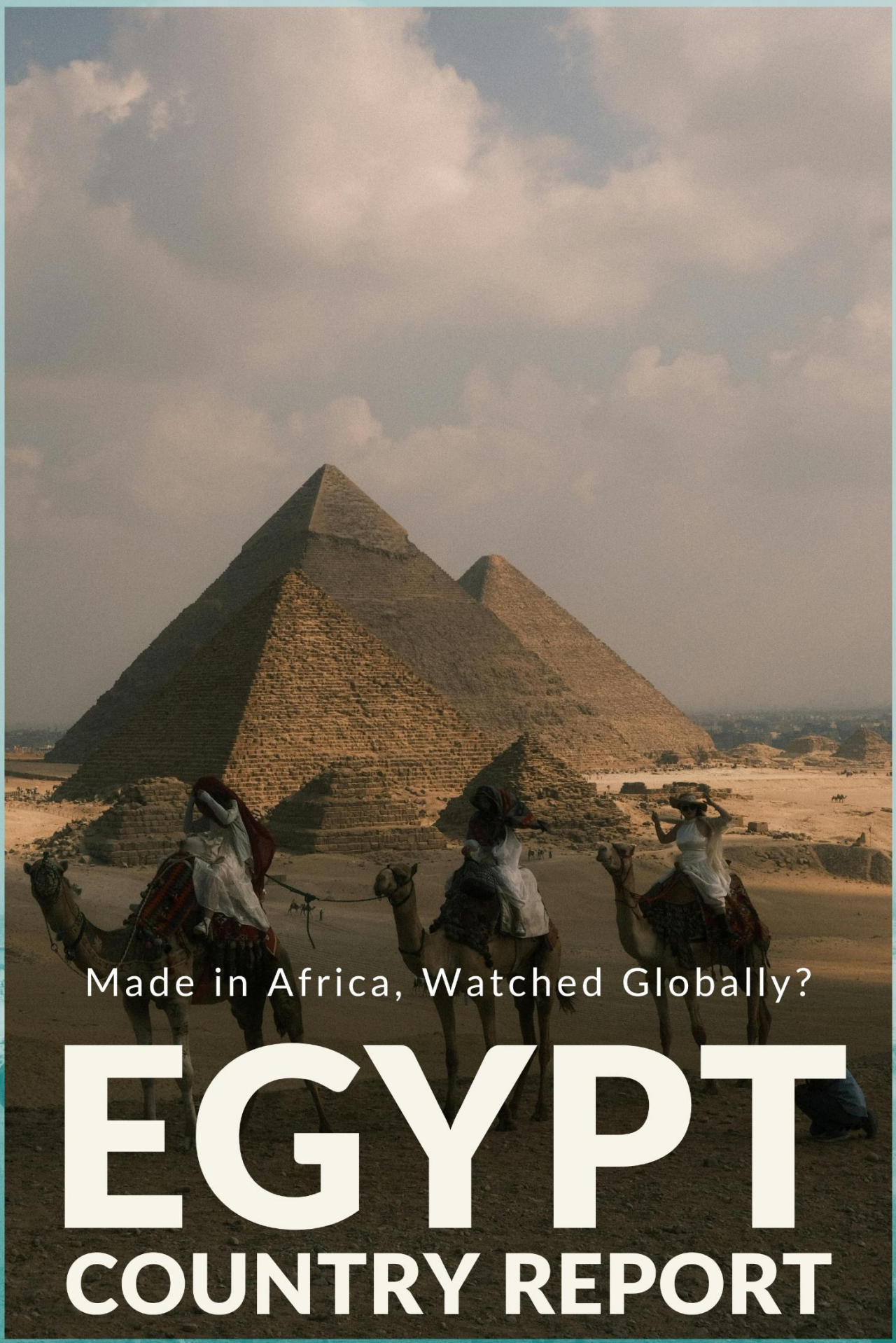


Made in Africa, Watched Globally?

EGYPT
COUNTRY REPORT

giz Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) GmbH
AFREXIMBANK
CANEX Creative Africa Nexus
Dalberg

Foreword

Egypt hosts the oldest film industry in Africa: the first public screening occurred in 1896, the first short film was produced in 1923, and the first locally made feature premiered in 1927. Over its history Egyptian cinema has produced more than 4,000 feature films, a regional record. Culturally, Egyptian films remain the most widely viewed across the Arabic-speaking world. Cairo is one of the principal centres for the region's film, television, and music industries.

Despite this long history and broad influence, Egypt's film market remains comparatively understudied. Existing literature concentrates on film studies, biographies, criticism, and interdisciplinary work that situates cinema within Egypt's socio-political history. By contrast, rigorous market studies that analyse cinema from a commercial perspective, examining audience behaviour, production and distribution dynamics, financing mechanisms, and market opportunities, are scarce.

This report addresses that gap. Employing a clear focus, documented methodology, and an objective approach, it provides reliable insights into the current Egyptian market. It examines how audiences consume films (theatre attendance versus television and streaming), the factors that drive viewing choices, genre preferences, financing models, and distribution scenarios. The report also evaluates whether traditional circulation channels remain effective or whether the digital era has generated new possibilities.

The findings indicate significant opportunities for investors and industry practitioners who base decisions on evidence rather than established habit. The report will be valuable to filmmakers exploring alternative distribution strategies and to academics pursuing further research in Egyptian cinema.

Enjoy discovering the oldest film market in the Arab world.

Ahmed Shawky

President of the International Federation of Film Critics (FIPRESCI)

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Executive Summary

Egypt remains one of Africa and the Arab world's most historically significant film markets, often described as the "Hollywood of the Arab World." The country benefits from a large, youthful population, strong digital connectivity, and a long-established production base centred around Cairo. However, the industry is marked by a dual structure: a commercially dominant mainstream sector built around star-led, formulaic content, and a vibrant independent sector that earns international recognition but remains economically marginal at home.

The Egyptian film ecosystem is undergoing a major transition from cinema-led distribution to platform-led consumption. While cinema remains culturally prestigious, streaming platforms such as Shahid and Watch iT have become increasingly influential as buyers, commissioners, and gatekeepers. This shift has expanded access to Egyptian content, but it has also introduced new challenges around data opacity, platform power, and limited bargaining leverage for independent filmmakers.

Film Distribution

Egypt's film distribution landscape is shaped by the coexistence of a recovering theatrical market and a rapidly expanding digital ecosystem. The cinema sector has rebounded, with box office revenue projected to exceed USD 37 million in 2025 and domestic films capturing a strong share of theatrical revenue. Egyptian films retain a clear "home-court advantage," often outperforming international titles in cinemas and across regional markets. The export market, particularly Saudi Arabia and the wider Gulf, has become increasingly important, with some Egyptian films earning more internationally than domestically.

Despite this strength, theatrical distribution remains highly centralized. Most cinemas and multiplexes are concentrated in Cairo, Giza, and Alexandria, leaving Southern Egypt, Nubia, the Delta, and rural governorates underserved. Commercial cinema is also increasingly dominated by star-led productions, while independent and socially driven films struggle to secure screens beyond a few cultural venues such as Zawya Cinema. Cinema attendance is occasional, with audiences citing time constraints, distance, and lack of interest as major barriers.

Digital platforms are now reshaping the distribution ecosystem. Shahid, Watch iT, OSN Plus, TOD, Yango play for commercial films and content, and Jawwy TV, and other regional platforms dominate paid OTT subscriptions, largely because they prioritise Arabic-language and Egyptian content. Watch iT and Shahid have become particularly important for local film circulation, while Pay TV remains a premium secondary window. However, platforms keep viewership and revenue data largely private, creating a major barrier for filmmakers who need audience insights to negotiate better licensing terms and refine distribution strategies.

Audience Development

Egyptian audiences show a strong preference for local content, with domestic films and Arabic-language storytelling remaining central to film consumption. Viewing is still heavily television-led, with almost all surveyed audiences watching films through TV, while social media, VOD platforms, and cinema play secondary roles. Streaming is growing but remains selective, cost-sensitive, and complementary to traditional television rather than replacing it.

Audience segmentation shows three main groups: Heavy Local-TV Traditionalists, Cinema-Oriented Streamers, and Global Explorer Digital Families. These segments reflect a market in transition, where traditional TV remains dominant but younger and more digitally engaged viewers are increasingly using YouTube, Watch iT, Shahid, Netflix, and other platforms. Across these groups, affordability, access, and content discovery remain critical to expanding film consumption.

Film discovery in Egypt is overwhelmingly driven by personal networks, with friends and family playing the strongest role, supported by social media. Audiences are motivated primarily by

entertainment, recommendations, strong storytelling, and family-friendly content. They place extremely high importance on plot, acting quality, technical quality, genre, and actors when choosing what to watch. This means that successful audience development in Egypt depends not only on increasing access, but also on producing high-quality, emotionally resonant stories that can generate word-of-mouth and social media buzz.

Social Impact

Egypt has a strong base for social impact filmmaking, particularly through independent cinema, documentary work, NGOs, film labs, and cultural centres. Impact-oriented content often addresses issues such as gender, identity, public health, community development, migration, mental health, and social inclusion. However, impact is not limited to issue-based films; stakeholders emphasise that authentic representation of everyday life can be equally powerful, especially when films portray marginalised communities as complex human beings rather than only as victims.

Public broadcasters play a limited role in financing or distributing socially engaged content. Instead, NGOs and cultural organisations have become the most active actors in this space. Organisations such as the Jesuit Cultural Center, Luxor Film School, Film Lab, Atyaf for Development Communication, and women-focused film initiatives have helped link filmmaking with skills development, community participation, and social inclusion.

Donors and foundations are also central to Egypt's social impact film ecosystem. Drosos Foundation, EUNIC, AFAC, Doha Film Institute, Sawiris Foundation, and European co-production funds support training, festival participation, capacity building, and production. However, donor support can also shape creative priorities, with some filmmakers noting that funding often favours specific "trendy" themes. The strongest models are collaborative partnerships between NGOs, donors, and festivals, though these remain fragile and dependent on sustained funding.

Financing and Enabling Environment

Egypt's film financing landscape combines private investment, Gulf-based financing, state support, donor funding, and emerging international funds. Commercial filmmaking is largely driven by private investors, Gulf distributors, and star-led production models, while independent filmmakers depend more heavily on grants, festivals, co-productions, and donor-backed support. The launch of Afreximbank's USD 1 billion Africa Film Fund and Egypt's 2025 Cinema Revival Plan, which allocated EGP 500 million for production grants and training, are important developments in the enabling environment. However, the Cinema Revival Plan has not been activated, limiting its current relevance as a source of financing or sector support.

However, the financing ecosystem remains fragmented and uneven. Egypt lacks a widely institutionalised cash rebate or tax credit system, limiting its competitiveness for large-scale international productions. Independent filmmakers also face limited access to domestic financing, weak transparency in platform revenue and audience data, and dependence on a small number of distributors and funders. Intellectual property protection exists in law, but enforcement, particularly around digital rights, online piracy, and residuals, remains an area requiring reform.

6. Opportunities and Strategic Levers

Egypt's strongest opportunity lies in aligning its historic production capacity with modern digital distribution systems. The country can strengthen its role as a regional and continental gateway by improving distribution infrastructure beyond Cairo and Alexandria, supporting intra-African circulation, and expanding regional partnerships across the MENA region and Africa.

There are also clear opportunities to develop alternative distribution models. These include micro-distribution and direct cinema booking, curated short-film packages for commercial

cinemas, a dedicated streaming platform for Arab and African independent cinema, and stronger exchange agreements between festivals, distributors, and cinemas across African markets.

For audience development, reviving cinema clubs and community screenings could help reconnect underserved audiences with Egyptian cinema. On the digital side, structured influencer campaigns, social media community building, and stronger word-of-mouth strategies could help mid-tier and independent films move beyond festival prestige into broader audience awareness.

7. The Path Forward

Egypt's film industry is at a turning point. Its creative legacy, strong domestic audience, regional export potential, and growing digital platforms provide a strong foundation for future growth. However, this potential will only be fully realised if the ecosystem addresses structural concentration, geographic exclusion, financing gaps, and data opacity.

Moving forward, Egypt should prioritise decentralising film access beyond Cairo and Alexandria, strengthening transparent and equitable digital distribution models, supporting independent and mid-tier production, and building stronger links between filmmakers, platforms, NGOs, donors, and regional markets. A more inclusive ecosystem would allow Egypt to retain its historic leadership in Arab cinema while expanding its role as a bridge between North Africa, the MENA region, and the wider African film industry.

1. Introduction

1.1 Background and context

Africa's film industries are experiencing rapid growth, driven by demographic expansion, urbanisation, and increased digital connectivity. Key industries in Africa - 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, the Africa's film industry remains 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 provides the critical USD1 billion financial facility via CANEX to scale production and infrastructure. 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:

1. 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.
2. Analyse how audience of African films are developed and sustained, including patterns of access, platform use, and engagement.

3. Assess the specifics around social impact films, including financing, marketing campaigns and audience preferences.
4. Map the film financing ecosystem and successful investment models.
5. 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 Arabophone North Africa contexts and capture a range of policy environments and production capacities. They also represent a sizable share of films produced in Africa and was therefore used as a proxy to understand the African film topography in this study.

The study adopts a mixed-methods approach, combining:

- Secondary research & media analysis: Literature review and media analysis is used to map how African filmmakers can monetize 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 monetization 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 can this be improved. The primary research was executed through a three-pronged approach:
    - Key Stakeholder/Informant Interviews with filmmakers and distributors, marketing platforms and policy actors
    - Audience survey, targeting the African film audience/viewers, to capture their perception 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.

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. 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 synthesize 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.

1.5 Limitations

This study provides a comprehensive synthesis of the African film ecosystem across six diverse markets. 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 survey data, festival participation and sales- market catalogues, and social- media- engagement metrics. These proxies provide indicative patterns rather than precise, audited indicators.
- 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. Country Context

Egypt remains the most populous nation in the Arab world and North Africa, with an estimated population of approximately 119 million as of October 2025. The nation possesses a notably youthful demographic, with over 64% of the population under the age of 35, creating a substantial consumer base for media and digital content. While the country's GDP is projected at approximately $349 billion in 2025, reflecting some macroeconomic pressures, the services sector including telecommunications and media continues to expand. Digital connectivity has strengthened significantly, with internet penetration reaching 82.7% by the end of 2025, 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. Historically a cornerstone of the regional creative economy, with a massive 35 square kilometre hub that serves as the operational backbone for both domestic and international productions.

2.1 Overview of national film ecosystem

The Egyptian film industry is currently defined by a profound structural dualism. On one side lies a centralized 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 marginalized within the domestic market. Stakeholders frequently 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 which is characterized 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.

3. Findings

3.1 Film Distribution

3.1.1. Overview

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 saw a contraction in the 2010s, revenues have rebounded, with 2025 projections exceeding $37 million. However, market structure remains highly centralized; approximately 90% of screens are located in Cairo and Alexandria, with major chains like Renaissance, VOX, and Galaxy controlling over 70% of the market[1]. 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 (FTA) channels like MBC Group, which remain crucial for national reach. Increasingly, over-the-top (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 impacted by a regulatory environment where 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% market loss[2]

3.1.2. Distribution channels

i. Cinemas

Infrastructure and Exhibition Capacity

The Egyptian cinema industry, historically the cultural epicentre of the Middle East and North Africa, is currently entering a structural growth phase characterised by a significant shift in infrastructure and consumption patterns. Driven by a pivot toward high-end multiplex assets and a resurgence in the quality of domestic production, the sector has effectively decoupled from the stagnation observed in the early 2020s. Egypt's theatrical footprint is undergoing a profound transition as the industry moves away from traditional, standalone urban venues toward premium, mall-integrated exhibition hubs.

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[3]. Geographically, the market remains concentrated in Greater Cairo, Giza, and Alexandria. Active screens grew from 400 in 2017 to 437 by July 2025[4]. 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.

Market Performance

[1] ScreenDaily (2025). Egyptian box office set to surpass pre-Covid levels in 2025. Link.
[2] ScreenDaily (2024). Egyptian authorities close down MENA's largest piracy site. Link
[3] Mohammad Hussain (2025). Egypt's cinema map is evolving -Here's the Data. Link.
[4] Mohammad Hussain (2025). 437 Cinema Screens in Egypt – July 2025. Link.

The 2025 calendar year marked a definitive milestone for the industry, as total box office revenue reached approximately $37 million (EGP 1.8 billion)[5]. This performance signals a full recovery to pre-pandemic levels, outstripping global recovery averages. Total cinema admissions for the year are estimated at 14.3 million, returning the market to its 2019 volume.

The Egyptian box office exhibits a unique "home-court advantage" where local productions typically capture over 60% of total annual revenue. In 2025, domestic films dominated the commercial landscape, accounting for eight of the top ten highest-grossing titles. The market was led by the breakout comedy *Siko Siko*, which grossed $3.7 million, followed by the action-adventure *Project X* at $2.8 million and *El Shater* at $2.2 million. In contrast, the highest-performing international release, the Brad Pitt-starrer *F1*, ranked eighth with a box office of $1.2 million. This 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[6].

The Regional and International Export Market

A pivotal development in the Egyptian film economy is the meteoric rise of the export market, which now often serves as the primary revenue generator for high-budget productions. Saudi Arabia has emerged as the most critical driver of international revenue, fundamentally altering the financial landscape for Egyptian filmmakers. In 2024, 33 Egyptian films were screened in Saudi Arabia, collectively earning $53 million, more than double their domestic box office takings. This trend has continued into 2025, with major titles like *Welad Rizk 3* generating over $22 million across 20 international markets[7].

Beyond the Gulf, Egypt is re-establishing its presence on the global festival circuit, which serves as a secondary but vital export channel. Successes at prestigious venues such as Cannes and Tribeca, evidenced by the 2025 awards for *Happy Birthday* and *Aisha Can't Fly away*, have facilitated new distribution agreements across Europe and North America. This dual-track export strategy allows the industry to monetise high-volume commercial content in the MENA region while leveraging prestige cinema to penetrate global arthouse markets.

The Distribution Landscape and Major Players

The distribution of content in Egypt is managed by a mix of long-standing family-owned firms and modern media conglomerates. Misr International Films (MIF), founded by the legendary Youssef Chahine, reclaimed its position as the top distributor in 2025, focusing on a diverse slate ranging from commercial hits to award-winning arthouse features. Other dominant players include Synergy Films, which continues to lead in high-budget commercial "tentpoles," and United Motion Pictures, which remains the primary gateway for major Hollywood imports. Furthermore, the regional distribution landscape has been reshaped by the emergence of Orient Films (OF), the international arm of MIF, which has been instrumental in facilitating the massive success of Egyptian intellectual property across the Gulf Cooperation Council (GCC)[8]. This has facilitated Egypt's massive export success solidifying the role of regional distributors in the Egyptian film economy.

Structural Challenges and the Theatrical Paradox

Despite its recovery, the theatrical channel is currently defined by a profound structural paradox: it remains the "gold standard" for cultural prestige while becoming increasingly inaccessible to the general population. The contemporary cinema landscape is characterised by extreme geographic and economic centralisation. Modern multiplexes are concentrated almost exclusively in high-end urban malls within Cairo and Alexandria, creating a geographic monopoly

[5] Elcinema.com. https://elcinema.com/en/work/2094784/boxoffice

[6] Ibid

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

[8] GCC is an alliance which comprises Bahrain, Kuwait, Oman, Qatar, Saudi Arabia, and the United Arab Emirates.

that has effectively decoupled the country's massive, tech-savvy 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 films to mitigate financial risk. This commercial narrowing has left a notable representation vacuum for the diverse cultures of Southern Egypt, Nubia, and the Delta, who find their stories increasingly absent from the silver screen. This exclusion from the physical cinema has accelerated the shift toward digital platforms and broadcast channels, where accessibility and content diversity better align with the needs of the broader Egyptian demographic.

Cinema attendance and barriers

Cinema remains a formal, structured experience. All audiences who attend cinemas do so through mainstream theatres. No alternative or informal exhibition spaces (were reported in the study's survey. Attendance is occasional. The median number of visits is four per year, suggesting that cinema is not part of routine viewing. Spending per visit is relatively low 53.08 EGP (USD 3.25), indicating price accessibility at the point of use.

Barriers to attendance are led by time constraints (48%). This is 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, it is avoided because it is less convenient.

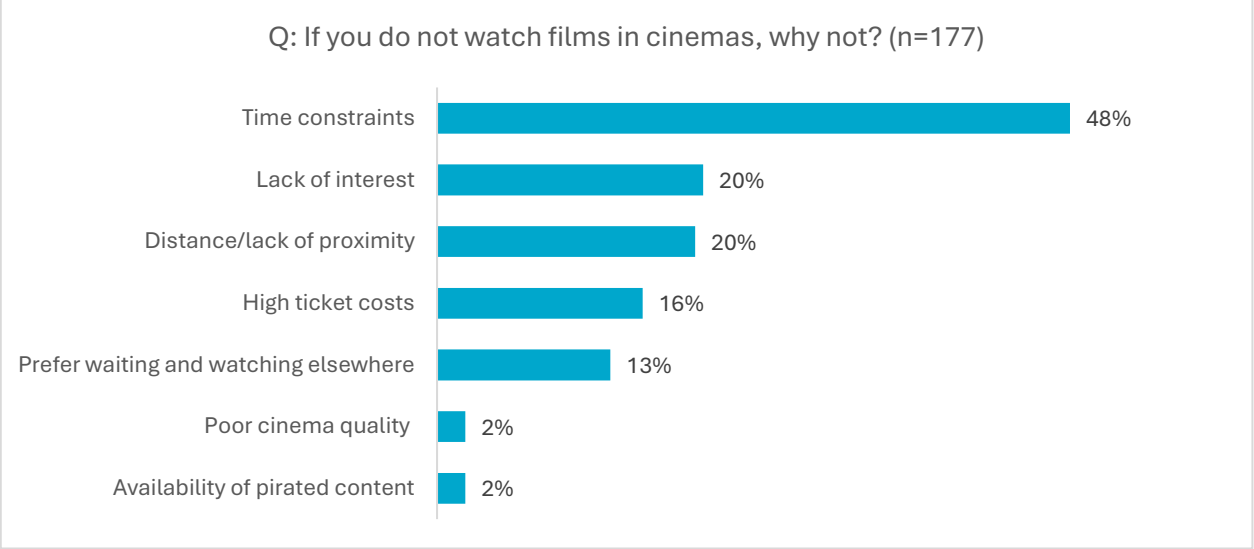


Figure 1: Reasons for not going to cinemas, Egypt | Source: Survey data

Overall, these findings suggest that cinema, in Egypt, plays an important but limited role in overall distribution. Convenience and access matter more than price, reinforcing the shift toward home-based viewing channels.

ii. Digital platforms - Pay TV and OTT

Market Overview and Structural Shifts

Egypt occupies a distinctive position within the MENA screen industries as both a major domestic audience market and the historical centre of Arabic-language film production. Its Pay TV and over-the-top (OTT) ecosystem reflects this dual function: it operates simultaneously as

a national consumption platform and as a regional distribution gateway through which Egyptian films circulate across the Arabic-speaking world.

The country's Pay TV and OTT sector is currently undergoing gradual transformation. While satellite Pay TV continues to dominate household access to premium television services, streaming platforms are expanding rapidly, particularly within subscription video-on-demand (SVOD). This transition reflects broader shifts in audience behaviour, including increasing broadband access, smartphone penetration, and demand for flexible viewing formats. As a result, digital platforms are becoming increasingly important secondary distribution windows for films following theatrical release.

Although Pay TV still accounts for the larger share of the combined market, OTT growth is reshaping how audiences encounter film content, extending the commercial lifespan of Egyptian films beyond cinema exhibition and enabling wider regional circulation.

