was difficult to generate the organic traction required for successful international export. It was noted the main bottleneck was the gap in the distribution systems and structures in African countries.

> The big part of this problem is the missing distribution system and structures in the African countries. They are totally missing. Even in their own market it is not working in a way to get an audience. You see in Kenya, you have only two distributors. In Rwanda, we have one distributor. In Ethiopia, you have not even one distributor, but Ethiopia is the only country where people really go to domestic films and Watch iT in cinemas.
>
> *Distributor, Germany*

Financial constraints and subsidy inequities

In European markets, funding structures such as the Creative Europe MEDIA programme were designed to support intra-European film distribution, excluding African content. The implication is that many film industries remain commercially fragile without public support or subsidy intervention. While this can work for countries with the fiscal capacity and coordination to sustain incentives, it creates a disadvantage for countries that cannot afford large-scale subsidies or lack organized audiovisual policies. Filmmakers in such markets will struggle to compete internationally. This created a structural disadvantage, as European distributors faced higher financial risks when acquiring African films compared to films from within Europe.

> I can get later reference more than a hundred thousand EUR for a French film, let's say 50,000 EUR, that is the best later reference (reference funding). Sometimes these subsidies from the media program can change the film from minus to plus, you know, and this is not per year. This support does not exist for African films for sure.
>
> *Distributor, Germany*

Technical gaps and limited resources

Production quality emerged as a critical determinant of international success. Distributors consistently emphasized that technical elements such as sound design, editing and cinematography were key to meeting global platform requirements. While creative talent was widely acknowledged, gaps in technical capacity and resources often limited the competitiveness of African films.

Fragmented rights management practices

Challenges in rights management further constrained distribution opportunities. Audiences highlighted instances where filmmakers, due to limited familiarity with international industry practices, prematurely released content on free platforms such as YouTube. Such actions undermined the film's commercial value and deterred potential distributors. However, the sources emphasize that these premature releases often occurred because filmmakers did not see other viable options.

This behaviour was driven by several critical factors: Many regions lacked a functional domestic distribution "machine" for cinema and streaming, leaving filmmakers without reliable market access. Kenya and Rwanda had only a few active distributors, while Ethiopia had none despite a strong cinema culture. Filmmakers also faced limited understanding of international distribution standards such as minimum guarantees, exclusivity, and distribution windows, weakening their negotiating power. Economic hardship pushed many to depend on NGO or donor funding, while others fell victim to exploitative agents offering little marketing or financial support. Misaligned expectations around revenue-sharing models further discouraged traditional distribution, leading many filmmakers to rely on free digital platforms for immediate audience access.

Shift to performance-based revenue models

The industry has increasingly transitioned from upfront payments such as flat fees or minimum guarantees to performance-based revenue-sharing models. While this reduced risk for distributors, it delayed financial returns for filmmakers, who often had to wait extended periods sometimes over a year before receiving income. In a global 'content tsunami' where 'nobody is waiting for your film,' commercial success is seen driven entirely by visibility. Without marketing budgets or audience analytics, even high-quality films would often remain 'very unknown' and yield negligible returns under modern performance-based revenue-sharing models. To generate revenue, filmmakers should strive for attention of their films.

> But in reality, 95% of the deals we do are so-called revenue share deals, meaning they are performance-based.
>
> *Distributor, Germany*

Perceptual barriers and market positioning

In several international markets, African films were frequently positioned as educational or of special interest rather than mainstream entertainment. This framing limited audience expectations and demand, often reinforcing a narrow focus on specific narratives such as hardship or social struggle at the expense of genre diversity.

> In Germany, African films or in Europe or in the West in general, African films are still treated as educational or special interest in course of the demarks.
>
> *Distributor, Germany*

Language and accessibility constraints

Language emerged as an additional barrier, particularly for films produced in local African languages such as Swahili. Audiences noted that some international audiences demonstrated a preference for English-language content, reducing willingness to engage with subtitled films and limiting their reach.



4.3 Audience Development Abroad

Diaspora vs. non-diaspora audiences

Industry reports suggest two overlapping, but distinct, international audiences. Diaspora viewers, e.g., Nigerian, Ghanaian, Kenyan communities in the UK, U.S., Germany, France show higher baseline interest. They also respond to community anchored marketing such as church/mosque outreach, influencers, and community cinemas. Festival organisations like Film Africa explicitly celebrating African cinema in London bridge diaspora and broader cinephile publics and act as repeat touchpoints for discovery and debate. The qualitative findings indicated that diaspora emerged as the most immediate and commercially viable segment, although its impact varied significantly by region. North America particularly the United States and Canada was identified as the leading market, driven by a larger and more established diaspora base alongside stronger monetization opportunities. In contrast, the diaspora in Germany was considered insufficient to sustain a commercial theatrical market. Even in contexts with relatively large diaspora populations, cinema attendance did not consistently translate into significant box office performance, with only a small fraction of potential audiences engaging in theatrical viewing.

Non-diaspora audiences in Europe/North America more often encounter African films via festivals, public broadcasters such as ARTE's thematic strands, specialty exhibitors, and university programmes. German buyer profiles indicate ARTE/3sat curate "*contemporary arthouse and festival attached movies*", consistent with how African films enter German cultural television schedules. In addition, the key informants revealed among non-diaspora audiences, engagement remained limited. Where engagement did occur, it was often framed through a "touristic" or "exotic" lens, with audiences seeking cultural insight rather than consuming the films as mainstream entertainment. However, this pattern showed signs of generational variation. Younger audiences particularly those under 15 were described as more platform-driven and less concerned with a film's country of origin, instead prioritizing content accessibility and entertainment value.

Positioning and reception

The positioning of African works affects reception abroad. Arthouse dramas and creative documentaries with festival pedigrees typically reach critics and cinephiles. Genres such as thriller, romance, comedy, horror tend to travel best on streamers and diaspora cinemas. Trade reporting and streamer disclosures highlight African series/films that break out internationally (e.g., *The Black Book* reached Netflix global Top 10) but also note recalibration in commissioning and budgets that narrows the pipeline for mid-tier projects. European audiovisual data from Lumiere database indicates non-English originals have increased their share on major platforms, implying a broader consumer openness to subtitled/dubbed content, a context that arguably benefits African titles if discoverability is solved.

In reference to the key informants, there is a growing push to reposition content toward commercially viable genres such as thrillers, sci-fi and historical dramas, alongside a shift toward digital-first formats and series. However, regardless of positioning, production value remained the key determinant of success, with high technical standards serving as a prerequisite for accessing international markets.

4.4 Social Impact in International Context

Shaping perceptions of Africa

- The international circulation of African films arguably contributes to a more diverse representation of the continent, countering monolithic or deficit narratives. UNESCO's policy framing positions films as "public goods" warranting public support because of their role in cultural diversity and social dialogue. At major European festivals, curatorial statements and programming trends highlight African cinema's political and social textures, an emphasis visible in recent Berlinale coverage positioning African works as vehicles for messages of peace, tolerance, and post-conflict reflection. While this language comes from festival-adjacent media commentary rather than a single dataset, it indicates how gatekeepers frame the social stakes of African cinema for European audiences[76].
- According to the qualitative interviews, African cinema faced significant perceptual barriers, with international audiences often viewing it through a narrow lens. While some filmmakers attempted to "westernise" content to expand reach, experts emphasised that authentic, locally grounded stories such as Nairobi Half Life were often more impactful and relatable regardless of their background. At the same time, gaps in production infrastructure contributed to lower technical quality, reinforcing misconceptions about African filmmaking, with high production value remaining the key gatekeeper for global recognition and distribution.

> So, there is a certain standard that you should not, where your film should not go below, you know, so you have to meet a certain production standard. And I think this is key to have an easy entry into the film market.
>
> *Filmmaker, Germany*

Partnerships and advocacy

- International funds and broadcasters often connect African films to advocacy circuits (e.g., parliamentary screenings, NGO campaigns). The WCF's stated mission explicitly couples artistic support with democratizing international film production, and its Africa line, supported by Germany's Federal Foreign Office, institutionalizes partnerships that can translate into policy dialogues around coproduction and cultural exchange. DW Akademie's Film Development Fund operates one step earlier in the chain, development and mentorship, but its logic is similar: enabling films from Ethiopia, Tanzania, and Uganda[77] to reach a quality threshold that makes festival selection, international financing, and impact campaigns more likely[78].
- African films relied heavily on partnerships, though these often-presented structural challenges. Funding largely came from NGOs, embassies and cultural institutes, providing vital subsidies in the absence of local film funds but requiring alignment with social impact or educational themes.

> What we have to understand is that social impact is a code and reality in many African countries because there does not exist a film funding system, so at least a social impact film is the only way, at this level, to get any funding, to get funding from NGOs, to get funding from embassies, to get funding from GIZ, to get funding from whatever, yeah. It's a little bit of a subsidy compared with the normal funding system that we have, for instance, in France and Europe, which is far away from the amount.
>
> *Distributor, Germany*

- This dependency sometimes limited creative independence, with filmmakers pressured to include inauthentic narrative elements. Sustainable international growth depended on stronger advocacy and trade agreements to support co-production and distribution. While institutions like Goethe-Institut and Alliance Française offered screening spaces, these interventions are not aimed at building a self-sustaining, market-driven industry.

