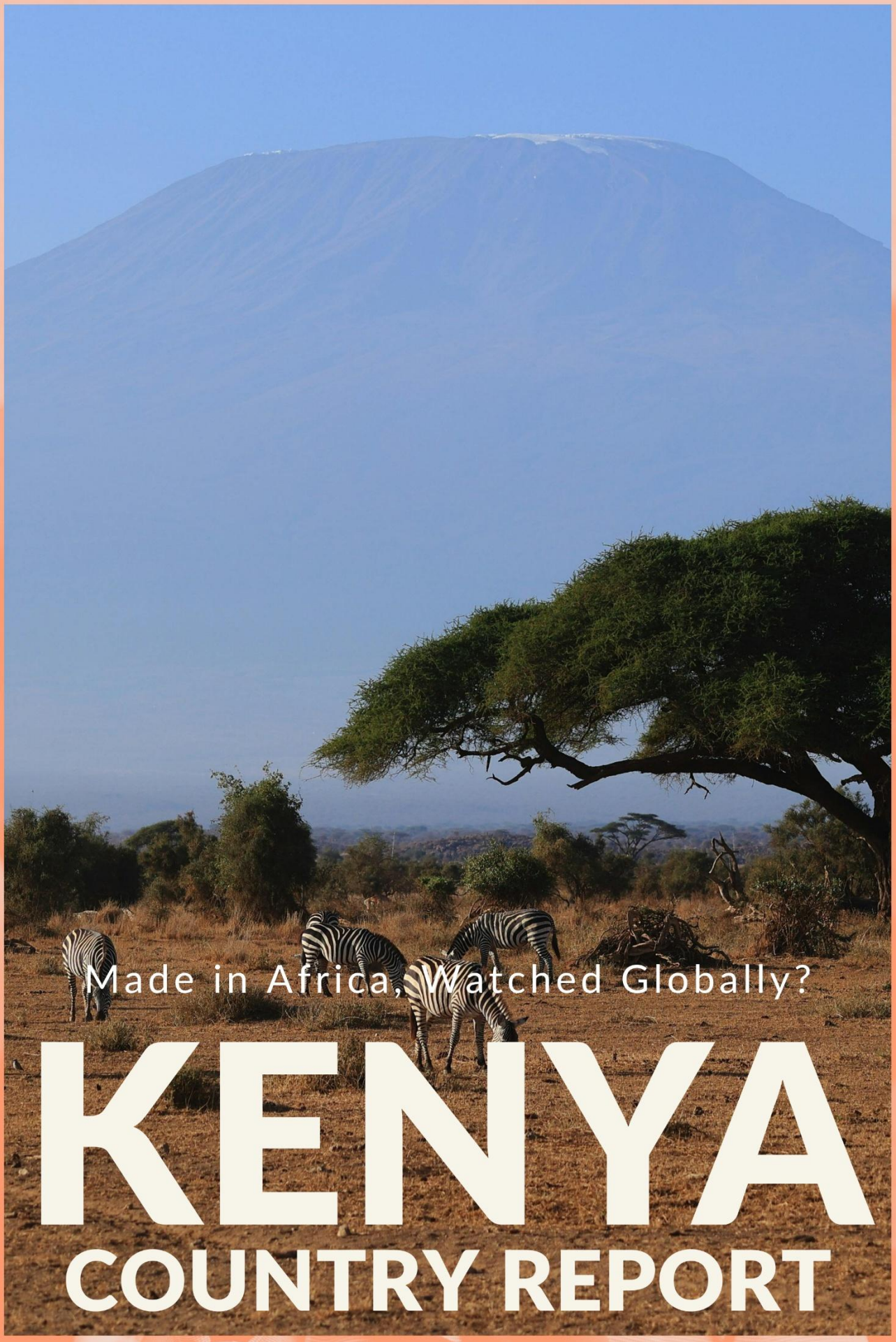


Made in Africa, Watched Globally?

KENYA
COUNTRY REPORT

giz Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) GmbH

AFREXIMBANK

CANEX Creative Africa Nexus

Dalberg

Foreword

Kenya stands today at a defining moment in the evolution of Africa's audiovisual landscape. As one of the continent's most dynamic creative economies, the country possesses the talent, entrepreneurial spirit, cultural richness, and technological adaptability required to become a leading hub for audiovisual production and distribution across Africa and beyond.

The discussions and reflections captured throughout this report reaffirm that the future of Kenya's film and media ecosystem will depend not only on infrastructure and financing, but also and perhaps more importantly, on what I would call "mindset transformation".

A sustainable audiovisual industry cannot be built on passive expectations or intermittent interventions alone. It requires a proactive, industry-led approach in which creators, distributors, policymakers, investors, exhibitors, broadcasters, and digital platforms work collectively toward long-term structural growth.

One of the most urgent opportunities identified is the creation and circulation of reliable industry datasets. While this remains an underdeveloped area across many African markets, Kenya is particularly well-positioned to pioneer practical solutions in audience measurement, distribution analytics, consumer insights, and market intelligence. In many respects, only a few strategic adjustments are needed for this to become a reality. Better access to credible data would not only improve investment confidence but also strengthen policymaking, audience targeting, content development, and regional distribution strategies.

Equally important is the question of audience building. The long-term viability of Kenya's audiovisual sector depends on cultivating stronger viewing cultures, improving access to local content, and creating more meaningful connections between stories and communities. The growth of digital platforms, mobile consumption, and youth-driven media engagement presents significant opportunities to expand audiences beyond traditional cinema and broadcast models. However, this growth must be intentional, inclusive, and supported by sustained collaboration across the value chain.

To conclude, I'd like to insist once again on the need for greater collaboration within the ecosystem itself. By fostering more collaborative frameworks between public institutions, private companies, creators, and continental networks, the industry can move from fragmented efforts toward a more unified and scalable ecosystem.

When knowledge is shared effectively and matched with decisive action, meaningful change becomes possible.

Kenya already has the foundations. The next phase will depend on collective ambition, practical innovation, and the willingness to build an audiovisual ecosystem that is both locally sustainable and globally competitive.

The future can and will be bright if we collectively take those small steps in the right direction.

Yours sincerely,

Serge Noukoué

Okada Media Distribution

Table of Contents

Foreword 2
Table of Contents 3
Executive Summary 4
1. Introduction 8
1.1 Background and context 8
1.2 Objectives and research questions 8
1.3 Methodology and scope 9
1.5 Limitations 10
2. Country Context 11
2.1 Country Context 11
3. Findings 18
3.1 Film Distribution 18
3.2. Audience Development 33
3.3 Social Impact 53
3.4 Financing and Enabling Environment 58
3.5 Children's Consumption Landscape 62
4.0. Case Study 70
4.1. Social Impact- Impact, access and limits of exposure 70
5. Recommendation 72
5.1 Country-Specific Priorities and Opportunities 72
6. Annex 74
6.1 Links 74
6.2 Qualitative Questionnaire 74

Executive Summary

Kenya's film industry has emerged as a significant contributor to the country's creative economy, contributing approximately 5% to national GDP and generating an estimated KES 86.9 billion in gross output value in 2022. The sector continues to demonstrate resilience and growth potential, supported by a young and increasingly digital population, rising internet penetration, and expanding demand for African stories locally and globally.

Historically, the industry has evolved from a colonial-era production hub primarily serving foreign filmmakers into a more locally driven storytelling ecosystem. Landmark productions such as Saïkati and Nairobi Half Life helped establish Kenya's identity as a producer of authentic African narratives, while the rise of digital technologies democratized filmmaking and expanded opportunities for independent creators.

Kenya now maintains a strong domestic production base, with local productions accounting for approximately 66% of all content classified by the Kenya Film Classification Board (KFCB) between July 2022 and March 2023. Short films, documentaries, and episodic content dominate production due to lower production costs and faster turnaround times, while the country has also positioned itself as a regional hub for documentary and factual storytelling.

Despite this momentum, the industry remains structurally constrained by underinvestment, limited exhibition infrastructure, fragmented distribution systems, piracy, and weak monetization channels. The absence of robust incentives, limited cinema infrastructure outside Nairobi, and overreliance on donor and foreign funding continue to restrict the industry's scalability and long-term sustainability.

Film Distribution

Kenya's distribution ecosystem is characterized by a dual structure: a constrained theatrical market alongside rapidly expanding digital distribution channels. The cinema landscape remains underdeveloped, with fewer than 50 screens nationwide and over 75% concentrated in Nairobi. International films dominate theatrical exhibition, occupying approximately 85-90% of cinema screens annually, while local films are typically confined to limited screenings or off-peak schedules.

As a result, many Kenyan filmmakers increasingly bypass theatrical releases in favor of digital-first distribution models. Streaming platforms such as Showmax, Netflix, Viusasa, and YouTube have become central distribution channels for Kenyan content. Showmax previously emerged as the most significant institutional buyer of premium Kenyan scripted content, while local platforms such as Viusasa, K24 Plus, and Phil-IT TV have built strong audiences through highly localized and vernacular content offerings.

YouTube has also become a key democratized distribution channel, enabling independent filmmakers to reach audiences directly while monetizing through advertising, sponsorships, and memberships. This shift reflects broader changes in Kenyan viewing behavior, where mobile-first consumption and affordable digital access increasingly shape audience preferences.

However, the distribution ecosystem remains fragmented. Formal box office reporting systems are weak, limiting transparency and reducing investor confidence. Informal distribution and piracy remain widespread, with over half of surveyed audiences indicating that pirated sources are their primary method of film consumption, largely due to high subscription costs, limited legal availability of recent releases, and geographic restrictions on content access.

At the same time, the Pay TV and OTT market continues to expand steadily, with OTT revenues projected to grow significantly faster than traditional Pay TV over the next decade. Hybrid monetization models combining subscription video-on-demand (SVOD), advertising-supported video-on-demand (AVOD), FAST channels, and telco bundling are emerging as the most viable long-term strategy for the Kenyan market.

Audience Development

Audience development in Kenya is increasingly shaped by digital accessibility, affordability, and cultural relevance. Kenyan audiences demonstrate strong engagement with local stories, particularly emotionally resonant dramas, comedies, and socially grounded narratives that reflect everyday lived experiences. Survey findings show that drama remains the most preferred genre, followed closely by comedy and action content.

Digital platforms have played a central role in audience expansion by making local content more accessible through mobile devices and flexible payment models. Platforms such as Showmax and Viusasa achieved traction largely because of their investment in authentic Kenyan storytelling and localized programming strategies. Stakeholders consistently emphasized that audiences respond strongly to content that reflects their realities, languages, and social experiences.

At the same time, cinema-going remains relatively limited. The median cinema attendance frequency is only three visits annually, with audiences citing preference for home viewing, time constraints, high ticket prices, and distance from cinemas as the primary barriers to theatrical attendance.

Audience development is therefore increasingly shifting toward digital and community-based engagement models rather than traditional theatrical pathways. Social media, grassroots marketing, and creator-driven engagement are becoming critical mechanisms for film discovery and audience mobilization.

However, affordability remains a major structural challenge. Kenyan consumers strongly prefer low-cost, pay-as-you-go content models aligned with the country's "kadogo economy," where small incremental payments are favored over fixed monthly subscriptions. This has created opportunities for localized streaming platforms and mobile-friendly distribution models that can adapt to local consumption patterns more effectively than international platforms.

Social Impact

Social impact storytelling occupies an important but still underdeveloped space within Kenya's film ecosystem. Historically, Kenyan filmmakers have used cinema to address themes of identity, governance, gender equality, corruption, youth empowerment, and social justice. Documentary filmmaking, in particular, has emerged as one of the strongest vehicles for impact-oriented storytelling, supported by Kenya's reputation as a regional hub for factual content production.

Stakeholders noted growing audience engagement with socially conscious films, especially within documentary and independent cinema spaces. Community screenings, festivals, and alternative exhibition spaces such as Unseen Nairobi and Nyumba Cinema have become important channels for socially driven storytelling and public dialogue.

However, filmmakers continue to face regulatory and creative constraints. Many stakeholders criticized the current classification and censorship framework as restrictive, particularly regarding political and socially sensitive storytelling. Several filmmakers expressed concern that the existing regulatory environment discourages critical narratives and limits the industry's ability to fully engage with pressing societal issues.

Additionally, the lack of sustainable financing for impact-oriented content remains a major challenge. Most social impact films continue to rely heavily on donor funding, grants, and international co-productions, making long-term sustainability difficult. Despite these constraints, there is growing recognition among ecosystem actors that film can serve as both a cultural and developmental tool capable of influencing public discourse, representation, and social awareness.

Opportunities and Strategic Levers

Kenya's film industry presents significant opportunities for growth if structural bottlenecks can be addressed effectively. One of the strongest opportunities lies in the expansion of digital distribution and mobile-first consumption models. Kenya's high mobile penetration, young population, and growing OTT market position the country well for digitally led audience growth and regional content circulation.

There is also substantial opportunity in local content production. Audience demand for authentic Kenyan and African stories remains strong, while local content consistently outperforms international content on several regional platforms. This creates opportunities for filmmakers, broadcasters, and streaming platforms to scale investments in culturally relevant storytelling.

The documentary and factual storytelling sector also presents a strategic advantage. Kenya already serves as a preferred production hub for international documentary projects, particularly from the UK and USA. Strengthening technical capacity, international partnerships, and regional co-production frameworks could further position Kenya as a continental centre for factual and impact-driven filmmaking. Additional strategic opportunities include:

- Expanding alternative exhibition spaces and community cinemas outside Nairobi.
- Developing hybrid monetisation models aligned with local affordability realities.
- Leveraging FAST and AVOD channels to increase discoverability and monetisation of local content libraries.
- Strengthening regional co-production and content circulation across East Africa.
- Introducing local content quotas and incentives to stimulate domestic commissioning and investment.

The proposed Creative Economy Bill also represents a potentially transformative policy opportunity through the introduction of a dedicated film fund and structured incentives, provided implementation is effectively executed.

Financing and Enabling Environment

Kenya's financing ecosystem remains fragmented and underdeveloped despite the industry's growing economic significance. Stakeholders consistently identified the absence of a dedicated national film fund, limited tax incentives, and insufficient public investment as major barriers to industry growth. Kenya currently lacks the competitive production incentives available in markets such as South Africa, reducing its attractiveness for large-scale international productions and co-productions.

The industry remains heavily dependent on donor funding, grants, and foreign financing, particularly for independent and socially driven projects. This reliance often shapes production priorities and limits local ownership over storytelling and intellectual property.

The Kenya Film Commission continues to play a central coordinating role through promotion, research, and facilitation efforts. However, institutional limitations related to resources, enforcement, and data systems constrain its effectiveness. Similarly, while the Kenya Copyright Board (KECOBO) and the Communications Authority provide a legal framework for intellectual property protection, piracy remains widespread and enforcement remains inconsistent.

At the same time, the enabling environment shows signs of gradual improvement. Government stakeholders increasingly position themselves as facilitators rather than controllers of the creative economy, emphasising industry coordination, infrastructure support, and digital access expansion. The Creative Economy Bill further signals growing recognition of the sector's economic importance, although stakeholders emphasised that meaningful impact would depend on implementation and sustained government commitment.

The Path Forward

Kenya's film industry stands at a pivotal moment. The sector possesses strong creative talent, growing digital audiences, expanding regional influence, and increasing global interest in African stories. However, unlocking its full potential will require coordinated interventions across financing, distribution, infrastructure, policy, and audience development. Moving forward, priority actions should focus on:

- Expanding cinema and alternative exhibition infrastructure beyond Nairobi.
- Establishing a sustainable national film fund and competitive production incentives.
- Supporting hybrid digital monetisation models suited to local affordability realities.
- Strengthening intellectual property enforcement and anti-piracy mechanisms.
- Increasing investment in local content commissioning and regional co-productions.
- Enhancing audience data systems and industry analytics to support investment decisions.
- Creating stronger collaboration between government, platforms, filmmakers, and private investors.

Kenya's future competitiveness will depend on its ability to transition from a primarily production-oriented ecosystem into a fully integrated film economy capable of sustaining creation, distribution, monetisation, and audience growth at scale. With the right policy support, financing mechanisms, and digital innovation strategies, Kenya is well-positioned to emerge as one of Africa's leading film and creative industry hubs.

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

2.1 Country Context

The Kenyan film industry functions as a vital segment of the nation's broader creative economy, contributing approximately 5% to the national GDP. The Film Industry Satellite Account (FISA) 2022 report, the most recent year for which official data is currently published, highlights that the Kenyan film industry has demonstrated remarkable resilience and economic potential. FISA reports the film industry generated a gross output value of Kes. 86.9 billion and a Gross Value Added (GVA) of Kes. 38.1 billion in 2022. While the film and broadcasting subsector specifically averaged 0.4% of GDP between 2016 and 2022, it remains a critical employer, supporting 42,823 jobs and providing livelihoods for millions across both formal and informal sectors. Despite this significant footprint and annual earnings of Kes. 14.5 billion, the film industry is historically underfunded, receiving less than 1% of the national budget allocation. Nevertheless, Kenya's global trade presence remains strong, with film-related imports reaching Kes. 50 billion and export earnings seeing a significant upswing in 2022. PwC Media and Entertainment Outlook 2025-2029 suggest the entertainment and media sector in Kenya will grow at a compound annual growth rate (CAGR) of 5.2% through 2029, outpacing regional peers like South Africa. This growth is supported by a young population with a median age of 20 and an internet penetration rate of 48%, representing 27.4 million users as of 2025.