Subscription Streaming as a Film Distribution Channel

Egypt demonstrates one of the strongest subscription streaming cultures in Africa and the Arab region. GMI[9] estimates roughly 4.93 million unique OTT subscribers. The OTT market is a blend of SVOD and AVOD/FAST with the vast majority of users accessing content through paid platforms. This pattern distinguishes Egypt from many Sub-Saharan African markets, where free ad-supported streaming remains dominant. For film distribution, this is particularly significant. Subscription-based viewing environments support catalogue depth and repeat consumption, allowing both new releases and legacy Egyptian films to remain visible to audiences over longer periods. Streaming platforms therefore operate not only as secondary exhibition windows but also as long-term circulation infrastructures for Egyptian cinema.

Importantly, the strength of subscription platforms reflects sustained demand for professionally produced Arabic-language entertainment content, including feature films and serial drama. This demand reinforces the continued relevance of Egyptian film production within regional digital distribution networks.

Regional Platforms and the Centrality of Arabic-Language Content

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 according to GMI 2025 report. Unlike global platforms, these services rely heavily on Egyptian and pan-Arab productions to attract subscribers. Arabic-language platforms alone account for roughly 80% of the streaming audience in Egypt, demonstrating the continued importance of language as a structuring factor in platform competition and audience reach. This linguistic segmentation strengthens Egypt's position as a regional exporter of film content. Because Egyptian Arabic remains widely understood across the Arab world, Egyptian films continue to travel easily across North Africa and the Gulf through platform licensing agreements.

Platform Catalogue Strategies and the Role of Egyptian Film Libraries

Differences in catalogue composition across platforms highlight the continuing importance of Egyptian cinema within the streaming ecosystem. Watch iT maintains one of the highest proportions of Egyptian content among major platforms (approximately 42%), while Shahid VIP adopts a broader pan-Arab strategy with around 22% Egyptian titles. Meanwhile, AVOD service Weyak carries more than 90% Egyptian content, reflecting the enduring commercial value of legacy Egyptian film catalogues.

These catalogue strategies demonstrate that Egyptian cinema functions not only as contemporary entertainment but also as a valuable archival resource supporting platform

[9] Global Market Insights Africa Pay TV and OTT Market Report - 2025

differentiation. Digitised film libraries continue to generate revenue and visibility decades after their original theatrical release. For distributors and producers, this reinforces the importance of rights management and catalogue digitization as long-term distribution strategies.

Table 1: Content Library Breakdown | Source: GMI, 2025

Platform Name	Active Subs (K)	Total Hours	Local			Regional			International		
			Titles	Hrs.	%	Titles	Hrs.	%	Titles	Hrs.	%
Shahid VIP	2,150	17,000	1,850	3,700	21.8	6,240	12,480	73.4	410	820	4.8
Watch iT	1,250	8,000	1,680	3,360	42	2,280	4,560	57	40	80	1
Netflix	550	15,600	48	96	0.6	185	370	2.4	7,567	15,134	97
OSN Plus	420	14,400	580	1,160	8.1	5,850	11,700	81.7	770	1,540	10.2
TOD	350	6,920	780	1,560	22.6	2,660	5,320	76.8	180	40	0.6
Jawwy TV	950	6,920	280	560	8.2	3,180	6,360	93.1	0	0	0
Aloula	850	3,440	280	560	16.3	1,050	2,100	61	70	780	22.7
Prime Video	250	12,800	22	44	0.3	195	390	2.7	6,183	12,366	97
StarzPlay	680	16,000	85	170	1.3	680	1,360	10.2	4,035	14,470	88.5
Weyak	285	1,260	580	1,161	92.1	42	84	6.7	8	15	1.2

Stakeholder interviews highlight that Pay TV services, such as OSN (Orbit Showtime Network) and MBC Group, continue to serve as a high-value "premium window" for Egyptian cinema. However, the distinction between Pay TV and OTT is increasingly blurred as broadcasters launch their own digital arms to capture the mobile-first demographic. Pay TV remains essential for reaching the broader Arab diaspora and high-income households, providing a stable licensing revenue that helps filmmakers recover production costs. Despite the rise of streaming, Pay TV is still viewed as a critical validator of a film's "premium" status, often serving as the secondary release window after a theatrical run but before a wide OTT release.

The emergence of OTT platforms, led by Shahid and Watch iT, represents the most significant structural shift in the Egyptian film industry since 2017. These services have transitioned from auxiliary buyers of library content to primary stakeholders that finance, commission, and premiere original work. Stakeholders characterise this shift as a "digital revolution" that has democratised content access while simultaneously centralising market power. For independent filmmakers, OTT platforms provide a vital revenue stream and a way to bypass traditional theatrical monopolies, though they now face a new form of gatekeeping based on platform-specific algorithms and commercial viability. As one distributor noted:

"At that time [2017], streaming was still kind of breaking into the industry... now, the industry depends on films being strong enough to explode the market. The people that used to buy the rights for our films were mainly broadcasters such as OSN... now it has shifted significantly toward these digital platforms." Distributor, Egypt

The growth of digital platforms is inextricably linked to Egypt's high internet penetration and the consumption habits of its massive youth population. For many younger viewers, Pay TV and OTT are not just alternative channels but the primary way they engage with cinema. This shift has led to a decentralisation of the viewing experience, moving it away from the Cairo-centric multiplex and into the hands of anyone with a smartphone. Ecosystem leaders suggest that this technological shift is redefining "cinematic culture," where films are consumed in shorter intervals and across multiple devices.

A recurring theme across the stakeholders' insights is the lack of transparency regarding viewership data on OTT platforms. Unlike the traditional box office, where performance is relatively public, digital platforms treat engagement metrics as commercially sensitive trade secrets. This data opacity creates a strategic hurdle for independent creators, who are left without the insights necessary to understand their audience or negotiate better terms. Government-aligned respondents justify this silence as a competitive necessity in a crowded market, while filmmakers argue it prevents the growth of a data-driven independent sector.

"Public policy and investment should focus on nurturing cinematic culture rather than treating films merely as commodities... because cinema now survives on platforms like TikTok, Instagram, and YouTube. The platforms are where the audience is, and the industry must adapt to that reality." Funder, Egypt

Stakeholder further highlight the structural evolution of digital distribution in Egypt has necessitated a transition from traditional viewership models to a "sticky" ecosystem where long-term subscription retention outweighs individual project performance. This shift is driven by a sophisticated content strategy that increasingly leverages high-volume, serialised narratives to mitigate the economic volatility of the region, effectively moving the industry's financial anchor from the opening weekend to a year-round digital engagement cycle. By integrating Pay TV's prestige licensing with OTT's data-driven commissioning, platforms have created a hybrid gatekeeping mechanism that demands a more rigorous development phase for scripts. This evolution suggests that the future of the national film ecosystem lies in its ability to harmonise professionalised research and development with decentralised digital access, ensuring that authentic cultural narratives are not just produced, but are structurally positioned to compete with international content on a global stage.

"Instead of all collaborating on one large scale film with a massive budget, they could produce ten independent feature films with audience potential... financial restructuring alone could reshape the industry's intentions." Filmmaker, Egypt

Pay TV and OTT Revenue

The Egypt Pay TV and OTT market shows modest overall growth, with total revenues projected to rise at a 5.3% CAGR through 2030 up from USD 525 million in 2025 to USD 610 million. The most significant shifts are occurring within OTT platforms. While Pay TV remains dominant, its slow growth contrasts sharply with OTT's strong 12.2% CAGR, signalling expanding opportunities for filmmakers beyond traditional broadcasters. SVOD remains the largest OTT segment, but faster growth in AVOD, FAST, and hybrid models points to increasing demand for high-volume, cost-efficient content with broader audience appeal. For filmmakers, this suggests growing opportunities for digital distribution, particularly for films that can travel across platforms and monetisation models. The steady growth in movies and entertainment, alongside rising investment in regional content, indicates sustained demand for local storytelling. However, the relatively small market size and prepaid-heavy consumption environment mean that revenue per title is likely to remain limited, reinforcing the need for diversified financing and multi-platform release strategies. The table below details the Pay TV and OTT market.

Table 2: Egypt Pay TV and OTT Market 2022-2025 with projections from 2026-2030 (USD Million) | Source: GMI

Market Value	2022	2023	2024	2025	2026	2027	2028	2029	2030	CAGR
USD Million	**553.2**	**544.4**	**532.6**	**524.9**	**539.5**	**556.8**	**575.2**	**582.1**	**609.7**	**5.3%**
By Platform Type										
Pay TV platform	**473.0**	**455.9**	**440.0**	**428.1**	**436.5**	**446.2**	**456.8**	**453.1**	**467.6**	**2.9%**
Cable TV	55.2	52.9	50.7	49.1	49.7	50.6	51.4	50.7	52.0	2.3%
Satellite TV (DTH)	379.2	364.7	351.1	340.8	346.6	353.5	361.0	357.2	367.7	2.7%
IPTV	38.6	38.4	38.2	38.3	40.1	42.2	44.4	45.2	47.8	5.5%
OTT platform	**80.2**	**88.5**	**92.6**	**96.8**	**103.0**	**110.6**	**118.4**	**129.0**	**142.2**	**12.2%**
SVOD	63.9	70.4	73.5	76.7	81.4	87.3	93.3	101.4	111.5	12.0%
AVOD	10.0	11.1	11.7	12.3	13.1	14.2	15.2	16.7	18.5	12.7%

FAST	2.2	2.4	2.6	2.7	2.9	3.2	3.4	3.8	4.2	13.4%
TVOD	1.1	1.2	1.2	1.2	1.3	1.4	1.5	1.6	1.7	10.4%
Hybrid OTT Models	3.0	3.4	3.6	3.9	4.2	4.6	5.0	5.6	6.3	14.3%
By Subscription Model										
Postpaid	**164.9**	**162.7**	**159.6**	**157.8**	**162.6**	**168.3**	**174.4**	**176.9**	**185.9**	**5.6%**
Monthly contracts	134.1	132.4	130.0	128.6	132.6	137.3	142.4	144.6	151.9	5.7%
Annual contracts	30.7	30.3	29.6	29.2	30.0	31.0	32.0	32.4	33.9	5.3%
Prepaid	**388.3**	**381.7**	**373.0**	**367.1**	**376.9**	**388.5**	**400.9**	**405.2**	**423.9**	**5.1%**
Daily passes	32.5	31.9	31.1	30.6	31.4	32.4	33.4	33.7	35.2	5.0%
Weekly passes	52.4	51.4	50.1	49.2	50.4	51.8	53.3	53.8	56.1	4.8%
Monthly prepaid vouchers	303.4	298.4	291.7	287.3	295.1	304.3	314.2	317.7	332.5	5.2%
By Content Type										
Movies & entertainment	**137.4**	**135.7**	**133.2**	**131.7**	**135.9**	**140.7**	**145.8**	**148.1**	**155.6**	**5.7%**
Sports	179.0	176.1	172.2	169.6	174.2	179.8	185.6	187.8	196.6	5.2%
News & current affairs	42.9	41.9	40.7	39.8	40.6	41.5	42.6	42.8	44.4	4.3%
Cartoon/animation	**31.4**	**30.8**	**30.1**	**29.6**	**30.4**	**31.3**	**32.3**	**32.6**	**34.1**	**5.1%**
Music & lifestyle	118.0	116.3	114.0	112.5	115.8	119.7	123.8	125.4	131.6	5.4%
Others (docus & educ)	**44.5**	**43.6**	**42.5**	**41.7**	**42.7**	**43.8**	**45.1**	**45.4**	**47.4**	**4.8%**
By Content Origin										
Regional content	253.4	249.9	245.0	241.9	249.2	257.7	266.8	270.6	284.0	5.5%
International content	299.8	294.5	287.6	283.0	290.3	299.1	308.4	311.6	325.7	5.1%
By End Users										
Residential	**484.3**	**476.8**	**466.6**	**460.0**	**472.9**	**488.2**	**504.6**	**510.8**	**535.2**	**5.3%**
Commercial	**68.9**	**67.7**	**66.0**	**64.9**	**66.6**	**68.5**	**70.7**	**71.3**	**74.5**	**5.0%**
Offices	4.0	3.9	3.8	3.7	3.7	3.8	3.9	3.9	4.0	3.9%
Hospitality (Hotels, Restaurants)	57.1	56.2	55.0	54.1	55.6	57.3	59.2	59.9	62.7	5.2%
Public transportation	1.6	1.5	1.4	1.4	1.4	1.4	1.4	1.4	1.5	2.5%
Others	6.2	6.1	5.9	5.7	5.8	6.0	6.1	6.1	6.4	4.2%

In practice, this platform-led growth operates within a highly opaque revenue environment. Stakeholder insights reveal that a defining characteristic of the OTT revenue landscape in Egypt is the total lack of public data regarding viewership reach and specific financial returns. Unlike the traditional theatrical box office, which provides some level of public reporting, platforms like Shahid and Watch iT treat their internal metrics as highly guarded trade secrets. Stakeholders identify this data silo as a significant strategic hurdle, as independent creators often lack the leverage to negotiate better licensing fees without knowing their actual market value.

"That data is not publicly available. It is commercially sensitive. It is a competitive advantage. If Shahid shared its internal viewing data, Watch iT could replicate the same strategy... Platform strategies evolve quickly, driven by internal data analysis." Government, Egypt

The revenue model for digital platforms has evolved from a secondary "library acquisition" phase into a primary "commissioning" phase. Previously, platforms primarily bought existing films to fill their libraries (Pay-per-view or fixed licensing); now, they act as the main financiers for original content. This shift has made digital revenue a lifeline for many filmmakers, particularly as the high cost of theatrical distribution makes it difficult to achieve a return on investment through ticket sales alone.

While the primary revenue driver for Pay TV (like OSN) and OTT is the subscription model (SVOD), stakeholders observe that economic pressures such as inflation and currency fluctuations, are forcing platforms to diversify. This includes the introduction of ad-supported tiers (AVOD) and hybrid models where major broadcasters use their digital arms to premiere "premium" content. These platforms are increasingly competing for the disposable income of a young demographic that is sensitive to price. Consequently, platforms are focusing on high-volume addictive content (such as Ramadan series) to maintain consistent subscription revenue throughout the year.

Revenue for digital platforms is not limited to the domestic Egyptian market. A significant portion of the reach and thus the licensing value, comes from the Arab diaspora in the Gulf and Europe. Pay TV and OTT platforms act as the bridge to this lucrative international market, allowing Egyptian content to monetize beyond its borders. Furthermore, for independent filmmakers, the sale of digital rights is often bundled with other ancillary streams, such as airline rights or festival prizes, to reach a financial break-even point.

"As a developing country with limited resources, we need foreign partners for exposure, sales, and funding... This is about accessibility and reaching other countries with work they want to see and support." Filmmaker, Egypt

Informal distribution and piracy

Based on the stakeholders, piracy levels are low, defined by low usage of unofficial or pirated websites/apps to watch films. However, where it occurs, it is largely driven by gaps in content availability or subscription cost rather than habitual use. This suggests that when legal options meet audience needs, reliance on informal channels decreases. It also suggests that the existing distribution channels, especially television and low-cost streaming services, are meeting a significant share of demand, reducing the need for piracy.

3.1.3 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 art-house Arab films. Stakeholders describe it as having a near-monopoly, with many filmmakers express frustration that they have no realistic alternative, even when dissatisfied with contract terms or lack of transparency. At the same time, industry actors acknowledge that MAD Solutions has played an indispensable role in creating a distribution pathway for films that would otherwise never reach audiences. The company's Cinemaat initiative successfully released independent titles across 70+ commercial cinemas in the Arab world, and films like Goodbye Julia and Palestine 36 achieved regional box office success under its stewardship. The data highlight that the frustration is therefore not with MAD Solutions' competence or commitment, but with the structural reality of a market that offers no meaningful competition, leaving filmmakers with little leverage regardless of which distributor they choose. 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. Telecine is noted as a local distributor that buys regional rights from international sales agents. Beyond these, the commercial sector is heavily dependent on Gulf distributors, primarily three major entities: Arab Radio and Television (ART) and Rotana.. 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.

"Many people tell you, 'Do not go to MAD Solutions.' They say MAD Solutions has a very large library, that films end up sitting on the shelf… However, in practice, almost everyone eventually turns to MAD Solutions to sell their films." Filmmaker, Egypt

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 30 Egyptian pounds) and focus on local content. Shahid, the leading Arabic platform (MBC Group), has a large library of Egyptian series and films and commissions original content. While its subscription fee is moderate compared to Netflix, producers describe access as costly due to high production value expectations and competitive commissioning criteriae. Yango Play is a newer entrant focused on commercial content. Netflix, while globally recognized, is less widespread in Egypt because of its higher subscription cost (around 350 Egyptian pounds); 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 specialized platform for art-house films, but its reach in Egypt is very limited. Basita, a small Egyptian platform focused on short films and social impact content, is noted by one funder. A recurring complaint across all platforms is that their acquisition strategies shift rapidly and without explanation, and that they have recently stopped acquiring documentaries unless the topic fits narrow genres like true crime.

Broadcasters play a minimal role in the independent film ecosystem. Egyptian state television is described as largely irrelevant for independent cinema as it airs 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 such as Arte, Canal Plus, BBC, which 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. BBC Arabic is also noted, but access is limited. European public broadcasters—Arte, Canal Plus, and Denmark's DR 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.

"There is another important space… news channels such as Al Jazeera, Al Qahera Documentary, and BBC Arabic. That is a market for documentary films… but my film did not fit what Al Jazeera was looking for." Filmmaker, Egypt

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 such as Mall of Egypt, Cairo Festival City, and District 5, are described as almost entirely closed to independent films, prioritizing Hollywood blockbusters and Egyptian commercial films with major stars. Historical grand cinemas like Cinema Metro and Cinema Odeon have been divided into multiplexes and now show only commercial content. 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. In Southern Egypt, Luxor hosts two film festivals but until recently had no functioning cinema at all; Aswan has only one screen.

"Zawya is also one form of audience development. For young people, going to Zawya has become something fashionable. It means you are cool. That in itself is a form of audience cultivation." Ecosystem partner, Egypt.

3.2 Audience Development

3.2.1. Overview

Egyptian audiences exhibit a strong preference for local storytelling, with domestic films capturing approximately 60% of the 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 in Egypt follow a unique bifurcated model. Commercial blockbusters rely almost exclusively on the personal social media accounts of their star-studded casts and distributor channels rather than dedicated film accounts. In contrast, festival films such as those premiering at the Cairo International Film Festival or El Gouna Film Festival utilise 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 (AUC), 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 which stakeholders note are not only about the ticket itself but also the cumulative cost of transportation, snacks, and the fact that a single family outing can exceed 1,000 Egyptian pounds, remain a significant barrier to regular cinema attendance, particularly for lower-income and middle-class families. Filmmakers noted, even if ticket prices dropped to match a streaming subscription, the platform still wins because the viewer watches from home without additional expenses. The lack of cinemas outside major metropolitan areas further entrenches this exclusion as stakeholders repeatedly lament that governorates such as Luxor, Aswan, and Qusayr have few or no functioning cinemas, and the once-extensive network of 36 cinema clubs that toured villages has completely disappeared. Consequently, audiences in Southern Egypt and the Delta are forced to rely on piracy or wait months for limited platform releases, severely limiting the reach of Egyptian cinema beyond Cairo and Alexandria. These twin barriers economic and geographic collectively suppress audience participation and reinforce the centralization of Egypt's film culture. There is a recognized need for more robust audience data systems, as precise annual admissions data is not consistently published, often requiring the use of box office revenue and ticket price inflation as proxies for actual footfall.

3.2.2. Egypt film audience segments

Audience segments in Egypt are shaped by a mix of traditional television viewing and growing digital adoption, with affordability and access playing a central role.

- Heavy local-TV traditionalists: This is the largest segment, with viewing centred on television and shared household screens. Local films dominate, reflecting strong cultural alignment. Streaming use is limited, mainly to YouTube and Watch iT, and cinema attendance is low. Engagement could increase with better discovery and lower-cost viewing options.
- Cinema-oriented streamers: This group combines cinema attendance with active streaming use. They are digitally engaged but remain price-sensitive and selective in subscriptions. Free satellite TV remains widely used alongside paid platforms. Viewing decisions are strongly influenced by recommendations and accessibility.
- Global explorer digital families: This segment balances local and international viewing within a family setting. Content choices are often shaped by shared household preferences, including children. Barriers include subscription costs, limited awareness of African films, and difficulty finding content across platforms. Engagement depends on affordability and improved visibility.

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.

Table 3: Egypt film consumer segments | Source: Survey data

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%)
Net Promoter Score 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

3.2.3. Film discovery and marketing channels

Film discovery among audiences in Egypt is overwhelmingly driven by personal networks, with 93% of audiences reporting that they usually hear about films through friends and family. This extremely high figure indicates that word-of-mouth is the dominant and most trusted source of film awareness in the market. Social media follows as the second most important channel at 54%, suggesting that online platforms significantly amplify conversations and recommendations happening within social circles. All other discovery channels play a much smaller role: out-of-home advertising such as billboards (8%) and traditional media advertising like radio or TV (8%) have modest influence, while influencers/bloggers account for 6%. Notably, streaming platforms contribute only 2%, and cinema advertisements and film festivals record no meaningful impact (0%), indicating that formal promotional channels are not key drivers of awareness.

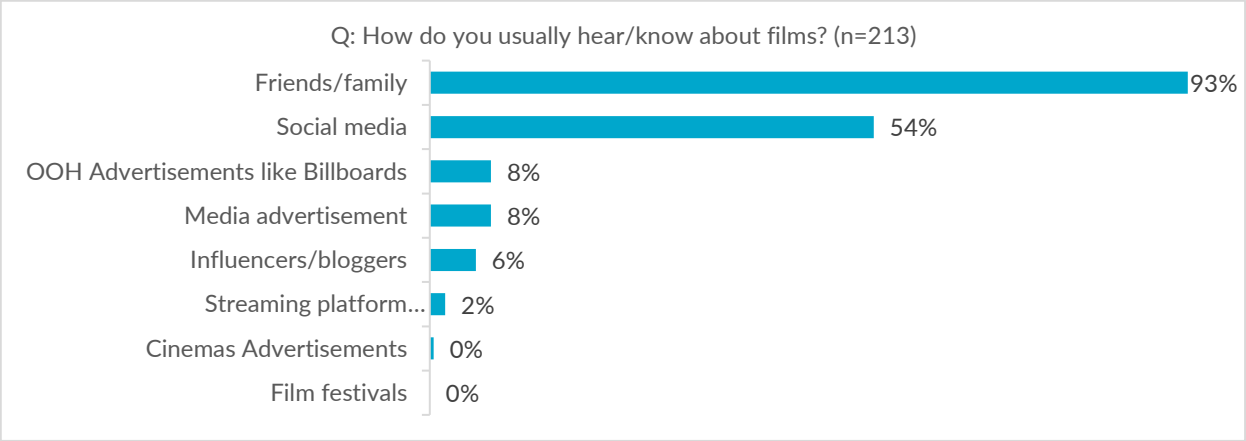


Figure 2: How audience in Egypt know/hear about new films | Source: Survey data

Overall, the pattern suggests that film discovery in Egypt is highly socially mediated, where audiences rely primarily on trusted personal recommendations supported by social media conversations. As a result, film marketers should prioritize campaigns that stimulate strong word-of-mouth and social media engagement, such as shareable digital content, community buzz, and audience-driven promotion, while using traditional advertising mainly as a complementary awareness tool.