[76] African Cinema Illuminates Berlinale with Powerful Messages of Peace and Tolerance Link
[77] DW Akademie Film Development Fund - A growing community Link
[78] Start - Film Fund - DW Akademie Film Development Fund Link

Impact narratives and examples

While rigorous counterfactual evaluation is scarce, case led reporting shows patterns. WCF's funded slates over multiple jury rounds include projects from Sudan, Cameroon, Egypt, Lesotho, Senegal, Rwanda, and DRC, many of which subsequently appear at major festivals; this exposure often generates media coverage and invitations to policy forums on topics ranging from migration to resource governance, indicative of soft power and advocacy spillovers. Public broadcasters also commission or acquire high-visibility factual series with African perspectives, e.g., ZDF/ARTE's *Africa from Above*, that blend environmental, urban, and cultural storytelling for mainstream European audiences, potentially normalising African locales as sites of innovation rather than crisis. Primary research would be needed to quantify attitude change; however, existing program rationales and festival media show a consistent belief among European cultural institutions that African cinema contributes to intercultural understanding[79].

Several films and models from the qualitative interviews illustrated how African cinema could drive advocacy and policy dialogue. The film *Impure* (2024, Kenya/Germany) for instance addresses period stigma and was successfully used as an educational tool, including school campaigns and post-screening discussions that reportedly transformed teachers' mindsets in Uganda. *The Legend of the Vagabond Queen of Lagos* (2024, Nigeria/South Africa/USA/Germany), a co-production that premiered at the Toronto International Film Festival, achieved high social impact visibility through coverage in outlets such as The Guardian and The Washington Post, even though commercial returns were limited. The German initiative Vision Kino was highlighted as a successful model for integrating impact-driven films into education, facilitating millions of student admissions annually and providing teachers with materials to discuss political and social issues raised in the films. At the same time, the analysis noted a contrast between festival-style arthouse films, which appealed to Western critics but could feel "a little boring", and Nollywood-style productions, which retained authentic energy and resonated more organically with African audiences.

Lessons and opportunities for distribution, audience, and impact

Lesson for distribution

A key lesson was that weak domestic distribution systems, limited marketing budgets, weak audience data, fragmented rights ownership, undercapitalized producers, and inconsistent production quality remained the primary bottleneck to international success. In the absence of a functional machine for local cinema release and circulation, which typically fed into streaming visibility and global discoverability, films often failed to meet the structural requirements of international markets. At the same time, the traditional model of upfront flat license fees or minimum guarantees had largely disappeared, with approximately 95% of distribution agreements shifting to revenue-share models that made returns strictly performance-dependent and often delayed by at least a year due to complex reporting and payment cycles.

> And that's what a lot of filmmakers still think is the case. But in reality, approximate 95% of the deals we do are so-called revenue share deals, meaning they are performance-based. That means we give the films we license, the films we deliver them, they go into distribution slash online if it is a platform. And only, you know, some way down the road we see what they actually do.
>
> *Distributor, Germany*

[79] Shooting finalized of ZDF Enterprises' major new Factual series Africa from Above | ZDF Studios Link

In parallel, global platforms such as Tubi, LG Channels, and Samsung TV Plus increasingly prioritised high-volume content over single-film acquisitions, requiring distributors to supply hundreds of hours of programming and pushing the industry toward catalogue and slate-based strategies. Weak rights management systems further constrained international potential, as limited distribution options often force creators into premature digital release strategies that can compromise long-term IP value, by uploading content to platforms like YouTube shortly after festival runs, thereby violating exclusivity windows. While African markets showed growing potential, North America remained the most critical region for monetisation due to its advanced digital infrastructure, established distribution ecosystems, and higher consumer spending power. Conversely, North America is seen as an extremely difficult market to penetrate, even for high-profile international productions, and that the Global South is noted as increasingly on the rise. While current commercial returns are higher in more developed territories, the long-term potential of the Global South including both the continent's domestic audience and its expanding international diaspora is expected to grow significantly as Africa plays a major role in the global film market throughout the 21st century.

Lessons for audience development

The need to move beyond "trauma-heavy" or conflict-centred narratives and position African cinema across a full range of genres, including thrillers, dramas, science fiction, and comedies, to achieve broader international reach. Successful films consistently emphasised universal human experiences, with relatability grounded in shared emotions, relationships, and life struggles emerging as the strongest driver of cross-cultural audience engagement. While the use of local languages such as Swahili strengthened cultural authenticity, it also created accessibility barriers for international audiences who preferred dubbed or audio-led content over subtitles. However, experts cautioned against "westernising" narratives, emphasising that maintaining cultural specificity was critical for authenticity and for positioning films as representative "lighthouses" of national cinema. At the same time, younger global audiences were increasingly indifferent to a film's country of origin, prioritising content quality and ease of access, with platform availability and algorithmic visibility, marketing budget and existing audience momentum as well playing a more decisive role than geographic or cultural context.

Lessons for social impact

Much of African film funding remains externally driven by NGOs and donors, which, while important, can unintentionally narrow the creative space by pushing filmmakers toward specific thematic priorities such as gender, health, or conflict themes that may not always align with broader commercial appeal. At the same time, social impact screenings operate as a parallel, largely unrecognised industry: they are highly transformative, especially in regions where access to film is limited, and play a critical role in building a cinematic culture despite not being reflected in box office data. Models like Germany's Vision Kino demonstrate how this gap can be bridged by linking education and film through paid school-based screenings supported by learning materials, creating both impact and sustainability. Ultimately, strengthening the sector requires a wider ecosystem approach, bringing together filmmakers, researchers, and policymakers, distributors, exhibitors, telecom operators, streamers, and advertisers to better understand audiences, support distribution, and position films on national and global platforms.

Opportunities for distribution, audience, and impact

The stakeholders' insights suggest that the African film industry is at a turning point, with opportunities to move beyond festival-based exposure toward more structured, market-driven growth. There is strong potential for international partnerships, particularly through formal trade agreements and better alignment in business practices between African and European stakeholders.

Expanding into commercial markets such as Germany, supported by a growing Afro-German audience and increasing interest in African culture, offers new pathways, especially through specialised distribution models that bypass traditional gatekeepers. At the same time, the shift to digital-first, performance-driven distribution, including FAST channels, requires high content volumes and adaptability to new commercial realities.

Audience development opportunities are seen to lie in universal storytelling, youth-focused content, and strategic use of diaspora markets, although diaspora audiences alone are insufficient to sustain large-scale theatrical success. Language also remains a key barrier, with English-language content being more exportable. Additionally, social impact films present alternative distribution and engagement models, particularly through educational screenings, but often struggle to compete in mainstream entertainment markets. Overall, growth will depend on leveraging technology, targeting high-monetisation markets, addressing data gaps, and balancing social impact with commercial viability.

Opportunities for further international (including Germany)–Africa partnerships

The stakeholders' insights pointed to strong growth potential for African film industries, with experts highlighting the need to shift from fragmented, philanthropic support toward structured, commercially driven, and technologically enabled partnerships. Hence funding should be increasingly structured to crowd in market based financing and build long infrastructure rather than sustain isolated projects.

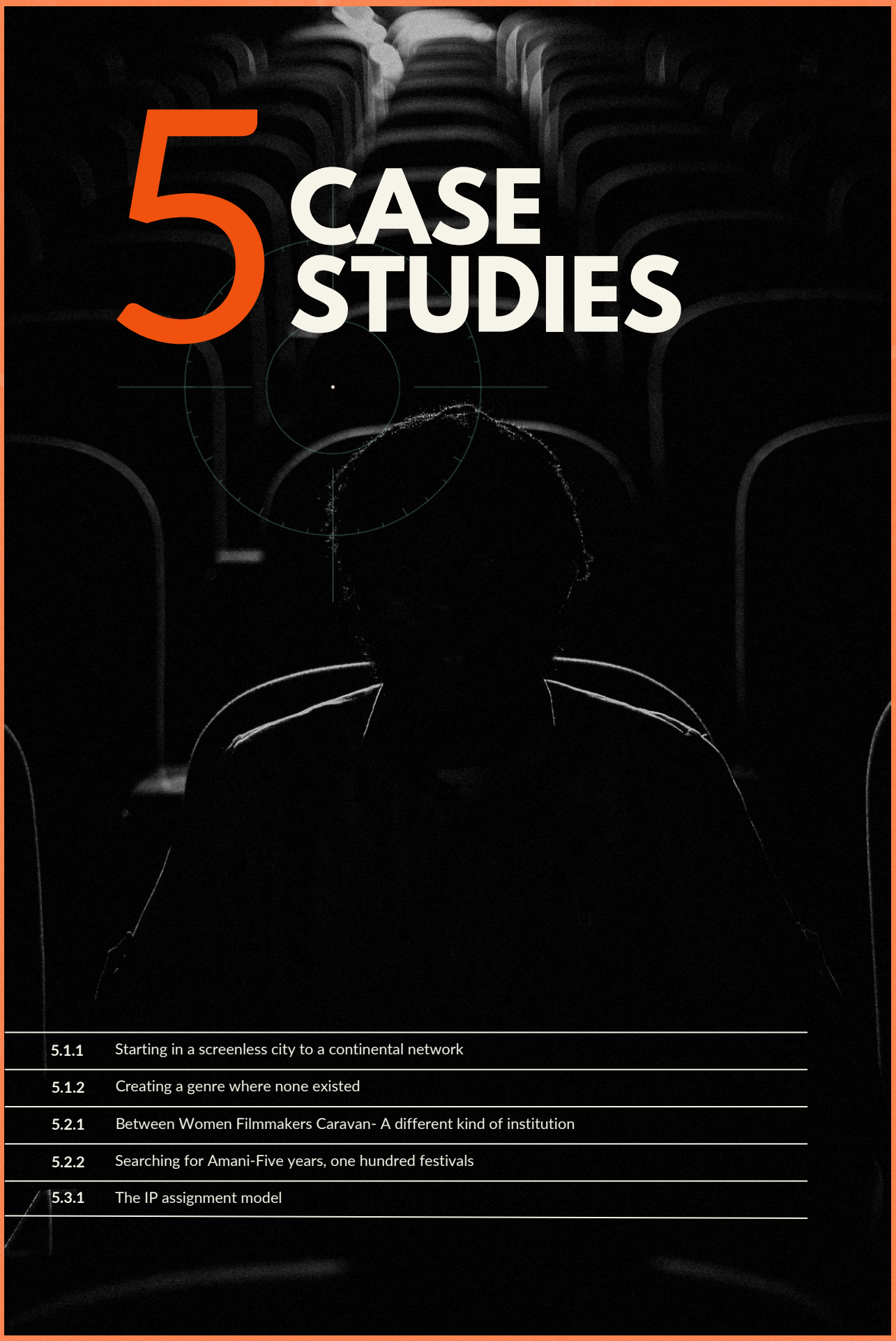
Future partnerships stand to benefit from greater African leadership and governance in their design, rather than being led primarily from Berlin, Paris or other international hubs, consistent with the broader point made in Section 2.4.1 about the risks of externally directed editorial and funding priorities.