Historically, filmmaking in Kenya has transitioned from a "colonial gaze" in the early 20th century to a vibrant landscape of local storytelling. Early Western productions like *Trader Horn* (1931) and *Out of Africa* (1985) used Kenyan landscapes as exotic backdrops, often sidelining authentic narratives. The 1980s marked a pivotal shift as local filmmakers reclaimed the narrative, influenced by global movements for gender equality and the 1985 World Conference on Women in Nairobi. Trailblazing films such as *Kolor Mask* (1983) and *Saïkati* (1992) explored themes of identity, race, and women's empowerment, laying the foundation for an inclusive industry. The rise of digital technology in the 1990s and 2000s further democratized production, leading to global successes like *Nairobi Half Life* (2012) and the establishment of institutional support through the Kenya Film Commission.

Classification as a Gateway to Distribution

Kenya's audiovisual distribution ecosystem is heavily shaped by the country's content classification framework. Under the Films and Stage Plays Act (Cap 222), all films intended for public exhibition or commercial distribution in Kenya are legally required to obtain classification approval from the Kenya Film Classification Board (KFCB). This includes theatrical releases, television broadcasts, DVDs, public screenings, and, increasingly, digital distribution channels. In principle, the classification framework is intended to regulate age appropriateness, protect minors, uphold cultural standards, and ensure compliance with national content regulations. In practice, however, stakeholders described the system as both a regulatory gatekeeping mechanism and a key source of industry data, since KFCB classification records remain one of the few publicly accessible indicators of production volume and content trends within the Kenyan market.

At the same time, the rapid expansion of streaming and mobile-first consumption has exposed important grey areas within the current regulatory framework. Stakeholders noted that while locally distributed streaming content is technically expected to comply with classification requirements, enforcement remains uneven, particularly for content accessed through international VOD platforms, YouTube channels, and informal digital distribution networks. This has created a partially dual-track ecosystem in which theatrical and broadcast content remains more tightly regulated, while sections of the digital economy operate with greater flexibility and lower compliance visibility.

The result is a regulatory paradox: Kenya possesses one of the continent's most active content classification systems, yet a growing share of actual audience consumption increasingly occurs through digital pathways that remain difficult to comprehensively monitor or regulate. Between July 2022 and March 2023, the Kenya Film and Classification Board classified 633 pieces of content, with Kenyan productions accounting for a dominant 66% of all submissions. This underscores a strong and growing domestic production base, albeit one that remains largely locally oriented.

Table 1: Films classified by KFCB between July 2022 - March 2023 | Source: KFCB

Period	Jan - 23	Feb - 23	Jul - 22	Aug - 22	Sep - 22	Oct - 22	Nov - 22	Dec - 22	Total	% share
All content	37	5-	7-	42	142	205	56	31	633	
Content Origin										
Kenya	24	43	40	26	114	107	42	20	416	66%
USA	8	5	18	6	16	17	2	7	79	12%
India	4	1	12	8	10	14	6	4	59	9%
Asia	1	-	-	2	-	4	-	-	7	1%
Europe	-	1	-	-	-	22	2	-	25	4%
Africa	-	-	-	-	2	18	4	-	24	4%
S. America	-	-	-	-	-	7	-	-	7	1%
Iran	-	-	-	-	-	16	-	-	16	3%
Type of Content										
Documentary	5	2	2	-	4	15	2	1	31	5%
Feature	15	19	44	14	28	33	12	9	174	27%
Series	10	-	16	16	60	8	17	15	142	22%
Short	7	28	6	8	46	147	25	5	272	43%
Animation	-	1	2	4	4	2	-	1	14	2%

Foreign content, primarily from the USA (12%) and India (9%), still plays a notable role, particularly in cinema and festival circuits, but Kenyan filmmakers are clearly the primary users of the classification system. In terms of format, short-form content (43%) and feature films (27%) together made up the bulk of classified works, reflecting the industry's structural realities: constrained budgets, faster turnaround times, and the accessibility of short films as entry points for emerging filmmakers. The relatively lower share of animation (2%) and documentaries (5%) suggests underinvestment in technically demanding or long-gestation formats.

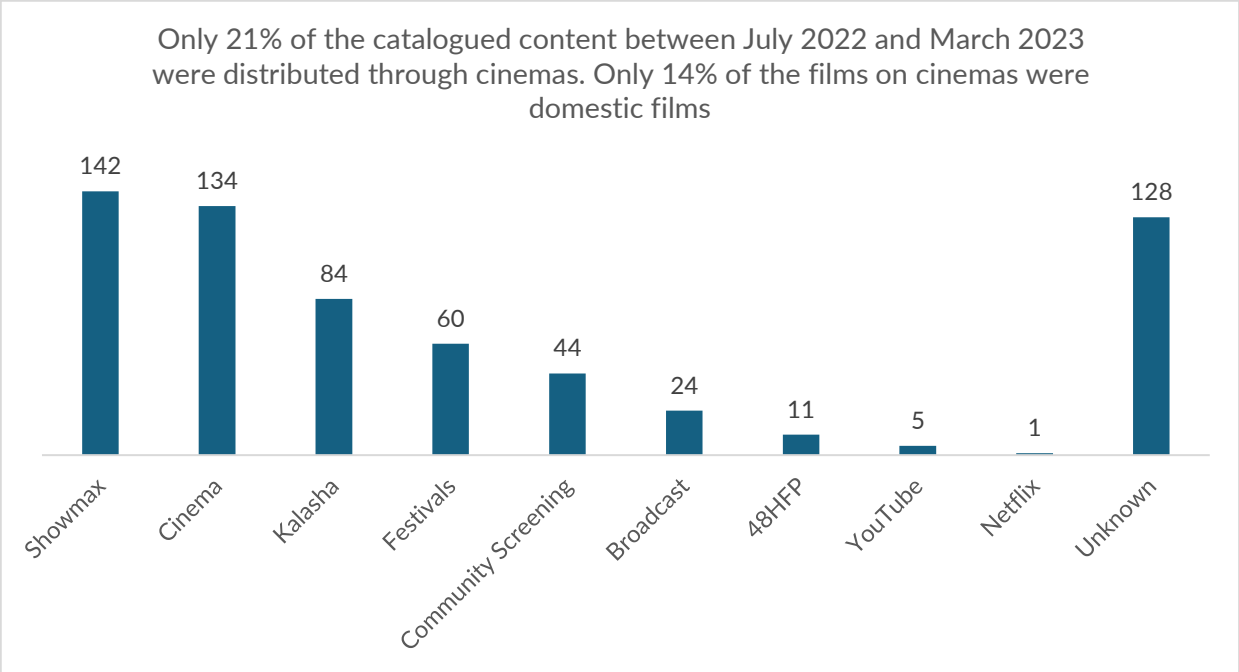


Figure 1: Platform where the content classified by KFCB between July 2022 - March 2023 was distributed | Source: KFCB

Platform data highlights an increasingly segmented distribution landscape with important implications for filmmakers' market strategies. Showmax alone accounted for 22% of classified content and was entirely domestic, signalling the platform's central role as a commissioning and exhibition space for Kenyan stories. Cinema, while contributing a similar share (21%), was overwhelmingly international (86%), indicating that theatrical exhibition remains difficult for local filmmakers to access or sustain. Festivals and community screenings, though smaller in volume, continue to serve as critical alternative pathways especially for films seeking international exposure or grassroots engagement. The large "unknown" category (20%) also points to informal or emerging distribution channels that may not yet be fully institutionalised, highlighting both opportunity and risk for filmmakers navigating less regulated markets.

Genre trends further reinforce a conservative but pragmatic creative ecosystem. Drama dominates production (36%), followed by documentaries (21%) and action/thriller content (13%), reflecting audience familiarity, lower production risk, and clearer pathways to classification and distribution. However, the audience survey reveals a demand gap, with audience preference for drama at 66%, comedy at 62%, and action at 39%. Genres such as sci-fi, horror, and romance remain niche in production, but survey interest in sci-fi (19%) and rom-coms (38%) suggests that limited output is due to higher perceived regulatory and commercial risk rather than a lack of audience confidence. For filmmakers, the data implies that sustainable success currently lies in aligning content with dominant genres and platforms while selectively innovating within those boundaries. At the same time, the gaps particularly in animation, diverse genres, and cinema access, represent strategic opportunities for creators, investors, and policymakers willing to support experimentation and long-term capacity building within Kenya's film industry.

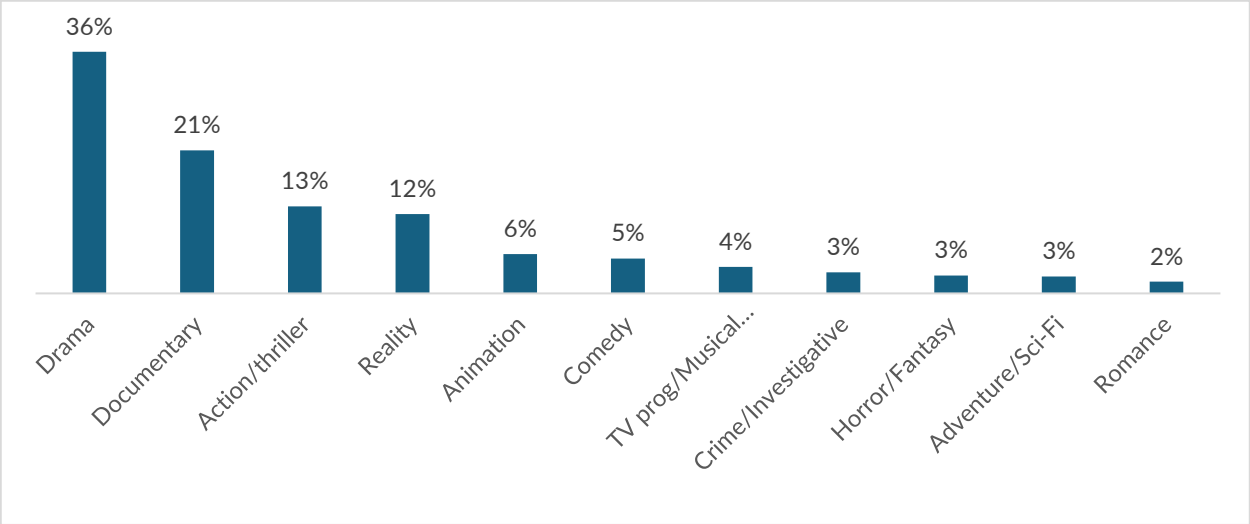


Figure 2: Genre of the content classified by KFCB between July 2022 - March 2023 | Source: KFCB

A further classification in 2025 reveals that when focusing on documentaries, docuseries, features, series, and shorts, local productions account for 64% of the industry's creative output. Within this specific segment, documentaries emerge as the dominant format, representing 39% of Kenyan productions and a significant 71% of all foreign-licensed projects. This underscores Kenya's established reputation as a global hub for factual storytelling, particularly for filmmakers from the UK and USA, who together account for over half of all international productions.

Table 2: Kenyan and Foreign films licensed by Type of Production - 2025 | Source: KFC

Type of Production	Kenyan	Share	Foreign	Share	Total	Share
Advertisement	130	23%	8	3%	138	17%
Commercial	45	8%	14	6%	59	7%
Documentary	**221**	**39%**	**170**	**71%**	**391**	**48%**
Docuseries	**19**	**3%**	**20**	**8%**	**39**	**5%**
Feature Film	**35**	**6%**	**8**	**3%**	**43**	**5%**
Series	**51**	**9%**	**13**	**5%**	**64**	**8%**
Short	**63**	**11%**	**6**	**3%**	**69**	**9%**
Musical	6	1%	-	-	6	1%
Total	570	100%	239	100%	809	100%
%	70%		30%		100%	

The data further highlights a vibrant local scene for episodic and short-form content, with 51 series and 63 shorts produced by Kenyan creators, significantly outnumbering foreign entries in these categories. In contrast, feature films remain a smaller portion of the landscape, making up only 6% of local productions. While current official economic data is only published through 2022, these 2025 licensing trends show an industry that is actively leveraging its strengths in factual and short-form media. As the media and entertainment sector targets a 5.2% CAGR through 2029, there remains significant potential to transition this high volume of documentary and episodic work into a more robust market for narrative feature films and docuseries.

2.1.1. Current state of film

Ecosystem partners generally confirmed the notable growth and increasing momentum of Kenya's film industry particularly the non-fiction segment, as experiencing. Key informants highlighted that more documentary projects are being produced and that audiences are

showing greater engagement, as evidenced by screenings that attract strong attendance and films remaining in cinemas longer than initially anticipated.

This trend was viewed as a sign of a gradually developing cinema culture, supported by emerging infrastructure and partnerships between filmmakers and exhibition spaces. Over the past five to six years, partners observed the establishment of clearer pathways and frameworks that help film teams understand how to distribute and showcase their work, including collaborations with cinemas that are open to screening local productions. However, despite this positive trajectory, informants emphasized that the sector still faces limitations in exhibition infrastructure, noting the need for more cinemas and alternative screening spaces to ensure that the growing number of projects can effectively reach wider audiences.

"I think on the non-fiction side things are building up and it's exciting to go to these different screenings and really see audiences engaged and you know, you have a film that you didn't think would be in the cinema for more than a week or two and have extended runs. So, I do feel that there is sense of cinema culture being built with the growing infrastructure but I still feel that there's still a lot of spaces where the infrastructure can expand so that there are more cinemas, there are more spaces for exhibition, there are more ways for audiences to connect so that people can really enjoy the content that filmmakers are making."- Ecosystem Partner, Nairobi, Kenya

2.1.4. Overview of National Film Ecosystem: History, Key Milestones, and Institutional Landscape

i. Historical foundations

Kenya's film industry emerged during the colonial period primarily as an instructional and administrative medium rather than as a commercially oriented entertainment industry. As highlighted in the work of Rachel Diang'a, early film practice in Kenya was shaped not only by the colonial gaze, but also by the didactic use of cinema as a tool for public communication, behavioural influence, and social instruction. Film was used to disseminate messages related to governance, health, agriculture, religion, and "civilisation", positioning African audiences primarily as subjects of education rather than consumers within an entertainment economy.

This early orientation had long-term structural implications for the development of the sector. Rather than evolving around commercial audience demand and domestic distribution networks, film production in Kenya became closely associated with externally driven messaging, development communication, and service provision for foreign productions. Following independence, Kenya continued to function largely as a filming destination for international projects, with local practitioners occupying technical and logistical roles within externally financed productions.

Stakeholders noted that this legacy continues to shape the industry today. Many local productions, particularly within documentary and non-fiction filmmaking, remain closely connected to donor, advocacy, and impact-oriented funding ecosystems. While this has contributed to the development of strong documentary storytelling traditions and internationally recognised non-fiction work, it has also reinforced a production culture in which distribution, audience monetisation, and long-term intellectual property exploitation are often treated as secondary considerations. As one stakeholder observed, filmmakers frequently structure projects to recover costs during production rather than through downstream distribution revenues: "So, when film initially came to Kenya, it came with the colonizers. And it was as a tool for control and to push, you know, their agenda. And so, it was never about entertaining the Kenyans. It was more about giving the messaging of how they could be more civilized and how they could be better. And then came post-independence, we still continued being this shooting location and people were coming. And so we were more of service providers. So, distribution, impact producing all that comes as an afterthought for most producers." Filmmaker, Nairobi, Kenya

ii. Key milestones and shifts

The establishment of the Kenya Film Commission (KFC) in 2005, and expansion of its mandate in 2015, marked a formal recognition of film as an economic sector, though implementation remains limited. Literature indicates that the expanded mandate under Legal Notice No. 147 of 2015 positioned KFC as a central coordinating body with responsibilities spanning policy advisory, film promotion and marketing, facilitation of local and foreign productions, investment promotion, research and data collection, capacity building, audience development, support for local content creation, co-production facilitation, export promotion, and stakeholder coordination. Despite this broad institutional framework, gaps in execution, particularly around incentives, data systems, and enforcement, continue to constrain impact.

The KFC plays a central role in promotion, research, and co-production facilitation, but faces constraints in resources, enforcement, and data systems. While efforts exist to build partnerships and support filmmakers, the absence of incentives limits Kenya's competitiveness globally. At the same time, co-production efforts are growing, though often remain unequal due to funding imbalances.

"South Africa has incentives. Kenya does not have incentives. South Africa has talent, Kenya has talent. South Africa has locations, Kenya has locations. So, we can be able to match locations and talent, but when it comes to money, we cannot be able to match. That becomes an issue.." Government entity, Nairobi, Kenya

iii. Regulation and creative constraint

The Kenya Film Classification Board (KFCB), operating under outdated legislation, is widely perceived as restrictive and inconsistently applied. Stakeholders highlight ambiguity in content guidelines and limitations on political, social, and youth-oriented storytelling, which constrain creative expression. While some view regulation as necessary for cultural protection, many argue it limits the industry's ability to address real societal issues.

"So, you are curtailing and you can only tell a story of a president and his family but nothing happens to him. You can't tell political stories and the minute you start telling a political story it's automatically graded as 18. Yet we are busy here watching West Wing, the Good ones, The Designated Survivor, but we can't tell stories about politics in Kenya and the corruption that happens..." Film distributor, Nairobi, Kenya

More recently, the proposed Creative Economy Bill (2026) provides for the establishment of a Creative Industry Development Fund, with creative industries defined as sectors that rely on the creation, production, distribution, and exploitation of intellectual property. In addition, film-related incentives were developed by the Kenya Film Commission and drafted in June 2023 under the National Film Incentives Framework, aimed at strengthening the competitiveness of Kenya's film sector. However, existing funding mechanisms continue to face constraints. For example, the Kalasha funding framework has been affected by resource limitations and sustainability challenges, with the 2025 Kalasha Awards reportedly cancelled due to a KSh 40 million funding shortfall. This highlights the need for stronger private sector participation and broader stakeholder engagement to complement public financing and support a more sustainable film financing ecosystem.