3.2.4. What drives audiences to watch films

Egyptian audiences overwhelmingly watch films for entertainment and relaxation (67%), but social influence and storytelling quality play a particularly strong role, with recommendations from friends and family (34%) and high-quality storytelling (34%) both ranking as major motivations. Family-friendly content (32%) and affordability (27%) also shape viewing decisions, while cultural connection (22%) and educational motivations (15%) are less dominant but still present. Compared with other markets, discovery through word-of-mouth appears particularly influential, indicating that audience networks and public conversation significantly affect film popularity. Filmmakers and distributors should focus on engaging, accessible films with strong storytelling that can generate organic discussion and social buzz. Marketing strategies should emphasize community engagement, influencer promotion, and social media word-of-mouth, while exhibitors and platforms may benefit from group-oriented viewing experiences and family-friendly programming to capitalize on the social nature of film consumption.

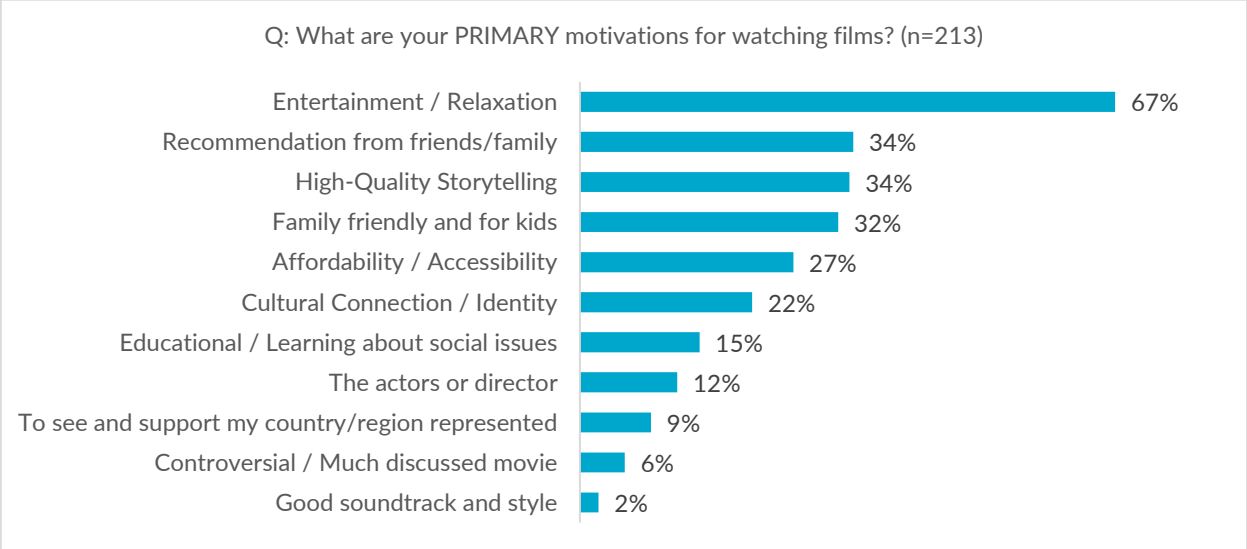


Figure 3: Primary motivations for watching films | Source: Survey data

Egyptian audiences place overwhelming importance on core storytelling and performance elements, with plot/theme (100%) and acting quality (100%) ranking as universally important. Technical quality (98%), genre (98%), actors (96%), and movie type (92%) also strongly influence film choice, highlighting the central role of narrative strength and performance in audience decision-making. Social influence and marketing remain relevant, peer recommendation (90%), marketing campaigns (87%), and representation of African cultures (87%), but institutional signals such as awards (54%) and the producing director (53%) are less influential. Filmmakers targeting Egyptian audiences should prioritize strong narratives, compelling acting performances, and high technical production standards, as these are the primary decision drivers. Marketing strategies should focus on audience buzz and social engagement rather than awards or industry recognition, while distributors can highlight actors, storylines, and genre appeal in promotional materials.

3.2.5. Audience viewing platforms and access to films

Film viewing is anchored on connected home screens. TVs are the dominant device accessed by almost every viewer (100%). Smartphones play a supporting role (30%), while laptops are less prominent (7%). Smartphones show a strong skew toward international content. This suggests that when viewers shift to mobile, they are more likely accessing global platforms or content outside traditional broadcast channels.

Television dominates as the primary viewing platform. Almost all audiences (96%) watch films through TV. Social media plays a secondary role (40%), while VOD platforms (18%) and cinema (10%) are less central. This shows that film access is still largely broadcast-led rather than platform-led.

Platform data reinforces the dominance of television. Almost all audiences (96%) watch films through TV. No other channel comes close. Social media is used by 40%, but more as a supplementary space. VOD platforms (18%) and cinema (10%) remain secondary. This is not a fragmented ecosystem. It is clearly led by one channel.

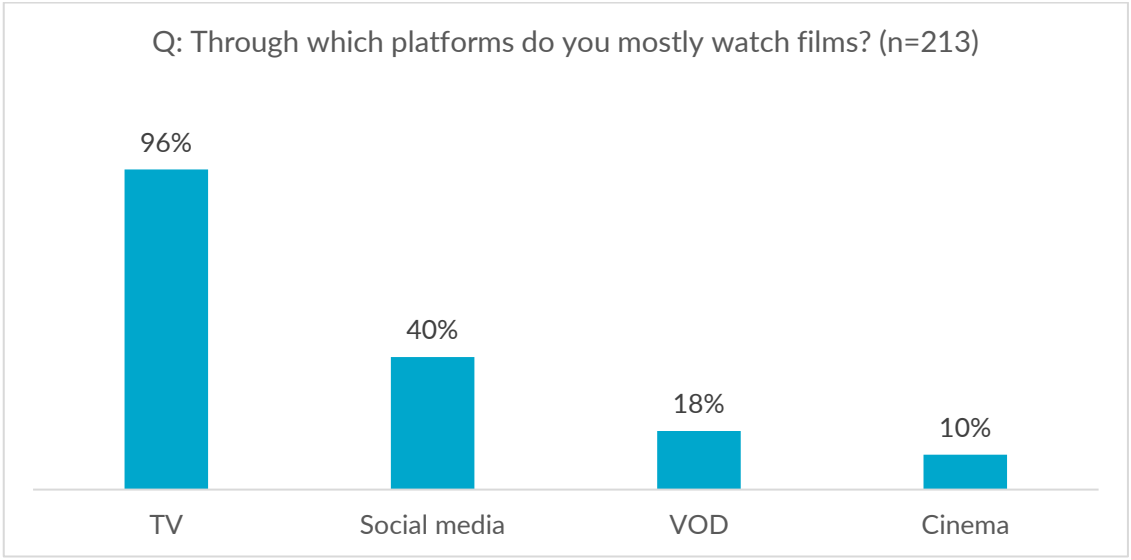


Figure 4: Primary viewing platforms in Egypt | Source: Survey data

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%). This distribution shows that both free and local platforms play a central role in streaming access. International platforms are present, but not dominant.

Television viewing, on the other hand, is almost entirely free-to-air (100%), with limited Pay TV usage (16%). This points to a strong reliance on accessible, non-subscription-based distribution.

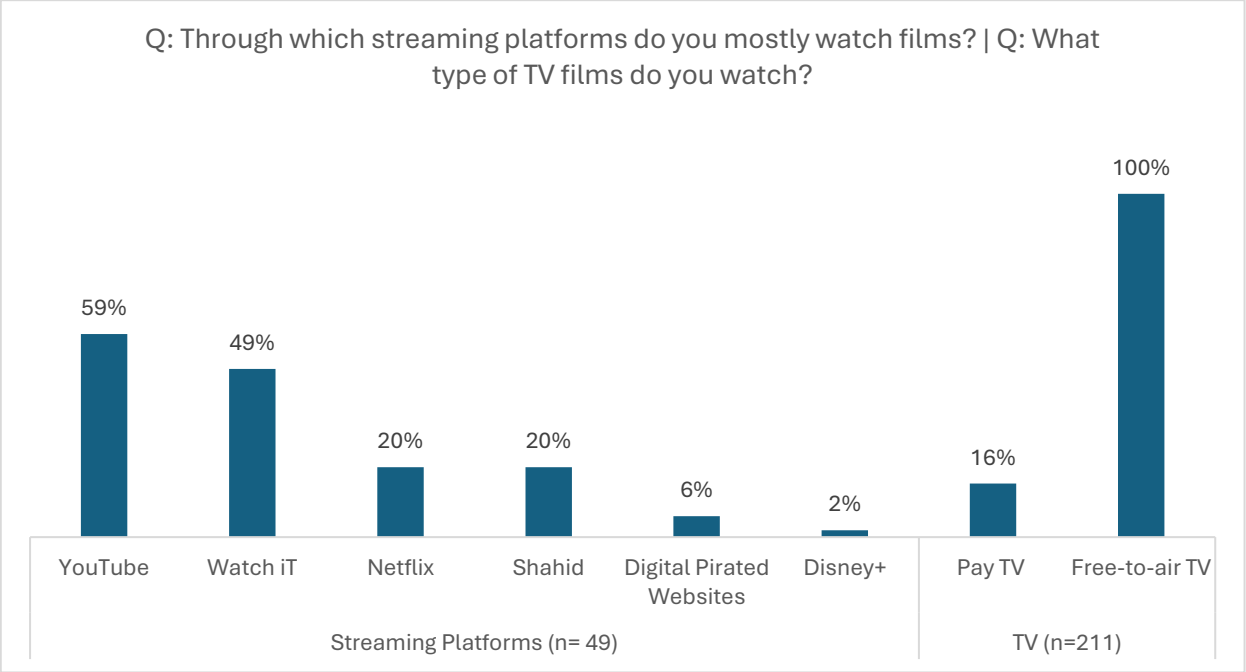


Figure 5: TV & streaming platforms used in Egypt | Source: Survey data

TV content is consumed primarily through Smart TVs (65%) and satellite connections (48%), with some crossover into mobile viewing (30%). This affirms that film distribution in Egypt remains broadcast led. Streaming is growing, but within clear limits. Cost, accessibility, and content relevance keep television at the centre of film consumption.

3.2.6. 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. This is not a balanced content mix; it is clearly local-first.

Platform-level behaviour confirms this. On both YouTube and Watch iT, local films account for nearly all viewing. International titles appear, but they do not drive platform usage.

Stakeholders confirmed that platform-level behavior mirrors this local-first pattern. On YouTube, which several stakeholders described as a gateway for younger audiences, the most viewed film-related content consists of Egyptian short films, behind-the-scenes clips, and user-generated parodies of popular local series. On Watch iT, the most widely used local platform, the platform's own programming strategy reinforces local dominance. Stakeholders note that platform strategies have increasingly adapted to clear audience signals, with early efforts to promote international titles, often backed by significant marketing investment, failing to generate sustained engagement. Over time, platforms responded by prioritizing local content, recognizing that audience subscription and viewership are primarily driven by familiar, culturally resonant Egyptian titles rather than imported productions. Additionally, stakeholders also highlight the role of trust and perceived cultural alignment in shaping platform preferences. Local platforms are often seen as more aligned with societal values and norms, which increases their acceptability among households.

The minimal presence of American and other international content is not simply a matter of supply or licensing costs. Stakeholders point to deeper cultural and economic factors.

Stakeholders noted that a Hollywood film about superheroes feels like a product while a local film about a family in Alexandria feels like a conversation. Economically, the low subscription price of local platforms (Watch iT at ~30 EGP vs. Netflix at ~350 EGP) means that even when international content is available, it is accessed through a different tier or not at all.

"They tried pushing international titles with big marketing budgets, but the numbers didn't lie. People subscribe for Wad Elyateem and Kamel El Adad, not for the latest Netflix import." Distributor, Egypt

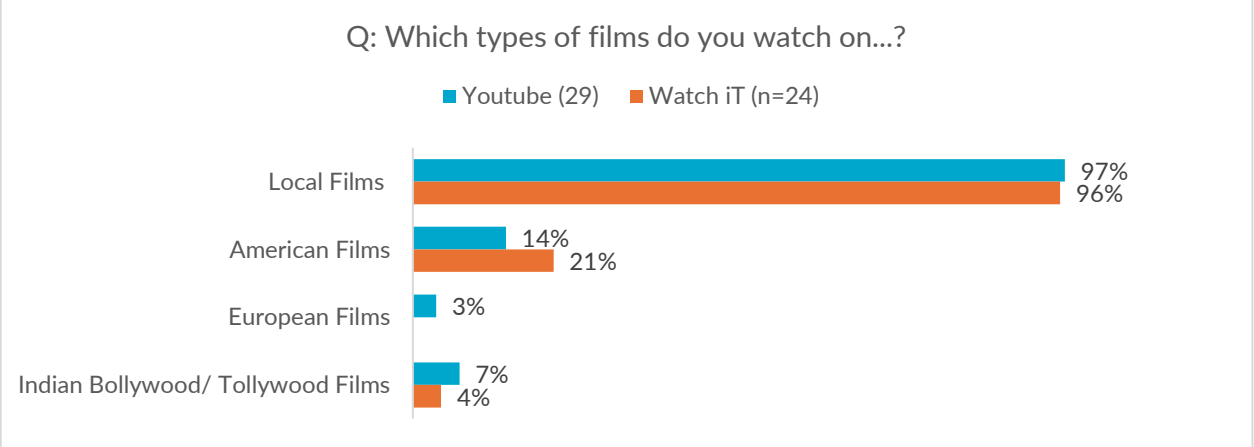


Figure 6: Films streamed on YouTube & Watch iT in Egypt | Source: Survey data

While streaming frequency is steady, it is not intensive. Weekly viewing dominates (84%), with very limited daily use. This suggests that streaming is integrated into routines but does not replace traditional TV habits.

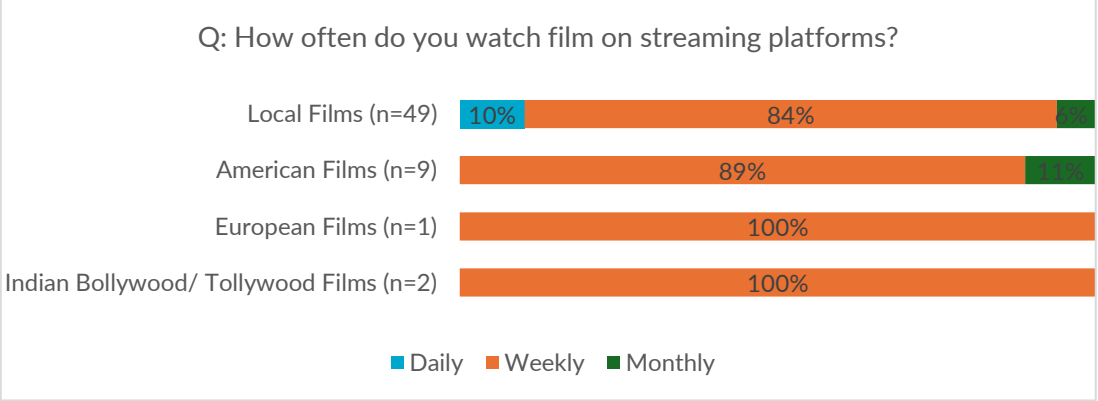


Figure 7: Frequency of streaming in Egypt | Source: Survey data

Streaming devices reinforce this pattern. Smart TVs lead (75%), followed by Pay TV connections (57%) and laptops (43%). Smartphones are used but are not the primary streaming device. Streaming, in this case, is still largely a shared, home-based activity.

Subscription, on the other hand, behaviour is restrained. Most users subscribe to just one service. Monthly spending is low, with a median of 167.21 EGP / USD 3.15.

All these suggests that streaming is selective and cost-sensitive. It complements television rather than replacing it. Growth is likely tied to affordability and access to relevant local content rather than expansion into multiple subscriptions.

Egyptian audiences place overwhelming importance on core storytelling and performance elements, with plot/theme (100%) and acting quality (100%) ranking as universally important.

Technical quality (98%), genre (98%), actors (96%), and movie type (92%) also strongly influence film choice, highlighting the central role of narrative strength and performance in audience decision-making. Social influence and marketing remain relevant—peer recommendation (90%), marketing campaigns (87%), and representation of African cultures (87%) but institutional signals such as awards (54%) and the producing director (53%) are less influential.

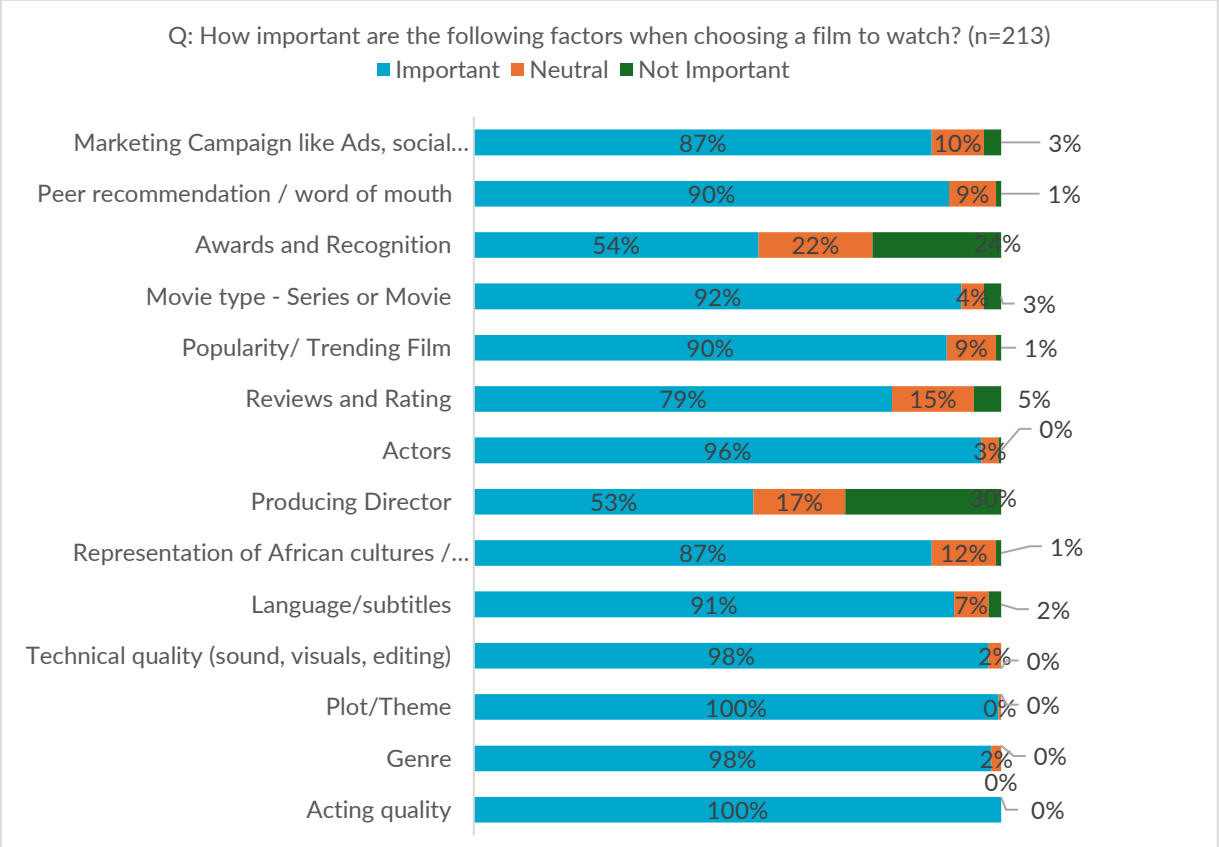


Figure 8: Important factors when choosing film to watch | Source: Survey data

Filmmakers targeting Egyptian audiences can prioritize strong narratives, compelling acting performances, and high technical production standards, as these are the primary decision drivers. marketing strategies should focus on audience buzz and social engagement rather than awards or industry recognition, while distributors can highlight actors, storylines, and genre appeal in promotional materials.

3.2.7. Festivals, campus circuits and university-based screenings role in audience building

Festivals

Stakeholders recognize 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. Festivals tend to prioritize high-profile guests and red-carpet events over cultivating local engagement, while competition over a limited pool of films and attendees further limits their outreach. As a result, despite their visibility and prestige, festivals play a limited role in expanding cinema audiences beyond an already-cultivated segment.

Campus and University Screenings

Stakeholders view universities as natural partners for audience development, recognizing their potential to engage young and curious viewers. While some isolated successes, such as daytime screenings of Lana Fi Al-Khial Hob or events organized by the Jesuit Film School at the French University in Cairo, demonstrate how institutional partnerships can foster active engagement through screenings and discussions, these efforts remain sporadic and largely donor-dependent.

Structural limitations further constrain university-based audience building. Most Egyptian universities lack film studies programs, dedicated screening spaces, or campus film societies, and the few resources that exist are concentrated in Cairo. Unlike models in Europe or the United States, where repertory cinemas and student film societies are common, Egyptian students seeking independent or socially engaged films must often travel to specialized venues or resort to piracy. Without formalized programs or infrastructure, universities remain an underutilized channel for cultivating informed and engaged audiences.

Cinema Clubs

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. The Jesuit School representative recalled touring villages around Ismailia, where audiences gathered weekly to watch and discuss films. 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. One ecosystem actor noted that cultural palaces still exist in many governorates but are underutilized. With small investments in digital projectors and curated programming, these spaces could become local screening hubs.

The Qusayr project, where teenagers made films on mobile phones and screened them in their community, demonstrates the viability of decentralized, low-cost exhibition. Stakeholders call for scaling such models rather than concentrating resources on a few glamorous festivals.

3.2.8. Education and Training Actors as Audience Builders

Stakeholder interviews reveal that education and training actors in Egypt such as film schools, media programs, 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 or expanding the cinema-going public.

Audience development is consistently attributed to a separate, underfunded ecosystem: the defunct network of 36 cinema clubs,, the European Film Panorama (a festival supported by UNIC and associated with Marianne Khoury), the art-house cinema Zawya, and community screenings.

Where training initiatives do engage audiences such as the Jesuit Film Lab's modules on distribution and criticism, , stakeholders describe them as nascent, underfunded, and small-scale. Instead, the most promising pathways for audience building, according to those interviewed, lie outside formal film education: reviving cinema clubs, integrating film literacy into public school curricula, and activating underutilized cultural palaces in governorates.

"For me, the only person working seriously on audience development in Egypt is Marianne Khoury through the Panorama experience. She is very keen on taking films to small schools, for example. She goes to primary schools and organizes morning screenings at reduced prices, or she makes agreements directly with schools. That is the

kind of audience development I recognize. Zawya is also one form of audience development. For young people, going to Zawya has become something fashionable. It means you are cool. That in itself is a form of audience cultivation." Ecosystem partner, Egypt

3.2.9. 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. This shows that, while formal audience development programmes remain limited, Egypt benefits from a deeply entrenched film culture developed over decades. The country's long-established film industry, widespread recognition of local actors and filmmakers, extensive media promotion, and strong cultural affinity for Egyptian storytelling have organically cultivated a large and loyal domestic audience. As a result, audience engagement is driven less by dedicated audience-building initiatives and more by the historical strength and visibility of Egyptian cinema within everyday cultural life.

While these quantitative figures underscore a strong cultural anchor, the qualitative transcripts reveal that this 100% preference for local content is increasingly tempered by a "quality over quantity" mandate from the audience. Stakeholders emphasize that maintaining this domestic dominance requires moving beyond the "formula trap", a cycle of safe, star-led comedies and action films that many viewers now find repetitive. The insights suggest that the modern Egyptian audience is not only looking for local stories, but for authentic, human-centred narratives that offer a conscious processing of their contemporary reality.

Consequently, the strategic priority for the ecosystem is shifting as it is no longer enough to simply produce domestic content to fill seats. Instead, investment must pivot toward humanizing the script-writing process and leveraging the prestige of the festival circuit to ensure that Egyptian films remain the primary social dialogue of the nation rather than just a commercial commodity.