A critical opportunity lay in moving beyond project-based collaboration toward formal political trade agreements. Such agreements were seen as essential for creating a sustainable infrastructure for co-production backed by financial and distribution incentives, strengthening institutional cooperation between African and European partners, and enabling more predictable market access. In this context, there was also a growing need for government-level advocacy, including stronger support for national films in global platforms, alongside policy reforms that could create more balanced incentives for African content distribution internationally.

Audience development emerged as another key area of opportunity, particularly through the creation of a paying audience culture. The German Vision Kino model where schools paid to screen socially relevant films as part of structured educational programs, offered a transferable blueprint for building long-term cinematic culture beyond dependency on free NGO or donor-led screenings. This approach highlighted the potential for integrating film into education systems as a sustainable demand driver while also strengthening local appreciation for cinema.

Technological and data collaboration presented additional opportunities, particularly through the combination of Kenyan strengths in digital innovation, AI, and platform usage with German production expertise and industry standards. Such partnerships could help reduce production costs, improve efficiency, and strengthen the analysis of fragmented global audience data, enabling more targeted distribution strategies. At the same time, there was significant potential to leverage AI-driven tools for content creation and visual effects, further enhancing competitiveness in global markets.

A parallel opportunity lay in the professionalisation and standardisation of distribution systems, particularly in rights management. Weak enforcement and inconsistent practices, such as premature uploading of films to platforms like YouTube after festival runs, were identified as major risks that undermined commercial value and restricted international licensing potential. Strengthening rights management frameworks was therefore seen as essential to preserving exclusivity windows and improving access to revenue-sharing models with global platforms.



5 CASE STUDIES

5.1.1	Starting in a screenless city to a continental network
5.1.2	Creating a genre where none existed
5.2.1	Between Women Filmmakers Caravan- A different kind of institution
5.2.2	Searching for Amani-Five years, one hundred festivals
5.3.1	The IP assignment model

5.1 Audience Building

From a screenless city to a continental network

Background

In 2015, the founder of Goree Cinema launched a film festival in a country with no functioning cinema screen. The choice of location Goree Island, historically recognised as a point of embarkation in the transatlantic slave trade was strategic and symbolic. This was not meant to be a glamorous industry event. It was an attempt to create a genuine, accessible encounter between Senegalese people and African cinema: cinema embedded in cultural identity rather than imported from outside it.

For five years the festival ran open-air, free of charge, drawing between 300 and 1,000 people per screening. Those numbers, in a market with no theatrical infrastructure, were exceptional. The festival built real audience relationships, real visibility for African cinema and an institutional reputation that the company continues to benefit from. But it also created a problem: having been trained to experience cinema at no cost, the audience had no framework for paying.

Goree by Night: The pivot to sustainability

The company's answer was Goree by Night, a curated premium weekend experience that kept cinema at its centre but surrounded it with accommodation on the island, a restaurant experience and a live music showcase. Hotels and restaurants were integrated as commercial partners, creating a circular local economy. The package generated revenue and demonstrated that the willingness to pay existed among Senegalese audiences but only for something genuinely and categorically different from what they had previously received for free. The lesson was hard-won: free access builds community; it does not automatically become a paying audience without a new value proposition.

Distribution as a practitioner network

When the company moved into production, its approach to distribution stayed grounded in the same relationship-first logic. For the circulation of a documentary about a German Senegalese contemporary dancer, West Africa was handled directly through the company's own distribution contacts; East Africa was co-ordinated through LBx Africa (under its distribution arm Bigger Motion), a Kenyan impact-distribution company. The goal was circulation across 15 to 20 countries achievable only because the trust, shared purpose and working relationships among those practitioners had been deliberately built over years.

A think tank event in Brazil in 2025 bringing together film practitioners from Africa and Latin America, formalized this network into a structured knowledge exchange that continues to generate market intelligence the company uses. The core argument to emerge from all of this: the best platform for African cinema is not a technology or a streaming service. It is the network of people who know their local markets and can be trusted to activate a film within them. African audiences, moreover, always include their diasporas and treating the diaspora as an activation point rather than a secondary market opens a categorically different set of strategic possibilities.

Key lessons

- Free festivals are effective at building audiences and generating interest, but they do not automatically convert those audiences into paying customers.
- The shift to financially sustainable exhibition requires a fundamentally different value proposition not simply the same content with a ticket price, but a clearly differentiated, higher-value experience that audiences are willing to pay for.
- Distribution models built on practitioner relationships across territories are often more durable and better suited to the African context than those reliant on one-off international licensing deals.
- Diaspora communities should be treated as primary distribution targets, not secondary markets, given their strong role in driving visibility, demand, and revenue.
- As entrepreneurial cultural enterprises grow and gain traction, they require stronger institutional and legal protection to manage the stakeholder friction that often emerges with success.

Recommendations

- For institutions and funders: Support the development of paid exhibition and hybrid access models that allow African filmmakers and festival organizers to transition audiences from free to paying without losing them. This means funding the infrastructure of experience, venue development, island or destination event logistics, community partnerships not just content production. Investment in companies like LBx Africa as continental distribution infrastructure is urgent and underfunded.
- For policymakers: Provide legal and institutional frameworks that protect entrepreneurial cultural enterprises from predatory stakeholder behaviour as they scale. Develop in-country incentives for film exhibitions, not just production including support for open-air screening infrastructure, community cinema development and festival organizers working outside established urban venues. Recognise the diaspora as a strategic cultural and commercial priority in national film policies.
- For the broader ecosystem: Invest in formalizing practitioner networks through think tanks, co-distribution coalitions and structured knowledge platforms. The market intelligence that flows through these networks of who is distributing what, where, on what terms, with what results is the most valuable and least-funded resource in African film distribution. It cannot be replaced by external market research reports.

Creating a genre where none existed

Background

The founder of Kalista Production created *Maîtresse d'un homme marié* (Mistress of a married man) in 2019 after identifying an absence so fundamental it was almost invisible: Senegalese audiences were consuming Nollywood drama, Ivorian comedy, Burkinabè entertainment and Latin American telenovelas but almost nothing that reflected their own contemporary lives and social realities. The series was modern, frank and distinctly Senegalese. It accumulated more than six million digital views and helped establish Senegal as a significant producing country in Francophone African content. The YouTube channel grew from zero to 600,000 subscribers. Across the wider ecosystem that grew alongside Kalista's work, Marodi reached more than seven million subscribers and Even Prod five million placing Senegalese French-language series among the most-watched African digital content in the world.

A financing model built on brand partnerships

Each production is financed with 70% to 80% from brand partnerships with Senegalese and regional companies contributing their communication budgets in exchange for product integration aligned with their campaign calendars. The remaining 20% comes from YouTube revenue and VOD sales through the platform Wido, where content is sometimes dubbed from Wolof into French to enable regional resale across Francophone Africa. Television broadcast is structured through arrangements in which the producer contributes 20 to 40% of production costs in exchange for airtime counterintuitive by conventional standards, but a realistic reflection of the current market maturity.

Content that moves people to act

What distinguishes Kalista Production is the social purpose embedded in every project. *Yaay 2.0* centering an infertile man, a framing entirely absents from Senegalese content before its release won 11 awards at the Gayne Festival and generated national advocacy for the operationalization of Senegal's Medically Assisted Procreation centre. Viewers called for state subsidies and awareness campaigns encouraging men to get fertility testing. The forthcoming series *Kalista* addresses body-shaming; *Ladies Boss* focuses on financial literacy for women entrepreneurs. These topics are chosen because they speak directly to realities the audience is already living and that connection is what converts viewers into advocates.