"I'm really keen on the creative economy support bill that I've been watching, and I love that it's moving, like it's not stuck and it's not something that the Ministry of Youth Affairs has just dropped or the one who proposed it. Like it keeps moving by December I think it's now in for parliamentary review." Ecosystem partner, Kenya

iv. Institutional gaps and opportunities

A major gap remains the absence of a dedicated national film fund, robust incentives, and coordinated policy implementation, leaving the industry heavily reliant on donor and foreign funding. While the Creative Economy Bill offers promise, stakeholders emphasize that impact will depend on enforcement and sustained government commitment. The current fragmentation limits growth and reinforces external influence over local storytelling priorities.

"The way Kalasha has been funding recently is too constrained. The government cannot manage the Kalasha effectively on its own. We need more creative stakeholders and private sector players on board." Ecosystem Partner, Kenya

3. Findings

3.1 Film Distribution

3.1.1. Overview

Film distribution in Kenya is currently defined by a sharp contrast between acute infrastructure shortages in traditional cinema and a robust surge in digital streaming. The country faces a crisis in cinema characterized by a remarkably low number of screens, fewer than 50 nationwide, with over 75% concentrated in Nairobi. This scarcity is compounded by high operating costs and unfavourable revenue splits, where cinema operators often prioritise Hollywood blockbusters over local productions due to high overheads and taxes. Consequently, many local filmmakers are bypassing theatrical releases entirely in favour of VOD platforms. Traditional linear television, both free-to-air and Pay TV, has also seen its relevance as a first-window release platform marginalized, with traditional TV accounting for only 5% of new film releases.

Within this constrained theatrical ecosystem, the collection and availability of box office data remain highly fragmented and institutionally underdeveloped. Kenya lacks a unified, authoritative, real-time system for reporting cinema attendance and revenues. While cinema chains such as Anga and Century capture ticket sales and revenue data through internal point-of-sale systems, this information is treated as commercially sensitive and is not disclosed publicly. Regulatory bodies, notably the Kenya Film Classification Board, focus on licensing and content classification rather than financial reporting and therefore do not publish box office figures. National-level revenue estimates are instead produced periodically through survey-based and modelled approaches such as the FISA report, which provide valuable high-level insights into the scale of the cinema sector but do not support film-by-film performance analysis or timely market tracking. International box office aggregators such as Box Office Mojo and Statista report Kenyan figures, but these typically reflect only a subset of formal cinemas and disproportionately capture Hollywood releases, resulting in significant under-representation of the market. Consequently, theatrical performance data in Kenya is best understood as indicative rather than definitive, limiting its utility for investment decisions, revenue benchmarking, and policy design.

Against this backdrop of constrained exhibition infrastructure and limited theatrical data transparency, distribution growth has shifted decisively toward digital platforms. The digital pivot is led by major streaming giants like Showmax and Netflix, which have become the primary hubs for premium Kenyan content. Showmax acts as a local champion by consistently commissioning and acquiring Kenyan episodic series and reality shows to drive its regional strategy. Meanwhile, local platforms like Viusasa provide a critical niche for vernacular dramas and short-form content, with over 85% of its users engaging with local content frequently. YouTube has also emerged as a powerful, democratised distribution channel, allowing independent filmmakers to reach global audiences and monetise through ads and memberships while bypassing traditional gatekeepers. Because formal box office data remains limited, this study acknowledges a data scarcity environment where alternative metrics such as YouTube viewership and social media engagement serve as essential proxies for estimating market size. To monetise YouTube in Kenya, creators must join the Partner Program by reaching 1,000 subscribers and 4,000 watch hours, after which they can earn through Google AdSense, sponsorships, and affiliate marketing. On average, Kenyan YouTubers earn between Kes. 100 and Kes. 200 per 1,000 views, with payments transferred to local bank accounts once they reach a $100 threshold.

Distribution Landscape and Key Market Intermediaries

Kenya's distribution ecosystem remains relatively fragmented, characterised by a mix of cinema exhibitors, broadcast networks, digital platforms, independent aggregators, and filmmaker-led

distribution initiatives. Unlike larger markets such as Nigeria or South Africa, Kenya does not yet possess a deeply institutionalised studio-distributor system with nationally integrated release pipelines. Instead, distribution pathways are often negotiated on a project-by-project basis, with filmmakers combining theatrical screenings, festival circulation, broadcaster licensing, streaming releases, community screenings, and direct digital distribution.

Within theatrical exhibition, major cinema operators include Century Cinemax, Anga Cinemas, and Mega Cinema, with most screens concentrated in Nairobi and a small number of urban centres such as Mombasa and Kisumu. Stakeholders consistently noted that theatrical access for Kenyan productions remains constrained by limited screen availability, short exhibition windows, and competition from Hollywood blockbusters and Indian films, which continue to dominate multiplex programming.

On the broadcast side, major television distributors include Citizen TV, NTV Kenya, Maisha Magic, and KBC. Particularly significant has been the role of Maisha Magic, operated by MultiChoice, in commissioning and licensing Kenyan drama series and reality programming for regional Pay TV audiences.

Digital distribution has expanded rapidly over the last decade, driven by high mobile penetration and changing viewing habits. Platforms such as Showmax (shut down on 30th April 2026), Netflix, Viusasa, and YouTube have become increasingly important release windows for Kenyan filmmakers. Viusasa in particular pioneered low-cost mobile micropayment models aligned with local consumption patterns, while YouTube has emerged as a major discovery and monetisation platform for independent creators operating outside formal commissioning systems.

At the same time, stakeholders highlighted the continued importance of informal and alternative distribution channels, including film festivals, educational screenings, NGO partnerships, cultural centres, and travelling community screenings. These channels remain especially important for documentary filmmakers and socially oriented productions seeking audiences beyond commercial multiplexes.

Despite growing experimentation across distribution models, the ecosystem continues to face major structural constraints, including fragmented licensing markets, weak audience analytics, limited regional theatrical infrastructure, and the absence of large-scale domestic distributors capable of consistently financing marketing, localisation, and multi-territory releases. As a result, many Kenyan filmmakers continue to self-distribute or rely on hybrid release strategies that combine formal and informal pathways simultaneously.

3.1.2. Distribution channels

i. Cinemas

. Stakeholders interviews noted that Nairobi accounts for over 75% of this screens and cinemas capacity, underscoring the extreme geographic concentration of theatrical exhibition. Outside the capital, Mombasa, Kisumu and Eldoret each sustain only a single cinema, while several major urban centres, including Nakuru, have none. This scarcity has been repeatedly flagged by the KFC and UNESCO as a major bottleneck to sustainable theatrical distribution and audience development.

Stakeholder interviews highlighted that programming within these cinemas is dominated by international studio content. Hollywood releases account for most of the screen time, particularly during peak evening and weekend slots. Stakeholders such as distributers indicate that international films occupy an estimated 85%- 90% of available cinema screens over the course of a year, with local Kenyan films largely confined to short runs, off-peak slots or event-style screenings. While occasional local hits break through often supported by aggressive

grassroots marketing, the absence of screen quotas and the commercial risk aversion of exhibitors continue to marginalise domestic theatrical releases.

"The box office in Kenya is I think it is like 95% American film, then something like two or 3% Bollywood. And then the rest is Kenyan, it is insignificant almost." Distributor, Kenya

While commercial multiplexes dominate the market, independent venues offer alternative exhibition pathways. Unseen Nairobi offers a notable exception as a niche cinema focused on African and arthouse films. Its programming deliberately centres African stories, with a small but dedicated audience that includes both expatriates and Kenyans seeking alternatives to Hollywood fare. Similarly, Nyumba Cinema utilizes a private, bookable model for premieres and small-group viewings. However, their scale remains limited, with only two such spaces against 43 commercial screens dominating the market.

Box office performance reflects both these small scale of the market and its volatility. According to Box Office Mojo, total annual box office grosses in Kenya stood at approximately USD 458,000 in 2023, rising from about USD 341,000 in 2022, before softening slightly in 2024 and 2025 at USD 426,191 and USD 423,364 respectively as global attendance pressures persisted. These figures are modest by regional standards and should be read alongside the KFC's FISA report, which notes that theatrical revenues represent only a small fraction of total film consumption value in the country. Importantly, local films account for a disproportionately small share of cinema box office, despite stronger performance on television and digital platforms, highlighting a persistent disconnect between theatrical exhibition and domestic audience preferences.

Results from the audience survey explain this disconnect between theatrical supply and domestic demand. Among active cinema-goers, the median visit frequency is just three times per year. While spending per visit averages Kes. 800 (USD 6.24), there is a notable gap in price sensitivity. The median current ticket price is Kes. 850 (USD 6.63), yet the median maximum price audiences are willing to pay is only Kes. 600 (USD 4.68).

Several factors were cited as limiting cinema attendance beyond just pricing. The most frequently mentioned were a preference for home viewing (41%) and time constraints (41%). Other reported reasons include lack of interest (29%), distance or lack of proximity to cinemas (21%), and high-ticket costs (15%). A smaller proportion of audiences cited availability of pirated content (3%), limited awareness of showtimes (1%), and poor cinema quality (1%).

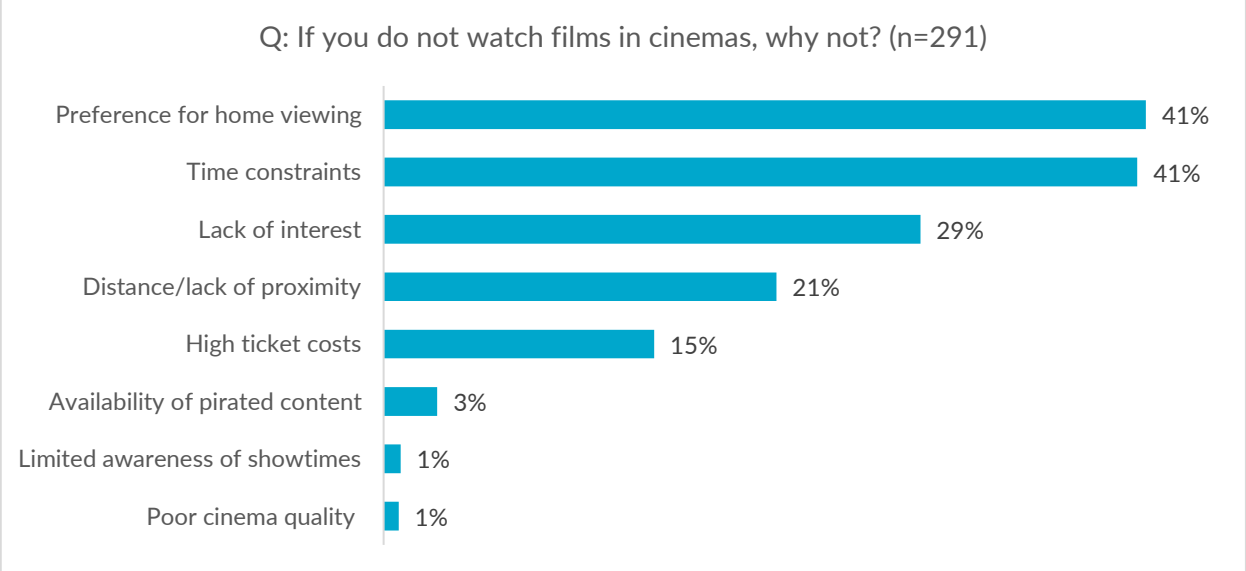


Figure 3: Reasons for not going to cinemas in Kenya | Source: Survey data

These findings signal a need to move beyond traditional multiplex models and explore lower-cost, high-convenience distribution channels that align with the economic realities of the Kenyan audience.

ii. Digital platforms - Pay TV and OTT

Kenya has consolidated its position as one of the most dynamic Pay TV and OTT markets in Sub-Saharan Africa, underpinned by exceptional mobile penetration, a young digital-native population and accelerating urban connectivity. Mobile connections now exceed the total population, making smartphones the primary gateway for video consumption. This has fundamentally shaped the country's distribution landscape, favouring mobile-first, on-demand and hybrid delivery models over traditional linear television. While Pay TV remains significant, particularly in satellite (DTH) and digital terrestrial television (DTT), its relative dominance is gradually eroding as consumers migrate towards more flexible, data-conscious OTT services.

The Pay TV ecosystem in Kenya reflects broader regional affordability dynamics. DTT functions as the mass-market entry point, driven by low decoder costs and wide population coverage, while DTH services occupy a more premium tier, concentrated in urban and peri-urban households. Cable television remains marginal due to high last-mile infrastructure costs and is largely confined to dense urban pockets. This structural reality has limited cinema-style premium windowing for film content on television, while simultaneously expanding demand for digital-first distribution strategies. Operator reports highlight a total of about 1.7M Pay TV subscribers in Kenya as of September 2025.

Kenya's Pay TV market is led by MultiChoice (DStv and GOtv), which remains a major commissioner and distributor of local film and television content. Pay TV penetration has stabilised, but its role as a financier and broadcaster of Kenyan drama and feature films remains strategically important. Local films and made-for-TV movies achieve substantially higher viewership on these platforms than in cinemas, reflecting affordability and household viewing habits.

Table 3: Kenya pay TV subscriptions 2024-2025 | Source: Communications Authority of Kenya (CAK)

Indicator/Period		25-Sep	25-Jun	25-Jun	25-Mar	25-Jun	24-Jun	Annual Variation (%)
DTT	Go TV	444,007	314,520	314,520	362,543	314,520	2,793,579	-88.7
	Star Times	500,906	492,330	492,330	496,322	492,330	1,693,340	-70.9
	Sub-Total	944,913	806,850	806,850	858,865	806,850	4,486,919	-82.0
DTH	Azam	31,069	30,095	30,095	28,258	30,095	81,553	-63.1
	MultiChoice (DSTV)	270,017	188,824	188,824	230,777	188,824	1,195,775	-84.2
	Star Times	199,270	195,948	195,948	192,241	195,948	361,953	-45.9
	Wananchi (Zuku)	186,248	187,839	187,839	193,105	187,839	202,416	-7.2
	Sub-Total	686,604	602,706	602,706	644,381	602,706	1,841,697	-67.3
Cable	Cable One	1,281	1,316	1,316	1,296	1,316	2,758	-52.3
	CTN (MSA)	398	484	484	532	484	2,067	-76.6
	Wananchi (ZUKU)	44,593	64,212	64,212	78,832	64,212	53,898	19.1
	Hirani	758	758	758	758	758	758	0.0
	Wadani Cable	95	95	95	95	95	95	0.0
	Sub-Total	47,125	66,865	66,865	81,513	66,865	59,576	12.2
Total		1,678,642	1,476,421	1,476,421	1,584,759	1,476,421	6,388,192	-76.9

The qualitative research strengthened the literature review as the stakeholders indicated that the Pay TV model in Kenya is moderately effective because it targets both higher-income

audience segments and the broader mass market, balancing convenience with curated content. Pay TV platforms sustain widespread appeal by anchoring subscriptions around premium sports content, particularly European football such as the English Premier League, while also investing in locally relevant programming. Channels like Maisha Magic East have a strategy that offers accessible, lower-tier subscription content that resonates with everyday audiences. Its mix of local dramas and telenovelas often emotionally driven and family-centred, further strengthens its appeal, reflecting storytelling formats that resonate strongly with Kenyan audiences. As noted by a distributor,

"Maisha Magic is pretty popular across the board again because it serves content lower tier like that, it has good viewership." Distributor, Film distributor, Kenya

The stakeholders also noted that the Pay TV ecosystem is now facing uncertainty due to the Canal+ acquisition of MultiChoice, which can lead to potential budget cuts. The industry is watching closely, as any reduction in MultiChoice's investment would have immediate consequences for the volume of local content being produced.

"The merger with Canal + might explain it because now as they work on the next way forward, of course, budget cuts and things like that. And maybe, yeah, we'll see after we have a way forward, they have finalized their strategy." Ecosystem partner, Kenya

Pay TV and OTT Platform subscribers, 2025

Table 4: Pay TV and OTT Platform subscribers, 2025 | Source: GMI

Country	Pay TV Subscribers (Million)	OTT Subscribers (Million)
South Africa	7.9 (12% of total population)	2.8 (4%)
Nigeria	9.8 (4%)	1.2 (0.5%)
Kenya	1.7 (3.0%)	0.75 (1%)
Egypt	5.1 (4.5%)	7.5 (6.5%)
Senegal	0.55 (3%)	0.15 (1%)
Rwanda	0.4 (3%)	0.23 (1.6%)

Kenya's OTT market is on a strong upward trajectory, supported by extensive 4G coverage, declining smartphone prices and high social media engagement that feeds directly into streaming discovery and audience mobilisation. As of 2025, GMI estimates indicate approximately 750,000 active unique OTT subscriptions in Kenya, reflecting a steadily expanding on-demand consumption culture despite relatively low penetration compared to larger regional markets.

Content library breakdown highlights a strongly segmented platform ecosystem. Prior to its closure in March 2026, Showmax occupied a structurally distinct position in the market. With estimated 220,000 active subscribers, it combined scale with the deepest investment in Kenyan and regional content, hosting 190 local titles alongside 520 regional titles, collectively accounting for just over 22% of its total library hours. No other subscription platform approached this level of local or regional representation. In contrast, Netflix and Amazon Prime Video, each with just under 100,000 subscribers, operated content libraries that were overwhelmingly international, with local African content accounting for less than 1% of total hours on each platform. These services primarily served urban, premium, and diaspora audiences, offering global reach rather than domestic cultural depth.