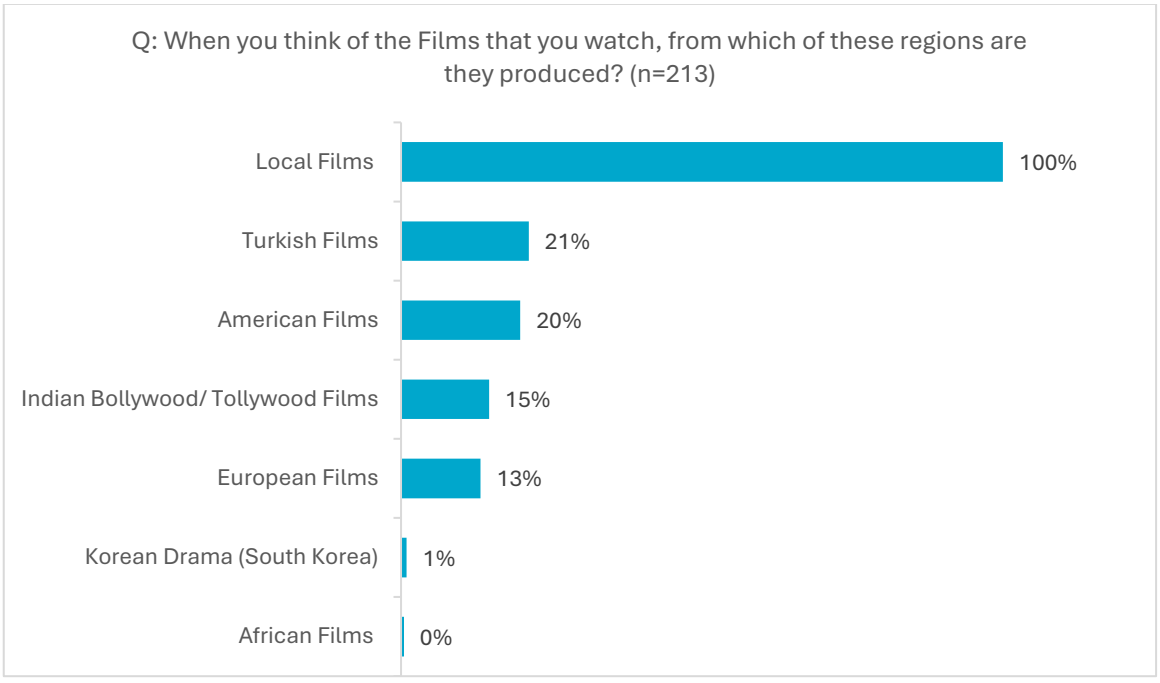


Figure 9: Regions of films watched | Source: Survey data

Egyptian audiences display has a stronger localization of film consumption, with 93% reporting that the films they watch most often are locally produced. Very small shares watch other African (4%) or

international films (1% each) most often. This pattern aligns with audience attitudes, where 100% say it is important that films are locally produced (54% very important; 46% somewhat important). Filmmakers and distributors should continue capitalizing on Egypt's strong domestic film ecosystem while also exploring opportunities to export Egyptian content regionally and globally, as the strong local industry could serve as a foundation for wider cultural influence and market expansion.

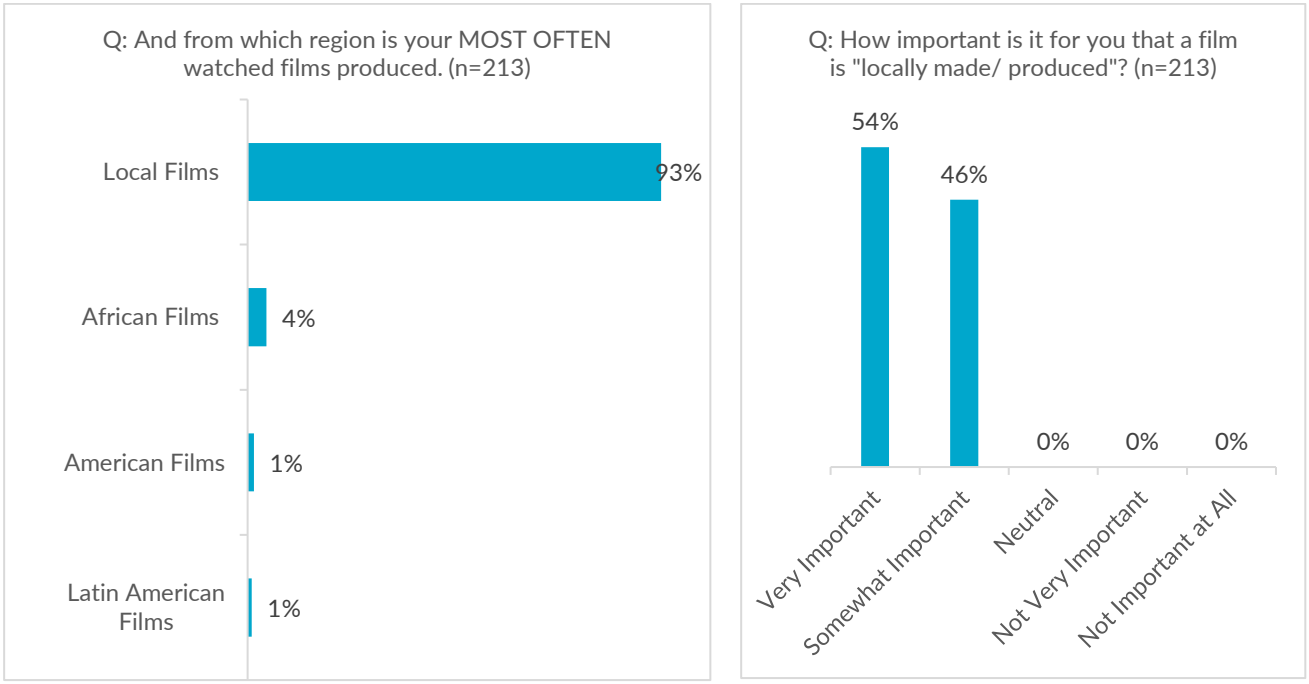


Figure 10: Most frequently watched region and Importance of films being locally produced | Source: Survey data

Egypt's streaming landscape is distinctly local-first, with audiences overwhelmingly prioritizing domestic content while international films play only a marginal role. Viewing patterns show that streaming is embedded into routine consumption but remains moderate rather than intensive, complementing traditional television rather than replacing it. This is further reinforced by device usage, where smart TVs and pay TV dominate, indicating a shared, home-based viewing experience rather than individual, mobile-first consumption. At the same time, subscription behavior is highly selective and cost-sensitive, with most users maintaining only one low-cost service. Overall, streaming growth in Egypt is anchored in affordability and the continued strength of locally relevant content, rather than diversification across multiple platforms or heavy engagement with global content.

3.2.10. Barriers to audience growth for local films

For Egyptian audiences, the largest barrier 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. This indicates that both cultural relevance and accessibility are major constraints for African films in Egypt. Stakeholders should focus on localizing and subtitling content effectively, strengthening distribution on popular platforms, and promoting African films with narratives that feel culturally relatable or globally appealing.

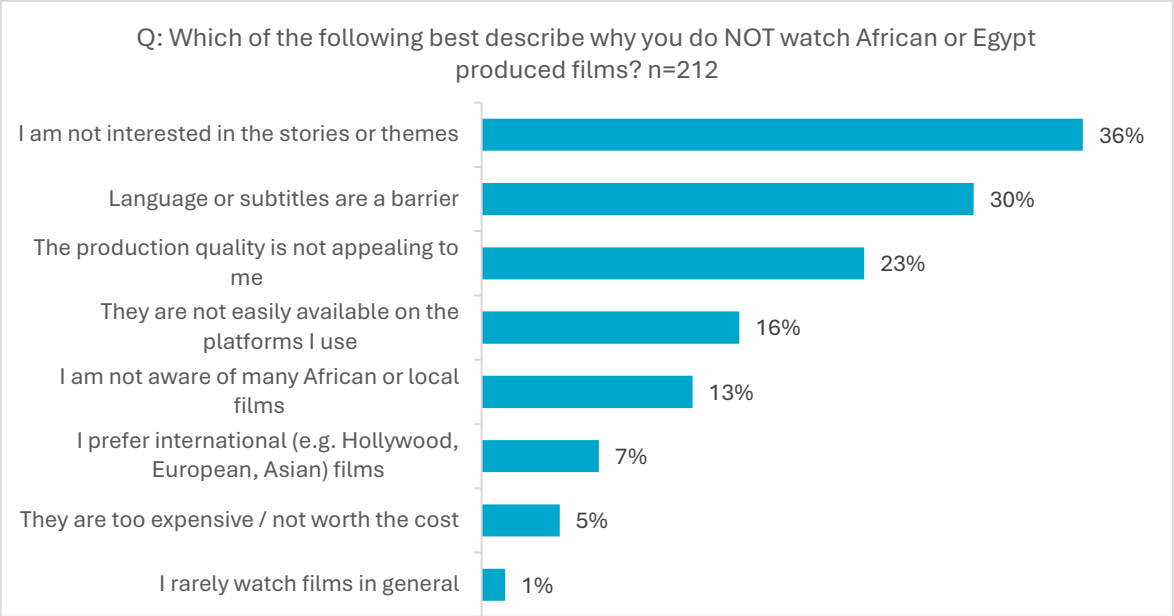


Figure 11: Why audience do NOT watch Local or African films | Source: Survey data

In Egypt, 36% report no significant barriers, suggesting that many viewers who want to watch African films 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. This suggests that content appeal and discoverability are the main challenges. Stakeholders should therefore focus on strengthening narrative quality, investing in creative development, and improving distribution and promotion of African films on commonly used platforms.

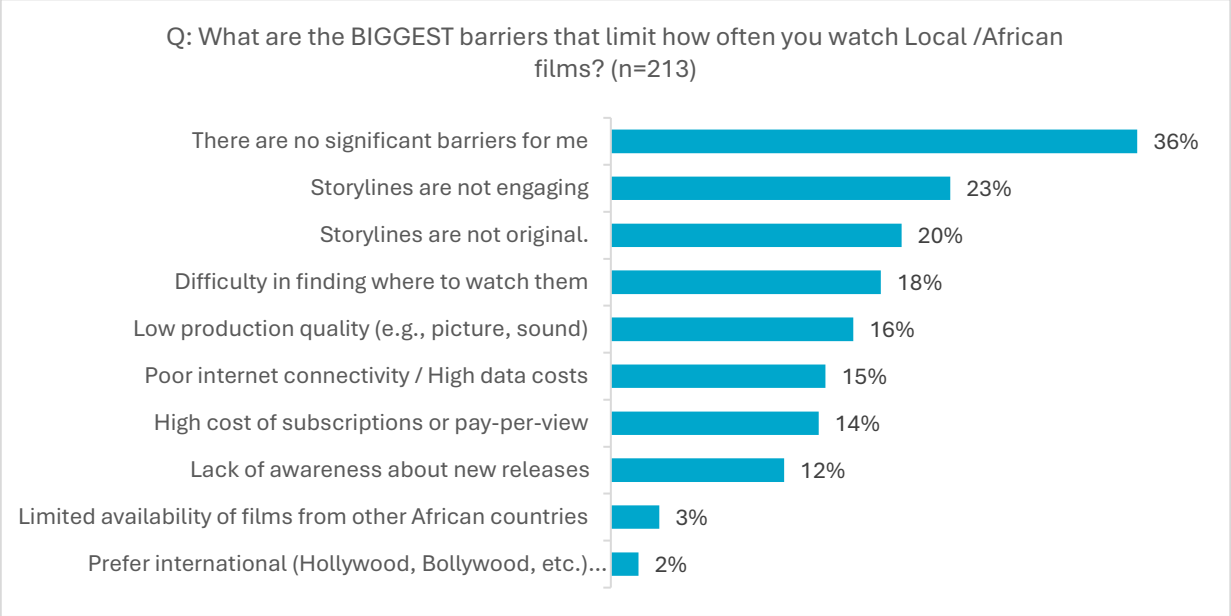


Figure 12:Barriers to watching Local or African films | Source: Survey data

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 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, perceptions around discoverability and marketing are mixed: 41% find it difficult to

locate local films on mainstream platforms, while a substantial 53% 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.

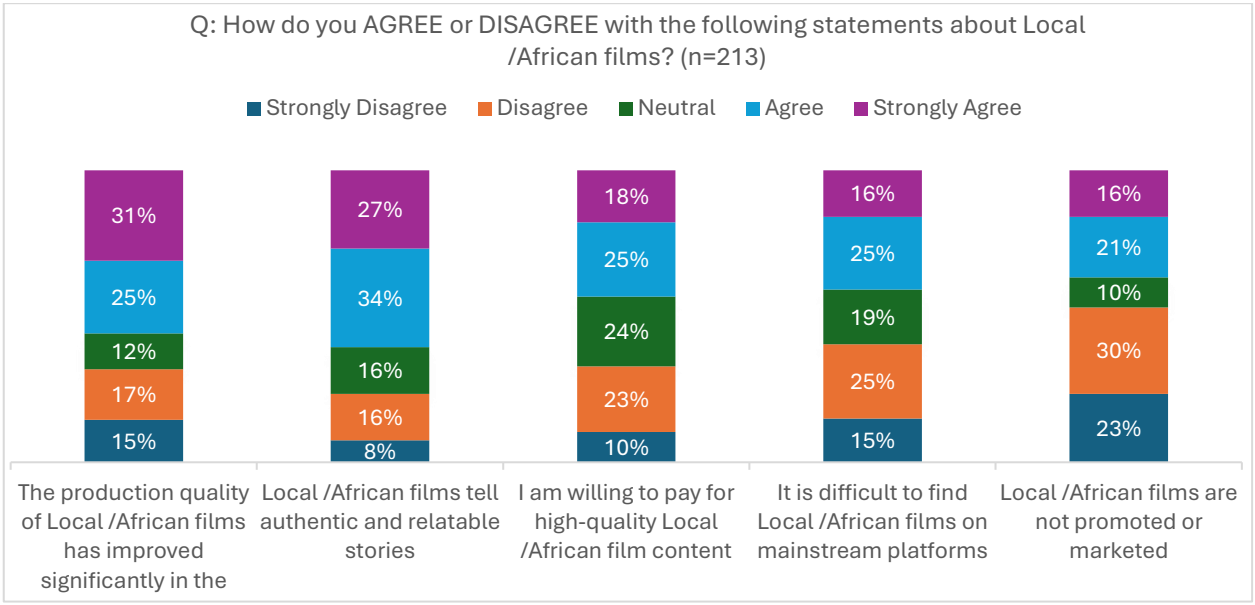


Figure 13: Perceptions on local/African films | Source: Survey data

In Egypt, barriers to watching African and local films are relatively limited, with many audiences able to access content without major constraints. However, where challenges exist, they are primarily driven by content appeal and discoverability rather than cost or preference for international films. Viewers cite gaps in storytelling, particularly around engagement and originality, as well as difficulty finding content on platforms, pointing to both creative and distribution shortcomings. At the same time, audiences recognize improvements in production quality and value the authenticity of local storytelling, though willingness to pay remains moderate, reflecting price sensitivity and competitive alternatives. Overall, the key constraint is not demand but conversion, translating positive perceptions into consistent viewership. For stakeholders, this highlights the need to strengthen narrative quality, invest in creative development, and significantly improve marketing and platform visibility to ensure local and African films are both compelling and easy to find.

3.2.11. Audience engagement and word-of-mouth

Egyptian audiences appear to engage less in post-viewing discovery activities compared to other markets. While 49% recommend films to others, a significant 38% report doing nothing specific after watching, and only 9% look for more films from the same country. Engagement activities such as searching for actors (6%), reading reviews (5%), or exploring social issues (3%) remain relatively low. This suggests that film consumption may be more passive and entertainment-focused rather than exploratory. Stakeholders should focus on strengthening audience retention through stronger franchise development, recognizable actors, and platform-driven recommendations to encourage audiences to continue engaging with related films.

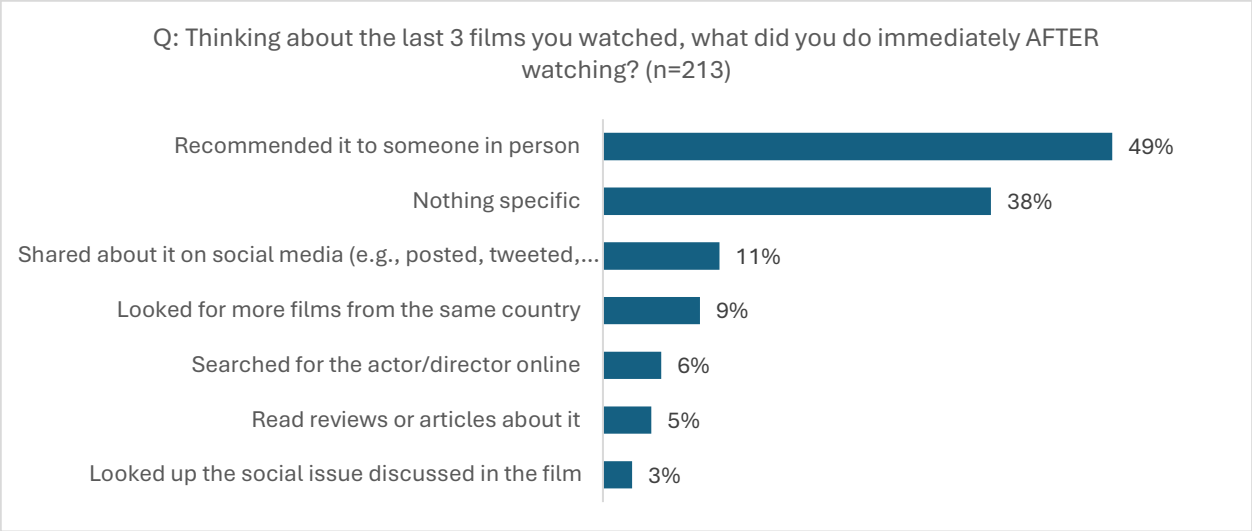


Figure 14: Actions after watching a film | Source: Survey data

Egypt shows the lowest level of active film-related engagement among the countries surveyed. Over half of audiences (53%) reported none of the listed activities, while only 25% actively searched for films and 12% purposely went to the cinema. Engagement with the broader film ecosystem, such as following actors (6%), attending screenings (10%), paying for digital content (1%), or joining film communities (1%), is minimal. Recommendation: The industry should focus on audience activation strategies, particularly through strong digital promotion, influencer-led campaigns, and more accessible community screenings to stimulate interest and encourage more active film consumption behaviours.

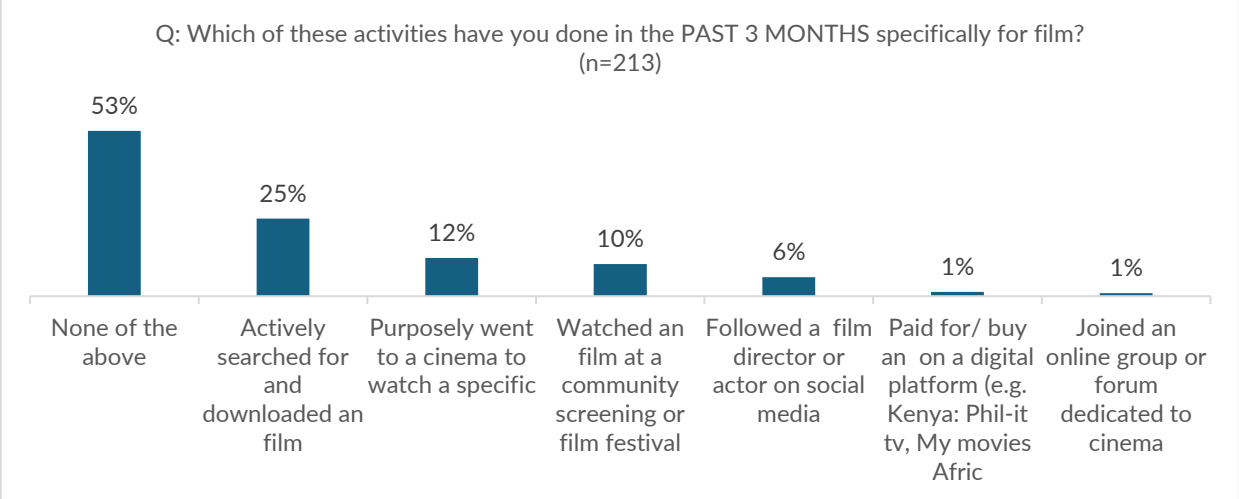


Figure 15: Engagement in past 3 months | Source: Survey data

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 to sustain audience enthusiasm. Distributors and streaming platforms should increase the availability of African films within Egyptian viewing channels, ensuring audiences can easily access a broader catalogue of content from across the continent. Government institutions and cultural agencies can play a role by strengthening film exchange programs, supporting regional film festivals, and

facilitating co-production initiatives that connect North African cinema with other African industries. Funders and ecosystem partners should prioritize investments in distribution infrastructure and cross-border marketing strategies to capitalize on Egypt's highly receptive audience and position the market as a gateway for African films in the Middle East and North Africa region.

3.2.12. 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 centralized or standardized 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.

Further, 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. One funder noted that platforms possess extraordinarily precise data, knowing exactly how long a viewer watches, on what device, and even which actor retains attention, but this information is treated as a competitive advantage and never disclosed. 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. The Cairo International Film Festival is an exception: its artistic director described a new practice of calculating occupancy rates, currently around 30%, to inform programming decisions. However, even this is limited to festival screenings and does not capture demographic or behavioural data. No stakeholder reported any system for tracking repeat viewership, geographic distribution of audiences, or correlation between marketing spend and attendance.

Piracy compounds the evidence gap. With widespread use of IPTV and pirate sites such as Cima4U and Telegram channels, a significant portion of viewership occurs completely outside measurable channels. Several stakeholders noted that a film may be widely discussed and shared online, yet official ticket sales remain low. This disconnect makes it impossible to distinguish between genuine lack of interest and audience preference for free, accessible piracy.

"This morning, for example, our distribution company sent us a detailed report about ticket sales for screenings at Zawya Cinema. It included the total number of tickets sold, total revenue, how much would be deducted from revenues, what the net amount would be, and how that net would be divided among stakeholders. I found that very positive especially since we did not request it. However, numbers alone are not enough. The report does not provide analysis or context. There is no interpretation. And I come from an economics background numbers without context or analysis do not mean much. If someone tells me that 200 tickets were sold, I need to know: for this type of film, in this season, in this context is 200 a good number or a bad one? Without comparison or benchmarking, the number has no meaning. I also doubt that cinemas truly know the identity of the audience in a detailed way. If we are discussing potential improvements, I think age brackets are extremely important. Tracking audience age is crucial. I mentioned earlier that categorization and demographics matter."
Filmmaker, Egypt

3.3 Social Impact

3.3.1. Overview

Social impact in Egyptian cinema is largely characterized 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, films like *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.

The role of public broadcasters and international festivals is central to maintaining the visibility of socially relevant content. 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. This information will be filled in through primary research findings. While these films generate significant cultural conversation, the industry has yet to fully tap into coordinated mobilization strategies that could translate viewer engagement into measurable behavioural or policy change.

3.3.2. Definition and measuring of social impact through behaviour

Across stakeholders, a clear divide emerges in how social impact is understood and measured in Egyptian cinema. Funders and development organizations approach social impact as something that can be intentionally designed, tracked, and evaluated. They rely on structured frameworks such as evaluation indicators, DAC criteria, attendance figures, and engagement metrics, to assess whether a project has raised awareness, reached target groups, or contributed to behavioural change. From this perspective, social impact is embedded within project design and accountability systems, often tied to reporting requirements and longer-term development objectives, even as funders acknowledge that deeper impact may take years to fully materialize.

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 and result in less compelling films. Instead, stakeholders emphasize subtler forms of behavioural change shifts in awareness, empathy, and dialogue that are difficult to quantify but central to how cinema engages with society.