The limits of YouTube and the road ahead

The practitioner is clear-eyed about the model's structural vulnerabilities. YouTube monetizes diaspora views at dramatically higher rates than continental African views the most commercially valuable audience is the one furthest from the communities the content serves. YouTube is not monetized at all in some African markets, including Ivory Coast, where producers earn nothing from potentially hundreds of thousands of views. Platform policy changes can restructure the economics without warning. And inadequate content security on VOD platforms has allowed piracy to divert revenue that paid-access distribution was supposed to protect.

The long-term answer she advocates is African-owned paid VOD infrastructure that routes payment directly to creators, developed alongside sustained cultural work to help audiences understand why local content is worth paying for. A coordinated cross-continental marketing strategy launching series simultaneously across Francophone Africa would activate audiences that already exist but are currently unreached because no one has invested in finding them.

Key lessons

- YouTube has played a critical role in building and aggregating audiences, but on its own, it cannot sustain the long-term growth and stability of the industry.
- Brand partnerships currently offer a viable financing pathway for Francophone African content at scale, but this model depends on addressing platform monetization inequalities and developing paid distribution infrastructure alongside it.
- Platform-driven revenue remains uneven and unreliable, reinforcing the need for diversified income streams beyond digital advertising.
- Content that is rooted in genuine audience resonance rather than shaped to meet funder compliance consistently drives deeper engagement, stronger loyalty, and more meaningful social impact.
- In contrast, commissioned content built primarily around grant criteria often struggles to connect with audiences at the same depth or scale.

Recommendations

- For financing institutions and funders: Fund audience education initiatives alongside content production helping Senegalese and Francophone African audiences understand the cultural and economic value of paying for locally produced content is part of the infrastructure investment the sector needs. Support brand partnership models as a legitimate and effective financing mechanism, and develop complementary instruments such as equity, soft loans, development grants that reduce dependence on a single revenue pillar.
- For production companies and co-producers: Invest in the development of African-owned VOD platforms with robust content security infrastructure. Treat content protection, watermarking, access controls, rights management as a production cost, not a technical afterthought. Build coordinated cross-continental marketing campaigns as a standard component of every major digital release: the audience exists across Francophone Africa; it needs to be told the content is there.
- For platforms (YouTube / Google): Extend full monetization access to all African markets currently excluded including Ivory Coast as a matter of policy equity. The absence of monetization in key Francophone African markets removes the primary financial incentive for local content creation in those territories and disproportionately punishes the creators building the continent's largest digital communities. This is a platform policy decision with ecosystem-level consequences.

5.2 Social Impact- Impact, access and limits of exposure

Between Women Filmmakers Caravan- A different kind of institution

Background

The Between Women Filmmakers Caravan was founded in Cairo in 2008 on a founding principle that sounds simple and is actually quite radical: women filmmakers in the Arab world should be able to make documentary films, screen each other's work and build solidarity without having to accept the conditions that commercial production and European development funding routinely impose. Operating through the production company Claquette Arabe, the Caravan has spent 17 years constructing the infrastructure for that independence one film, one festival, one subtitling project at a time.

The Workshop: Ownership from the first frame

The Caravan's flagship activity is a year-long professional documentary filmmaking workshop the only programme of its kind in the Arab world. Between seven and eight women per cohort develop their first creative documentary over twelve months, with the Caravan providing facilities, mentorship, technical support and production infrastructure. When the film is finished, it belongs entirely to the filmmaker who made it. The Caravan holds no rights, takes no fee and places no conditions on the content. Since 2019, approximately 45 short documentary films have been produced through the workshop, many of which have been selected for international festivals and continue to circulate years after their completion.

The collective that grew out of the workshop Ma'an, meaning 'together' in Arabic, now co-develops feature-length documentaries across 15 women from Egypt and Lebanon, with members taking turns directing, producing and supporting each other's editing across different projects. The model is deliberately designed to break from the competitive individualism of the conventional film industry and from the hierarchies that European co-production templates tend to reproduce. The Lebanon chapter of Ma'an continued its work without interruption through three consecutive years of wartime a quiet demonstration that collective structures, when properly built, can outlast the instabilities that destroy individual enterprises.

Naming soft censorship

One of the most politically precise observations to emerge from the entire research series came from the Caravan's founder. The limitation of national production funding in Arab countries, a structural gap across most of the region, leaves filmmakers entirely dependent on foreign support, primarily from European development funds. And European funds are not neutral. They come with narrative expectations about what Arab and African stories should look like, what kinds of women are worth following, what problems deserve documentation and what perspectives are appropriate to foreground.

When compliance with those expectations is the price of funding and for most Arab filmmakers, it is the result, then it is a form of soft censorship that is rarely named as such. Films that confirm the funder's existing frame of reference get made. Films that challenge or diverge from it, or that pursue aesthetics and angles the funder's cultural vocabulary cannot accommodate, go without support. The films that are not made are invisible, so the mechanism is invisible too. But its effects a narrowing of what African and Arab cinema looks like, feels like and argues for are real and cumulative.



The Caravan's structural counter-strategy is to seek funding for the workshop itself rather than for individual productions. The fund from País Vasco that supports the programme pays for the process of making films, not for particular content outcomes. A filmmaker who enters the workshop is free to make a film about whatever her life, her observations and her creative instincts prompt her to make not what a funder's agenda requires. That distinction, which sounds technical, is the difference between a programme that produces genuine creative expression and one that produces well-made advocacy materials.

Subtitling as political act

Every film screened by the Caravan is subtitled into Arabic. That sentence requires a moment of attention: Egyptian international film festivals routinely subtitle in English only, effectively excluding Arabic-speaking audiences who do not read English fluently the majority of the audiences the Caravan seeks to serve. Subtitling all content into Arabic is the Caravan's most consistent and most expensive single commitment. It is one of the largest budget lines in an organization that runs no red carpets, no celebrity events and no luxury programming.

The political logic is explicit: cinema that excludes its intended audience in their own language is not really cinema for that audience at all. It is cinema performed in front of them, addressed elsewhere. The Caravan refuses this. Until recently, all screenings were also free of charge. The organization has only recently begun charging a modest entry fee at Zawya, Cairo's sole independent cinema at half the standard price, purely to cover the rental cost of the space. The surplus above cost does not accrue to the Caravan.

Overview of the impact

The Caravan does not primarily measure its impact in viewing figures. More meaningful evidence appears in life over time. Women who began attending Caravan screenings in 2008 have in many cases become activists, feminists and community organizers in the 15 years since. The Cairo International Women Film Festival, organized by the Caravan between 2013 and 2018, was the only cultural event held in Cairo during the political turbulence of 2013. The audience that formed around those screenings built a relationship with the institution that has never fully broken. Regular audience debates in cinemas and online continue to generate the kind of sustained dialogue that is the precondition for genuine attitude change.

An educational programme developed recently uses the Caravan's film archive to create curated screening catalogues for schools and universities across five Arab countries. The level of engagement from students and teachers points to an appetite for structured encounters with film as a tool for discussion and reflection rather than passive entertainment that is both real and largely unmet by the wider cultural infrastructure.

Key lessons

- Funding the process of filmmaking, rather than focusing only on content outcomes, is the most effective structural protection for creative freedom, allowing filmmakers to retain independence in how stories are developed and told.
- Collective production models which share roles, resources, and risk are more resilient than individual production, particularly under hostile or unstable conditions, as demonstrated by the Ma'an Lebanon experience.
- Language access is not a secondary concern; subtitling content into the audience's language is a fundamental precondition for the audience existing at all and for meaningful engagement to happen.
- Soft censorship through funding conditions is a structural problem, and it requires structural solutions not individual resistance by individual filmmakers operating within constrained systems.

Recommendations

- For African and Arab development funders: Audit the narrative conditions embedded in film funding criteria. Support programmes that fund the process of filmmaking rather than prescribing content outcomes, the workshop model, not the commissioned-film model. Invest in Arabic, Swahili, Wolof and other local-language subtitle infrastructure as a standard component of any film distribution grant.
- For regional and national cultural institutions: Establish national production funds in Arab and African countries that operate independently of foreign political agendas and that explicitly protect creative freedom. Support the development of collective and solidarity-based production models with legal, financial and administrative infrastructure as a recognized and fundable form of cultural enterprise.
- For research and impact community: Develop longitudinal impact frameworks that capture the kind of change the Caravan produces shifts in identity, community, activism and civic participation rather than only tracking viewership. Fund monitoring of workshop outputs over years, not months. Build the evidence base for collective filmmaking models so that funders can recognize and support them with confidence.