Table 5: Content Library Breakdown - 2025 | Source: GMI

Platform Name	Active subs (K)	Total Hours	Local			Regional			International		
			Titles	Hrs.	%	Titles	Hrs.	%	Titles	Hrs.	%
Showmax	220	5550	95	190	3.4	520	1040	18.8	4235	4320	77.8

Netflix	90	14400	18	36	0.3	72	144	1	7110	14220	98.7
Prime Video	88	11200	8	16	0.1	42	84	0.8	5550	11100	99.1
YouTube Premium	120	-	-	-	-	-	-	-	-	-	-
Viusasa	71	5000	188	4860	97.2	0	0	0	-	140	2.8
K24 Plus	120	1598	88	1584	99.1	6	12	0.8	1	2	0.1
Philit TV	85	143	45	135	94.4	3	6	4.2	0	2	1.4
Maisha Magic	-	1954	49	1470	75.2	14	420	21.5	2	64	3.3
MyMoviesAfrica	32	370	52	104	28.1	125	250	67.6	8	16	4.3

Local and broadcaster-linked platforms such as Viusasa, K24 Plus, Philit TV, and Maisha Magic reveal a parallel distribution logic. Viusasa's catalogue was over 97% local, while K24 Plus and Philit TV exceeded 94% local content share, underscoring their role as culturally proximate, mass-market platforms rather than global competitors. These services typically operate at lower subscription price points or hybrid models, aligning more closely with Kenyan household spending realities.

The closure of Showmax therefore represented not merely a platform exit, but the withdrawal of the market's single largest institutional buyer of premium Kenyan scripted content. Post-March 2026, distribution has consolidated around Netflix, Amazon Prime Video, Viusasa, YouTube, and broadcaster-affiliated platforms, intensifying the strategic importance of advertising-supported video on demand (AVOD) and free ad-supported streaming television (FAST). YouTube Premium's reported 120,000 subscribers, despite the absence of a defined content library, further reinforces the dominance of creator-driven, advertising-anchored ecosystems.

Across the ecosystem, affordability remains the decisive constraint. Willingness to pay is sharply stratified, with most households sustaining monthly expenditure below Kes. 400 (USD 3), placing structural limits on pure SVOD growth. As a result, hybrid monetisation models, combining SVOD, AVOD, FAST, and telco-bundled data, are emerging as the most resilient distribution strategy. These models mitigate subscription fatigue, support local content discoverability, and insulate platforms against foreign exchange volatility and escalating international content licensing costs, solidifying their central role in Kenya's evolving digital film and television distribution landscape.

iii. Content Strategy and Film Distribution Implications

Content strategy is now the primary competitive lever across both Pay TV and OTT platforms. Kenyan audiences demonstrate strong engagement with movies, drama series, news and locally resonant storytelling, yet the supply of Kenyan-produced films on major platforms remains limited relative to demand. This gap presents a clear opportunity for film producers and distributors to reposition Kenyan films not only as cultural assets but as commercially viable digital products.

Local content production offers a compelling cost advantage, with per-hour production budgets significantly lower than imported premium content while delivering higher completion

rates and stronger audience affinity. Platforms have commissioned regional originals and multi-territory formats that can travel across East Africa, enabling films and series to amortise costs through wider distribution. FAST channels, in particular, offer an underutilised secondary window for film catalogues, allowing distributors to recycle libraries, extend content life cycles and generate incremental advertising revenue.

Kenya's regulatory environment remains relatively permissive for OTT platforms, with no formal licensing regime in place. However, proposed interventions, including a potential 30% local content quota and digital taxation measures by the Communications Authority of Kenya, signal a shift towards greater oversight. For film distribution, this regulatory trajectory could materially improve demand for local films, provided producers are positioned to meet platform commissioning standards and compliance requirements, particularly around classification and age ratings.

Additionally, based on the qualitative study, stakeholders note that COVID-19 era shifted towards digital consumption and increased interest in African content by global platforms such as Netflix. International streaming platforms have achieved only modest penetration in Kenya. Stakeholders estimated Netflix's subscriber base is estimated at around 55,000 and Showmax an estimated 250,000 subscribers. stakeholders point to Showmax's investment in authentic, locally resonant content as the primary driver of its stronger traction, with local shows consistently appearing in its top ten rankings. More broadly, the fixed monthly subscription model of both platforms sits uneasily with Kenya's "kadogo" payment culture, where consumers prefer small, pay-as-you-go transactions, a model that has proven successful for local platforms offering content for as little as 20 shillings per view. Without adapting to these local payment behaviours or deepening investment in locally relevant storytelling, global streaming platforms will continue to serve only a narrow, urban segment of the potential market.

"Showmax is doing very well because of the authenticity of the stories, even minus the sports, because remove the sports, the football they are still doing well. When you look at their top ten row, it's always TV shows it's always filled by local shows." Ecosystem partner, Kenya

This reflects a deeper dynamic, Kenyan audiences are not only price-sensitive but also highly responsive to content that reflects their lived experiences. By combining local originals with popular, emotionally driven formats such as dramas and reality shows, Showmax was able to convert relevance into sustained viewership and subscription growth.

Local OTT platforms in Kenya, including Yakwetu, Phil-IT TV, Rafu TV, and Movie Zetu, are emerging as part of a new wave of homegrown digital distribution. These platforms are driven by a desire to retain greater control and value within the local ecosystem, particularly in response to the high costs and limitations of outsourced technology solutions. As one funder explained, "*We realized that there were ready apps available out in the market, but they were white labelled and fairly costly. We would've ended up working for the white label service itself rather than generate anything,*" highlighting the cost barriers that pushed them toward building independent platforms.

However, these platforms face significant financial and structural constraints, particularly their inability to offer minimum guarantees to filmmakers, leading most to adopt revenue-share models, typically around 50/50, which shifts risk onto content creators and limits their competitiveness in attracting high-quality or exclusive content within a price-sensitive market.

iv. Pay TV and OTT Revenue

A report by the Global Market Insights - 2025 indicates that Kenya's Pay TV and OTT market is entering a structurally transformative phase, with overall revenues growing steadily from

2022 and accelerating more decisively from 2026 onwards. Total market revenue rises from USD 473.4 million in 2022 to an estimated USD 574.1 million by 2030, reflecting a compound annual growth rate of 5.5%. This growth, however, is not evenly distributed across platforms and is driven overwhelmingly by the rapid expansion of OTT services rather than traditional Pay TV.

Pay TV remains the dominant revenue contributor throughout the period, but its growth is modest and largely defensive. Revenues from Pay TV platforms stagnate between 2022 and 2026 before edging upwards to 407.2 by 2030, delivering a low CAGR of 1.6%. Satellite television continues to underpin this segment, while cable TV shows marginal decline and IPTV records comparatively stronger, though still moderate, growth. This suggests a mature market facing increasing substitution pressures rather than outright collapse.

By contrast, OTT platforms emerge as the principal engine of market expansion. OTT revenues more than double between 2022 and 2030, growing at a robust CAGR of 14%. Subscription video-on-demand remains the largest OTT sub-segment, but advertising-led models, including AVOD and FAST, record even faster growth rates. Notably, hybrid OTT models show the strongest momentum, signalling increasing experimentation with blended revenue strategies suited to price-sensitive consumers.

Subscription behaviour further reflects Kenya's affordability dynamics. Prepaid models dominate revenues and continue to outpace postpaid growth, particularly monthly prepaid vouchers. In content terms, sports and movies remain the primary value drivers, while regional content consistently outperforms international content, underscoring the commercial importance of local and regional programming. Overall, the outlook points to a digitally led market in which OTT platforms reshape distribution economics, audience reach and content investment priorities over the remainder of the decade.

Table 6: Kenya 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
Total Revenue	**473.4**	**477.2**	**480.6**	**487.1**	**497.5**	**512.1**	**528.0**	**545.6**	**574.1**	**5.5%**
By Platform Type										
Pay TV platform	**399.1**	**395.9**	**389.9**	**388.0**	**388.8**	**392.3**	**394.7**	**400.0**	**407.2**	**1.6%**
Cable TV	49.5	48.9	47.9	47.4	47.3	47.5	47.9	47.9	48.5	1.2%
Satellite TV (DTH)	322.4	319.5	314.3	312.3	312.5	315.0	316.2	320.4	325.8	1.6%
IPTV	27.1	27.6	27.8	28.3	28.9	29.8	30.6	31.7	32.9	3.2%
OTT platform	**74.3**	**81.4**	**90.6**	**99.1**	**108.8**	**119.7**	**133.3**	**145.5**	**166.9**	**14.0 %**
SVOD	61.2	66.5	73.9	80.5	88.2	96.9	107.7	117.3	134.7	13.8 %
AVOD	9.5	10.9	12.2	13.5	14.9	16.5	18.5	20.3	23.4	14.8 %
FAST	1.3	1.5	1.6	1.8	2.0	2.3	2.5	2.8	2.8	14.5 %
TVOD	1.0	1.1	1.2	1.3	1.4	1.5	1.6	1.8	2.0	12.2 %
Hybrid OTT Models	1.3	1.4	1.7	1.9	2.2	2.6	3.0	3.4	4.0	17.5 %
By Subscription Model										
Postpaid	**140.6**	**142.1**	**143.5**	**145.8**	**149.3**	**154.1**	**159.3**	**165.0**	**174.1**	**5.8%**
Monthly contracts	116.8	118.2	119.4	121.4	124.4	128.4	132.8	137.7	145.4	5.9%
Annual contracts	23.8	23.9	24.1	24.4	24.9	25.7	26.4	27.3	28.7	5.4%
Prepaid	**332.8**	**335.1**	**337.1**	**341.3**	**348.2**	**358.0**	**368.7**	**380.5**	**400.0**	**5.4%**
Daily passes	27.3	27.4	27.6	27.9	28.4	29.1	30.0	30.9	32.4	5.2%

Weekly passes	48.6	48.8	48.9	49.3	50.1	51.3	52.7	54.2	56.7	4.9%
Monthly prepaid vouchers	256.9	258.9	260.7	264.1	269.7	277.5	286.0	295.5	310.8	5.4%
By Content Type										
Movies & entertainment	**118.8**	**120.2**	**121.4**	**123.5**	**126.6**	**130.7**	**135.2**	**140.2**	**148.0**	**5.9%**
Sports	161.4	162.7	163.7	165.9	169.4	174.3	179.6	185.5	195.1	5.4%
News & current affairs	36.5	36.5	36.5	36.7	37.2	38.0	38.8	39.8	41.6	4.6%
Cartoon/animation	**27.9**	**28.1**	**28.3**	**28.6**	**29.1**	**29.9**	**30.8**	**31.8**	**33.4**	**5.3%**
Music & lifestyle	96.6	97.5	98.3	99.8	102.1	105.2	108.6	112.4	118.4	5.6%
Others (documentaries, education)	**32.2**	**32.3**	**32.4**	**32.7**	**33.2**	**34.0**	**34.9**	**35.9**	**37.6**	**4.9%**
By Content Origin										
Regional content	250.4	253.0	255.3	259.3	265.4	273.8	282.8	292.9	308.8	5.7%
International content	223.0	224.2	225.3	227.8	232.1	238.3	245.1	252.7	265.3	5.2%
By End Users										
Residential	**408.5**	**412.0**	**415.0**	**420.8**	**430.0**	**442.7**	**456.5**	**471.9**	**496.8**	**5.5%**
Commercial	**64.9**	**65.2**	**65.6**	**66.3**	**67.6**	**69.4**	**71.4**	**73.6**	**77.3**	**5.2%**
Offices	4.0	4.0	4.0	4.0	4.0	4.1	4.2	4.3	4.5	4.5%
Hospitality (Hotels, Restaurants)	52.6	53.0	53.3	54.0	55.1	56.6	58.3	60.2	63.3	5.4%
Public transportation	1.2	1.2	1.2	1.2	1.2	1.2	1.2	1.3	1.3	4.2%

3.1.3. Policy and regulatory environment impacting distribution

Government support, regulation, and collaboration in Kenya's digital and streaming distribution ecosystem are largely facilitative rather than restrictive, with the state positioning itself as an enabler of industry growth while maintaining legal oversight. The approach emphasizes self-regulation by industry actors, with government intervention acting as a backstop when necessary. As one government entity stakeholder noted, *"If it's a story that you cannot watch with your children… then it is not good for anybody else. Just self-regulate and you'll be at peace with the government."* Regulation is therefore framed not as control but as coordination and standard-setting to ensure fairness, accountability, and alignment with societal norms, while still allowing market forces to drive innovation. In this context, a government entity emphasized that government focus is not control.

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

Beyond regulation, policy is also designed to foster collaboration between streaming platforms and independent filmmakers, recognizing their interdependence within the value chain. Platforms provide distribution infrastructure and audience access, while filmmakers supply content, making alignment between supply and demand essential for a functioning ecosystem.

A government entity stakeholder noted that independent filmmakers and streaming platforms cannot work in isolation, highlighting the need for policies that facilitate efficient linkages and partnerships. There is also concern that without appropriate policy guidance, platforms may increasingly shift toward self-production, potentially marginalizing independent creators. As a government entity warned, *"We should not let platforms to be self-producing, otherwise we'll not have*

any business." Support from the government is therefore seen as indirect, focused on improving digital infrastructure, expanding connectivity, and enabling access, rather than through direct subsidies, though affordability of data remains a persistent constraint, as indicated by government efforts to ensure audiences can access content.

i. Policy on intellectual property

In parallel, government policy on intellectual property (IP) protection and monetization is grounded in formal legal frameworks, including the Copyright Act (2001, revised 2019), with institutions such as the Kenya Copyright Board (KECOBO) and the Communications Authority of Kenya (CA) playing key regulatory roles. These frameworks define ownership rights, licensing conditions, and enforcement mechanisms against piracy, while contracts and licensing agreements operationalize these protections in practice. Such agreements specify usage duration, territorial rights, and revenue-sharing terms, enabling filmmakers to retain control while allowing distributors to commercialize content within agreed boundaries. As a government entity stakeholder explained, *"We need to know when, where, how and for how long. Then we can be able to have partnership with anyone."*

3.1.4. Informal distribution and piracy

In addition to formal platforms and exhibition spaces, the audience survey indicated that films also circulate through informal digital and physical distribution channels. When asked about the use of pirated sources to watch films, 55% of audiences reported that piracy is their primary method of accessing films. A further 25% admitted to using it for a significant portion of their viewing, while 20% reported using pirated sources rarely, typically only when a film is unavailable through legal platforms.

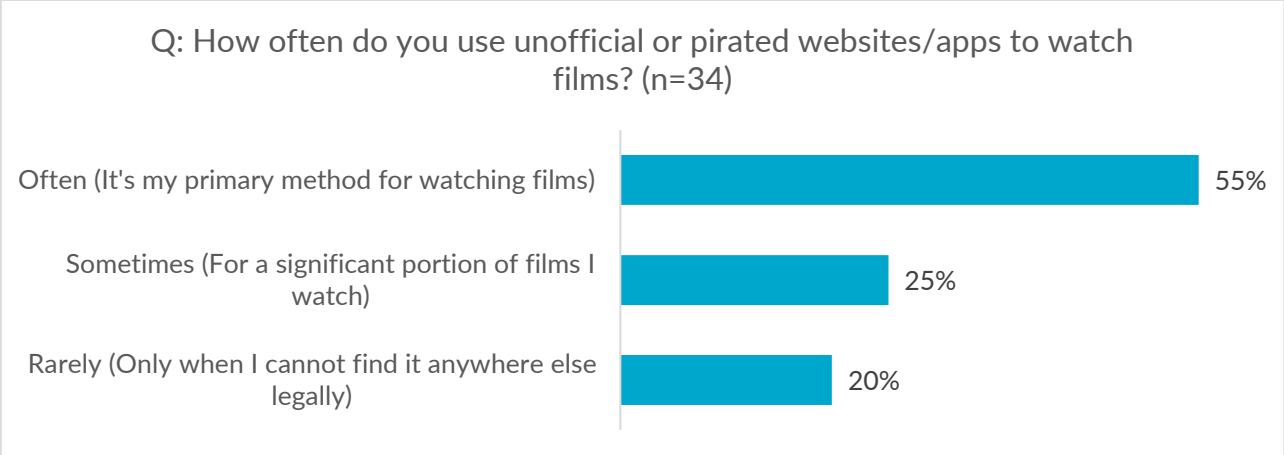


Figure 4: Piracy frequency in Kenya | Source: Survey data

The reasons viewers give for turning to piracy point directly to structural gaps in the formal market. The most frequently cited factor (67%) is the ability to watch recent films not available on mainstream platforms. A filmmaker described the frustration this creates for legitimate producers: "*The only saving grace is that, you know, we still believe in 3D films and things like that, and audience prefer when it's a big film, they want to watch it in cinema. That experience cannot be taken over even by an Android box. So, the bigger films survive, the smaller ones don't."* When films cannot get theatrical release or timely platform availability, piracy fills the gap.

Subscription costs (65%) are the second most cited reason, reflecting an economic reality where multiple subscriptions are prohibitive for most Kenyans. A distributor explained the perverse math: *"Netflix right now, the reason why they're to withdraw is, it's not that they don't have*

viewership, but it's available on the Android box. It's so easy and it's digital digitally pirated." When legal access costs more than a pirate's one-time fee, the market chooses the cheaper option regardless of legality.

Geographic restrictions drive 56% of viewers to piracy, as licensing agreements prevent content from being available where audiences are. A filmmaker noted the paradox of cross-border discovery: *"In Nigeria, it was number 2 in Kenya it was number 1 and just seeing that a Nigerian can watch your projects*" yet such access remains the exception, not the rule.