"For example, in the series [Newton's Cradle], there was an episode that included a scene involving marital rape. That scene generated a very large public debate at the time. People discussed it extensively, questioning whether the characters' actions were justified or not and debating the broader implications of the situation. In my opinion, this represented a genuine social impact because the issue emerged naturally from the story rather than being inserted artificially as a message. This illustrates the difference between storytelling that organically incorporates social issues and storytelling that attempts to deliver a lesson directly to the audience." Distributor, Egypt

3.3.3. Audience interest in socially relevant storytelling

The audience survey unveiled that a large share of them prefers films focused purely on entertainment (43%). 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 among Egyptian film audience.

Stakeholders' findings add an important layer of nuance to these patterns. Stakeholders consistently emphasize 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. Filmmakers and programmers note that

audiences engage more deeply with narratives that evoke emotion, relatability, and lived experience rather than those that feel instructional or agenda-led. As a result, the lower prominence of topics like corruption or climate in the survey should not be interpreted as a lack of interest, but rather as a reflection of audience sensitivity to storytelling approach and tone.

"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

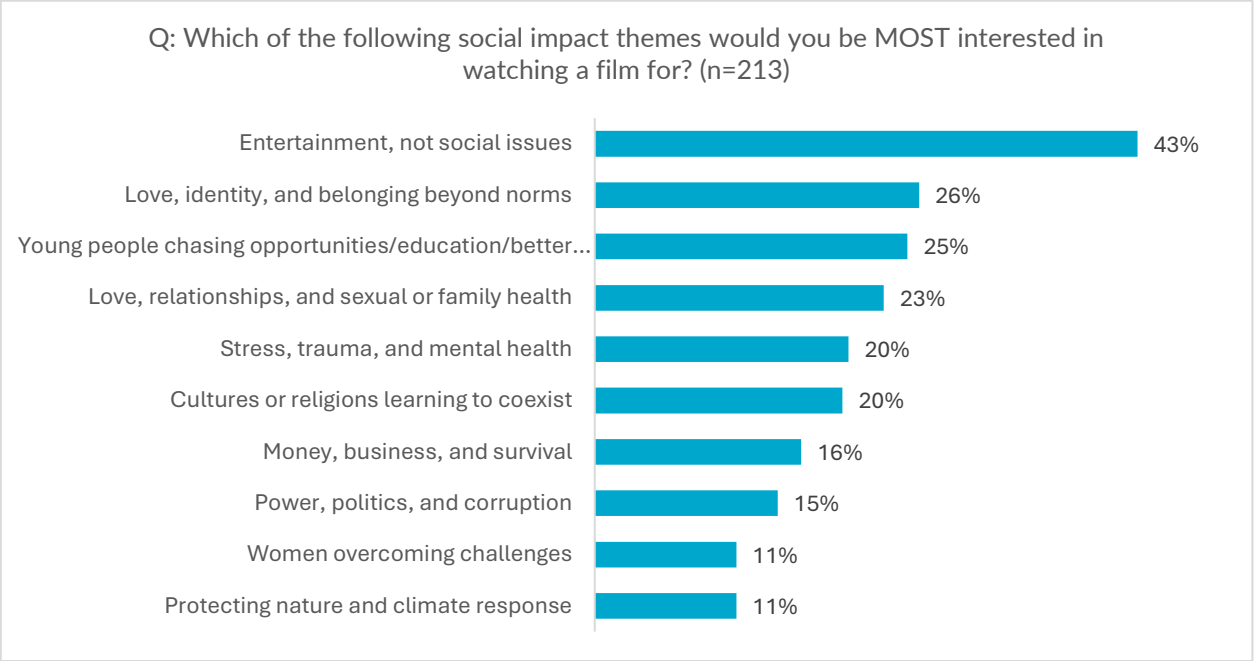


Figure 16: Social impact themes audiences want to watch in Egypt | Source: Survey data

From the above survey data, it is certain that social impact in film is most effective when embedded in relatable, everyday stories in Egypt. Audiences engage with social themes, but only when they are delivered through accessible and entertaining narratives rather than overt messaging.

3.3.4. Thematic Areas Where Film Has Strongest Perceived or Observed Impact

Women's Issues and Gender-Based Vulnerabilities

Stakeholders cited films that portray underaged workers (Factory Girl), women navigating inheritance rights, eating disorders, and sexual harassment. One funder described a project where participants with personal experience of eating disorders made short films after working with a psychologist, leading to behavioural changes. Another noted that women's issues, when presented without moralizing, consistently draw audience engagement. However, stakeholders caution that surface-level "feminism" (e.g., a female director making a film about women in a gas station to please European funders) is seen as inauthentic and less impactful.

Family Dynamics and Intergenerational Conflict

Several stakeholders note that themes related to family such as parent-child relationships, sibling rivalries, care for elderly relatives, and internal family secrets, generate strong audience resonance. Television series like *Kamel El Adad* are cited as successful examples because they explore everyday family dynamics without heavy political messaging. One filmmaker observed that audiences cry and share personal stories after screenings that depict difficult family members, indicating emotional impact.

Marginalized Regional and Cultural Identities

Stakeholders repeatedly point to the underrepresentation of Southern Egyptian and Nubian cultures in Egyptian cinema. The film *Al-Jazeera* (2007) is recalled as a rare commercial success that portrayed Southern Egyptian dialect and life, drawing massive audiences from those regions. Funders and ecosystem actors describe projects in Luxor, Aswan, and Qusayr where local youth used mobile phones to tell their own stories, resulting in community pride and engagement. Nubian narratives, particularly around displacement due to the Aswan High Dam, are noted as almost entirely absent from mainstream cinema.

"Nubian stories… it's not represented at all. They have around fifty villages, each with a different culture. A huge history that hasn't been told." Funder, Egypt

Palestinian Cause and Arab Solidarity

Several stakeholders mention the Palestinian cause as a thematic area where films have generated significant impact, particularly after October 7, 2023. Films like *The Voice of Hind Rajab* (2025) and *Palestine 36* (2025) are cited as examples that attracted large audiences and sparked discussion. The stakeholders noted that *Palestine 36* achieved massive success in the UK and Ireland, staying in cinemas for 13–14 weeks. Funders observed that artists became hesitant to associate with European Union affiliated programs due to perceived pro-Israel positions, indicating that films addressing Palestine carry real-world political weight.

"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

Labor and Economic Exploitation

The film *The Colony (Al-Mostaamara)* (2009) is mentioned by multiple stakeholders as a socially impactful work addressing labour issues, specifically the invisibility of factory workers and their struggles. One distributor noted that the film brought attention to realities many viewers were unaware of, without resorting to didactic messaging. This theme connects to broader concerns about economic injustice and class, though stakeholders agree it remains underexplored.

"The Colony addressed labour issues, portraying the struggles of factory workers and their invisibility. It brought attention to realities many were unaware of." Distributor, Egypt

Health and Social Awareness

Stakeholders observe that social impact on health issues has shifted from cinema to television series. Series like *La Tord Wala Tastabdel* (kidney disease) and *Lam Shamsia* (child abuse) are cited as generating mass public discussion, articles, and even policy conversations. One programmer noted that these series reach across social classes and age groups, creating "mass impact" that films currently struggle to achieve.

"When such series are released, they generate what I would call mass impact. People from different social classes and different age groups talk about them. Articles are written. Television programs discuss them. I do not feel that films are currently producing that same kind of impact." Filmmaker, Egypt

Authentic Representation of Everyday Life

A recurring theme is that the strongest impact comes from films that simply show marginalized people as ordinary human beings, not as victims or heroes. The Palestinian black comedy *Thank You for Banking with Us* (2024) is cited as impactful because it portrayed Palestinians with ordinary lives, hopes, and ambitions, rather than focusing solely on war and suffering. Similarly, Goodbye Julia succeeded because it depicted the complexity of North-South Sudanese relationships without reducing characters to political symbols.

"Thank You for Banking with Us was socially impactful because it portrayed Palestinians as people with ordinary lives, hopes, and ambitions… Its tone was light and engaging. Impact lies more in how the story is told than in the subject itself." Distributor, Egypt

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

Public Broadcasters

Stakeholders consistently highlight the minimal role of Egyptian public broadcasters in supporting or disseminating socially engaged or impact-oriented films. Public television is widely perceived to have shifted its focus toward commercial content, entertainment, and state-aligned programming, creating a gap in the ecosystem for films that engage with social issues. As a result, the responsibility for producing and distributing such content has largely fallen to independent filmmakers and foreign-funded initiatives, which often operate with limited reach and sustainability.

This absence is particularly striking when compared to international models, where public broadcasters play a central role in financing and acquiring socially relevant content, including short documentaries and impact-driven films. In the Egyptian context, limited public investment in this space, alongside a prioritization of high-visibility cultural events over public service broadcasting has constrained opportunities to bring socially engaged cinema to wider and more diverse audiences, particularly those outside traditional urban and cultural hubs.

"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." Filmmaker, Egypt

NGOs

Non-governmental organizations 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 (which ran the She in Cinema program for women), the Egyptian Film Producers Club, and various community-based organizations in Southern Egypt.

These NGOs do not simply produce films; they integrate filmmaking into broader development objectives: skills training, economic empowerment, social inclusion, and mental health awareness. One funder described a project on eating disorders where participants worked with a psychologist and produced short films that led to behavioural changes.

"The idea of low-cost cinema was not only about budgets; it was also about freedom in filmmaking… There was a kind of rebellion against the structure of the mainstream industry." Ecosystem partner, Egypt

Donors and Foundations: Enablers with Specific Agendas

International foundations and donors provide the financial backing for most impact-oriented film work in Egypt. The two most prominently cited are Drosos Foundation (Swiss) and EUNIC (the network of European cultural institutes, funded by the EU). Other mentioned funders include AFAC (Arab Fund for Arts and Culture), the Doha Film Institute, the Sawiris Foundation, and various European co-production funds.

These donors operate differently from NGOs. They do not produce content directly but fund capacity-building, training, festival participation, and sometimes production. Their agendas vary: Drosos focuses on community development and measurable social impact, while EUNIC emphasizes freedom of expression and European cultural exchange. However, stakeholders express ambivalence about donor-driven impact work. Several filmmakers note that donors often prioritize "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.

"We do not issue calls for proposals like some donors. We accept proposals almost all year… The selection and balance are purely for internal organizational reasons." Funder, Egypt

Collaborative Models

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 program 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. When funding ends, the infrastructure often collapses.

"We have a Swiss partner, Drosos Foundation, operating in Egypt, who has been one of our best collaborators with donors. They don't just provide money; they help remove financial obstacles, facilitate bureaucracies, and ease practical challenges." Ecosystem partner, Egypt

3.4 Financing and Enabling Environment

3.4.1 Overview

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. A major development in the enabling environment is the launch of the $1 billion Africa Film Fund by the Cairo-headquartered Afreximbank, which aims to catalyse high-quality production and global reach for African content. However, the absence of a widely institutionalized 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 (IP) laws exist, enforcement—particularly regarding digital residuals and online piracy—remains a critical priority for reform.

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

Stakeholder interviews reveal a fragmented and largely underdeveloped landscape of financial mechanisms supporting Egyptian cinema. Government grants have virtually disappeared, international grants are highly competitive and agenda-driven, tax credits are almost non-

existent, and co-production schemes are dominated by European partners with limited benefit to local filmmakers.

Government Grants

Multiple stakeholders mourn the decline of state funding. 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. One filmmaker noted that the Center's budget might has actually increased (to EGP 20 million) but appears to be entirely consumed by staff salaries, with no funds reaching production. Another stakeholder recalled that as recently as 2012, feature films received between EGP 1.5 and 3 million , and short films received EGP 100,000–150,000. That support stopped abruptly and has not been replaced.

"The National Center's budget is 20 million pounds. For over 10 years, it hasn't produced a single film because all the money goes to staff whose interest is to prevent the funds from going into film production." Ecosystem partner, Egypt

International Grants: Competitive and Agenda-Driven

Regional and international grants have become the primary source of funding for independent Egyptian cinema. Key players mentioned include AFAC (Arab Fund for Arts and Culture), Doha Film Institute, Drosos Foundation, EUNIC (European Union cultural network), Mawred and various European national funds. However, stakeholders describe intense competition across 22 Arab countries for a limited number of grants. Moreover, many grants carry implicit or explicit thematic expectations, favouring films about women's issues, migration, political oppression, or environmental crises, that filmmakers feel pressured to satisfy.

One funder openly acknowledged that applicants often use "trendy keywords" (climate change, gender, refugees) to increase their chances, even when the project does not genuinely engage those topics. Another funder noted that European co-producers often reject projects that do not fit a recognizable "Arab festival film" mold.

"Grants at first seemed easy because they were tied only to artistic quality. But after a while, quality became linked to how trendy or in-demand your work is at that moment. After 2011, Egypt became a 'trend.' Lots of money flowed to that part of Egyptian cinema. After two years, it could be Syria, then Libya." Filmmaker, Egypt

Tax Credits and Incentives: Largely Absent

Stakeholders consistently report that Egypt offers no meaningful tax incentives for film production. Several compare Egypt unfavourably to Jordan and Morocco, which have established rebate systems. One government-affiliated interviewee mentioned that tax rebates are under discussion but face bureaucratic hurdles, and the Egypt Film Commission (EFC) is working to facilitate foreign productions through a "one-stop shop" for permits, but actual cash rebates or tax credits are not yet operational.

"There are discussions about tax rebates, but implementation faces bureaucratic challenges. Because tax rebates require strict documentation and coordination with tax authorities… You might announce a 40 percent rebate, but practically implementing it requires administrative coordination that can be difficult." Government, Egypt

Co-Production Schemes

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 only exists with France, and Morrocco. While these

partnerships provide access to post-production facilities, festival networks, and distribution in Europe, stakeholders express frustration with the terms. European co-producers without an existing treaty often require that a portion of the budget be spent in their country (hiring local crews, using local post-production services), which reduces 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.

One filmmaker shared a positive experience with a Tunisian co-producer who understood Egyptian culture and helped secure French funding without imposing creative changes. Another filmmaker noted that having a name like Wim Wenders attached as co-producer immediately elevated the project's prestige, even without active involvement. However, several stakeholders noted that intra-African co-production is extremely rare. The only successful example cited is the Egyptian-Tunisian co-production Souad.

"What was truly difficult, though, was the early stage, when we were submitting the project. I received a lot of rejections, both inside and outside Egypt. Outside Egypt, the rejections were often based on things like: How do you see us? How do you want the film to move? Is the film too raw? We don't understand it. There's an issue with the hijab. The father character is problematic, and so on. Sometimes these questions were asked directly, and sometimes they were implied. I still have some of those rejection emails saved — they were honestly very frustrating." " Filmmaker, Egypt

Private and Distribution-Led Financing

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 criticized 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.

"99.99 percent of Egyptian producers have sold their films entirely, including the negative, in an outright sale. If you sell your own asset, what are you living on? We have never done that, thank God… The fundamental asset that emerges from your being is your film. When you sell it entirely, you lose everything." Filmmaker, Egypt

Alternative and Emerging Models

Stakeholders also mention smaller-scale, innovative mechanisms:

- Crowdfunding and collectives: A filmmaker described the Tunisian model where a group of producers agree to co-produce each other's films year by year, creating a trust-based system. Another mentioned the Nigerian Nollywood model where 20 people contribute small amounts and become shareholders in a film.
- In-kind support from festivals and labs: Cairo Film Connection, El Gouna, and Red Sea festivals offer cash prizes (e.g., $25,000 for a short film) and post-production services.
- Cash prices: Stakeholders recognize cash prizes as a legitimate and helpful form of alternative funding, particularly for short films and emerging filmmakers. A $25,000 prize can make the difference between a short film being produced or not and can even yield profit when combined with sales. However, for feature films, cash prizes are merely a supplement; they cannot substitute for distribution advances, grants, or co-production equity.
- Low-budget self-financing: Several filmmakers advocate for making films with minimal resources (e.g., EGP 400,000 for a feature) to avoid dependency on grants and distributors. However, they note that even low budgets have become harder to sustain due to inflation and increased permit costs.

"I once contributed 800 EUR for a sound engineer and later earned 3,000–4,000 dollars from award prizes and sales. Short films generally generate revenue from sales to platforms, TV channels, or airlines, not from cinemas." Filmmaker, Egypt

3.4.3 Business models and revenue mixes across distribution channels.

Stakeholder interviews reveal a fragmented revenue landscape where commercial and independent cinema operate under entirely different logics. Commercial films rely on theatrical box office (especially Gulf markets) and distribution advances. Independent films depend on grants, festival awards, and platform sales, with theatrical release serving primarily as a prestige vehicle. The most sustainable model for individual filmmakers appears to be television series commissioning, while the most empowering (though riskiest) is micro-distribution. Stakeholders consistently call for restoring state grants, introducing tax incentives, and building a public service broadcasting infrastructure to diversify revenue streams and reduce dependency on European co-producers and agenda-driven international donors.

Below are the models highlighted by the stakeholders:

The Commercial Distribution Advance Model

This is the dominant model for mainstream Egyptian commercial cinema. A distributor provides a significant advance (often 70–90% of the budget) in exchange for exclusive theatrical and sometimes platform rights. The distributor effectively functions as the producer. 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 (1–3 weeks), and films move quickly to platforms like Shahid, Watch iT, Yango play, or Netflix.

"Distribution advances became common. A distributor would provide up to ninety percent of a film's budget in advance and later acquire distribution rights. In practice, the distributor functioned as the real producer." Distributor, Egypt

The Independent Festival-to-Platform Model

Independent and art-house films follow a different trajectory. They premiere at international festivals (Cannes, Berlin, Venice, or regional festivals like El Gouna, Cairo, Carthage). Festival exposure generates critical recognition, which then facilitates sales to European television channels (e.g., Arte, Canal Plus), streaming platforms (Netflix, Mubi, Shahid), 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.

"Short films generally generate revenue from sales to platforms, TV channels, or airlines rather than from cinemas… We sold the film to Canal Plus for 9,000 EUR . I earned more than I invested." Filmmaker, Egypt

The Co-Production Equity Model

Films financed through co-production (typically with European partners) involve multiple equity contributors. Each partner puts in cash or in-kind services (post-production, sound design, colour grading) in exchange for territorial rights. The revenue mix is highly fragmented, with each co-producer recouping from their own territory. This model is common for films aiming for festival circuits but is criticized for leaving little net cash for Egyptian producers.

The NGO/Funded Impact Model

This model applies to films produced within donor-funded development projects (e.g., Drosos Foundation, EUNIC). The film is not expected to be profitable. Instead, its "revenue" is measured in social impact, community engagement, and training outcomes. Films are screened for free at

community venues, schools, and small festivals. Any commercial sales are secondary and often reinvested into the NGO's programs.

The Self-Distribution/ Micro-Distribution Model

A small but growing number of filmmakers bypass traditional distributors entirely. They secure small grants or personal funds, produce at very low cost, and then self-distribute through community screenings, cultural centres, and direct negotiations with platforms. This model requires significant entrepreneurial effort but allows filmmakers to retain full rights and control.

The Television Series Model

Television series, particularly those produced for streaming platforms (Shahid, Watch iT, Netflix), operate on a commissioning model. The platform commissions a series (often 10–15 episodes instead of the traditional 30 Ramadan episodes) and pays a license fee that covers most or all of the production budget. Additional revenue comes from advertising (for ad-supported tiers) and international sales. This model has created new opportunities for writers and directors but is highly selective.

"Streaming platforms require continuous content throughout the year. They need series and films constantly in order to retain their audiences, not just during Ramadan. This opened the door for many new talents." Filmmaker, Egypt

3.4.4 Key Constraints and Promising Innovations

Based on the stakeholder transcripts, the following constraints and innovations are identified as distinct from the detailed thematic areas already covered. This section focuses specifically on structural barriers and emerging solutions that cut across distribution, funding, audience engagement, and production models.

3.4.4.1 Key Constraints

Centralization of infrastructure and opportunities in Cairo

All training programs, post-production facilities, sales agents, and major distributors are concentrated in Cairo. Filmmakers from Southern Egypt, the Delta, or other governorates must relocate to access basic industry services. This centralization excludes regional talent and limits the diversity of stories told.

Lack of data transparency across the value chain

Distributors do not share sales data with producers; platforms do not share viewership analytics with filmmakers; cinemas do not provide demographic breakdowns. Without reliable data, stakeholders make decisions based on anecdote or assumption, perpetuating inefficient practices.

Inconsistent censorship enforcement

Censorship decisions are unpredictable and can arrive the day before a screening. Films that pass production censorship may still be blocked at the exhibition stage. This uncertainty discourages investment and forces filmmakers to self-censor from the script stage.

Weak intellectual property enforcement

Contracts are often informal or unenforceable. Filmmakers report verbal agreements with cinemas that are broken without recourse. Piracy via IPTV and unauthorized streaming sites is rampant, and legal remedies are inaccessible for independent producers.

No career pathway between independent and commercial sectors

Filmmakers who start in independent, festival-driven cinema find it nearly impossible to transition into commercial production. The two sectors operate as parallel universes, with different funding sources, distribution channels, and audience expectations. This siloing prevents talent accumulation.

High cost of entry for technical roles

Equipment rental, post-production software licenses, and certified training programs are expensive. Aspiring technicians from lower-income backgrounds cannot afford the entry costs, leading to a homogenized workforce drawn from privileged socioeconomic strata.

3.4.4.2 Promising Innovations

Mobile cinema and phone-based filmmaking

Several NGOs have successfully implemented workshops where participants use only mobile phones to shoot, edit, and screen short films. This dramatically lowers production costs and allows youth in cinema-less towns to participate. One project reached teenagers aged 8–15, teaching them to see phones as creative tools rather than just social media devices.

Festival-based talent incubation with alumni tracking

Programs like EMERGE (El Gouna) and New Wave (Cairo International Film Festival) bring youth from governorates to festivals, provide mentorship, and maintain alumni WhatsApp groups for ongoing networking. This creates low-cost, sustained peer support across geographical distances.

Rotating collective production (the Tunisian model)

A group of producers agree to co-produce each other's films year by year, rotating who receives the primary support. No external funding is required; the collective pools resources and skills. Stakeholders cite this as a replicable model for Egypt, though it requires trust and long-term commitment.

Short film packages as commercial programming

Instead of releasing individual short films (which struggle to attract audiences), distributors are experimenting with curated programs of 3–5 shorts under a unified theme. The Drop the Beat program (three shorts featuring rap artists) sold out and extended its run, proving that packaged shorts can work commercially.

One-stop shop for filming permits

A recent government initiative consolidates multiple permit approvals into a single window. While still imperfect, it reduces bureaucratic friction for foreign and local productions. Stakeholders see this as a model that could be expanded to cover censorship and tax rebates.

Direct filmmaker-to-cinema micro-distribution

A few independent filmmakers have bypassed distributors entirely, approaching cinema owners directly for revenue-share agreements. This requires significant marketing effort but allows full creative and financial control. The international example of *Hundreds of Beavers* (2022) (self-distributed over three years) is held up as an aspirational model.

Vertical drama and short-form experiments

While still nascent, some stakeholders view vertical-format content (designed for TikTok, Instagram Reels, and YouTube Shorts) as a potential new revenue stream. They note that attention spans are shrinking, and short-form narrative experiments could reach younger audiences that traditional cinema cannot.

Cross-art form collaboration

Film festivals and training programs increasingly partner with theatre, literature, and visual arts. One stakeholder described a behind-the-scenes documentary about a play they produced, which then screened at a film festival. These crossovers create multiple revenue and exposure opportunities from a single project.

3.4.5. Film Ecosystem Development: 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, they are increasingly becoming prerequisites for accessing funds and sustainability mechanisms that reduce dependency on external capital. Unlike direct production grants or tax incentives, these soft infrastructure elements are where many Egyptian and international funders are concentrating their resources, often because they are more politically feasible and have measurable developmental outcomes.