Searching for Amani-Five years, one hundred festivals

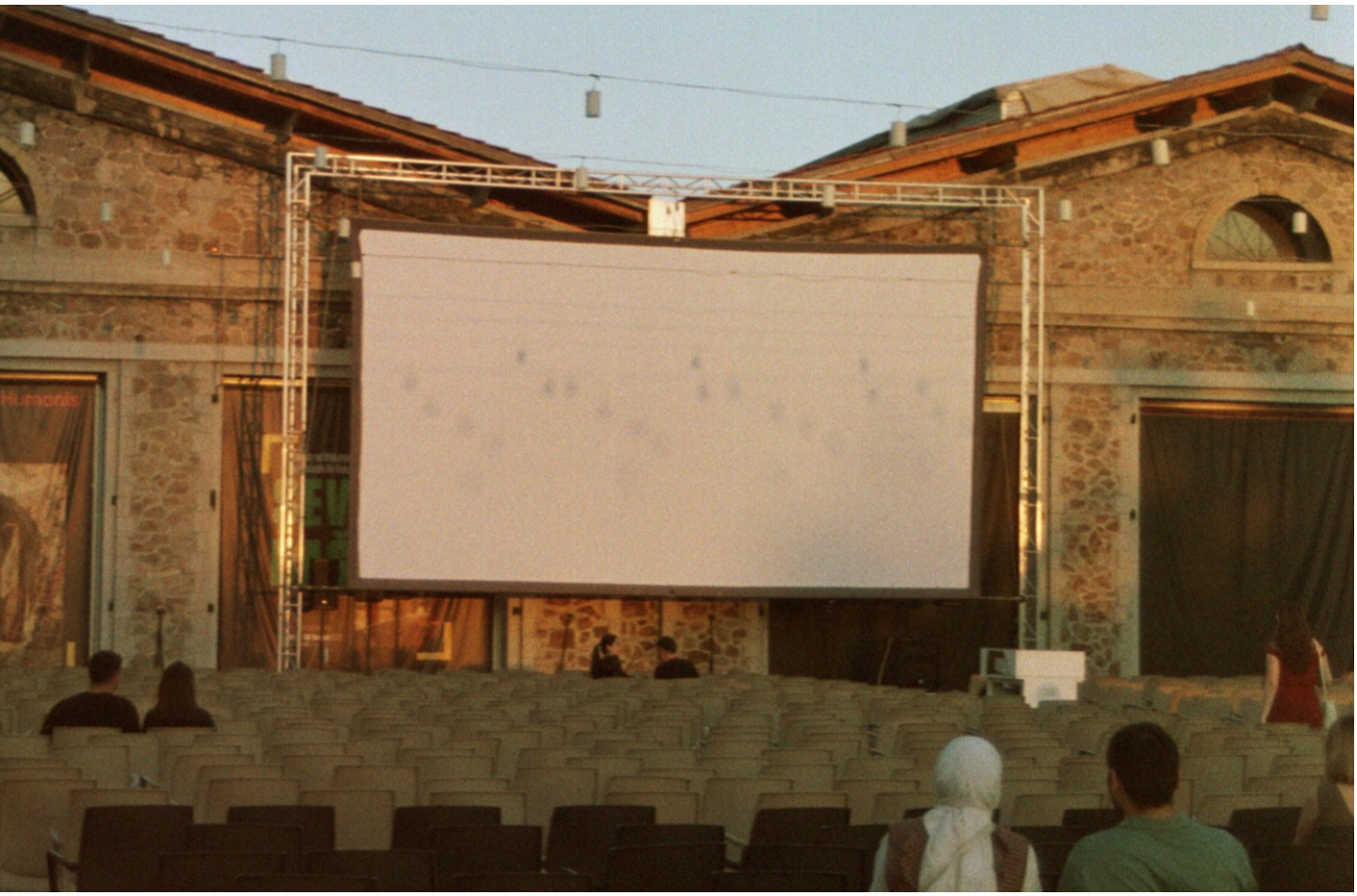
Background

Searching for Amani began with two intentions that were in productive tension with each other: a desire to contribute to a culture of East African documentary filmmaking, and a specific subject climate change experienced not as a global statistic but as a lived reality reshaping individual lives and community bonds. The film's eventual central character, Simon, resolved that tension. He was a young Kenyan boy who, before any documentary crew arrived, had already begun investigating his father's death. A death linked to the climate-driven conflicts fracturing his community. He was not waiting to be helped. He was already acting.

That framing became the film's ethical and political core. *Searching for Amani* did not position Simon as a victim of forces beyond his comprehension. It accompanied him as an agent curious, determined, using his own resources and relationships to seek answers. The film's argument was implicit and powerful: the communities most affected by the climate crisis are not passive recipients of a catastrophe made elsewhere. They are people with full inner lives, active strategies and the right to be represented with full human complexity.

Building distribution without infrastructure

When production began in 2019, there was no established pathway for distributing a Kenyan feature documentary to the audiences it needed to reach. Everything that followed was improvised. The critical breakthrough came at Doc Forum in Amsterdam, where a connection through an executive producer introduced the film to Outlook, a European sales agent with an established international festival network. Outlook took on all rights except Kenya and East Africa, which it had no capacity to activate. For East Africa, LBx Africa (Bigger Motion), a Kenyan impact-distribution company, was engaged.



In Kenya, a one-week theatrical run at a single Nairobi cinema established Oscar eligibility, followed by a month-long run at the Unseen Cinema. Al Jazeera acquired worldwide broadcast rights and made the film free on YouTube globally. PBS acquired US rights and offered free online access. The distribution philosophy was stated clearly by the filmmakers: access mattered more than revenue. For a film about climate justice, a paywall was a contradiction. The film needed to reach educators, students, community groups and policy advocates and it did, across approximately 100 festival selections on every continent.

When the infrastructure fails

The practical limits of that first access decision were significant and revealing. Community screenings in Kenya the most direct way to reach the communities the film depicted remained in planning at the time of the interview, not for want of effort but for want of money. Organizing a community screening on a minimal budget is possible; monitoring its impact, sustaining the conversation it starts, and following up with participants all require resources that were not available.

Television broadcast inside Kenya was explored and abandoned. NTV, a major Kenyan broadcaster, quoted an advertising rate meaning the filmmakers would have had to pay per broadcast minute, at commercial advertiser rates, to air their own documentary to a national audience. The economics were not merely unhelpful; they were structurally reversed. The broadcaster's standard practice assumed that locally produced content carried no intrinsic value worth paying for.

YouTube reached a wide and genuinely global audience but generated negligible revenue for production. The monetization rates for African content particularly content consumed primarily by African continental audiences are a fraction of what equivalent diaspora or European viewership would yield. Streaming platforms offered licensing fees but came with exclusivity clauses that locked the film away from the communities it had been made for. PBS, one of the film's two major broadcast partners, was subsequently defunded as part of wider US public broadcasting cuts, removing a distribution channel the filmmaker had relied on. Outlook, the sales agent that had made the film's international journey possible, did not take on the filmmaker's next project.

Each of these setbacks is individual. Together they describe a system: one in which social impact documentary filmmaking in East Africa is commercially unviable by default, dependent on foreign funding with narrative conditions attached, and structurally prevented from building the sustainability that would allow it to continue.

Overview of the impact

The filmmaker articulated impact through four dimensions: shifts in mindset, shifts in behaviour, shifts in perception, and shifts in legislation or the rule of law. Citing *Softie* and *Thank You for the Rain* as evidence that documentary films can move people toward action but paired that observation with a caution: single films are insufficient. Sustained change requires a sustained pipeline of production and distribution, not one powerful film every five years.

The most precise summary of the problem came in the comparison between what a Kenyan audience pays for imported entertainment and what it pays for local cinema. A ticket to watch Avengers costs 1,100 shillings. A ticket to watch Searching for Amani costs 1,100 shillings. The asymmetry is not in price; it is in the cultural conditioning that makes one feel like a normal consumer choice and the other feel like a charitable act. Dismantling that conditioning is a long-term project requiring consistent production, consistent distribution and consistent institutional investment in the value of locally made stories.

Key lessons

- Social impact filmmaking in East Africa has, by structure, become a non-profit enterprise not necessarily by choice, but by default conditions.
- The enabling infrastructure for commercial sustainability including functional broadcast economics, fair digital monetisation systems, community screening funds, and strong IP protection is still largely missing or underdeveloped.
- Access, impact, and commercial sustainability are not opposing forces; in practice, they are deeply interdependent.
- Ultimately, films that cannot sustain the people who make them cannot sustain the social missions they are meant to serve.

Recommendations

- For financing institutions and funders: Enhance funding streams for documentary distribution and community impact activation not just production. Fund monitoring and evaluation as a line item within impact-oriented projects from the outset, to ensure they are not redirected to post production budget items. Develop East African distribution infrastructure by backing respective companies with institutional capital and long-term support. Documentary Africa (DOCA), which is represented on this study's Advisory Reference Group, is one existing organisation working in this space. This study did not independently verify the scale of DOCA's current funding, but engaging and resourcing existing intermediaries such as DOCA is a lower-risk starting point than establishing new mechanisms.
- For policymakers in Kenya and East Africa: Operationalize the film production fund framework through EASC relevant organs to ensure that Kenyan and East African productions benefit. Reform broadcaster obligations to require carriage payments for locally produced documentary content rather than charging producers for airtime. Strengthen IP law and piracy enforcement to make digital distribution commercially viable for local creators.
- For the research and impact community: Sensitize filmmakers on existing frameworks for measuring film's social impact beyond viewership such as Doc Society and Together Films, to empower them to document shifts in mindset, behaviour and policy over time. Advocate with streaming platforms for monetisation equity across African markets and against exclusivity clauses that limit access for communities most relevant to social impact films.