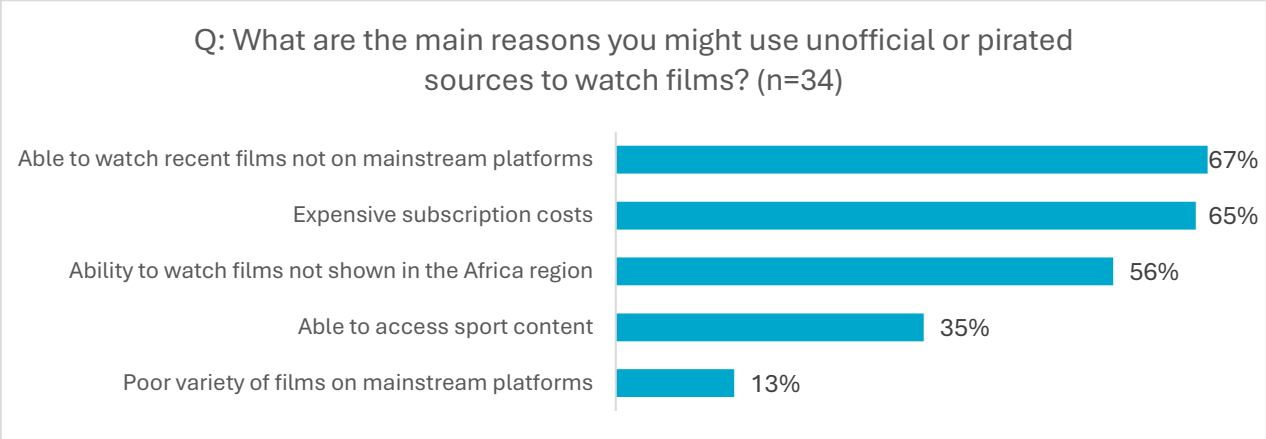


Figure 5: Reasons for piracy in Kenya | Source: Survey data

Informal circulation also exists through physical rental and resale channels. Among audiences who reported renting or buying films, local video shops were the most frequently cited source (90.9%). Smaller shares mentioned friends or informal sellers (18.2%), digital video rental services (18.2%), and street vendors (9.1%).

Those who sell through these rental and resale channels believe that they are filling gaps left by limited access to legitimate content, particularly in underserved or price-sensitive markets. Rather than being viewed purely as criminal actors, many of these informal retailers operate with a strong understanding of audience demand and take pride in serving segments that formal distribution often overlooks. They curate and supply content that they know is popular and in demand, effectively responding to consumer preferences in ways aligned with market realities. As one distributor observed, *"That guy is clever enough to know there is a certain drama series that is selling… that is the thing he sells… you will find them selling WWE… buying Shaka Zulu CDs."*

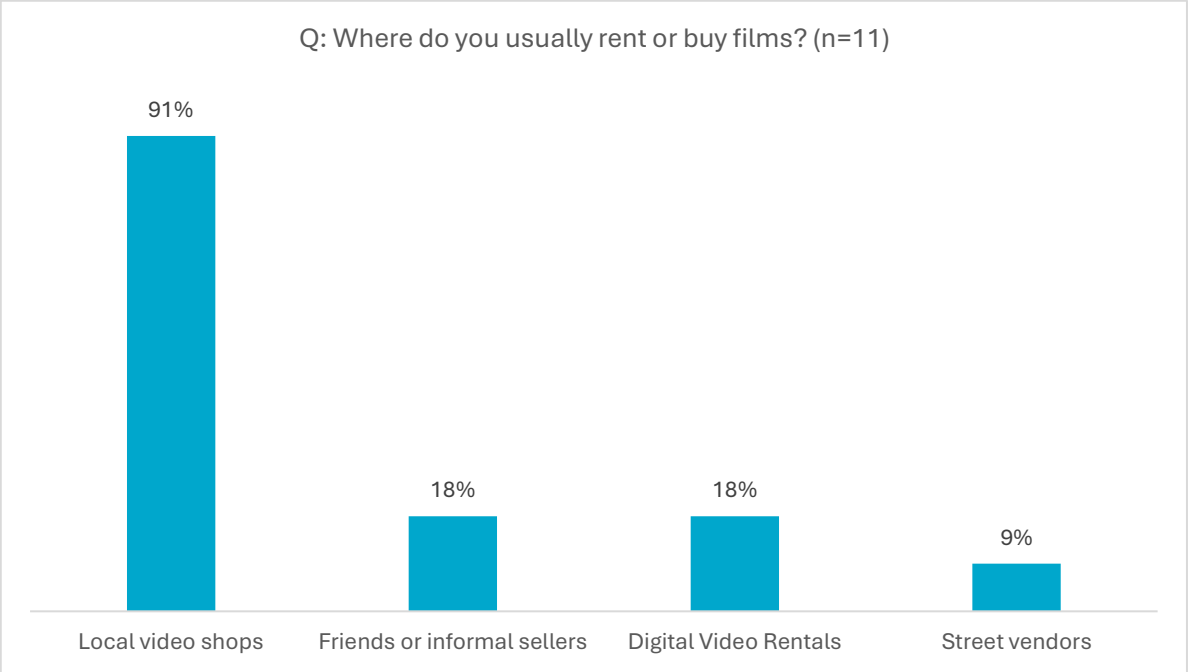


Figure 6: Video rental sources in Kenya | Source: Survey data

Piracy reveals underlying market demand and the gaps in formal distribution, with informal sellers demonstrating strong awareness of what audiences want and responding quickly to those preferences. Rather than operating blindly, they curate and supply content that aligns with consumer tastes, effectively acting as agile, demand-driven intermediaries. As stakeholders noted, piracy-related activity can serve as an indicator of audience direction, reflecting a level of responsiveness that formal systems often lack. At the same time, these actors take pride in their ability to serve market segments that are underserved or ignored by mainstream distributors. One distributor noted that *"some of the illegal things that happen in the industry are indicators of the direction of how things go… there is no one as agile as that person".*

Addressing piracy therefore requires a combination of enforcement, innovation, and market alignment rather than regulation alone. Stakeholders highlight the need to convert piracy into a signal that can be leveraged to design better distribution models, pricing strategies, and access points that reflect audience realities. This includes rethinking how content is delivered, priced, and scaled to meet demand, while also exploring ways to integrate informal distribution networks into legitimate ecosystems. As one perspective emphasized, the growth and improvement of the industry depend on engaging audiences effectively and learning from their behaviour. *"It's all about numbers… you will face the customer criticism and you'll learn from there and you elevate yourself."* Distributor, Kenya

3.1.5. Festivals and community screenings as alternative distribution channels

Film festivals in Kenya play a critical role in audience development and cultural mediation, particularly in a context where formal cinema infrastructure remains limited. Platforms such as the Kalasha International Film and TV Market, Festival and Awards, the NBO Film Festival, and Lola Kenya Screen provide structured exhibition opportunities for Kenyan and African films, often complemented by discussions, markets, and training components. More broadly, these festivals, alongside community screenings, function as "essential compensatory mechanisms" in a thin exhibition landscape, supporting audience development, language diversity, and regional storytelling.

However, their reach remains uneven and often confined to niche audiences. As one ecosystem partner observed, *"NBO Film Festival… it's still a very niche, niche festival that's even within the industry*

itself... you won't find the people who are going maybe to watch Phil Karanja's film attending NBO." Even high-profile platforms like Kalasha, designed to create an opportunity for foreign producers to come and meet their counterparts in Kenya, struggle with inconsistency, which limits their ability to build sustained audience momentum.

At the same time, emerging regional and grassroots approaches demonstrate how these limitations can be addressed. Community-based screenings, often organised with county governments, NGOs, and cultural centres, extend film access far beyond urban cinemas, prioritizing visibility and social reach over revenue. This aligns with practitioner experiences on the ground. The Kilifi Creek Film Festival, for example, adopts an intentionally inclusive model. Similarly, the Aftercare Film Festival in Lodwar integrates exhibition with capacity-building, as one filmmaker shared. Sustained regional platforms like Kitale Film Week further illustrate how repeated exposure can normalize film consumption habits. Complementing these efforts, community screening models demonstrate the depth of engagement possible when films are taken directly to audiences, reinforcing the desk research finding that these channels significantly enhance visibility despite limited direct revenues.

The survey also explored the role of film festivals and community screenings as exhibition spaces outside commercial distribution channels. Among audiences who reported attending such events, community screenings were mentioned by 71%, while 57% reported attending film festivals.

This is due to festivals being niche events concentrated in Nairobi's upscale venues, catering to filmmakers and cinephiles, with ticket prices and locations that exclude most Kenyans. Community screenings funded by organizations who have interest in the theme which in turn enables the community to access the screening for free at their area of residence. The community screenings are structured around engagement, with post-screening conversations and partnerships with local organizations that build trust and draw crowds.

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

Findings from the audience survey indicate that attendance at screening events appears to occur periodically rather than frequently. Audiences reported a median of two festival or community screening visits, with attendance ranging from one to ten events. Viewers described several reasons for attending these screenings, noting that the events are educative, entertaining, and provide opportunities to connect with friends or other members of the audience.

2.2.6. Data on Reach and Revenues: Box Office, TV, Streaming, and Ancillary

Reliable, comprehensive data on the Kenyan film market is virtually non-existent, creating a foundational gap that constrains decision-making across the value chain. There is no centralized system for collecting or aggregating industry data, leaving stakeholders without benchmarks for evaluating performance, guiding investment, or tracking market growth. As a result, actors across production, distribution, and exhibition rely heavily on fragmented insights, estimates, and anecdotal evidence to make strategic decisions. This lack of a unified data infrastructure means the industry operates without a clear evidence base, limiting its ability to professionalize and scale effectively.

"We don't have a central depository where film data or local content data is being collected. We are an industry so deprived of data." Ecosystem Partner, Kenya

The absence of reliable data has cross-cutting implications for how the industry understands audiences, measures success, and allocates resources across box office, television, streaming,

and ancillary markets. Without standardized metrics or shared repositories, each segment of the value chain functions in silos, with limited visibility into overall market performance or interconnections between platforms. This fragmentation not only affects commercial decision-making but also weakens the ability to attract investment, as stakeholders cannot quantify market size, audience behaviour, or revenue potential with confidence. Consequently, the lack of data is not just an operational constraint but a structural barrier to the growth and sustainability of the Kenyan film ecosystem.

i. Box Office

Box office data for Kenyan films is largely unavailable and undocumented, making it difficult to assess performance or establish meaningful comparisons across releases. Cinemas do not routinely disclose viewership or revenue figures, which leaves filmmakers and distributors without visibility into actual audience reach or financial outcomes. In the absence of formal reporting systems, industry stakeholders rely on indirect indicators such as the duration of theatrical runs or informal accounts of a film's popularity. However, these proxies do not provide a standardized or verifiable measure of success, making it challenging to build cumulative knowledge or benchmark performance over time. "If you were to ask the cinemas, the cinemas won't give you information." Distributor, Kenya

This lack of transparent results in the market implies that each film effectively starts from scratch, with limited ability to learn from prior releases or optimize future strategies. While some films are informally recognized as successful based on extended runs, such as locally notable titles that remain in cinemas for several weeks, there are no publicly accessible records to validate or compare their box office performance. The dominance of international films further highlights this imbalance, as they benefit from more consistent exhibition patterns and perceived market stability. Overall, the absence of transparent box office data limits accountability, reduces comparability, and constrains the industry's ability to build cumulative evidence base for decision-making.

ii. Television Ratings

Television ratings data in Kenya is primarily provided by third-party firms such as Ipsos and Geopoll, but it remains limited in granularity and scope. While these organizations offer structured audience measurement, the data is largely aggregated into broad time bands and general viewing trends, without sufficient segmentation by demographics, geography, or behavioural attributes. This means broadcasters and advertisers can observe when content performs relatively well, but cannot accurately identify who is watching, why they are watching, or how different audience segments behave. As a result, the data provides directional insights rather than actionable intelligence for detailed decision-making.

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

Despite these constraints, stakeholders use the available ratings data alongside internal observations and industry experience to infer general viewership hierarchies and programming preferences across major channels and platforms. Certain stations, genres, and Pay TV offerings consistently emerge as more popular, and some demographic tendencies are understood through localized or anecdotal research. However, because these insights are not derived from consistently granular or standardized datasets, they remain largely qualitative and cannot fully support precise pricing models, targeted advertising, or evidence-based content commissioning. Compared to more mature markets with highly detailed audience analytics, Kenya's television ecosystem continues to operate with limited visibility into audience composition and behaviour, constraining the optimization of both content strategies and revenue generation.

iii. Streaming

Streaming platforms operate with minimal transparency, as viewership, revenue, and subscriber data are not shared with filmmakers or the public, limiting visibility into actual content performance. While platforms provide surface-level indicators such as "top 10" rankings, these are not considered reliable reflections of underlying viewership or financial metrics. Stakeholders report that even these rankings may be algorithmically generated or curated, further reducing confidence in their accuracy. This lack of transparency creates uncertainty for content creators who are unable to assess how their work is performing beyond basic placement signals.

"Do you feel like these platforms have transparency… No, none at all." Filmmaker, Kenya

Available estimates of subscriber numbers suggest that the Kenyan streaming market remains relatively small, which has implications for content commissioning and investment decisions. Platforms with larger subscriber bases are perceived to have stronger local engagement, particularly where content resonates culturally and linguistically with audiences. However, even where subscriber bases exist, the absence of shared analytics limits the ability of filmmakers and distributors to evaluate return on investment or audience segmentation. This opacity, combined with constrained market size, reduces incentives for large-scale local content production and reinforces a cautious approach to platform-led commissioning.

iv. Ancillary Revenues

Ancillary revenue streams including airline licensing, community screenings, institutional sales, and international distribution, represent important but largely undocumented components of the Kenyan film industry's revenue base. These streams are typically negotiated privately and distributed across multiple channels, making them difficult to track or consolidate into industry-wide statistics. Despite their fragmented nature, they demonstrate that films can generate value beyond traditional box office and streaming platforms when strategically positioned across different markets and windows.

"In flight you don't get quite a lot of money, but if you get three to four to five airlines, it accumulates." Distributor, Kenya

A multi-window distribution strategy allows producers to maximize returns by extending the lifecycle of a film across diverse audiences and geographies. Revenue from airlines, educational screenings, corporate licensing, and international sales can cumulatively exceed initial expectations, even if individual deals are relatively small. However, because these transactions are not systematically recorded or shared, their aggregate contribution to the industry remains unknown. This lack of visibility limits the ability to fully understand the economic potential of ancillary markets, despite their demonstrated importance in sustaining film revenues beyond primary distribution channels.

3.1.6. Gaps and opportunities

i. Regional Gaps: The Nairobi-Centric Industry

The Kenyan film industry remains heavily concentrated in Nairobi, leaving most of the country underserved both in terms of infrastructure and storytelling. This imbalance is reinforced by stark infrastructure limitations, with limited cinema presence outside major urban centres such as Nairobi, Mombasa, Kisumu, and Eldoret. As a result, regional audiences are structurally excluded from theatrical experiences and reaching them requires significant additional investment in both distribution and localized marketing. This creates an economic barrier that perpetuates Nairobi-centric production and exhibition, limiting the industry's ability to engage the full national audience.

"*When you look at our industry, it tends to be concentrated within Nairobi and there's a tendency to call it a Nairobi industry… we are not engaging the full scale of the Kenyan audience."* E*cosystem partner, Kenya*

ii. Genre Gaps: The Dominance of Crime Dramas and Documentary Overreach

Kenya's film industry exhibits a narrow genre concentration, with crime dramas dominating fictional content while documentaries are disproportionately represented in festivals rather than mainstream distribution channels. This pattern is largely driven by risk-averse production behaviours, where filmmakers and producers replicate formats perceived as commercially successful rather than experimenting with new genres.

On the other hand, Kenya's documentary sector has achieved remarkable success, with films like Battle for Laikipia and Softie achieving extended theatrical runs, broadcast reach of over 1.5 million viewers, and international festival recognition. This success rests on dedicated funding streams such as Docubox and international documentary funds, structured impact campaigns that pair screenings with community engagement, and a clear festival-to-audience pipeline. Other genres such as comedy, sci-fi, horror, historical drama lack this infrastructure. Producers rationally replicate proven formulas such as crime dramas because they operate in a high-risk, low-data environment.

"There was Battle for Laikipia, which was an external project... which we were involved in distribution. There was the theatrical run which was really successful. We stayed in the cinema for over three months. And it was, and in the commercial cinemas it did nine weeks straight in one of the commercial cinemas. And it was like the first local film, both documentary fiction and nonfiction to have, it has the longest run in local cinema, which was a big thing." Filmmaker, Kenya

iii. Language Gaps: The Untapped Power of Mother Tongue Storytelling

Despite Kenya's rich linguistic diversity, with over 40 ethnic languages, mainstream film production remains largely dominated by English and Swahili, resulting in limited representation of local languages in scripted content. This creates a disconnect between content and audience identity, particularly in regions where vernacular languages are the primary medium of daily communication. While vernacular television channels have demonstrated strong viewership by localizing content, similar approaches have not been widely adopted in film production, especially in the creation of original stories. The lack of investment in mother tongue storytelling limits cultural resonance and excludes large segments of the population from seeing their lived experiences reflected on screen. Language remains a powerful driver of emotional connection and audience engagement, however, there is currently no viable business model for mother tongue film production. The stakeholders note that the market alone will not fill this gap because vernacular films are perceived as high-risk by private investors and broadcasters, who lack data on their potential returns. In the absence of commercial incentives, public funding becomes essential. The Ministry of Culture, through the Kenya Film Commission and the proposed Creative Economy Fund, should allocate dedicated resources for the development, production, and distribution of mother tongue content as strategic investment in cultural representation and audience expansion. Without such funding, the current gaps in the sector will persist, and the majority of Kenyans will continue to see themselves only in imported stories or not at all.