Capacity Building as a Gateway to Finance

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 (520-hour program), the Luxor Film School (initially documentary-focused, later expanded to fiction), 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 to 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. In response, orientation sessions on proposal writing have become part of the capacity-building offer.

"Many artists, especially filmmakers or screenwriters, are not really aware of how to write a proposal. They are creative and have the idea in their minds, but when it comes to putting the idea into words, it becomes difficult. We conducted orientation sessions where we explained how to write proposals." Funder, Egypt

Beyond proposal writing, capacity building includes technical skills that directly affect production costs. Filmmakers who can operate their own cameras, edit, or handle sound design reduce the need to hire expensive crews. Ecosystem partners described how the Luxor School trained students to use mobile phones and low-cost equipment, enabling them to produce films for a fraction of the usual budget. This kind of training is seen as a form of "pre-financing" that lowers the barrier to entry.

Collaborations as Financial Multipliers

Stakeholders consistently emphasize that collaboration between NGOs, festivals, donors, and private companies is essential for stretching limited resources. The EMERGE program at El Gouna Film Festival is a prime example: Drosos Foundation, the Sawiris Foundation, and the festival itself pooled funds to bring youth from governorates to the festival, covering travel, accommodation, and mentorship. No single entity could have achieved the same impact alone.

Similarly, the partnership between the Jesuit Cultural Centre and Drosos Foundation allowed the Film Lab to offer advanced training in production, distribution, and criticism areas that are typically neglected in traditional film education. The collaboration with the Cinema Professions Syndicate enabled graduates to obtain union membership cards, removing a bureaucratic barrier that had previously prevented them from working professionally.

International collaborations are also cited as financial enablers. The partnership between the Jesuit School and CineFabrique (France) allowed Egyptian students to learn about distribution strategies in Europe, while French experts contributed to the curriculum. These cross-border collaborations often come with in-kind support such as trainers, access to software, festival waivers that reduces the need for cash funding.

Mentorship as a Non-Monetary Form of Financing

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. In the EMERGE program, industry professionals condensed years of experience into masterclasses and one-on-one sessions. 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 who has a mentor with 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.

"In film markets, people invest in the person more than in the story, more than in the logic, and more than even in the potential of the project itself. They see a filmmaker they genuinely like. They believe in their talent, and they decide to invest in that person." Funder, Egypt

However, stakeholders also warn that mentorship can be extractive if not structured properly. Some established professionals use mentorship as a way to access emerging talent's ideas without providing real support. The most effective mentorship models are those embedded in formal programs with clear expectations and accountability.

Financial Literacy Training

A recurring gap identified by stakeholders is the lack of financial literacy training for filmmakers. Even when grants are available, many applicants do not know how to budget realistically, how to structure a co-production agreement, or how to negotiate a distribution contract. One funder observed that applicants often submit budgets that are either grossly inflated or impossibly lean, both of which signal inexperience.

Some capacity-building programs have begun to address this. The Jesuit Film Lab includes modules on production management and distribution. The She in Cinema project taught women how to budget and manage production finances. However, these efforts remain isolated and underfunded. Stakeholders call for dedicated workshops on film finance, contract law, and sales negotiations skills that are currently learned only through trial and error or informal networks.

3.5 Children's Consumption Landscape

This section examines children's film and media consumption behaviours within the Egypt context, with a focus on viewing patterns, content preferences, and access channels. Understanding how younger audiences engage with film is critical to assessing the future trajectory of the industry, as early exposure shapes long-term viewing habits, cultural affinity, and platform adoption. The analysis draws on primary research insights to highlight key trends, barriers, and opportunities in engaging children as an emerging audience segment.

The study adopts an age-segmented approach to capture differences in age and decision-making across childhood stages. Children aged 0–5 years and 6–9 years were represented through parent or guardian responses, reflecting the high level of supervision and support required for media consumption in these groups. In contrast, children aged 10–13 years and 14–17 years participated directly in the research, with appropriate parental guidance and consent, under the assumption that they exercise a greater degree of independence in content selection and viewing behaviours.

Findings

3.5.1 Content preferences and exposure to film types

Both groups overwhelmingly prefer local films, highlighting the strong importance of culturally relevant and locally produced storytelling among younger Egyptian audiences. Local films are

watched by 86% of children and an even higher 95.6% of teenagers, making them by far the most consumed film category across both groups.

Teenagers demonstrate broader international exposure compared to children, particularly toward Turkish, European, Indian, and Korean content. For instance, 9.9% of teenagers watch Turkish films compared to 3% of children, while 14.3% of teenagers watch European films and Indian Bollywood/Tollywood films respectively, compared to only 2% of children for each category. Additionally, 3.3% of teenagers reported watching Korean dramas, while no children (0%) reported doing so.

Children are more likely to watch American films than teenagers, potentially reflecting differences in platform exposure or entertainment preferences. About 23% of children reported watching American films, compared to only 4.4% of teenagers, representing an 18.6 percentage-point gap.

This suggest that film consumption becomes more diversified with age. While children's viewing habits are largely concentrated around local films (86%) and American films (23%), teenagers engage with a broader mix of international content including Turkish (9.9%), European (14.3%), Indian (14.3%), Korean (3.3%), and African films from other African countries (2.2%). This indicates a gradual expansion in exposure to different storytelling traditions and international genres as audiences grow older

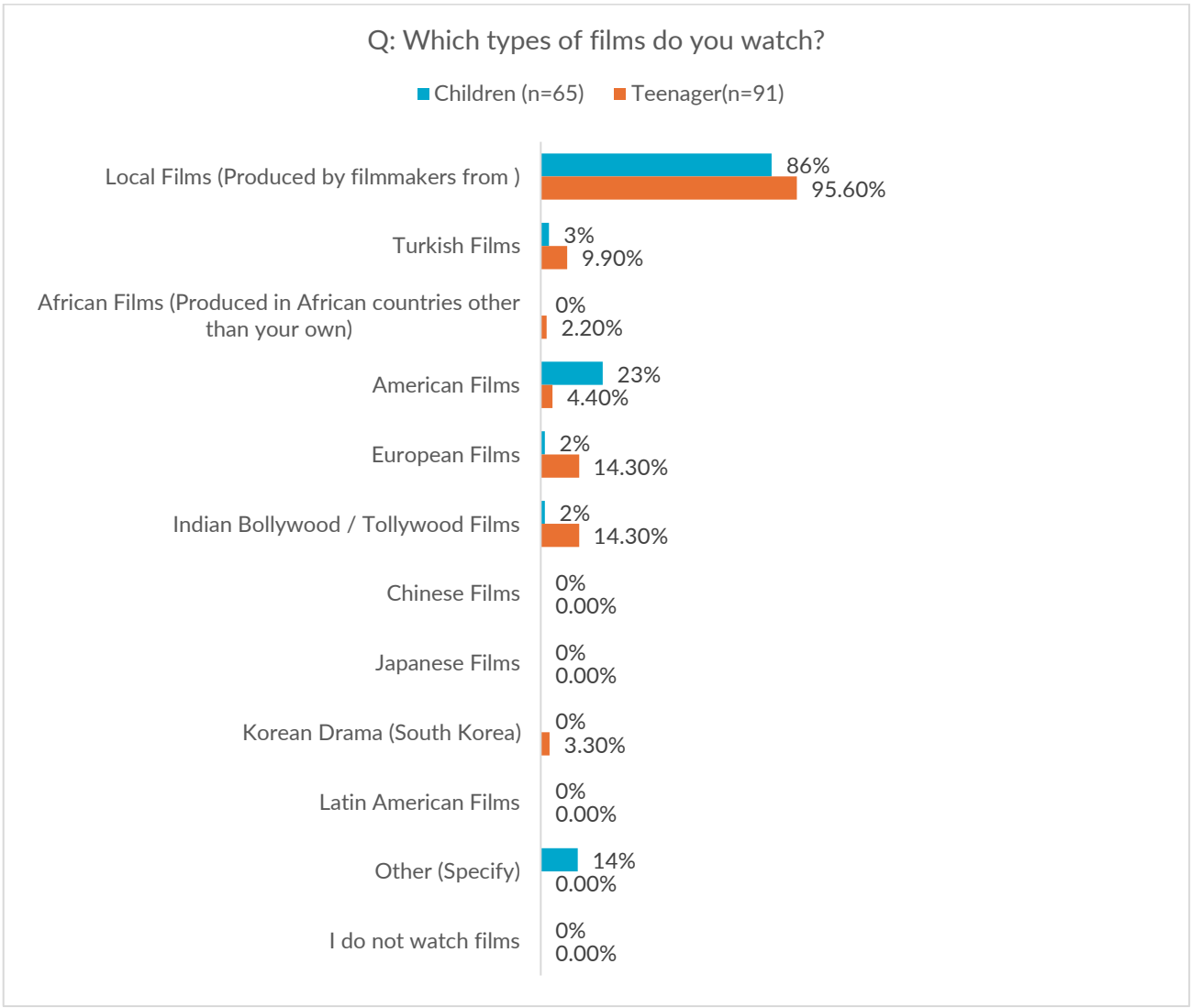


Figure 17: Type of films watched by teenagers and children in Egypt | Source: Survey data

3.5.2. Genre preferences among young audiences

Comedy and drama dominate film preferences among younger audiences in Egypt, particularly among teenagers. Comedy is the most watched genre for both groups, attracting 69.2% of children and 80.2% of teenagers, while drama viewership rises significantly from 43.1% among children to 68.1% among teenagers.

Children strongly prefer animation and cartoons, with nearly half (49.2%) watching this genre compared to only 18.7% of teenagers, highlighting a clear age-related shift away from child-oriented content as audiences grow older.

Teenagers exhibit stronger interest in more mature and intense genres, particularly action and horror. Action films are watched by 44% of teenagers compared to 10.8% of children, while horror films attract 19.8% of teenagers but only 1.5% of children.

Romantic comedy maintains moderate appeal across both groups, though teenagers show slightly higher engagement (29.7%) compared to children (24.6%).

Overall, this shows that as audiences grow older, film preferences diversify from animation-focused content toward more emotionally complex and mature genres such as drama, action, horror, and romantic comedy.

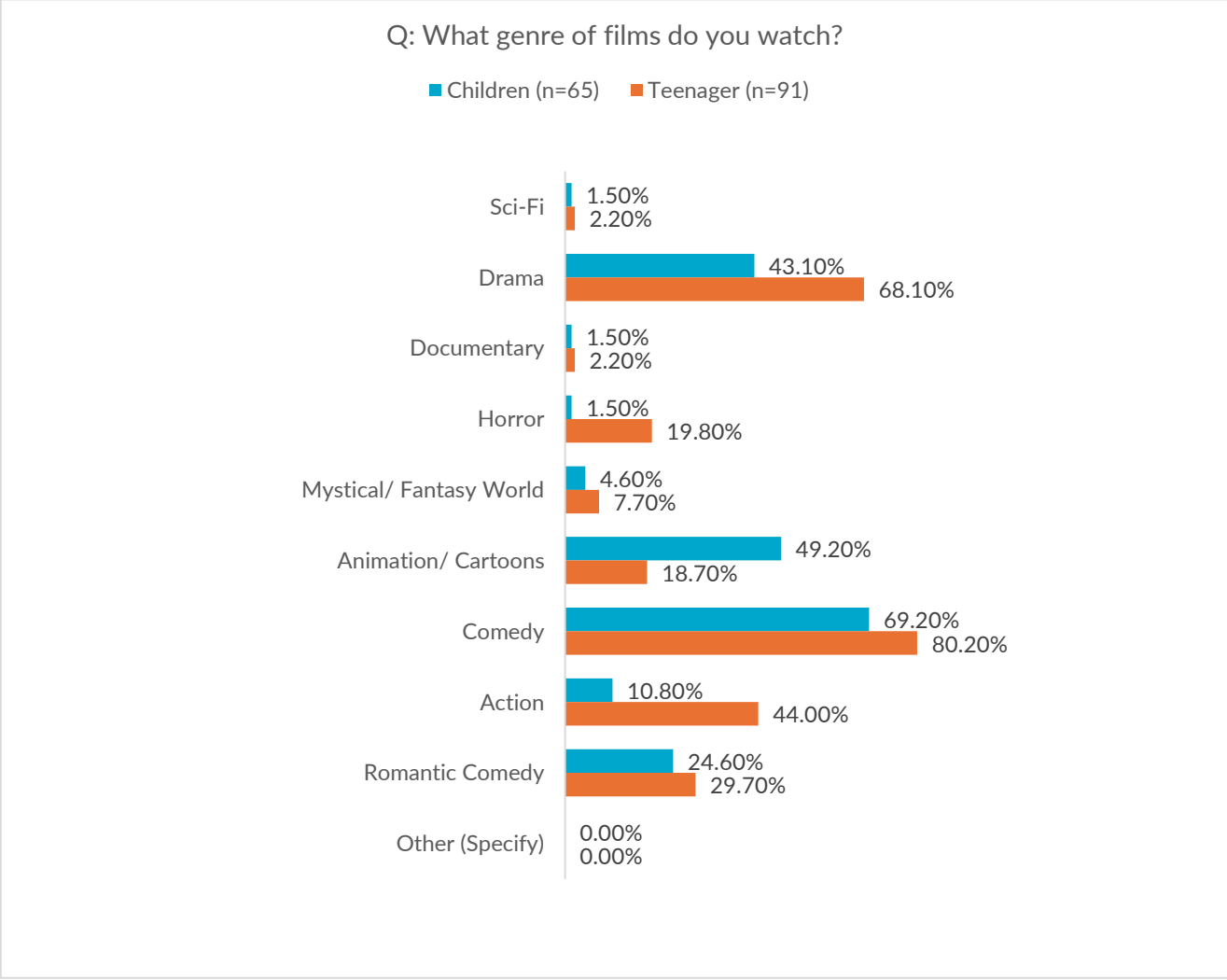


Figure 18: Genre of films watched by children and teenagers in Egypt | Source: Survey data

3.5.3. Digital platforms dominate film access

Traditional television remains the primary platform for film consumption among younger audiences in Egypt, particularly among children. Free-to-air TV is used by 92.3% of children and 81.3% of teenagers, highlighting the continued dominance of accessible and household-based viewing platforms.

YouTube and YouTube Kids are the leading digital platforms among both groups, with stronger adoption among teenagers. About 49.5% of teenagers use YouTube platforms to watch films compared to 38.5% of children, indicating increasing preference for flexible and on-demand digital viewing as audiences grow older.

Social media platforms are becoming important secondary channels for film consumption, with almost equal usage among children (20%) and teenagers (20.9%). This reflects the growing role of platforms such as TikTok, Facebook, and Instagram in content discovery and entertainment engagement.

Streaming platform usage remains relatively low overall, with only 7.7% of children and 5.5% of teenagers using services such as Netflix, Shahid, or Showmax, suggesting limited penetration of subscription-based streaming among younger audiences.

Teenagers demonstrate more diversified and informal viewing behaviors compared to children. Teenagers are more likely to use digital pirated websites (5.5% vs. 0%) and attend film festivals (6.6% vs. 1.5%), indicating broader exploration of alternative film access channels as they grow older

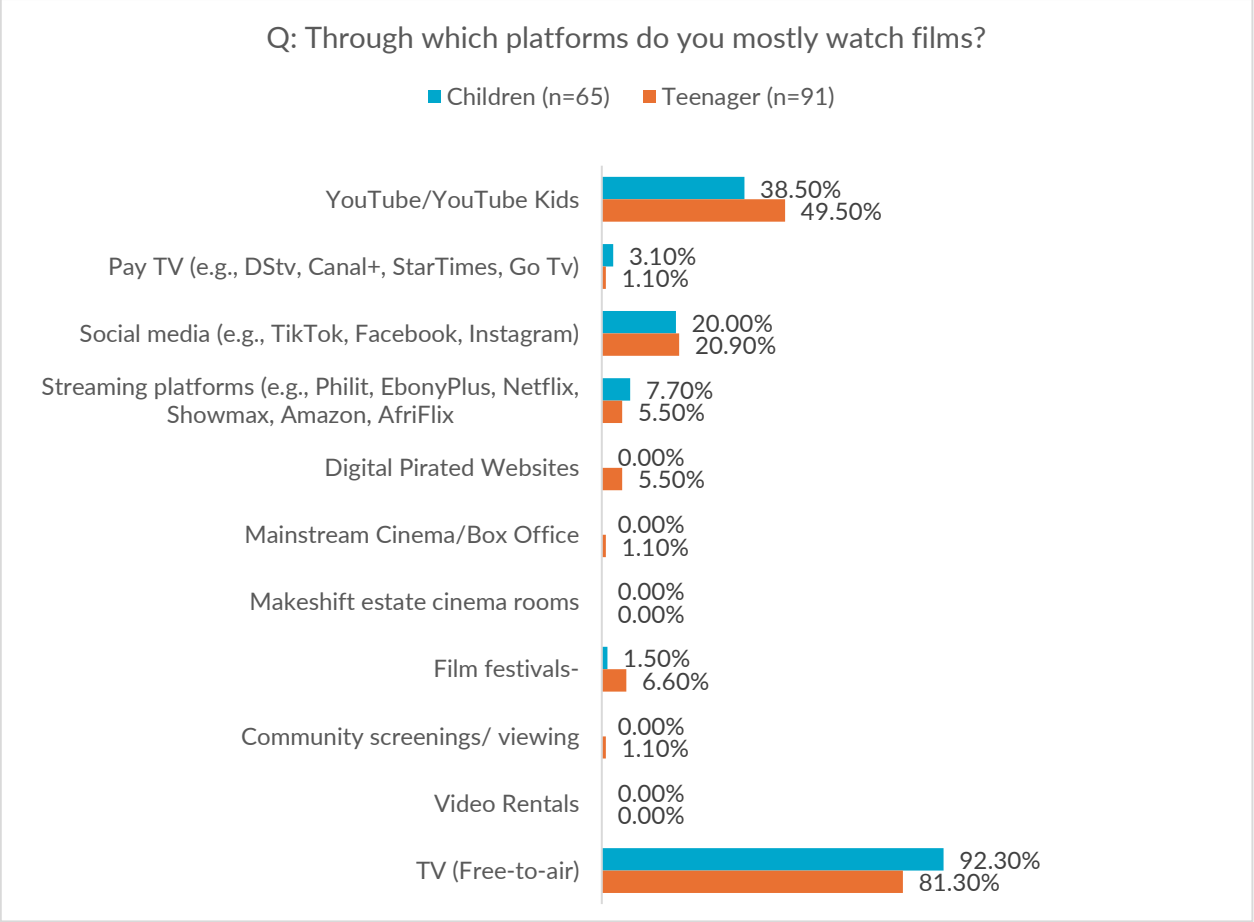


Figure 19: Platforms used mostly by children and teenagers to watch films in Egypt | Source: Survey data

3.5.4. Film consumption frequency among young audience

Film watching is a highly frequent activity among both children and teenagers in Egypt, with all respondents reporting that they watch films either daily or at least once a week. Daily film consumption is slightly more common among teenagers than children. About 52.7% of teenagers reported watching films daily compared to 50.8% of children, indicating very high and consistent engagement with film content across both groups.

Children are marginally more likely to watch films at least once a week rather than daily. Around 49.2% of children reported weekly viewing compared to 47.3% of teenagers, though the difference between the two groups is minimal.

Overall, this suggest that film consumption is deeply embedded in the everyday entertainment habits of younger Egyptian audiences, with both children and teenagers exhibiting extremely high viewing frequency and regular engagement with film content.

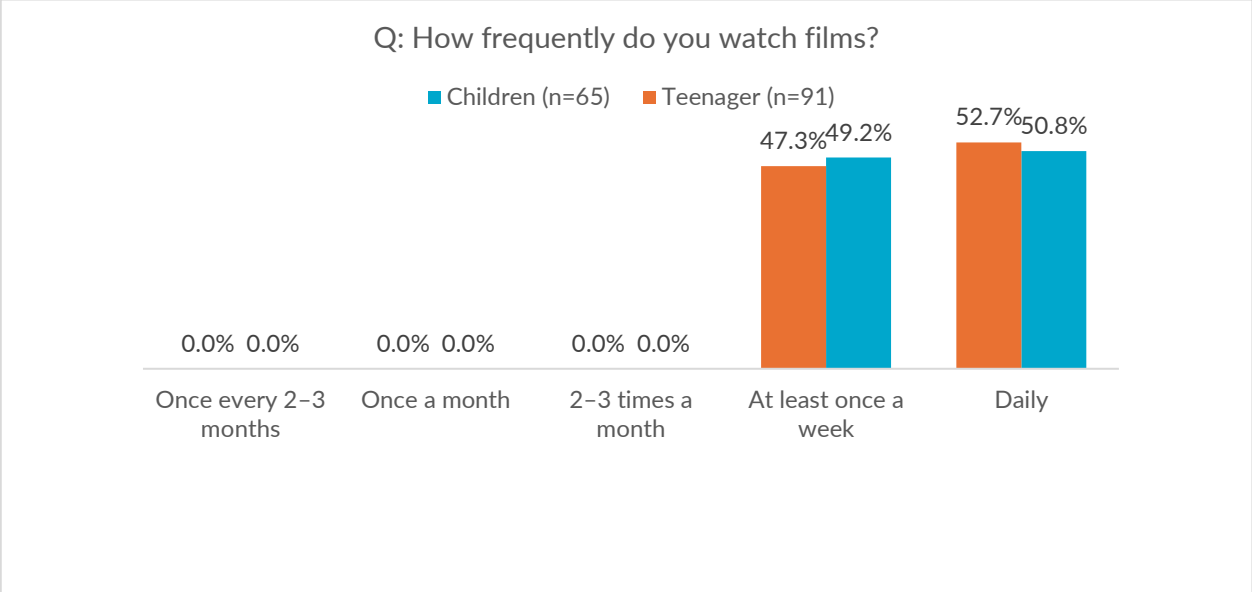


Figure 20: Frequency of children and teenagers watching films in Egypt | Source: Survey data

3.5.5. Family-Centered Viewing Behaviors

Film watching among younger audiences in Egypt is largely a family-centered activity, particularly with parents. The majority of both children and teenagers reported watching films with their parents, accounting for 80% of children and an even higher 87.9% of teenagers.

Siblings and relatives also play a major role in shared viewing experiences across both groups. About 64.6% of children and 68.1% of teenagers reported watching films with siblings or relatives, reinforcing the collective and household-oriented nature of film consumption.

Teenagers are more likely than children to watch films with friends. Around 27.5% of teenagers reported watching films with friends compared to 16.9% of children, suggesting increasing peer-based viewing habits as audiences grow older.

Watching films alone is relatively limited but more common among teenagers. About 20.9% of teenagers reported watching films alone compared to 12.3% of children, indicating greater viewing independence among older youth audiences.

No respondents reported watching films with classmates or schoolmates, with both groups recording 0%, suggesting that film consumption primarily occurs within family and close social settings rather than school-based environments.