5.3 Building a financing model

The IP assignment model

Background

MBO Capital's path into film finance began not with a passion for cinema but with a pattern in economic data. When Nigeria rebased its GDP in 2015 and formally measured the creative sector for the first time, one finding stood out: during the deep recession that followed, when oil and gas, agriculture, trade and financial services all contracted, the arts and entertainment sector kept growing. It was the only part of the Nigerian economy that did not go negative. That single observation planted a seed.

The firm's first move was cautious, a slate of three films that returned capital, but slowly and over several years. Rather than exit, they treated the experience as field research. They traced every bottleneck: where production money stalled, where post-production delayed delivery, where distribution failed to convert audience attention into revenue. By the time they re-entered the market after COVID-19, they understood the value chain from the inside.

The IP assignment model: Collateral without property

The insight that would define MBO Capital's model was deceptively simple: if African filmmakers have no physical assets to offer as collateral, use the intellectual property itself. Under their structure, a filmmaker arrived with a script, a production budget and ideally a signed contract with a streaming platform. MBO Capital provided the financing; IP ownership transferred temporarily to the firm during production. Once the film was delivered and the streamer paid, the debt was repaid and all rights reverted entirely to the creator.

Returns of 19 to 20% in USD terms made the model commercially compelling. Working initially with producers who already had signed Amazon Prime contracts reduced both execution risk (these were proven filmmakers) and offtake risk (the buyer was already contractually committed), in MBO Capital's assessment. The firm financed approximately 20 films through this structure before adapting it further.

A non-negotiable principle ran alongside financial mechanics: creative non-interference. MBO Capital reviewed synopses to understand commercial contours but never requested script changes or influenced creative decisions. If a film succeeded or failed, it did so entirely on the merits of the people who made it. This principle was not only ethical, but it was also strategic. Removing the financier from creative decisions kept the relationship clean and preserved the artistic integrity that audiences actually respond to.





Adapting when the market shifted

The model faced its first major stress test when Netflix and Amazon Prime pulled back from commissioning African content, shifting from paying to have films made to licensing finished films at a lower cost. Producers who had relied on streaming advances as their primary source of development funding were suddenly without it. MBO Capital's response was to evolve rather than retreat: wherever no signed streaming deal existed, they introduced an equity component alongside the debt, sharing in the potential upside of a well-performing film rather than accepting only a fixed return. That hybrid structure that is part debt, part equity[80] expanded the firm's portfolio and aligned its interests more directly with those of the producers it backed.

Understanding the theatrical economics makes clear why streaming was always central to the model's logic. In Nigeria, after government withholding tax, cinema-owner fees which run to 40–60% of remaining revenue and distributor commissions, a producer typically retains only 25 to 30% of box office gross. A film budgeted at one million dollars that earns two million at the box office yields roughly USD 600,000 from cinema alone, which is a loss. Profitability requires stacking airline licensing rights, streaming deals across multiple geographic territories and other secondary windows on top. A pre-signed streaming contract does not merely add a revenue line it fundamentally transforms the risk profile of the entire investment.

The three barriers and a long view

When asked to name the structural obstacles holding back not just their own portfolio but the wider Nigerian and African film sector, MBO Capital identified three interlocking barriers and ranked them in a counterintuitive order. Infrastructure came first: insufficient cinema screens, soundstages, post-production facilities, VFX capacity and trained creative technicians. Policy came second: the tax credits, production rebates, IP protection frameworks and government development funds that underpin mature film industries in France, South Korea and India are largely absent in Nigeria. Capital ranked third not because money is unimportant but because money deployed into a sector without functioning systems is largely wasted.

For example, the Korean analogy the firm draws on is worth taking seriously. The Korean Wave the global dominance of K-pop, K-drama and Korean cinema was not an accident of talent. It was the result

of deliberate government policy channelling industrial surplus capital into cultural export infrastructure over a sustained period. African creative industries have achieved remarkable global traction with almost none of that institutional support. Sustaining it, and converting cultural influence into durable economic value, will require African governments to play a more intentional and structured role than they have to date.



[80] Debt is borrowed money that you must pay back with extra cost called interest. Equity is money you get by selling a piece of ownership in your business or asset

Key lessons

- Private capital can enter African film finance both commercially and ethically but only if it is structured around the realities of the sector, rather than models borrowed from other asset classes that do not fit creative industries.
- IP assignment helps resolve the collateral challenge, creating a clearer asset base while still enabling filmmakers to unlock financing.
- Creative non-interference is critical, as it preserves the quality and authenticity of the content the very factors that ultimately drive audience demand and financial returns.
- Hybrid debt–equity models are better suited to the sector, as they absorb the revenue uncertainty that purely debt-based structures cannot accommodate.
- The most urgent investment need is not in individual films, but in the broader infrastructure of human capacity, physical systems, and enabling policy environments that make sustainable film production possible on a scale.

Recommendations

- For financing institutions: Adopt or adapt the IP assignment model as a replicable collateral mechanism across African markets. Structure investment at portfolio or slate level rather than film by film to spread risk. Introduce equity components wherever guaranteed offtake is absent. Establish a creative non-interference principle as a standard term of all film financing agreements.
- For policymakers (Nigeria and across Africa): Develop tax credit and production rebate frameworks; South Africa's rebate shows what targeted incentives can achieve, and Rwanda has introduced tax exemptions for large co-productions. Strengthen IP law and anti-piracy enforcement to make IP-backed financing viable on a scale. Establish government-backed production development funds that provide early-stage 'soft money' to de-risk private investment and attract international co-productions.



6 RECOMMENDATIONS

6.1	Distribution
6.2	Audience Development
6.3	Social Impact
6.4	Cross-Cutting Enablers
6.5	Recommendations by Stakeholder
6.6	Final Thoughts

Short-term focused recommendations

Short-term actions for industry stakeholders

While several recommendations in this report require system-level coordination and policy reform, the research also identifies a set of actions that individual stakeholders can undertake within the next 12 months. These actions focus on strengthening distribution planning, audience development, rights management, localisation, data collection and social-impact measurement. They are intended as practical "minimum good practices" that producers, distributors, platforms, exhibitors, funders and impact partners can adopt within their existing operations, while longer-term ecosystem reforms are pursued:

Stakeholders should adopt a minimum set of common indicators for audience reach, engagement, distribution performance and revenue, enabling individual organisations to benchmark their own performance while gradually contributing to stronger sector-level evidence.

Producers and filmmakers:

Producers should incorporate distribution planning into the production process from the outset, identifying priority audiences, markets and release windows across theatrical, streaming, broadcast and community channels before the film is completed. Additionally, they should budget for and conduct a basic audience assessment before release to identify the primary audience segment, their preferred viewing channels and the most effective routes for reaching them.

Producers should develop a simple, multi-channel audience engagement plan that combines social media, community networks, partnerships and word-of-mouth promotion, recognising that personal recommendations are a major driver of film discovery across the markets. Producers should treat rights management as part of production planning by reviewing IP ownership, exclusivity, territories, licensing periods and revenue-sharing arrangements before entering distribution or commissioning agreements. Producers should avoid releasing content freely before assessing its commercial distribution potential and should establish a clear sequence of release windows that protects the value of the film.

Distributors:

Distributors should progressively budget to localise content for priority markets through subtitling, dubbing or other forms of language adaptation, particularly where this can open access to neighbouring African markets.

Distributors should establish a basic audience and performance tracking system covering admissions/views, revenue, geography, audience characteristics where available, and the channels through which audiences discovered the film.

Exhibitors

Exhibitors should test more flexible approaches to pricing, including off-peak pricing, targeted discounts and bundled offers, to assess whether affordability can increase admissions without reducing overall revenue.

Exhibitors and distributors should pilot community-based or alternative screening models in locations underserved by formal cinemas, using schools, community halls, cultural centres or other suitable venues.

African oriented streaming platforms and broadcasters

African/local content-oriented streaming platforms such as Viusasa and broadcasters should improve the diversity and compensation of African content by using dedicated local-content collections, targeted recommendations, pay-per view, and promotional campaigns rather than relying on content simply being available in the catalogue.

Platforms should test more flexible payment models, including micro-payments, daily passes or mobile-money-enabled access, particularly in price-sensitive markets.

Platforms and broadcasters should provide producers with more consistent performance information to strengthen future commissioning, production and distribution decisions.

Funders and financing institutions

Funders should ensure that supported productions include realistic allocations for distribution, audience development, localisation and marketing rather than concentrating funding exclusively on production.

Development partners, donors and NGOs

Organisations supporting social-impact films should require an impact and audience-engagement plan at the beginning of the project, specifying the intended audience, expected change and how this will be measured.