"We have 42 tribes, different cultures across the board. So, I feel for reality it has been playing a bit, well, in terms of... let's say for the likes of foods of Kenya it's something that has really picked up quite well. At Zee we're even looking at having something like that on the channel in the future. So, it's something that I feel we still need to bring in our originality to our storytelling." Distributor, Kenya

3.2. Audience Development

3.2.1. Overview

The Kenyan audience is young, mobile-first, and highly engaged on social media, with 15.1 million active social media identities in the country. Discussions around cinema are most popular among the 25–34 age demographic, a group with relatively stable incomes and

consistent engagement with digital platforms. While audiences express a strong sense of pride in Kenyan stories "shining" globally, they are not automatically loyal to local content; they judge productions based on craft, emotional impact, and originality. High ticket prices and the physical shortage of venues remain the primary barriers to audience growth in the theatrical sector.

Audience building is increasingly facilitated by festivals, such as the Nairobi International Film Festival (NBO IFF) and the Kilifi Creek Festival, which serve as essential launchpads for prestige titles. Social media influencers and digital "film hangouts" have become the new marketing standard, moving away from traditional media to create community-based excitement around releases.

3.2.2. Demographic profile of Kenyan film viewers

The audience survey identifies three distinct segments defined by their content priorities, platform adoption, and technical expectations. These profiles reveal a marketplace that is highly digitally connected but divided by its specific demands for production quality and cultural relevance.

- African-First Family Streamers (45%): This is the largest and most gender-skewed segment, comprised of 79% female viewers. Primarily aged between 25 and 44, these audiences demonstrate a strong loyalty to African storytelling, with 83% preferring local content and 76% consuming regional films. Viewing is anchored on YouTube (94%), supported by smartphones and free-to-air TV as a fallback. While they value the educational aspects of film (46%), their engagement is frequently hampered by poor internet connectivity and high data costs.
- Cross-Platform Cultural Explorers (35%): This group represents a versatile audience that moves fluidly between local (86%) and international (100%) content. Preferences are driven by a demand for high-quality storytelling (64%) alongside traditional entertainment. They are more likely to utilize Smart TVs (56%) and paid services like Netflix (47%) compared to the first segment. Their primary barrier is not infrastructure but content quality, with 41% citing non-engaging storylines as the reason they disengage from local productions.
- International Quality Seekers (20%): Predominantly male (72%) and younger, this segment is almost exclusively oriented toward high-budget international content, particularly Action (80%) and Science Fiction (60%). Engagement with local films is significantly lower at 23%, resulting in a Net Promoter Score (NPS) of -80%. This group relies heavily on high-speed digital access, including pirated websites (42%) and Netflix (40%), and cites non-engaging storylines (57%) as the ultimate barrier to local film consumption.

Table 7: Kenya film consumer segments | Source: Survey data

Segment	Segment 1: African - First Family Streamers	Segment 2: Cross-Platform Cultural Explorers	Segment 3: International Quality-Seekers
Dimension	**Key Characteristics**	**Key Characteristics**	**Key Characteristics**
Segment distribution	n = 138 (45%)	**n = 106 (35%)**	**n = 60 (20%)**
Gender	79% female	59% female, 41% male	72% male
Age distribution	25 – 44 years – 75%	25 – 44 years – 78%	25 – 44 years – 80%

Content preference	Local content – 83% and regional content – 76%.	Local content – 86%, regional content– 79% and international films – 100%	Local and regional content - 23% and international films – 100%
Top genres	Drama (67%) and comedy – 65%	Drama (68%) and comedy – 61%	Action (80%), drama – 62% and science fiction – 60%
Primary device	Smartphone – 70% and smart TV – 42%	Smartphone/tablet – 70% and Smart TV – 56%	Smartphone / Tablet – 62% and Smart TV – 60%
Main platforms	YouTube – 94% and Netflix – 25%	YouTube – 85% and Netflix – 47%	YouTube – 76%, Pirated Websites – 42% and Netflix – 40%
Fallback option	Free-to-air TV - 70%	Free-to-air TV - 46%	DVDs/USB sticks - 48%
Main motivations	Entertainment (86%) and Education – 46%	Entertainment (93%) and High-Quality Storytelling - 64%	Entertainment (90%), High-Quality Storytelling – 72% and Education – 67%
Key barriers to watching local films	Poor internet connectivity / High data costs- 47%	Storylines that are not engaging - 41%	Storylines are not engaging – 57%
Median monthly streaming spend	~$7.80	~$9.40	~$8.20
Avg. streaming platforms	1	1	1
Cinema willingness to pay	~$3.90	~$4.70	~$4.70
Net Promoter Score for African local films	-37%	-39%	-80%
Growth triggers	Higher-quality films – 59% and Lower subscription prices – 36%	Higher-quality films – 77% and Personalization and recommendations – 48%	Higher-quality films – 80% and Personalization and recommendations – 52%

While a strong base of viewers demonstrates loyalty to African narratives, broader market expansion depends on addressing the perceived gap in production quality. Growth triggers across all three segments are remarkably consistent, with a primary demand for higher-quality films (ranging from 59% to 80%). This commonality indicates that while audiences differ in their taste for specific genres, they share a sophisticated expectation for technical polish and narrative depth. Strategic focus for audience development must therefore prioritize the transition from volume-based production to high-quality, engaging storytelling that can compete with international benchmarks on global platforms.

3.2.3. Film discovery and marketing channels

From the audience survey, it is evident that film discovery in Kenya is a deeply social and digital first experience, where personal recommendations and online algorithms far outweigh traditional advertising. With 67% of audiences hearing about films through friends and family and 61% via social media, the "word-of-mouth" effect is the most critical driver for audience development. While streaming platforms also play a significant role in discovery (54%), traditional media channels like radio, TV, and billboards have become largely marginalized, accounting for less than 7% of audience reach. This shift suggests that for a film to succeed in the Kenyan market, marketing strategies must prioritize community-building and digital engagement over legacy media spend to effectively convert interest into viewership.

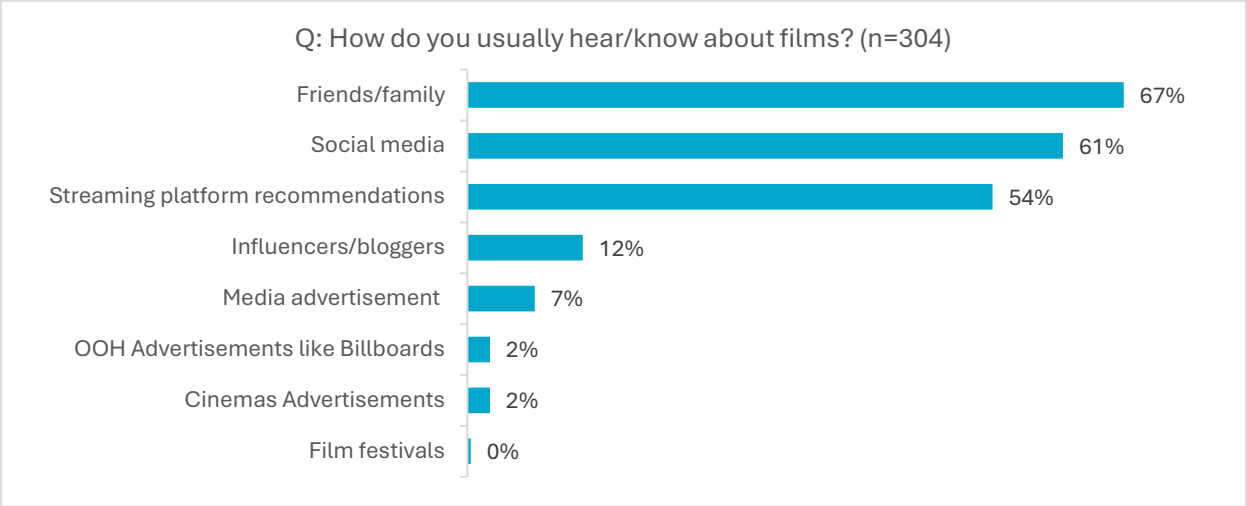


Figure 7:How audience in Kenya know/hear about new films | Source: Survey data

These patterns show that audience development in Kenya is largely driven by social networks and digital visibility. Films spread through conversations, shares, and algorithmic discovery rather than traditional advertising. For filmmakers and distributors, building early audience communities and strong digital presence is likely to matter more than investing heavily in legacy media channels.

3.2.4. What drives audiences to watch films

Entertainment and relaxation are the dominant motivations for film consumption in Kenya, cited by 89% of audience survey participants. The audience primarily indicated that they view films as a leisure activity and a way to unwind. Beyond entertainment, content quality and intellectual engagement also influence viewing decisions, with 48% drawn to high-quality storytelling and 47% watching films to learn about social issues or gain educational insights. Social influence is another key driver, as 42% of audiences rely on recommendations from friends and family when choosing what to watch. Interest in specific actors or directors (29%) and cultural connection or identity representation (23%) also shape viewing behaviour, though to a lesser extent. Other motivations are comparatively less prominent, including films that are controversial or widely discussed, locally representative, or affordable (15%), family-friendly content (14%), and technical elements such as soundtracks or visual style (16%). Overall, we see that while entertainment remains the primary driver, Kenyan audiences also value strong storytelling, socially relevant themes, and trusted recommendations.

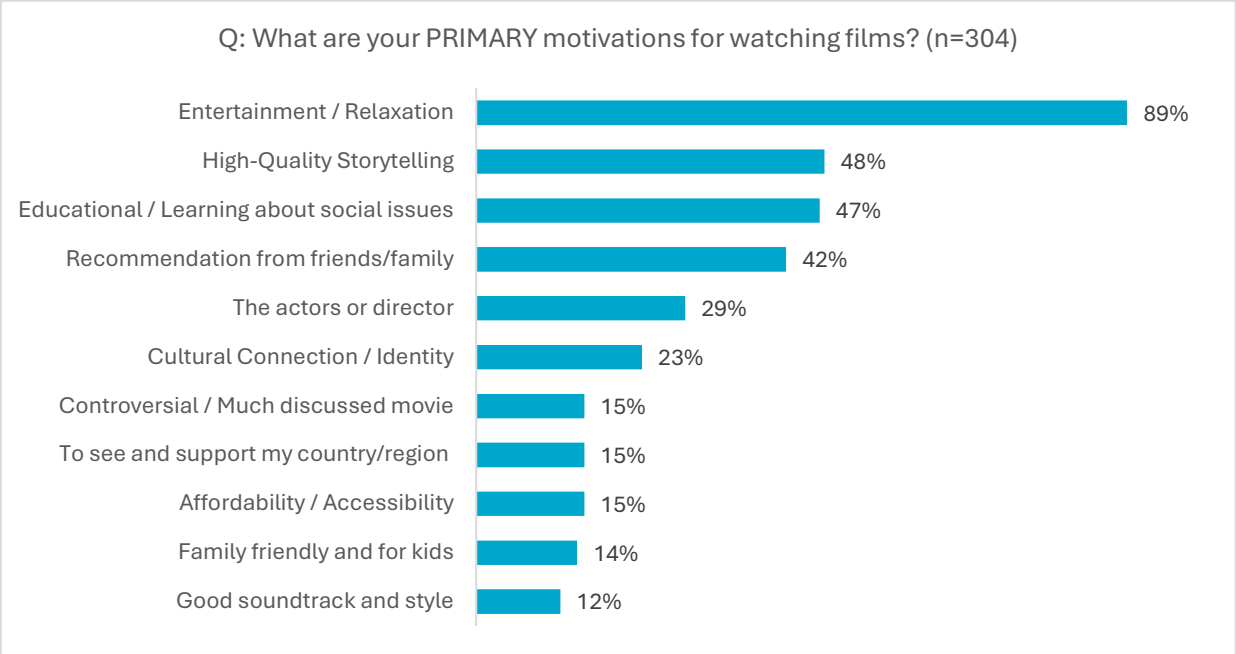


Figure 8: Primary motivations for watching films in Kenya | Source: Survey data

What drives a Kenyan to hit play? The data points to a highly sophisticated audience that prioritizes craft above everything else. Authentic acting is the ultimate deal sealer, cited by 97% of viewers, followed closely by technical polish (94%) and a compelling plot (86%). While word-of-mouth remains a powerful force influencing 72% of viewers, it significantly outperforms traditional marketing. Perhaps the most telling insight is the audience's independence: despite a strong appreciation for African cultural representation (61%), external validation like awards barely registers, mattering to just 34%. For Kenyan viewers, the proof is in the performance, not the plaque.

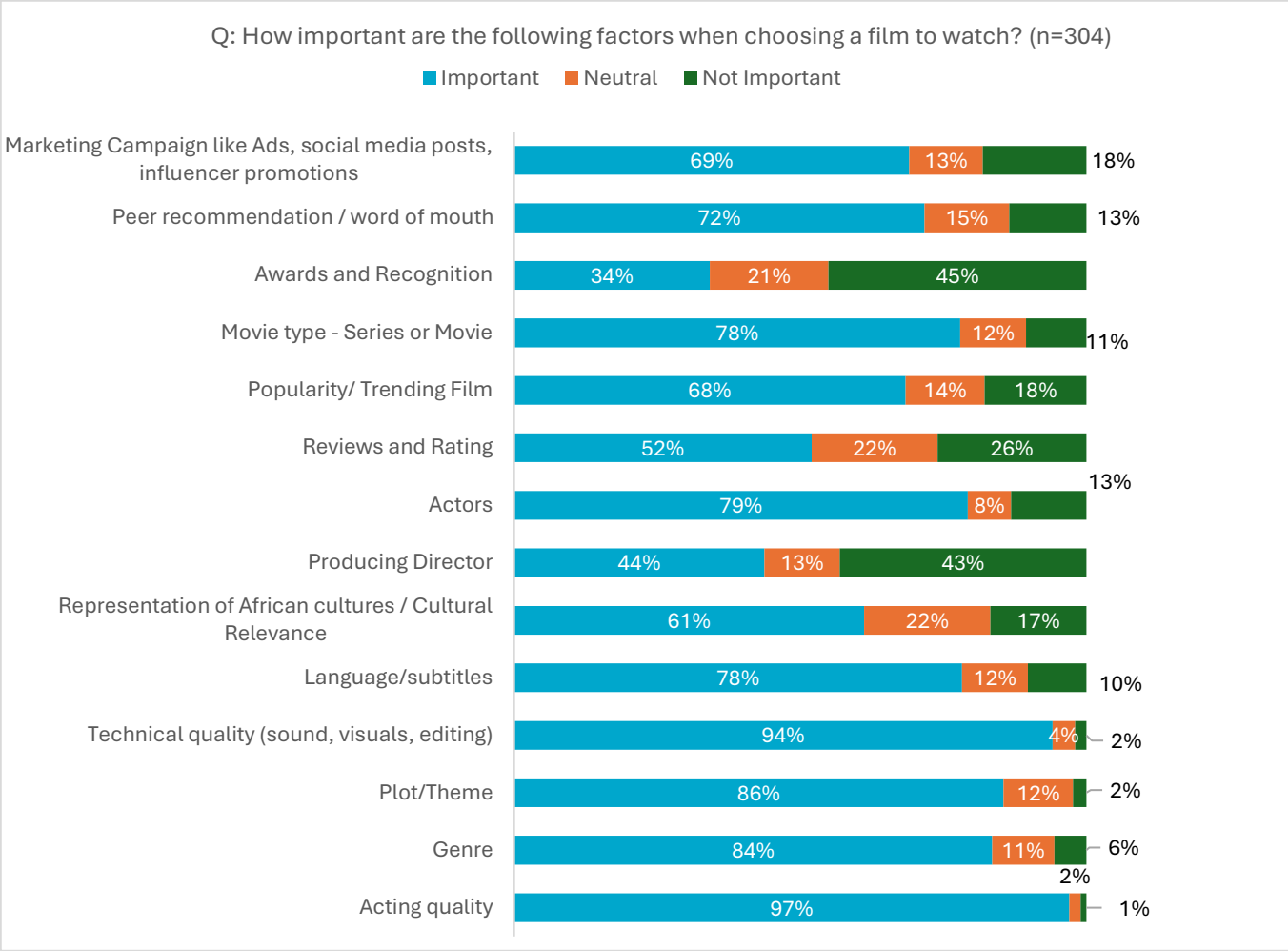


Figure 9: Important factors when choosing film to watch in Kenya | Source: Survey data

The findings suggest that Kenyan audiences are selective viewers who respond strongly to quality and authenticity. Strong acting, compelling plots, and technical polish appear to matter more than external signals such as awards or hype. For audience development, this means that attracting viewers depends less on promotion alone and more on delivering films that meet expectations for storytelling and craft.

3.2.5. Audience viewing platforms and access to films

The audience survey findings reveal that film consumption in Kenya is a multi-screen experience, heavily dominated by television devices. Television emerged as the primary hardware for viewing, cited by 73% of the audience, followed closely at 69% by smartphones and tablets. In contrast, laptops (14%) featured less prominently in the results. Only a negligible share of viewers reported using other specialized devices (1%), confirming a decisive shift toward personal, portable, and web-integrated screens.