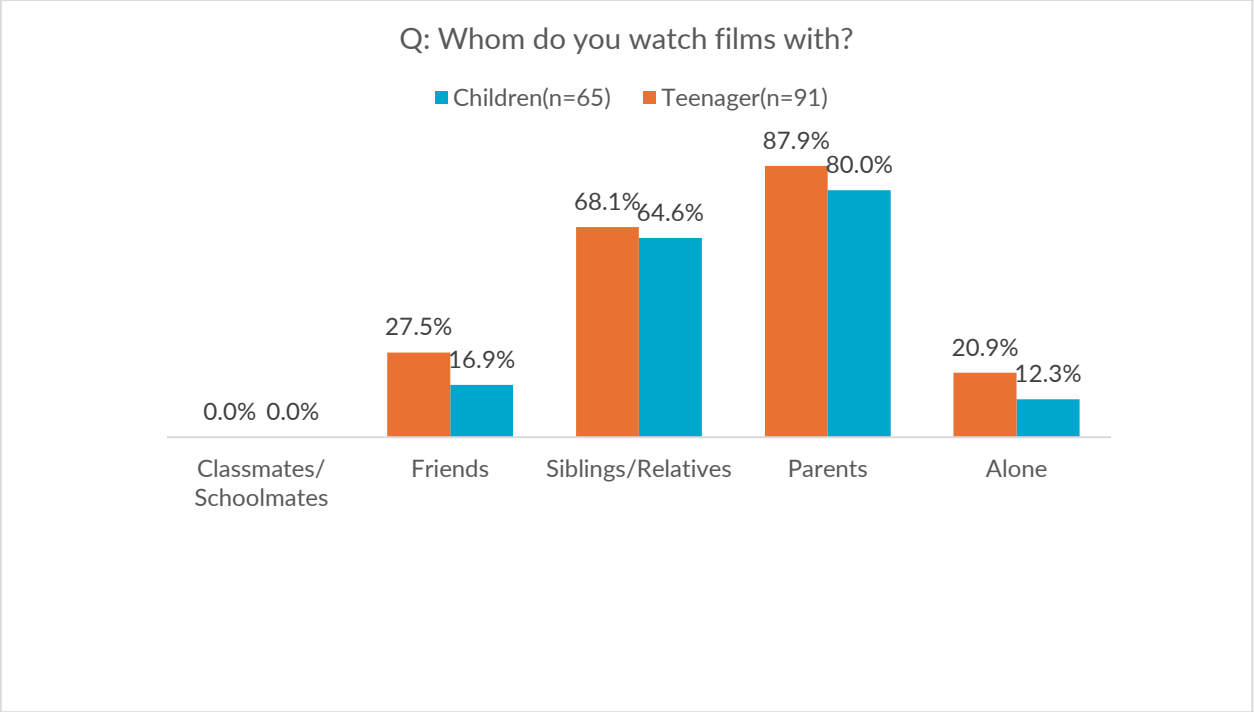


Figure 21: Whom do children and teenagers in Egypt watch films with | Source: Survey data

3.5.6. Film discovery pathways among young audiences

Friends and family are the primary source through which younger audiences in Egypt discover new films. This channel dominates across both groups, cited by 89.2% of children and 95.6% of teenagers, highlighting the strong influence of close social networks and word-of-mouth recommendations in shaping film awareness.

Social media is the second most important discovery channel, particularly among teenagers. About 57.1% of teenagers reported discovering films through social media compared to 47.7% of children, indicating the growing role of digital platforms in influencing entertainment choices among older youth audiences.

Traditional advertising and formal discovery channels play a very limited role overall. Only small proportions of respondents mentioned outdoor advertisements such as billboards (5.5% of teenagers; 1.5% of children) or media advertisements such as radio, newspapers, magazines, and blogs (2.2% of teenagers; 1.5% of children).

Streaming platform recommendations have minimal influence on film discovery. Only 2.2% of teenagers reported finding new films through streaming platform recommendations, while no children (0%) selected/mentioned this option.

Influencers/bloggers and film festivals appear to have no influence on film discovery among these younger audiences, with both categories recording 0% across children and teenagers.

Overall, the findings suggest that film discovery among younger Egyptian audiences is driven primarily by interpersonal recommendations and social media exposure rather than formal marketing, streaming algorithms, or institutional film channels.

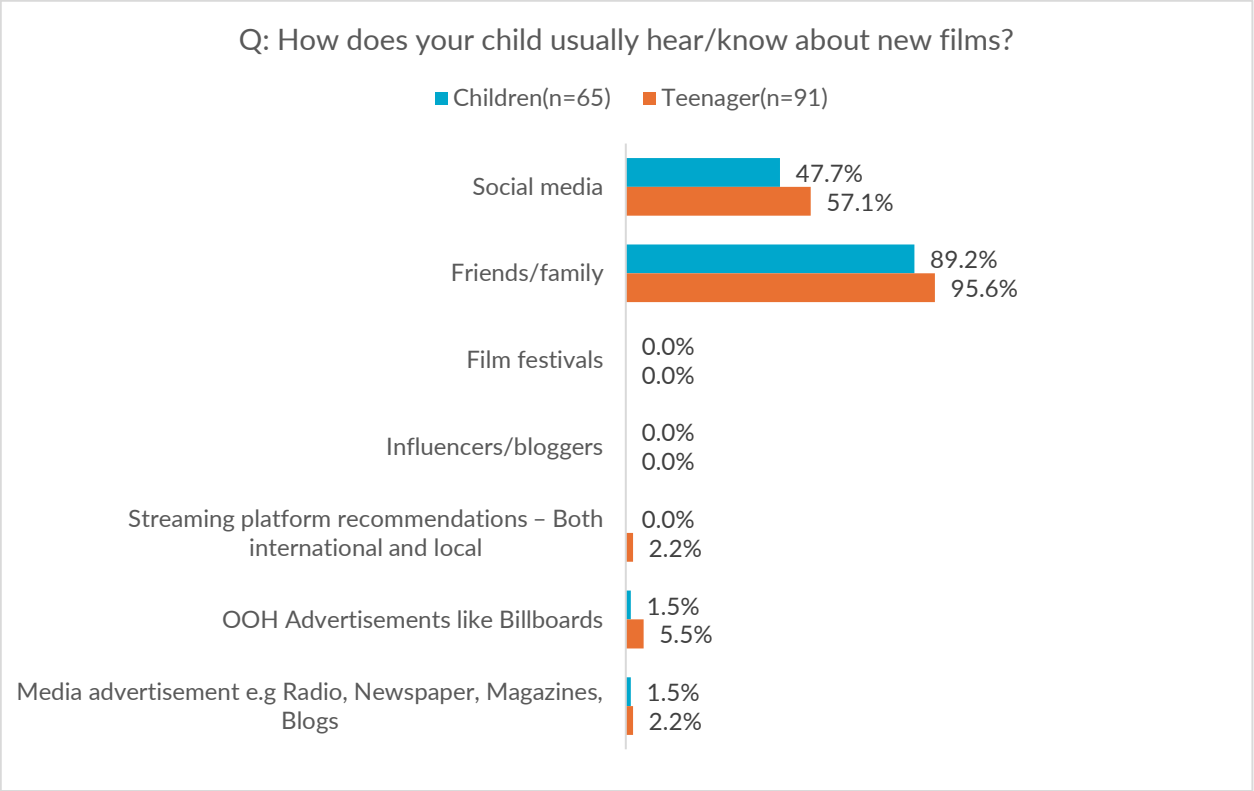


Figure 22: How children and teenagers hear about new films in Egypt | Source: Survey data

3.5.7. Motivations driving film consumption

Fun, entertainment, and relaxation are the primary motivations for watching films among both children and teenagers in Egypt. This was cited by 73.8% of children and an even higher 81.3% of teenagers, making entertainment the strongest driver of film consumption across both groups.

Children are significantly more motivated by family-friendly and safe content than teenagers. About 70.8% of children reported watching films because they are suitable and safe for children/families, compared to only 36.3% of teenagers, reflecting the stronger role of parental guidance and age-appropriate viewing among younger audiences.

Teenagers place much greater emphasis on engaging storytelling. Interesting stories that keep attention were cited by 40.7% of teenagers, compared to only 18.5% of children, suggesting that older audiences are more drawn to narrative depth and compelling plots.

Social influence becomes more important with age. Films that are popular with friends or family motivate 35.2% of teenagers compared to 26.2% of children, indicating stronger peer and social-driven viewing behaviors among teenagers.

Educational value is a secondary but notable motivation, particularly among teenagers. Learning something new or educational motivates 22% of teenagers and 12.3% of children, suggesting increasing interest in informative or knowledge-based content as audiences mature.

Representation and cultural familiarity matter similarly across both groups. Seeing familiar places, languages, or people “like us” was cited by 13.8% of children and 13.2% of teenagers, highlighting the continued importance of culturally relatable storytelling.

Favourite actors, creators, affordability, and visual style are relatively minor motivations overall. For example, favourite actors/characters influence 12.3% of children and 11% of teenagers, while ease and affordability of access motivate fewer than 8% across both groups.

Overall, the findings suggest that film viewing among younger Egyptian audiences is primarily entertainment-driven, but motivations become more story-focused, socially influenced, and educationally oriented as audiences grow older.

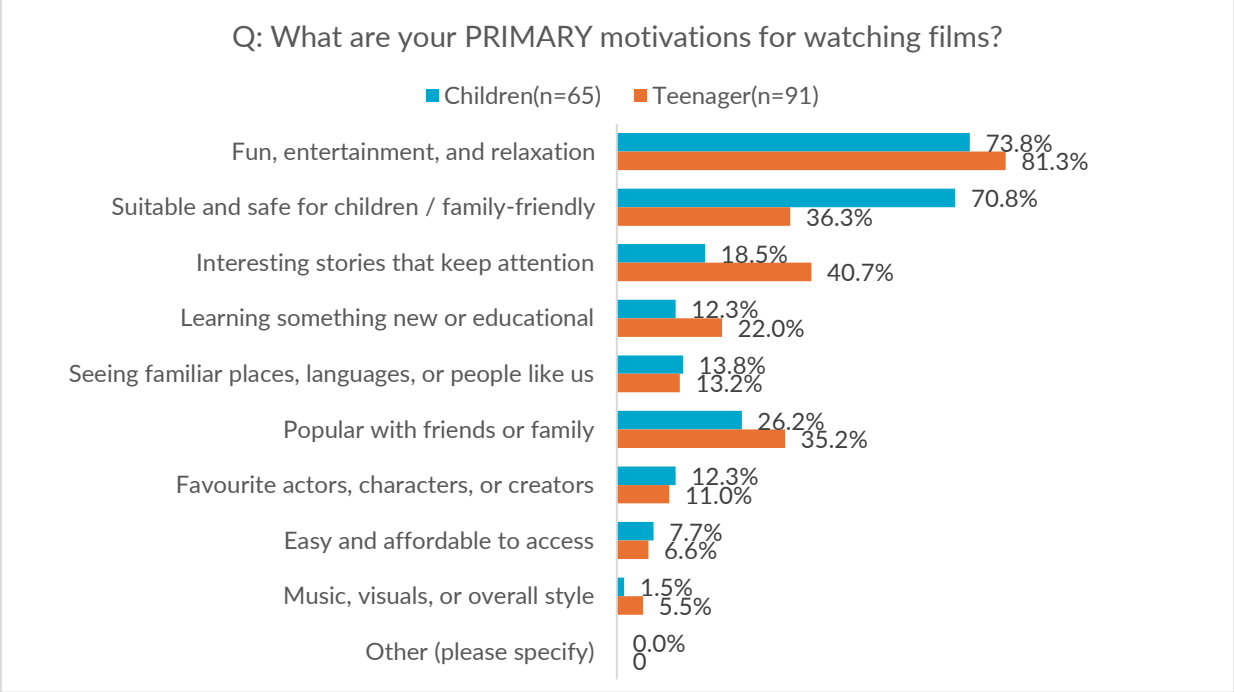


Figure 23: Primary motivation for children and teenagers to watching films in Egypt | Source: Survey data

Conclusion:

The audience study reveal that film consumption is deeply embedded in the everyday lives of younger audiences in Egypt, with both children and teenagers demonstrating high levels of engagement, frequent viewing habits, and strong attachment to locally produced content. Across both groups, Egyptian films dominate viewing preferences, underscoring the importance of culturally familiar storytelling, language, and representation in shaping audience connection and relevance.

The study further highlights clear shifts in viewing behaviour as audiences grow older. While children's preferences remain strongly oriented toward family-friendly, animation-based, and supervised viewing experiences, teenagers exhibit more diversified tastes, broader exposure to international content, stronger interest in emotionally complex genres such as drama and action, and greater independence in both content discovery and viewing behaviour. Social influence, peer engagement, and digital platforms also become increasingly important among teenagers.

At the platform level, traditional television continues to play a dominant role, particularly among children, while YouTube and social media are emerging as key digital gateways for younger audiences. However, subscription streaming platforms remain relatively underpenetrated, suggesting continued barriers related to affordability, accessibility, or household viewing structures. Film discovery is driven largely by family networks and social media rather than formal advertising or institutional channels, reinforcing the importance of community-driven and digitally amplified audience engagement strategies.

Overall, the findings point to a young Egyptian audience that is highly engaged, socially connected, and strongly responsive to culturally relevant entertainment. For industry stakeholders, this presents significant opportunities to strengthen youth audience development through locally resonant storytelling, family-oriented viewing experiences,

digitally driven promotion strategies, and age-responsive content that evolves alongside audience maturity and changing consumption behaviours.

4.0. Case Study

4.1. Case Study: 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 Zawiya, 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.

Recommendation

- 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.

5. Recommendation

5.1 Country-Specific Priorities and Opportunities

Priority opportunities in distribution involve decentralizing infrastructure beyond Cairo and Alexandria and strengthening digital enforcement to protect revenues on OTT platforms. In terms of audience development, there is significant potential for mid-tier films to utilize structured influencer marketing and digital community building to bridge the gap between festival prestige and commercial success. For social impact, the primary opportunity lies in developing intentional partnerships between filmmakers and NGOs to create coordinated advocacy vehicles. Scaling Egypt's potential will require aligning its established production capacity with modern digital infrastructure, diversifying financing through blended models, and leveraging its strategic position as a gateway between the MENA region and the broader African continent.

5.1.1 Priority Opportunities in Distribution

Micro-distribution and direct cinema booking

Several stakeholders point to the success of filmmakers who bypass traditional distributors and negotiate directly with cinemas. This model allows full creative and financial control, reduces dependency on monopolistic distributors, and keeps a larger share of revenue with the filmmaker. The international example of *Hundreds of Beavers*, self-distributed over three years, eventually turning a profit, is cited as proof of concept.

Curated short film packages for commercial cinemas

Short films individually struggle to attract audiences, but packaged as themed programs, eg, three shorts with a common thread or featuring known talent, they can succeed. The Drop the Beat program, three shorts featuring popular rap artists, sold out and extended its run. This model could be replicated across different genres and themes.

Dedicated streaming platform for Arab independent cinema

Stakeholders note the absence of a regional equivalent to Mubi or Criterion Collection. A platform dedicated to curated Arab and African independent films, with affordable subscription tiers, could aggregate demand and provide a sustainable revenue stream for filmmakers who currently have no digital home.

Intra-African distribution networks

Currently, African films rarely circulate within the continent. Establishing formal exchange agreements between festivals, distributors, and cinemas across African countries would open new markets. The success of *Goodbye Julia (2023)*, a Sudanese film performing well across the Arab world, demonstrates existing demand.

5.1.2 Priority Opportunities in Audience Development

Revival of cinema clubs and community screenings

In the 1960s and 1970s, Egypt had 36 cinema clubs that toured villages and towns, screening 35mm films for free or nominal fees. Stakeholders mourn their disappearance and call for their revival, not as commercial venues but as public cultural spaces. The Jesuit model of screening student films followed by discussions could be scaled.

School and university partnerships

Films like *Lana Fi Al-Khial Hob* succeeded partly because schools organized daytime screenings. Formalizing partnerships between distributors and educational institutions—with discounted tickets and curated content aligned with curricula—could build lifelong cinema habits. One stakeholder suggested university film studies departments as natural partners for repertory programming.

Mobile cinema units for underserved governorates

Several NGOs have piloted mobile cinema projects using vans equipped with projectors and screens. These units can reach villages and towns with no permanent cinemas. The Qusayr project, where teenagers made films on their phones and screened them locally, is a model that combines production with exhibition.

Influencer and social media strategies

Traditional marketing posters and TV spots no longer suffices. Stakeholders note that films like *El Hawa Sultan* succeeded partly through short clips circulated on Facebook and Instagram. Investing in targeted social media campaigns, including partnerships with micro-influencers, can reach younger demographics where they already spend time.

5.1.3 Priority Opportunities in Social Impact

Integrating films into public health and education campaigns

Television series have proven effective at raising awareness on health issues (kidney disease, child abuse). Film festivals and NGOs could partner with ministries of health and education to produce short impact films that are screened in schools, clinics, and community centers. The eating disorder project, where participants worked with a psychologist and produced short films, demonstrates a replicable model.

Supporting community-generated storytelling from marginalized regions

The most impactful films, according to stakeholders, are those made by and about communities that rarely see themselves on screen. Southern Egypt, Nubia, and the Delta are almost entirely absent from Egyptian cinema. Funding and training local filmmakers in these regions to tell their own stories rather than Cairo-based directors speaking for them, would produce authentic, resonant content.

Post-screening discussion forums as standard practice

One distributor noted that A Kiss in the Desert holds silent discussions after screenings the audience sits in silence, then speaks spontaneously. Institutionalizing moderated discussions after social impact films in cinemas, cultural centres, and online extends the film's life and deepens its effect. This low-cost intervention turns passive viewing into active engagement.

Documentary impact campaigns modelled on international best practices

Drawing from examples like *The Secret Love (*2020), a Netflix documentary about elderly lesbian couple, impact campaigns can include educational materials, community screenings with facilitated dialogue, and partnerships with relevant NGOs. Egyptian documentaries addressing labor, women's rights, or displacement could adopt similar strategies.

5.1.4 Scaling Potential Recommendations

Stakeholders consistently emphasize that pilot projects and isolated successes are not enough. The following recommendations address how to scale the priority opportunities identified above.

Establish a National Film Distribution Fund

A dedicated public fund, modelled on the now-defunct National Cinema Center but with modern governance, would provide small grants specifically for distribution, not production. Eligible activities could include festival submission fees, marketing campaigns, digital platform licensing, and cinema booking costs. This would address the "missing link" that stakeholders repeatedly identify.

Mandate data sharing as a condition of public funding

Any film receiving public or donor funding should be required to share anonymized exhibition and viewership data. This would create much-needed evidence base about audience behaviour, informing future programming and distribution decisions. A neutral data repository could be managed by a university or industry body.

Scale the collective production model through matching grants

The Tunisian rotating co-production model could be introduced by offering matching grants: for every amount a collective pool from its members, a donor provides a match such as 1:1 up to a cap. This incentivizes self-organization while providing external validation.

Establish an intra-African film exchange program

Use existing platforms such as Luxor African Film Festival, FESPACO, Durban FilmMart to create a formal exchange: each year, 5 Egyptian films are subtitled and distributed in 5 African countries, and vice versa. Fund translation, dubbing, and shipping through a pooled donor mechanism.

Create a legal clinic for independent filmmakers

Establish a legal empowerment program for independent filmmakers comprising:

i. A publicly available library of template contracts in Arabic, drafted and periodically updated by paid entertainment lawyers.
ii. Regular legal literacy workshops at major festivals (cost covered by festival budgets)
iii. A modest hybrid fund to subsidize initial contract reviews for low-budget productions, administered by a film industry body.

Pilot a "film voucher" system for low-income audiences

Modelled on cultural voucher programs in Europe, the government could distribute subsidized cinema vouchers to students, pensioners, and low-income families. The cost is low, and the return in audience development and cultural participation is high. Zawya's affordable pricing already demonstrates demand, therefore vouchers would extend access further.

6. Annex

6.1 Links

To see the catalogue of films from 2020-2025, see this link (Placeholder)

To read the full desk research report for Egypt, see this link (Placeholder)

To see full dataset, see the link (Placeholder)

To see full KII discussion guides, see the link (Placeholder)

To see full case studies discussion guides, see the link (Placeholder)

6.2 Qualitative Questionnaire

Below is the Audience survey questionnaire used during data collection.

African Film Audience Survey

Introduction

Good morning/Good afternoon/Good evening.

My name is xxxx and I am working on behalf of Dalberg Research, a company specializing in market and social research. We are conducting this research to **better understand the viewing habits and preferences of audiences like you**. The goal of this research is to gather evidence-based information on audience demand to inform and **foster the distribution of films from** [Insert Country] and to generally **support the growth of the African film industry**. The data we collect will be vital in developing effective **audience cultivation strategies** and addressing current knowledge gaps regarding audience numbers and characteristics. This survey will take approximately **30 to 45 minutes to complete**.

Please be assured that **your responses are anonymous and confidential**. Your participation is completely voluntary, and if at any point during the interview you feel uncomfortable or wish to stop, you are **free to drop out without needing to give a reason**.

Do you agree to begin the survey?

a. Yes- Continue
b. No – End the Interview

SECTION A: DEMOGRAPHICS & PROFILE

A1. **Enumerator code country. SA**[10]

1. Kenya
2. Rwanda
3. Nigeria
4. South Africa
5. Egypt
6. Senegal

A2. Town/County/ City:(Scripter Instruction: Match the country to the city). SA

Kenya	Rwanda	Nigeria	South Africa	Egypt	Senegal
1.Nairobi	1.Kigali	1.Lagos	1.Jo' Burg	1.Cairo	1.Dakar
2.Kisumu		2.Abuja	2.Cape Town		
3.Mombasa					

What is your name (open end)

A3 (Enumerator: Please observe and code gender) . SA

1. Male
2. Female
3. Non-binary- (Ask only in South Africa)

A4. What is your age? SA

1. 18 - 24
2. 25 - 34

[10] SA-Single Response

3. 35 - 44
4. 45 – 54
5. 55 – 64
6. 65 – 74
7. 75 – 84
8. 85 and above

A5. What is the highest level of education you have completed? SA

1. Secondary/High School or lower
2. College Diploma / Certificate / Intermediate Institute
3. Bachelor's Degree/Higher National Diploma
4. Postgraduate Degree

A6. Which best describes the area you live in? SA

1. Urban
2. Peri-Urban / Suburban
3. Rural

A7. Which of the following best describes your current employment status? SA

1. Employed Full-Time
2. Employed Part-Time
3. Student
4. Self-Employed / Freelancer
5. Unemployed
6. Retired
7. Housewife
8. Prefer not to say

A8. Approximate Household Monthly Income in your local currency:

Type in_____

A9. Which devices do you own?