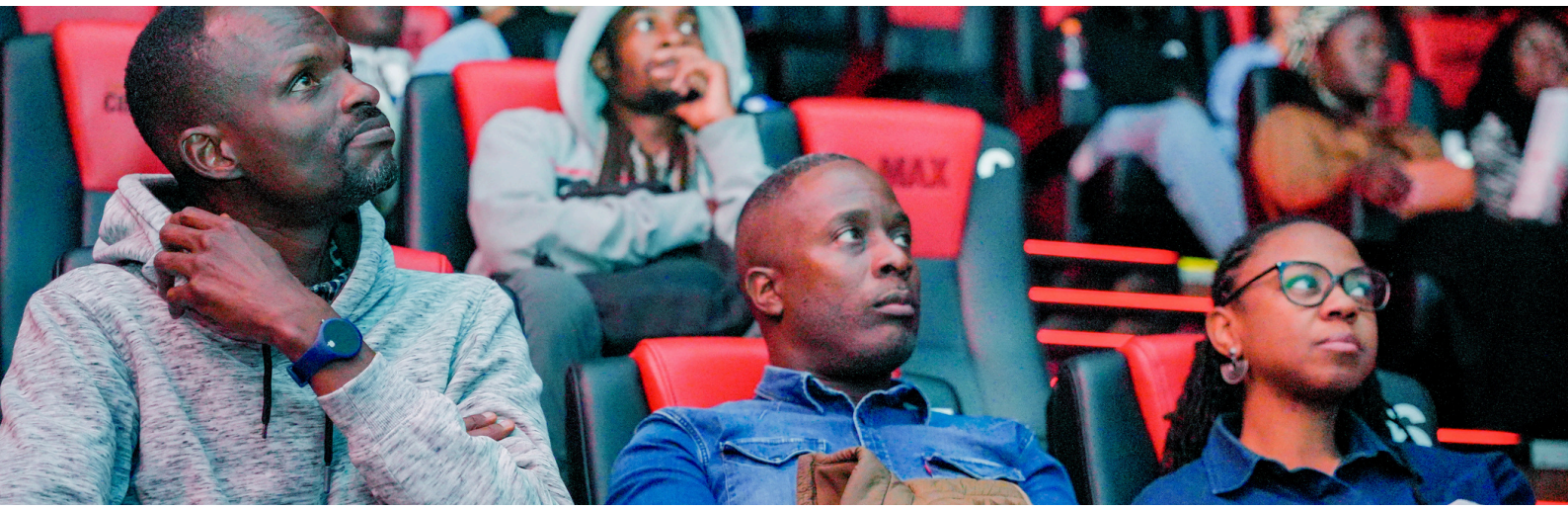
Social-impact films should be accompanied by structured engagement activities, such as facilitated discussions, community dialogues or links to relevant services, where appropriate, so that viewing can translate into deeper engagement.

All industry stakeholders

Stakeholders should adopt a minimum set of common indicators for audience reach, engagement, distribution performance and revenue, enabling individual organisations to benchmark their own performance while gradually contributing to stronger sector-level evidence. Below are some of the indicators that can be tracked:

Dimension	Core indicators
Audience reach	Total views/admissions; unique audience; geographic reach; target audience reached
Audience engagement	Completion rate; repeat viewing; social engagement; referrals; audience satisfaction
Distribution performance	Number of channels/windows; territories reached; screenings; performance by channel
Commercial performance	Gross and net revenue; revenue per viewer/admission; transactions/subscriptions; revenue by window
Social impact	Knowledge/attitude change; intended or reported action; participation in engagement activities; documented institutional/community response

Longterm focused recommendations



6.1 Distribution

Strengthening film distribution across African markets requires a shift from fragmented, nationally bound systems toward coordinated, scalable ecosystems that connect content to audiences. The core constraint is not a lack of content, but the limited ability of films to travel within countries and across borders due to regulatory fragmentation, weak infrastructure, and underdeveloped distribution financing.

Governments & Regulators:
harmonise regulatory frameworks to reduce friction and enable cross-border trade

Priority: Build an enabling policy environment.

Regulatory fragmentation - in classification systems, licensing, and censorship remains a major barrier to distribution, raising transaction costs and limiting circulation. Progressive harmonisation, aligned with mechanisms like the AfCFTA, would position film as a tradable digital good, easing cross-border licensing and letting producers amortise costs across a continent-wide audience.

Local Content Policy:
shift quotas from production-only to enforceable distribution and exhibition obligations

Priority: Close the gap between production growth and audience access.

Production quotas alone haven't translated into audience access or market growth, largely due to weak enforcement and no complementary distribution requirements. Broadcasters, cinemas, and streaming platforms should face enforceable obligations to allocate defined screen time or catalogue space to African content, backed by monitoring, otherwise the "value gap" between rising production and constrained distribution will persist.

Regional Institutions & Financiers:
Establish dedicated distribution financing to support the "last mile."

Priority: Unlock scale where production funding already exists but distribution funding doesn't.

There is little support for subtitling, dubbing, festival participation, or promotional campaigns. National and regional distribution funds expanded intra-African co-production treaties, and standardised rights management/digital registries would improve commercial viability and reduce reliance on European partnerships.

Producers, Distributors & Platforms: Adopt a distribution-first, multi-window strategy

Priority: Stop treating distribution as an afterthought

High-quality content often fails to reach audiences because distribution is not planned upfront. Combining theatrical, streaming, broadcast, and community screenings maximises reach, especially where cinema infrastructure is city-concentrated and digital access is uneven. Telecom partnerships (bundled or zero-rated data) can directly address affordability constraints. Alongside this, industry stakeholders should invest in audience-facing messaging that builds appreciation for the role film plays in society, as education, entertainment, and cultural reflection, and clearly links this value to the act of paying for it. Positioning ticket purchases and subscriptions as a direct contribution to sustaining local storytelling, rather than a one-off transaction, can help shift audience behaviour toward more consistent, willing consumption.



Pricing & Localisation:
adapt pricing to local economic realities and go beyond language-only segmentation

Priority: Make content affordable and culturally relevant, not just linguistically accessible.

Traditional subscriptions are inaccessible to most households; micro-payments, daily subscriptions, and ad-supported models (already gaining traction in Kenya and Nigeria) should scale further. Regional languages (Arabic, Kinyarwanda, Pidgin English, Swahili, Wolof, isiZulu) help content travel, but real audience targeting requires deeper cultural adaptation, accounting for ethnicity, education, class, and dialect, not language alone.

Development Finance Institutions, Public Funders & Platforms: Rebuild the missing middle by scaling existing platforms and payment rails

Priority: Invest where audiences already are, rather than building from scratch.

The closure of Showmax removed the tier of platforms that commissioned mid-budget local content. Rather than financing new continental platforms, DFIs and public funders should provide growth capital and content-linked facilities to existing African platforms and aggregators with demonstrated audiences, conditional on local commissioning commitments and data sharing. They should also fund shared infrastructure that individual platforms will not build alone: integration with mobile money and carrier billing, wallet interoperability, cross-border settlement, rights registries and audience measurement. Support for new platforms should be reserved for markets where no viable platform exists (see Section 2.5.4).

IP Enforcement & Access: pair stronger enforcement with expanded affordable, legal alternatives

Priority: Treat piracy as a signal of unmet demand, not just a crime to police

Piracy is driven as much by affordability gaps as by weak enforcement. A dual approach is needed:

Enforcement: specialised IP units with cybercrime training, 48-hour takedown procedures, and fast-track judicial processes with presumptive damages and low-cost claims forums.

Affordability/access: tax incentives or VAT exemptions for local platforms offering low-bandwidth/offline tiers, government co-investment in shared distribution infrastructure, micro-licensing frameworks, and subsidy schemes (cultural vouchers, data-saver bundles) with mobile operators.

Exhibition: decentralised, low-cost or mobile cinema models, via public-private partnerships and tax incentives, for markets like Rwanda and Senegal, where screens are concentrated in a handful of major cities.



6.2 Audience Development

Audience development is not primarily a question of generating demand, but of converting existing latent demand into consistent, competitive consumption. Survey findings show strong appetite for locally relevant storytelling; however, this demand remains under-realised due to affordability constraints, access barriers, and competition from alternatives like social media. Effective strategies must move beyond awareness-building toward reducing friction, increasing convenience, and competing for audience attention in fragmented media environments.

Governments, Exhibitors & Industry: restructure pricing and reduce non-ticket costs to reflect real purchasing power

Priority: Convert willingness into ability to pay

The primary barrier isn't lack of interest, but limited ability and willingness to pay, compounded by transport and security costs. Off-peak pricing, bundled offers, and youth discounts, alongside decentralising exhibition beyond city centres and ensuring safe viewing environments, would position film as a competitive everyday leisure option rather than a premium activity.

Industry Stakeholders: prioritise discoverability where audiences are already on digital and social platforms

Priority: Compete for attention, not just access

Film competes with highly accessible, low-cost alternatives like social media and informal content distribution. Targeted marketing, influencer partnerships, and culturally resonant campaigns can shift film from passive to actively chosen entertainment, while personalisation and recommendation systems can surface local content in line with observed reliance on peer influence and word-of-mouth.

Cinemas: evolve toward flexible, experience-driven models rather than traditional fixed pricing

Priority: Rebalance pricing with perceived value

Cinemas must adapt to changing consumption environments through varied programming, event-based screenings, and differentiated pricing. In Nigeria, for example, rising ticket prices have contributed to stagnant admissions. Hybrid models combining physical exhibition with digital distribution can extend reach while preserving cinema's social and experiential appeal.

Festivals: reposition as platforms for curation and industry development, not mass audience distribution

Priority: Use festivals as a launchpad, not an endpoint.

Festivals' primary value lies in curation, branding, and talent visibility, not reaching mass audiences. Public investment should support this discovery role, while films transition from festival circuits into mainstream broadcast and digital distribution. Mobile cinemas and community screenings can extend reach to underserved populations where formal infrastructure is limited.