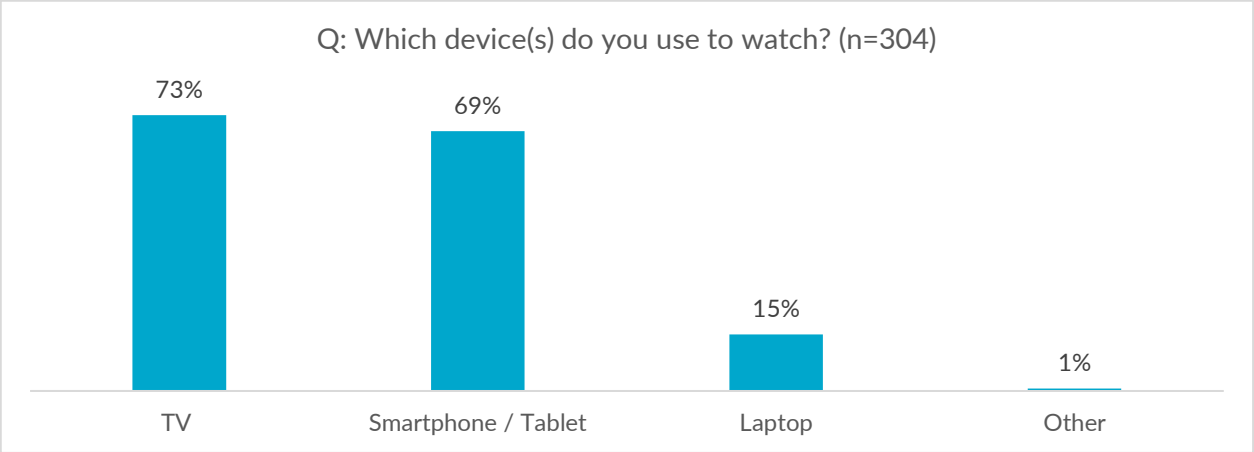


Figure 10: Devices used to watch films in Kenya | Source: Survey data

Additionally, the findings into how films reach audiences across different distribution channels indicate that 81% watch films through various on demand streaming platforms. Traditional broadcast remains an important secondary channel, cited by 48% of audiences, while 36% reported watching films through social media platforms. In contrast, cinema attendance (5%), video rentals (4%), and film festivals (1%) account for a much smaller share of viewing access points.

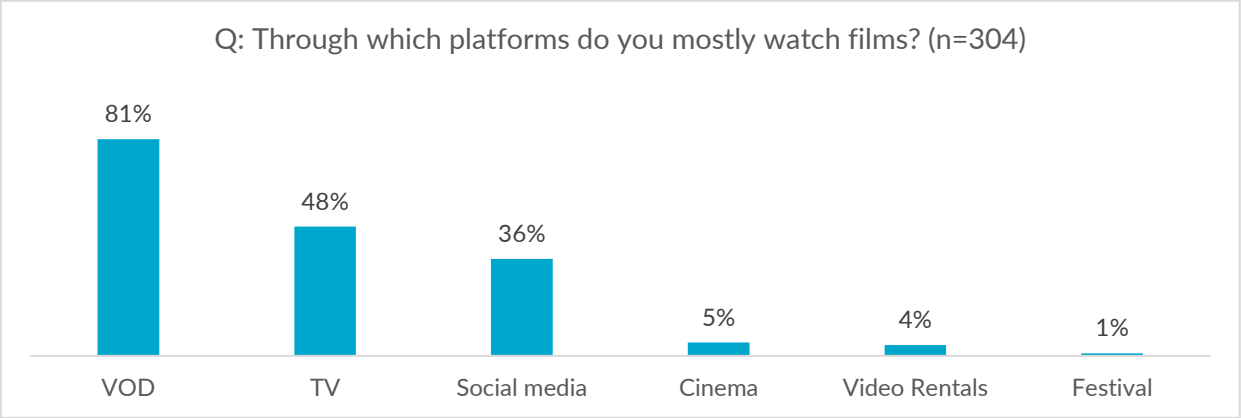


Figure 11: Primary viewing platforms in Kenya | Source: Survey data

Within the streaming ecosystem, YouTube is the most widely used platform among the Kenyan audience (87%), followed by Netflix (37%) and Showmax (15%). A smaller share reported using digital pirated websites (13%), while locally oriented or niche platforms such as Viusasa (8%), MyMoviesAfrica/Yakwetu TV (7%), Amazon Prime Video (6%), DStv Stream (6%), and AfriFlix (1%) were mentioned less frequently.

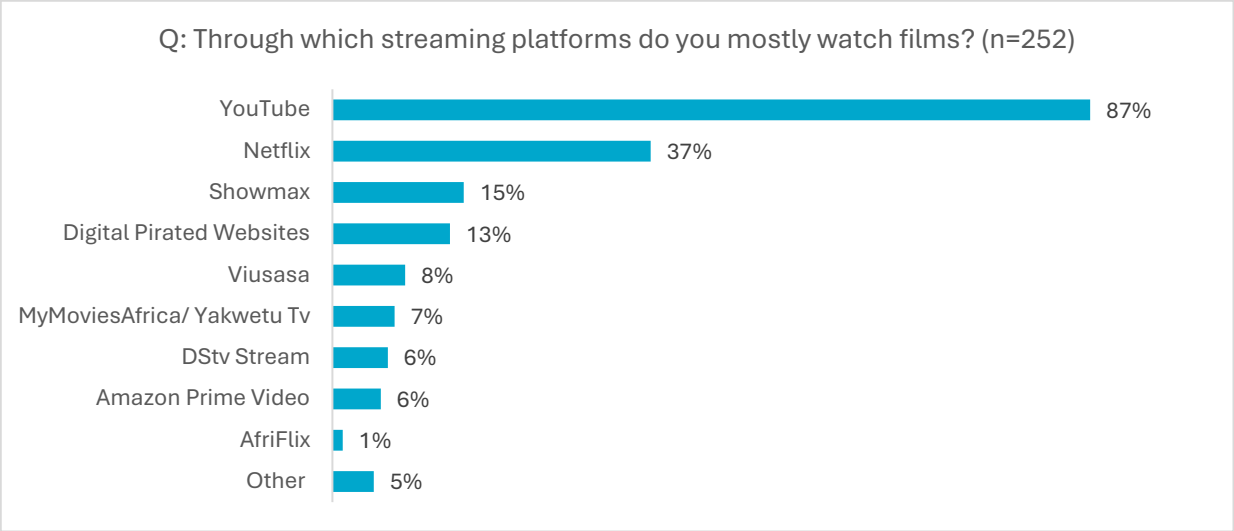


Figure 12: Streaming platforms used in Kenya | Source: Survey data

Television remains a key channel through which audiences watch films. Free-to-air television was reported by 64% of audiences, while 43% reported watching films through Pay TV services such as DStv, StarTimes, or GoTV.

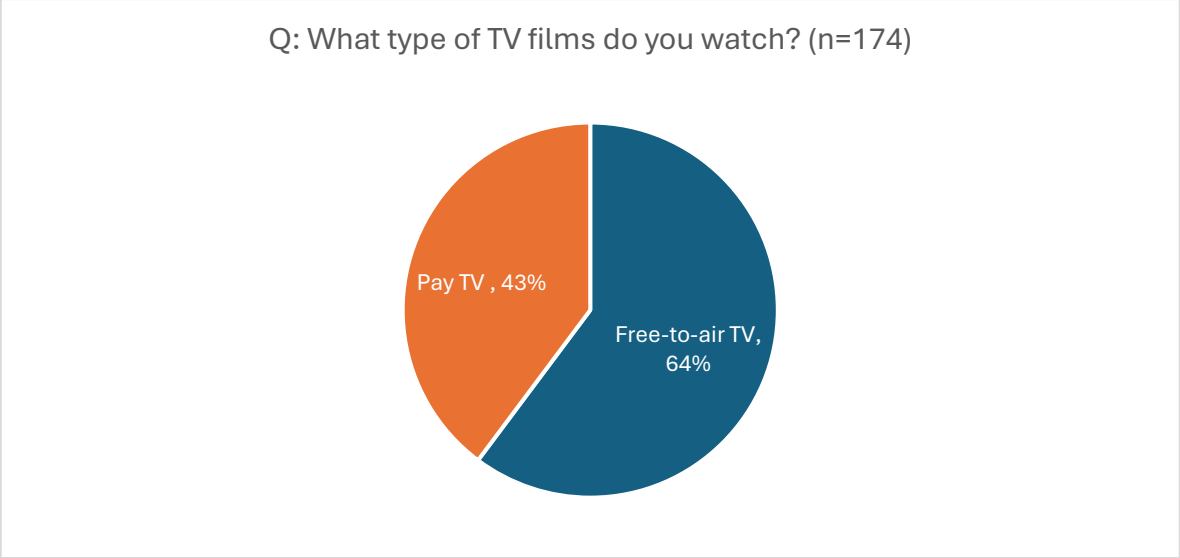


Figure 13: Type of TV films watched in Kenya | Source: Survey data

With reference to social media, TikTok (87%) was the most frequently mentioned platform, followed by Facebook (52%), Instagram (25%), and Telegram (19%), while X (formerly Twitter) was cited by 3% for accessing film content (film clips). These responses indicate that social media platforms form part of the broader digital environment through which films are accessed.

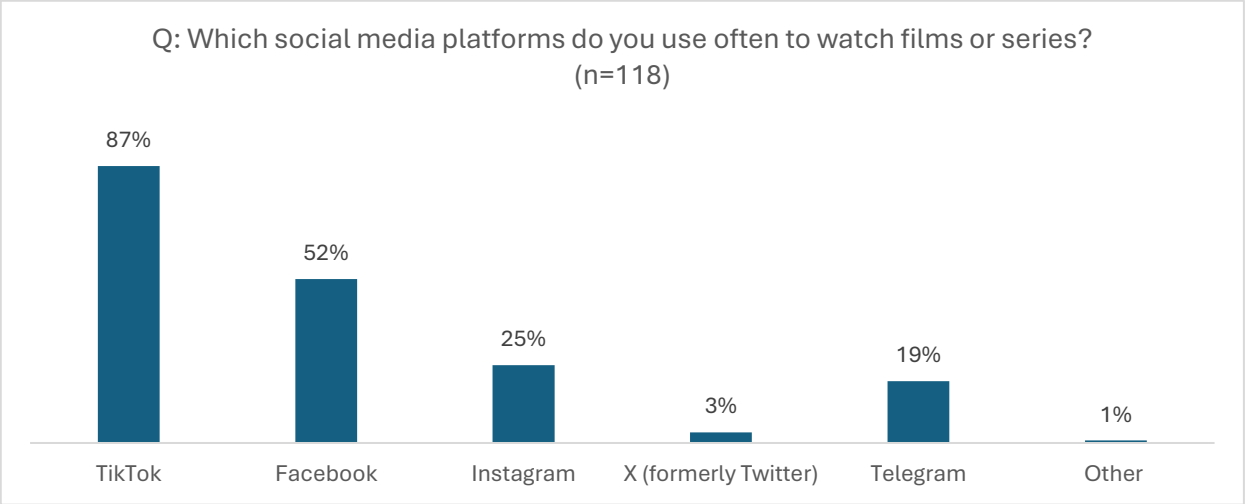


Figure 14: Social media platforms used to watch films in Kenya | Source: Survey data

Although cited by smaller shares of Kenya audience as primary viewing channels, the survey indicates that films also circulate through a range of physical and event-based distribution spaces. Among audiences who reported watching films in cinemas, mainstream cinema venues account for most viewing (81%), while 19% indicated watching films in makeshift estate cinema rooms, pointing to the presence of smaller or informal exhibition spaces alongside commercial theatres. Screening events also provide additional access points. Among those who attend such events, 71% reported attending community screenings and 57% reported attending film festivals. In addition, the responses suggest that physical rental markets remain present, with local video shops cited by 91% of audiences who rent or buy films, alongside friends or informal sellers (18%), digital video rentals (18%), and street vendors (9%). Together, these findings indicate that, beyond digital and broadcast platforms, films continue to reach audiences through a mix of cinema venues, community screening spaces, and retail distribution channels.

Overall, the findings indicate that film access among audiences is shaped by both the devices used to watch content and the platforms through which it is distributed. Smartphones and tablets emerge as the most reported viewing devices, followed by smart TVs, highlighting the role of mobile and internet-enabled screens in film consumption. In terms of distribution channels, streaming platforms represent the most frequently cited access point, with television and social media also providing additional pathways. Although cited by smaller shares of audiences, cinemas, community screenings, festivals, and physical rental outlets remain part of the broader ecosystem through which films reach audiences.

3.2.6. Streaming behaviour and platform preferences

To further understand how audiences engage with streaming services, the survey sought to understand the frequency with which they stream different types of films, the devices used for streaming, and their subscription patterns. The responses indicate that streaming is a regular activity among audiences across multiple film categories.

Among those using streaming platforms, audiences report watching a mix of international and regional content. Local films account for 24% of films watched on VOD platforms, closely followed by films from other African countries (23%) and American films (19%). European films represent 13%, while other international content, including Indian, Korean, and Latin American productions, accounts for smaller shares.

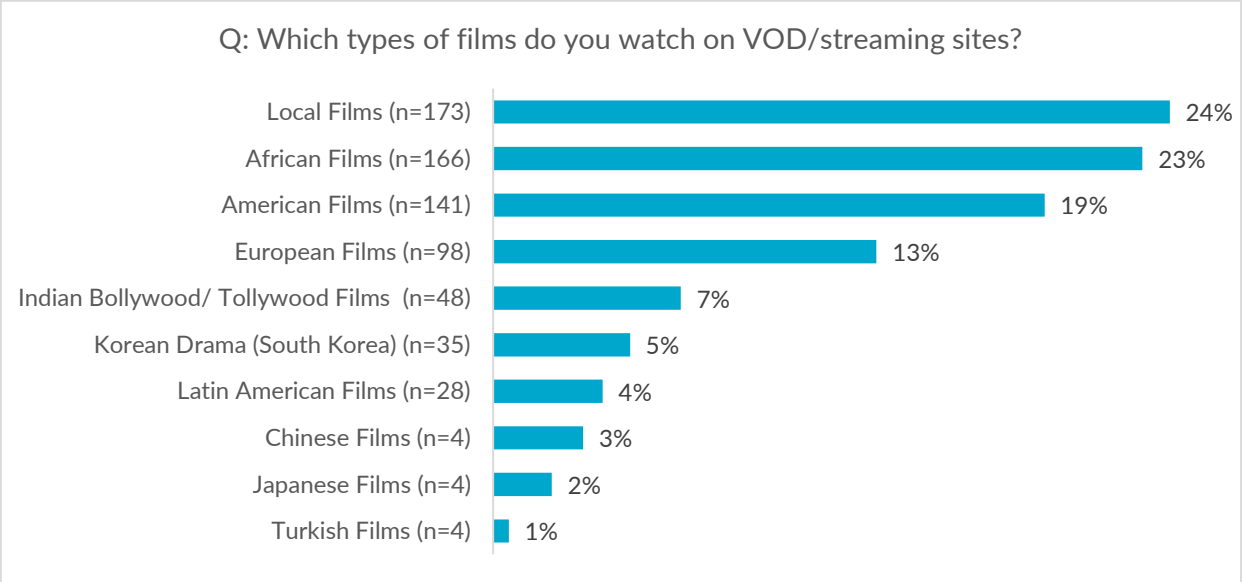


Figure 15: Type of films watched on VOD in Kenya | Source: Survey data

The audience survey also examined the types of films audiences reported watching on the two most widely cited streaming platforms, YouTube and Netflix. On YouTube, audience reported watching higher shares of local films (68%) and African films produced in other countries (66%), alongside American films (43%) and European films (33%). Other categories were mentioned less frequently, including Indian Bollywood/Tollywood films (15%), Latin American films (10%), Korean dramas (8%), Chinese films (7%), and Japanese films (5%).

In contrast, Netflix viewing among audience is more strongly associated with international content, particularly American films (73%), which represent the most frequently cited category on the platform. This is followed by African films (56%), European films (52%), and local films (46%). Smaller shares of audiences reported watching Korean dramas (20%), Indian Bollywood/Tollywood films (14%), Latin American films (11%), Japanese films (8%), and Chinese films (6%), while Turkish films (2%) were mentioned by very few audiences.

This shows that YouTube is more frequently associated with local and African films, while Netflix viewing among audiences is more concentrated on American and other international film content.