1. Feature phone
2. Smartphone
3. Tablet/iPad
4. Desktop
5. Laptop
6. Smart TV
7. TV set-top box/ streaming stick (e.g., Roku, Amazon Fire)
8. Projector
9. Gaming consoles – Xbox, Play station etc
10. Free satellite TV
11. Free to air digital TV
12. Other (Specify)
13. None

A10. Do you have children under 18 living in your household SA

1. Yes (Ask A.11)
2. No (Skip to A.13

A.11 What is the age of the children starting from the oldest SA

	0-5 years	**6-9 years**	**10-13 years**	**14-17 years**

Child 1	1	2	3	4
Child 2	1	2	3	4
Child 3	1	2	3	4

A12. Does your household have any domestic workers or caregivers who influence or supervise children's media consumption? ASK IF CODED 1 IN A.10

1. Yes
2. No

A13. Who typically makes decisions about what films, TV shows, or media the household watches? MA

1. Myself
2. Another adult in the household
3. Joint decision-making (multiple adults)
4. Children influence decisions
5. Each person watches individually
6. Other (Specify)

A14. Does your household share devices for watching films (e.g., TV, smartphone, tablet)? SA

1. Yes — shared devices
2. No — everyone has personal devices
3. Mixed (some shared, some personal)

A15.Which devices are shared? (Ask for what was selected in A9) MA

1. Feature phone
2. Smartphone
3. Tablet/iPad
4. Desktop
5. Laptop
6. Smart TV
7. TV set-top box/ streaming stick (e.g., Roku, Amazon Fire)
8. Projector
9. Gaming consoles – Xbox, Play station etc
10. Free satellite TV
11. Other (Specify

SECTION B: GENERAL FILM CONSUMPTION HABITS

B1. When you think of the Films that you watch, from which of these regions are they produced? MA

1. **Local Films (Produced by filmmakers from [Insert Country])**
2. **African Films (Produced in African countries other than your own)**
3. American Films
4. European Films
5. Indian Bollywood/Indian Tollywood Films
6. Chinese Films
7. Japanese Films
8. Korean Drama (South Korea)
9. Latin American Films
10. Turkish Films
11. Other (Specify)

12. I do not watch films- Terminate

B1a. And from which region is your MOST OFTEN watched films produced. SA

(Select options mentioned from B1)

1. **Local Films (Produced by filmmakers from [Insert Country])**
2. **African Films (Produced in African countries other than your own)**
3. American Films
4. European Films
5. Indian Bollywood/Indian Tollywood Films
6. Chinese Films
7. Japanese Films
8. Korean Drama (South Korea)
9. Latin American Films
10. Turkish Films
11. Other (Specify)

B1b. Which device(s) do you use to watch [Insert B1a] **films? MA**

1. Smartphone / Tablet
2. Laptop
3. Smart TV
4. Pay TV (e.g., DStv, StarSat, Canal+)
5. Other (Specify)

B1c: Which other African countries' films do you watch? (Select all that apply)
(ASK IF B1 = 2)

(don't show country coded in (A1))

1. Nigeria
2. South Africa
3. Kenya
4. Egypt
5. Senegal
6. Rwanda
7. Ghana
8. Tunisia
9. Morrocco
10. Other (Specify)

B1d. Which of the following best describe why you do NOT watch African or [Insert Country] **produced films? MA**

(ASK IF B1 = 1 and/or 2)

1. I am not interested in the stories or themes
2. I prefer international (e.g. Hollywood, European, Asian) films
3. I am not aware of many African or local films
4. The production quality is not appealing to me
5. They are not easily available on the platforms I use
6. Language or subtitles are a barrier
7. They are too expensive / not worth the cost
8. ~~I do not have time to watch films~~
9. I rarely watch films in general
10. Other (please specify)
11. Prefer not to say

B1e. Which of the following, if any, would make you more likely to watch an African or locally produced film in the future? MA

(ASK IF B1 = !1 and/or 2)

1. Strong recommendations from friends or family
2. Positive reviews or ratings
3. Better storytelling or more relatable stories
4. Higher production quality
5. Availability on platforms I already use
6. Lower cost or free access
7. Well-known actors, directors, or producers
8. Awards, festival recognition, or international success
9. Better marketing or promotion
10. Nothing would make me interested
11. Other (please specify)

B2. Through which platforms do you mostly watch [Insert B1] **films? MA**

1. VOD- Streaming platforms for example YouTube, Netflix, Philit, EbonyPlus, Netflix, Showmax, Amazon, AfriFlix, Shahid, WatchIT etc
2. Cinema
3. Festival
4. Video Rentals
5. TV
6. Social media

B3. If you do not watch [Insert B1] **films in cinemas, why not? (if not selected 2 in B2). MA**

1. The cost of the tickets is high/expensive
2. There is no cinema near me
3. I prefer waiting and watching on other platforms at my convenience
4. Poor cinema quality *(e.g., low-quality projection, poor sound, uncomfortable seating, or an overall unsatisfactory cinema environment)*
5. I am not interested in watching [B1] films in cinemas
6. I can get pirated versions at a cheaper or more affordable rate
7. I am never aware of [B1] films being shown in cinemas (Please specify why)?
8. No time to go to the cinema
9. Other (specify)

SECTION C: PLATFORM SPECIFIC MODULES

C1. VOD / STREAMING PLATFORMS

(ASK IF B2 = 1)

C1.1 Which streaming platforms do you regularly use to watch films? MA

ONLY SHOW COUNTRY OPTIONS AS CODED IN A.1

Kenya	Nigeria	Rwanda	South Africa	Egypt	Senegal

1. Netflix 2. Showmax 3. YouTube 4. Viusasa 5. MyMovies Africa / Yakwetu Tv 6. Amazon 7. Prime Video 8. AfriFlix 9. DStv Stream 10. Digital Pirated Websites 11. Other (specify)	1. Netflix 2. Showmax 3. YouTube 4. Amazon Prime Video 5. DStv Stream 6. Kava TV 7. Digital Pirated Websites 8. Circuit TV 9. Other (specify)	1. Netflix 2. Showmax 3. YouTube 4. Canal+ Online 5. Amazon Prime Video 6. Digital Pirated Websites 7. Other (specify)	1. Netflix 2. Showmax 3. YouTube 4. Amazon Prime Video 5. DStv Stream 6. Disney+ 7. Apple TV+ 8. Digital Pirated Websites 9. Other (specify)	1. Netflix 2. Shahid 3. YouTube 4. Watch iT 5. StarzPlay 6. Disney+ 7. OSN 8. Digital Pirated Websites 9. Other (specify)	1. Netflix 2. Canal+ Online 3. YouTube 4. StarzPlay 5. Shahid 6. Amazon Prime Video 7. Digital Pirated Websites 8. Other (specify)

C1.2 Which types of films do you watch on (C1.1)? MA
(Ask for ones coded in B1)

1. Local Films (Produced by filmmakers from [Insert Country])
2. African Films (Produced in African countries other than your own)
3. American Films
4. European Films
5. Indian Bollywood/Tollywood Films
6. Chinese Films
7. Japanese Films
8. Korean Drama (South Korea)
9. Latin American Films
10. Turkish Films
11. Other (Specify)

C1.3. How often do you watch [Insert **C1.2.**] **films on streaming platforms? SA**

1. Daily
2. Weekly
3. Monthly
4. Rarely

C1.4. Which device(s) do you use to stream [Insert **C1.2.**] **films? MA**

1. Smartphone / Tablet

2. Laptop
3. Smart TV
4. Pay TV (e.g., DStv, StarSat, Canal+)
5. Other (Specify)

C1.5. Why do you prefer watching [Insert **C1.2.**] films through **streaming platforms?**

Type in_____

C1.6. In total, how much do you spend on streaming platforms in a month? (If you do not spend, why?)

Type in_____

C1.7. How many paid streaming services are you subscribed to or regularly use

Type in _____

Piracy Frequency (If selected pirated websites in C1

C1.8. How often do you use unofficial or pirated websites/apps to watch [Insert **C1.2.**] **films? SA**

1. Rarely (Only when I cannot find it anywhere else legally)
2. Sometimes (For a significant portion of films I watch)
3. Often (It's my primary method for watching films)

C1.9. What are the main reasons you might use unofficial or pirated sources to watch an [Insert C1.2.] film? *MA*

1. Poor variety of films on mainstream platforms
2. Expensive subscription costs
3. Ability to watch films not shown in the Africa region
4. Able to watch recent films not on mainstream platforms
5. Able to access sport content
6. Other Specify

C2. CINEMA (MAINSTREAM & MAKESHIFT)

(ASK IF B2 = 2)

C2.1 What type of cinemas do you watch films in: MA

1. Mainstream Cinema/Box Office
2. Makeshift estate cinema rooms

C2.3. How many times have you been to the cinema in the past 12 months:

Type in_____

C2.4 On average how much do you spend per visit to the cinema either alone, with family or with friends? -Per person **(If you do not spend, why?)**

Type in_____

C2.5 Who do you usually go to the cinema with? MA

1. Alone
2. Partner
3. Family
4. Friends/ colleagues
5. Other specify

C2.6 Why do you prefer to go to the cinemas to watch [Insert B1] films?

Type in_____

C3. FILM FESTIVALS & COMMUNITY SCREENINGS

(ASK IF B2 = 3)

C3.1 What kind of screening events do you attend: MA

1. Film festivals
2. Community screenings/ viewing

C3.3. How many times have you attended film festivals or community screenings in the last 12 months?

1. Type in _____

C3.4 Why do you attend film festivals or community screenings to watch [Insert **B1**] **films? MA**

1. Access to films not available elsewhere
2. Lower or no cost
3. Community experience
4. Support [B1] filmmakers
5. Other (Specify)

C3.5 How much on average do you usually spend/pay to attend a film festival or community screening? (If you do not spend, why?)

Type in_____

C4. VIDEO RENTALS

(ASK IF B2 = 4)

C4.1. Where do you usually rent or buy films? MA

1. Local video shops
2. Street vendors
3. Friends or informal sellers
4. Digital Video Rentals
5. Other (Specify)

C4.2 Why do you use video rentals instead of cinemas or streaming? MA

1. More affordable
2. Internet access issues
3. Content availability
4. Convenience
5. Other (Specify)

C4.4. How frequently do you rent/purchase videos in a month

Type in_____

C4.5 How much do you usually spend on video rentals for [Insert **B1**] ilms per video**? (If you do not spend, why?)**

Type in_____

C5. TV/Broadcasting Stations

(ASK IF B2 = 5)

C5.1 What type of TV films do you watch MA

1. TV (Free-to-air)
2. Pay TV (e.g., DStv, Canal+, StarTimes, Go Tv)

C5.3 How often do you watch films on TV? MA

1. Daily
2. Weekly
3. Monthly

C5.4 Which device(s) do you use to watch [Insert **B1**] **films on TV? MA**

6. Smartphone / Tablet
7. Laptop
8. Smart TV
9. Pay TV (e.g., DStv, StarSat, Canal+)
10. Other (Specify)

C5.5 Why do you prefer watching [Insert **B1**] **films on TV? MA**

1. Convenience
2. Affordable cost
3. Wide film selection
4. Ability to watch anytime
5. Better video quality
6. Other (Specify)

C5.6 In total, how much do you spend on TV subscription in a month? (If you do not spend, why?)

(Ask only if coded 2 in C5.1)

Type in_____

C6. SOCIAL MEDIA

C6.1. Which social media platforms do you use most often to watch films or series? MA

1. TikTok
2. Facebook
3. Instagram
4. X (formerly Twitter)
5. Telegram
6. Other (specify

C6.3. How often do you watch [Insert **B1**] **films on social media? SA**

1. Daily
2. Weekly
3. Monthly

C6.4. Which device(s) do you use social media to watch [Insert **B1**] **films? MA**

1. Smartphone / Tablet
2. Laptop
3. Other (Specify)

C6.5 Why do you prefer social media for watching [Insert **B1**] films**?**

Type in_____

Preferred Alternative

C7. In the absence of streaming platforms and cinemas, which of this option would you ideally revert to? (Select only ONE)

1. Community screenings or mobile cinemas
2. Free-to-air TV broadcast of films
3. Making films available on affordable DVDs/USB sticks
4. Extremely low-cost Pay TV tiers
5. Other Specify

SECTION D : CONTENT PREFERENCES & PERCEPTIONS

D1. What genre of [Insert B1a.] films do you watch? MA

D2. And which ones would you like to see [insert B1a.] films focus on? MA

Genre	D.1	D.2
Sci-Fi	1	1
Drama	2	2
Documentary	3	3
Horror	4	4
Mystical/ Fantasy World	5	5
Animation/ Cartoons	6	6
Comedy	7	7
Action	8	8
Romantic Comedy	9	9
Others _____	10	10

D3. What type of storytelling do you prefer? MA

1. Fast-paced and exciting
2. Slow-burn and deep
3. Humorous and uplifting
4. Dark and gritty
5. Light, warm, feel good
6. High drama and emotional intensity
7. Very real and relatable
8. Escapist stories that take me into another world

D4. How important is it for you that a film is "locally made/ produced"? SA

1. Very Important
2. Somewhat Important
3. Neutral
4. Not Very Important
5. Not Important at All

D5. How important are the following factors when choosing a [insert B1a.] film to watch? SA

Use D4 options	Not Important				Very Important
Acting quality	1	2	3	4	5
Genre	1	2	3	4	5
Plot/Theme	1	2	3	4	5
Technical quality (sound, visuals, editing)	1	2	3	4	5
Language/subtitles	1	2	3	4	5

Representation of African cultures / Cultural Relevance	1	2	3	4	5
Producing Director	1	2	3	4	5
Actors	1	2	3	4	5
Reviews and Rating	1	2	3	4	5
Popularity/ Trending Film	1	2	3	4	5
Movie type - Series or Movie	1	2	3	4	5
Awards and Recognition	1	2	3	4	5
Peer recommendation / word of mouth	1	2	3	4	5
Marketing Campaign like Ads, social media posts, influencer promotions	1	2	3	4	5

D6. How do you usually hear/know about new [insert B1a.] films? MA

1. Social media (Specify)
2. Friends/family
3. Film festivals (Please specify)
4. Influencers/bloggers (Please specify)
5. streaming platform recommendations – Both international and local
6. OOH Advertisements like Billboards
7. Cinemas Advertisements (Please specify)
8. Media advertisement e.g Radio, Newspaper, Magazines, Blogs (Please specify)

D7. What are your PRIMARY motivations for watching [insert B1a] films? MA

1. Cultural Connection / Identity
2. Entertainment / Relaxation
3. Family friendly and for kids
4. High-Quality Storytelling
5. To see and support my country/region represented
6. Educational / Learning about social issues
7. The actors or director
8. Affordability / Accessibility
9. Recommendation from friends/family
10. Controversial / Much discussed movie
11. Good soundtrack and style
12. Others specify

D8. Which of the following social impact themes would you be MOST interested in watching a film for? MA

1. Strong women overcoming challenges and changing their lives
2. Young people chasing opportunities, education, or a better future
3. Stories about protecting nature, land, or dealing with climate changes
4. Stories about power, politics, corruption, or standing up to injustice
5. Love, relationships, and health challenges around sex or family life
6. Personal struggles with stress, trauma, or mental well-being
7. Stories about love, identity, and belonging that challenge social norms
8. Stories about different cultures or religions learning to live together
9. Stories about money, business, survival, or building a better livelihood
10. I prefer films mainly for entertainment, not social issues

D9. Compared to 5 years ago, how has the quality of Local/African films changed? SA

1. Much improved

2. Slightly improved
3. Stayed the same
4. Declined
5. Don't know

SECTION E: DRIVERS & BARRIERS

E1. How do you AGREE or DISAGREE with the following statements about Local /African films? (Scale: 1=Strongly Disagree, 2=Disagree, 3=Neutral, 4=Agree, 5=Strongly Agree) SA

Note to scripting: Please randomize

1. The production quality of **Local** /African films has improved significantly in the last 5 years.
2. It is easy to find **Local** /African films I want to watch.
3. **Local** /African films tell authentic and relatable stories.
4. There is a good variety of genres and themes available.
5. I am willing to pay for high-quality **Local** /African film content.
6. Many African films still have poor sound or visual quality.
7. It is difficult to find **Local** /African films on mainstream platforms.
8. **Local** /African films often repeat the same stories.
9. **Local** /African films lack creativity
10. **Local** /African films are not promoted or marketed.
11. I feel **Local** /African films are released on platforms that are easy for me to access
12. I don't think **Local** /African films can compete with international films in quality.

E2. What are the BIGGEST barriers that limit how often you watch Local /African films? MA

1. High cost of subscriptions or pay-per-view
2. Poor internet connectivity / High data costs
3. Difficulty in finding where to watch them
4. Low production quality (e.g., picture, sound)
5. Storylines are not original.
6. Storylines are not engaging
7. Prefer international (Hollywood, Bollywood, etc.) content
8. Lack of awareness about new releases
9. Limited availability of films from other African countries
10. There are no significant barriers for me
11. Other specify

SECTION F: BEHAVIOURAL ENGAGEMENT WITH FILMS

F1. Thinking about the last 3 [Insert B1a.] films you watched, what did you do immediately AFTER watching? MA

1. Searched for the actor/director online
2. Looked for more films from the same country
3. Recommended it to someone in person
4. Shared about it on social media (e.g., posted, tweeted, shared a clip)
5. Read reviews or articles about it
6. Looked up the social issue discussed in the film
7. Nothing specific
8. Other (Specify)

F2. Which of these activities have you done in the PAST 3 MONTHS specifically for [Insert B1a.] film? MA

1. Paid for/ buy an [Insert Country] film on a digital platform (e.g. Kenya: Phil-it tv, My movies Africa or Ya Kwetu etc)
2. Purposely went to a cinema to watch a specific [Insert Country] film
3. Watched an [Insert Country] film at a community screening or film festival
4. Actively searched for and downloaded an [Insert Country] film
5. Followed an [Insert Country] film director or actor on social media
6. Joined an online group or forum dedicated to [Insert Country] cinema
7. None of the above

F3. On a scale of 0-10 -If a friend asked you for a film recommendation TODAY, how likely would you be to recommend an [Insert Country] film? (*Where* 0 *is Very unlikely and 10 is very likely.) SA*

Very Unlikely										Very Likely
0	1	2	3	4	5	6	7	8	9	10

F4. Imagine a new [Insert Country] film that is released. Which viewing option are you MOST LIKELY to choose? SA

1. Go to the cinema in the first week
2. Go to the cinema after the first week, if reviews are good
3. Wait for it to be released on a streaming service I already subscribe to
4. Wait for it to be released and rent it on a digital platform (e.g., YouTube, iTunes)
5. Actively look for a free (and potentially pirated) copy online
6. I would probably not Watch iT

SECTION G: CINEMA vs. HOME VIEWERING & SPENDING

G1. When you think of watching films, where do you prefer to watch?

(Ask if 2 in B2)

1. Home / A friend's House
2. Cinema

G2. What are the PRIMARY reasons you PREFER watching films at HOME rather than in the cinema?

(Ask If G1 = 2 is not coded)

1. Cost (it's cheaper or free to watch at home)
2. Comfort and Convenience
3. Ability to pause and resume
4. Poor cinema experience in my area (e.g., quality, maintenance)
5. Safety and Security concerns
6. I can watch a wider variety of [Insert Country] films at home
7. Distance
8. Other (Specify)

G3,1. What is the AVERAGE price you currently pay for a single ticket to watch a highly anticipated film in the cinema

(Type in local currency) _____

G3.2. What is the MAXIMUM amount you would be willing to pay for a single ticket to watch a *highly anticipated* film in the cinema?

(Type in local currency) _____

G4. On average, how many films do you watch in a month?

Type in_____

G5. And out of those, how many are [insert country] films?

Type in_____

G6. Which of the following would motivate you to watch MORE [Insert Country] films? MA (Top 3)

1. Lower subscription prices for streaming services
2. "Free with ads" tiers on major platforms
3. Better personalization and recommendations
4. More high-quality original African films
5. Availability of films from different African countries
6. More reliable offline download features
7. Pay-per-film/view option
8. Pay-to-own/Rent
9. Nothing, I already stream as much as I want

SECTION H: RECOMMENDATIONS FOR THE AFRICAN FILM INDUSTRY

We value your opinion on how to improve the [Insert Country] film experience. Please tell us what you think should be prioritized.

H1. To make [Insert Country] films more enjoyable, which of the following should be the HIGHEST priority for filmmakers and producers? SA

1. Improving overall production quality (picture, sound, editing)
2. Investing in more original and creative storytelling
3. Exploring new and diverse genres (e.g., sci-fi, fantasy, thriller)
4. Working with bigger-name actors
5. Focusing on more relatable, everyday stories
6. Increasing the quantity of films released
7. More female-led stories
8. More films for family and kids

H2. Which of the following would make you MORE WILLING TO PAY to watch [Insert Country] films? MA

1. Lower prices (e.g., $2-$3 per film): Specify
2. Lesser number of platforms and payment models
3. More affordable monthly subscription plans
4. "Free with ads" options on major platforms
5. Higher quality and more reliable content (no buffering, high definition)
6. Exclusive early access to new films before free platforms
7. Bundled offers (e.g., film subscription with mobile data or music service)

H3. How can streaming platforms (like Netflix, Showmax, etc.) IMPROVE how they showcase Local/African films? MA

1. Creating more prominent "African Cinema" categories or hubs
2. Investing in more high-quality African Original series and films
3. Improving marketing and trailers for African content
4. Providing better information (synopsis, cast, reviews) for each film
5. Making it easier to find films from specific African countries
6. Other specify

H4. What is the MOST important thing that could be done to make it EASIER for you to discover and watch Local/African films? SA

1. A single, reliable website or app that lists all available African films and where to stream them.
2. Better use of social media and influences to promote new releases.
3. More film festivals (online or in-person) showcasing African content.
4. Streaming platforms doing a better job of suggesting African films I might like.
5. Traditional media (TV, radio) promoting African films more often.

H5. If you could send one direct message to [Insert Country] filmmakers and streaming platforms, what would it primarily be about? (Please select the ONE that best reflects your overall feeling) SA

1. Focus on Quality Over Quantity.
2. Tell More Diverse and Original Stories.
3. Make Your Films Easier to Find and Access.
4. Improve Your Marketing - We Don't Know About Your Great Films!
5. We Are Willing to Pay for Good Content if the Value is Fair.

SECTION CC: CHILDREN'S VIEWING BEHAVIOUR

(Only ask if respondents have children under 18. Otherwise skip to End. Ask Adult if option 1and/or 2 in A11, and one preteen or teenager if option 3 and/or 4 in A11)

CC1. Which types of films do you/your child watch?
(Select all that apply)

1. Local Films (Produced by filmmakers from [Insert Country])
2. African Films (Produced in African countries other than your own)
3. American Films
4. European Films
5. Indian Bollywood / Tollywood Films
6. Chinese Films
7. Japanese Films
8. Korean Drama (South Korea)
9. Latin American Films
10. Turkish Films
11. Other (Specify)
12. They/I do not watch films – (Ask CC1.1 then terminate)

CC1.1 Why don't you/your child watch films?

Type in_____

CC2. What genre of films do you/your child watch? (Select all that apply)

1. Sci-Fi
2. Drama
3. Documentary
4. Horror
5. Mystical/ Fantasy World
6. Animation/ Cartoons
7. Comedy
8. Action
9. Romantic Comedy
10. Others

CC3. Through which platforms do you/your child mostly watch films**?**
(Select all that apply)

1. YouTube
2. Streaming platforms (e.g., Philit, EbonyPlus, Netflix, Showmax, Amazon, AfriFlix)
3. Digital Pirated Websites
4. Mainstream Cinema/Box Office
5. Makeshift estate cinema rooms
6. Film festivals-
7. Community screenings/ viewing
8. Video Rentals
9. TV (Free-to-air)
10. Pay TV (e.g., DStv, Canal+, StarTimes, Go Tv)
11. Social media (e.g., TikTok, Facebook, Instagram)

CC4 Which device(s) do you/your child use to watch [Insert CC1] **films? MA**

1. Smartphone / Tablet
2. Laptop
3. Smart TV
4. Pay TV (e.g., DStv, StarSat, Canal+)
5. Free satellite TV
6. Free-to-air digital TV
7. Other (Specify)

CC5 How frequently do you/your child watch films:

1. Daily
2. At least once a week
3. 2–3 times a month
4. Once a month
5. Once every 2–3 months

CC6. Whom do you/your child watch films with?

1. Alone
2. Parents
3. Siblings/Relatives
4. Friends
5. Classmates/ Schoolmates

CC6. How do you/your child usually hear/know about new films? (Select all that apply)

1. Social media (Specify)
2. Friends/family
3. Film festivals (Please specify)
4. Influencers/bloggers (Please specify)
5. streaming platform recommendations – Both international and local
6. OOH Advertisements like Billboards
7. Cinemas Advertisements (Please specify)
8. Media advertisement e.g Radio, Newspaper, Magazines, Blogs (Please specify)

CC7. What are your/your child's PRIMARY motivations for watching films?

1. Fun, entertainment, and relaxation
2. Suitable and safe for children / family-friendly
3. Interesting stories that keep attention
4. Learning something new or educational
5. Seeing familiar places, languages, or people like us

6. Popular with friends or family
7. Favourite actors, characters, or creators
8. Easy and affordable to access
9. Music, visuals, or overall style
10. Other (please specify)

Closing Remarks

Thank you for your valuable time and input. Your responses will help in understanding and supporting the growth of the African film industry.