Long-Term Capacity Building: invest in film literacy and industry skills beyond production

Priority: Build the next generation of audiences and industry capability.

Sustained audience development requires long-term investment in cultural consumption habits. Integrating film literacy into curricula, and building university/community-based exhibition circuits, can cultivate early appreciation and engagement among younger audiences. At the industry level, capacity-building should extend beyond production into marketing, distribution, and audience analytics.

6.3 Social Impact

Film in Africa occupies a unique position as both an economic activity and a powerful tool for social change. Across the six countries, audiences are clearly drawn to stories reflecting their lived realities, particularly around youth opportunity, gender equality, and governance. However, the potential of film to drive social impact remains underutilised due to fragmented funding models and a lack of systematic impact measurement.

Donors, Foundations & NGOs: shift from project-based support to ecosystem-level investment

Priority: Fund infrastructure, not just individual films.

Rather than funding individual films in isolation, donors should support the broader infrastructure that enables impact storytelling, distribution channels, audience engagement campaigns, and data systems. Co-financing models that blend social impact objectives with commercial viability can help bridge the gap between donor-funded and market-driven content.

Producers & Creators: design for impact from the outset but protect editorial independence

Priority: Be intentional about impact without compromising commercial reach.

Integrating impact design from the start rather than as an afterthought, helps ensure films are both narratively compelling and socially meaningful. Partnerships with NGOs, public institutions, and community organisations (distinct from film-industry funders such as Ford Foundation, Doha Film Institute, or IDFA Bertha Fund) can extend a film's reach beyond traditional distribution channels, enabling deeper community-level engagement and dialogue.

Critically, these partners should hold limited editorial control over the content. Editorial input or even the perception of it, can limit a film's commercial sales and audience reach.

Measurement & Learning Ecosystems: close the evidence gap with standardised impact frameworks

Priority: Move from anecdote to evidence.

Anecdotal evidence of impact is widespread, but systematic tracking of behavioural or policy outcomes remains limited. Standardised frameworks for measuring social impact supported by longitudinal studies and open-access data platform, would improve accountability and attract greater investment. Linking audience data with impact metrics offers a more holistic view of value, positioning film as a credible tool for both economic and social development.

6.4 Cross-Cutting Enablers

Across all three thematic areas distribution, audience development, and social impact several cross-cutting enablers are essential to unlocking the full potential of the African film industry.

Data & Evidence Systems: establish national and regional film observatories to close the data gap

Priority: Reduce uncertainty for governments, investors, and industry players

The absence of reliable, centralised data remains one of the most critical constraints across all six countries, limiting sound decision-making at every level. Establishing film observatories, mandating data reporting, and investing in analytics capabilities will be essential to improving strategic planning across the sector.

Financing Models: move from fragmented investment to blended, value-chain-linked finance

Priority: Treat production, distribution, and impact as one integrated system, not separate silos

Current financing approaches often treat production, distribution, and impact as separate domains, resulting in fragmented investment. Blended finance instruments such as distribution-linked financing or impact-driven investment funds can connect these components into more sustainable, scalable models.

Capacity Building: extend training beyond creative skills into business, legal, and marketing competencies

Priority: Professionalise the industry, not just its content

Across all six countries, there is a clear need to professionalise the sector particularly in rights management, monetisation, and audience engagement. Distribution and impact labs can play a key role in bridging these skills gaps.

Regional & International Collaboration: strengthen integration to achieve scale

Priority: Individual market success depends on collective integration

Individual markets vary significantly in size and maturity, but long-term success depends on greater regional integration. Operationalising frameworks such as AfCFTA for the film sector, expanding intra-African co-productions, and building strategic global partnerships will be critical to achieving scale.

6.5 Recommendations by Stakeholder

The recommendations above are organised by theme. The table below consolidates them by stakeholder group, distinguishing between governments, development finance institutions (DFIs), public film funds, private investors, donors, platforms and industry actors, so that each reader can identify the actions most relevant to its mandate. Section references point to the supporting evidence.

Stakeholder	Priority actions	See sections
Governments and regulators (ministries, film commissions, communications and competition regulators)	Harmonise classification, licensing and censorship frameworks through the AfCFTA to reduce cross-border transaction costs. Shift local content policy from production quotas to enforceable screen-time and catalogue obligations for cinemas, broadcasters and streaming platforms. Keep production incentives and rebates predictable, with multi-year budgets and timely disbursement. Make access to public incentives conditional on verifiable audience and performance data. Pair piracy enforcement with measures that make legal access affordable, such as VAT relief for low-bandwidth local platforms and micro-licensing. Expand intra-African co-production treaties and support wallet interoperability and cross-border payment settlement.	2.5.1, 2.5.4, 6.1, 6.4
Development finance institutions (e.g. Afreximbank through CANEX, regional development banks)	Provide growth capital and content-linked facilities to existing African platforms, distributors and exhibitors with demonstrated audiences, rather than financing new platforms from scratch. Use blended, distribution-linked and slate-level instruments, and accept IP as collateral following the IP assignment model. Offer concessional finance to African-owned distribution companies operating across borders. Fund shared infrastructure as public goods: payment integration and cross-border settlement, rights registries and audience measurement systems.	2.5.1, 2.5.4, 5.3, 6.1, 6.4
Public film funds and agencies (e.g. NFVF, Kenya Film Commission, FOPICA)	Ring-fence budgets for distribution, marketing, subtitling and dubbing alongside production grants, including through national or regional distribution funds. Require distribution and audience plans as part of funding applications. Fund community and mobile screenings, campus circuits and film literacy to build audiences outside major cities. Establish or support national box office reporting and film observatories.	2.5.1, 2.5.2, 6.1, 6.2, 6.4
Private investors and commercial financiers	Structure investment at slate or portfolio level to spread risk, with equity components where guaranteed offtake is absent. Adopt creative non-interference as a standard term of film financing agreements. Co-invest alongside DFI and public capital in platforms and distributors with proven audiences.	5.3, 6.4
Donors, foundations and NGOs	Shift from single-film grants to ecosystem investment in distribution, audience engagement and data systems. Fund impact distribution, local-language subtitling and impact measurement as distinct budget lines. Protect editorial independence and structure impact funds as co-financing vehicles that crowd in private capital.	2.5.3, 6.3
Streaming platforms, broadcasters and telecom operators	Offer micro-payments, daily passes and ad-supported tiers integrated with mobile money and carrier billing. Bundle content with data or offer zero-rated access and offline downloads. Make African content discoverable through curated collections and recommendation systems, and commission mid-budget local titles. Share performance data with producers.	2.5.2, 2.5.4, 6.1, 6.2
Exhibitors and distributors	Test flexible pricing, including off-peak, youth and bundled offers. Pilot community-based and alternative screening models in underserved areas. Budget for localisation into priority African markets and track admissions, revenue and discovery channels.	6.1, 6.2, Short-term actions
Producers and filmmakers	Plan multi-window distribution and audience assessment from the outset. Treat rights management as part of production planning and avoid premature free release. Use community and word-of-mouth marketing as core audience development tools.	6.1, Short-term actions

Table 27 Table on stakeholder classification of recommendations

6.6 Final Thoughts

Across the six countries, the overarching challenge is not a lack of creativity or audience interest, but a structural disconnect between production, distribution, and audience systems. Addressing this disconnect requires coordinated action across multiple levels of actors, with a clear shift toward data-driven, audience-centric, and commercially sustainable approaches which are driven by the importance of finding contextualized answers of how to be competitive in an international market as it touches aspects of national sovereignty and economy prosperity.

While The countries share common structural challenges, the core priorities remain consistent but will require differentiated pathways toward sustainability and competitiveness. The future of African film lies in transforming fragmented national industries into an integrated continental ecosystem capable of delivering both economic value and social impact at scale.





Annexes

7.1 Exchange Rates Used in This Report

All local-currency figures cited in this report are accompanied by USD equivalents derived from the mid-market rates below, sourced from official and market references for April 2026. Rates reflect the approximate prevailing mid-market interbank rate at the time of publication (April 2026) and are provided for indicative purposes only. Actual transactional rates will vary.

Table 28 Currency exchange rates

Currency	Code	Rate to USD (April 2026)
Nigerian Naira	NGN	USD 1 = NGN 1,428
Kenyan Shilling	KES	USD 1 = KES 129.50
Egyptian Pound	EGP	USD 1 = EGP 52.00
Rwandan Franc	RWF	USD 1 = RWF 2,010
West African CFA Franc	XOF	USD 1 = XOF 790
South African Rand	ZAR	USD 1 = ZAR 16.38

7.2 Links

Questionnaire and Discussion Guides

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See the full Case Study Guide - Audience Building Tool
See the full Case Study Guide - Film Producers and Filmmakers
See the full Case Study Guide -Distributors and Streaming Platforms
See the full Case Study Guide -Funders
See the full Distributors Discussion Guide
See the full Ecosystem Partners Discussion Guide
See the full Filmmakers Discussion Guide
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Published by:
Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) GmbH
African Export–Import Bank (Afreximbank) through the Creative Africa Nexus (CANEX) initiative

Registered Offices:
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Design:
Dalberg Media, Nørrebrogade 45C, 2200 København N, Denmark

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