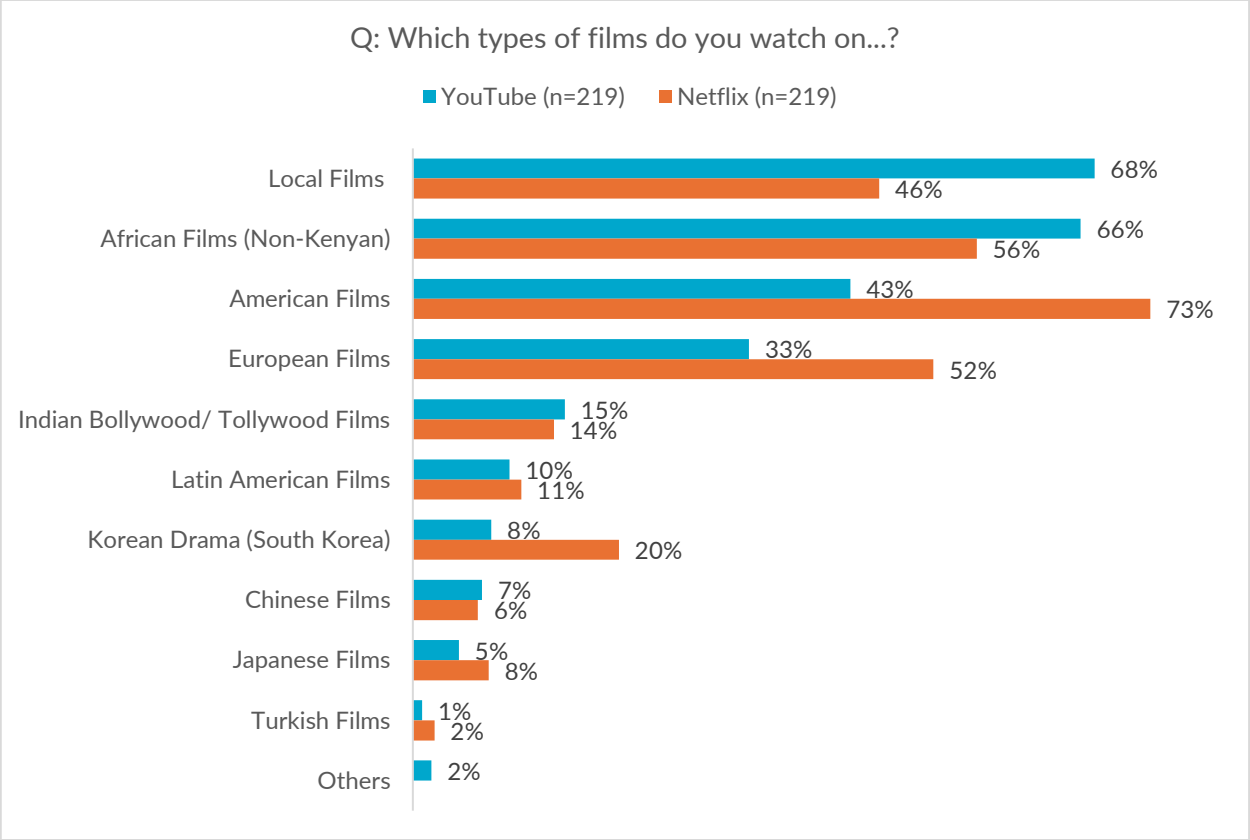


Figure 16: Films streamed on YouTube & Netflix in Kenya | Source: Survey data

For local films, 55% of audiences reported streaming daily, while 39% reported weekly. A similar pattern is observed for films from other African countries, with 54% streaming daily and 39% weekly. American films are streamed daily by 50% of audiences and weekly by 44%, while Indian films are streamed daily by 54% and weekly by 35.4% of audiences. Some categories, such as European films (59%) and Latin American films (52%), are more commonly streamed on a weekly basis. In contrast, Turkish films were reported as being streamed weekly by 75% of audiences who watch this content, with no audiences indicating monthly or rare viewing.

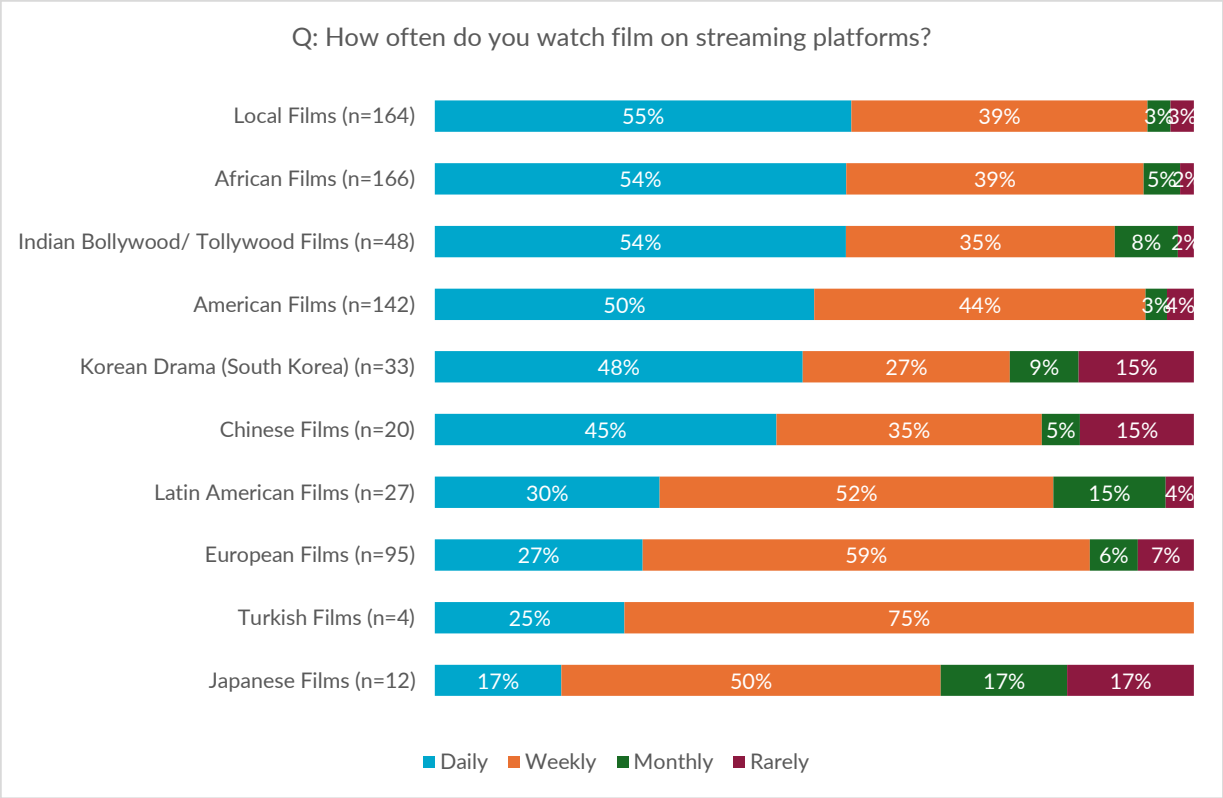


Figure 17: Frequency of streaming in Kenya

When asked about their monthly spending on streaming platforms, 24% of the respondents indicated that they do not pay directly for subscriptions. The most common reason, cited by 59% of respondents, is reliance on free platforms, such as YouTube or other free streaming websites. A further 30% reported accessing streaming services through shared subscriptions or accounts paid for by someone else, typically a family member or relative. In addition, 8% indicated that their access to streaming platforms comes through free options included in broader bundles, such as rent, internet packages, or promotional offers. Only 3% refused to answer the question.

Survey findings regarding subscription volume align with these non-payment patterns. Most of the audience maintains a very limited number of paid services, with 56% of respondents reporting only one active subscription. Data indicates that 23% of the audience maintains no paid subscriptions at all, while 14% are subscribed to two platforms and 5% to three. A small minority of 2% is subscribed to more than three streaming sites.

A key insight from these findings is that access to streaming services among audiences appears to be shaped by cost considerations. Audiences often combining free platforms, shared accounts, and occasional paid services to access film content online.

3.2.6. Demand for local and African content

Kenyan audiences engage with a truly global mix of content, though they demonstrate a powerful preference for stories that reflect their own context. While international content from regions like the US (56%) and Europe (38%) forms a part of the share of viewership, the data reveals a substantial appetite for local and continental stories. A dominant 72% of viewers consume Kenyan films, with productions from other African countries also reaching a majority (67%). This enthusiastic engagement with local content exists alongside a familiarity with global production values, which shapes audience expectations.

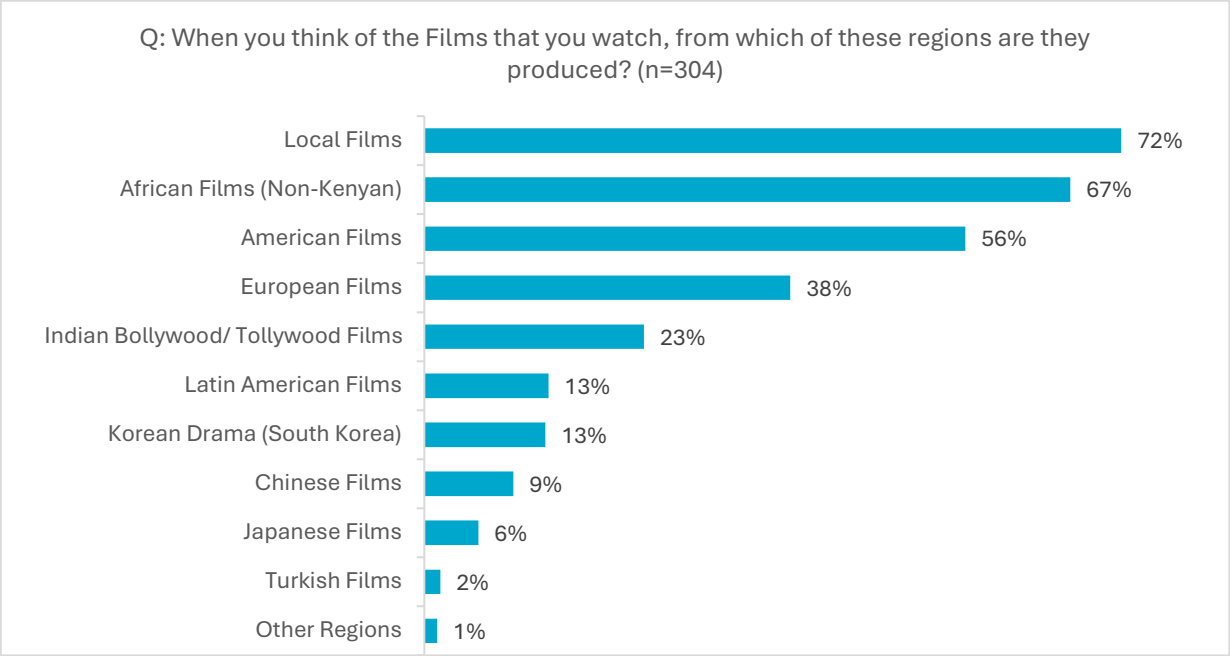


Figure 18:Regions of films watched by Kenyan Audience| Source: Survey data

American films just barely edge out the rest at 28% for the most frequently watched films. Right next are African films from other countries at 25%, and Kenyan films follow closely at 25%. Essentially, the top three are almost neck and neck, making up the vast majority of viewing habits. European films trail at 10%, while Indian Bollywood and Korean dramas register at 6% and 3% respectively. Other regions like China, Japan, and Latin America have a much smaller footprint, each hovering around 1–2%. Turkish films, interestingly, don't register at all in this data.

What stands out is that while international content, especially from America, has a strong presence, African and local films together actually command a larger share of frequent viewership. This suggests that regional content isn't just a niche interest; it's central to what Kenyan audiences regularly watch. The challenge, then, isn't about building awareness or interest, it's about ensuring local and African productions have the same distribution muscle and accessibility as their international competitors.

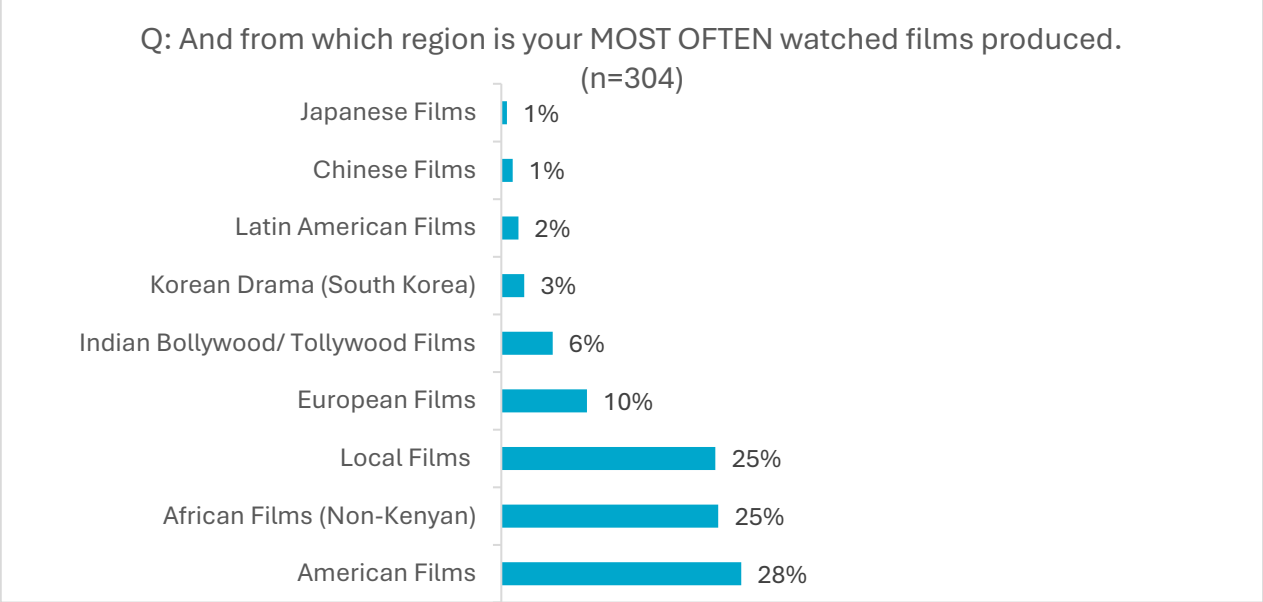


Figure 19:Most frequently watched region by Kenyan Audience | Source: Survey data

While audiences demonstrate a clear preference for local storytelling, origin alone is rarely the deciding factor in viewership. The audience survey results show that just over half of viewers (53%) consider it "very important" for a film to be Kenyan, with an additional 24% viewing it as "somewhat important." Collectively, more than three-quarters of the audience feels a distinct pull toward domestic content. However, the fact that nearly one in four viewers remains neutral suggests that while Kenyan identity matters to the majority, it does not override the fundamental demand for quality and entertainment value. For audience development, this implies that being locally produced serves as the initial hook, but technical polish and storytelling depth are required to convert that interest into a loyal, long-term viewership.

3.2.7. Barriers to audience growth for local films

The primary barriers to watching African or Kenyan films are preference-driven and content-related rather than purely structural. A strong majority of audiences prefer international content (67%) and report low interest in local storylines or themes (64%), indicating a perceived gap in relevance, quality, or storytelling appeal. Awareness is also a significant issue, with 38% stating they are not familiar with many local films, suggesting weak marketing and discovery channels. Perceptions of production quality remain a secondary but notable concern (24%), while access-related barriers such as platform availability (18%) are less dominant. Language and general disinterest in films overall are minimal constraints (4% each). Overall, this suggests that improving storytelling quality, audience relevance, and visibility of Kenyan films would likely have a greater impact than focusing solely on distribution or accessibility.

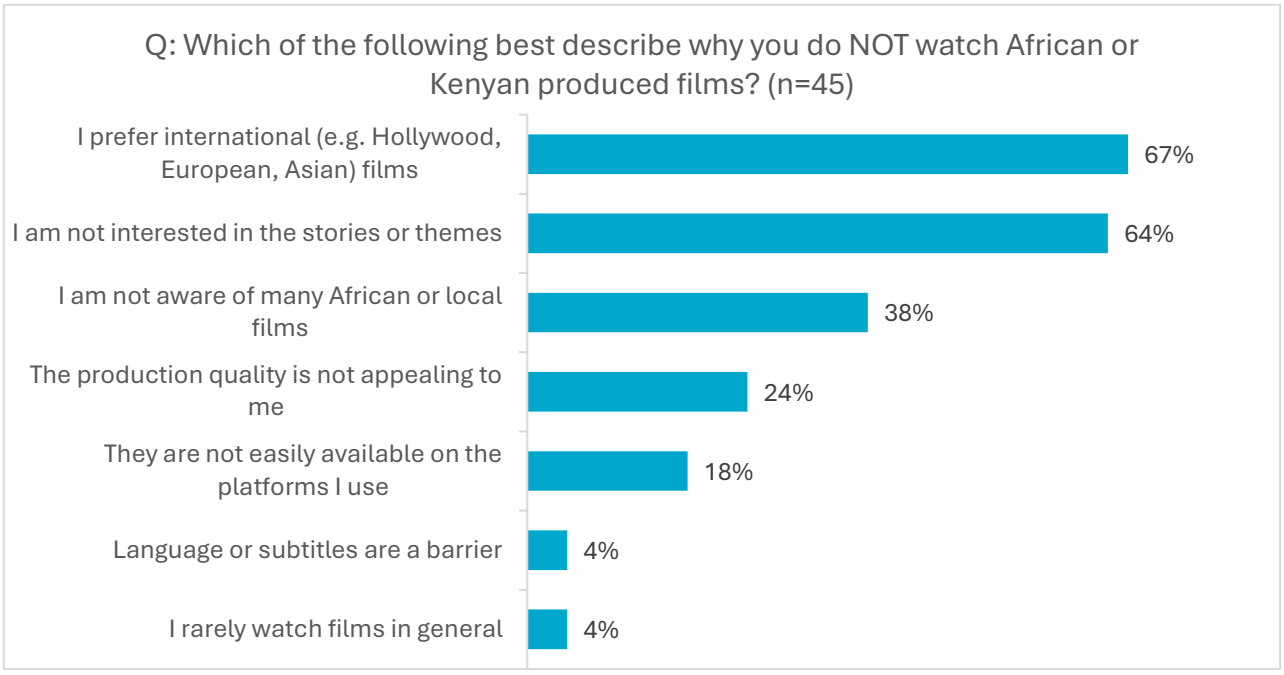


Figure 20:Why audience in Kenya do NOT watch Local or African films | Source: Survey data

The most significant reported barriers limiting Kenyan audiences from watching more local and African films are infrastructure and engagement related issues. The leading obstacle is poor internet connectivity and high data costs (37%), followed closely by a perception that storylines are not engaging (33%). A lack of awareness about new releases (30%) also emerges as a critical distribution and marketing gap. While financial concerns like high subscription costs (18%) and a preference for international content (18%) are notable, they are ranked lower than content quality issues such as unoriginal storylines (23%) and low production quality (18%). Accessibility remains a challenge, with 16% struggling to find where to watch films, while only 14% report

no significant barriers, indicating that a combination of affordability, content quality, and awareness must be addressed to boost local film viewership

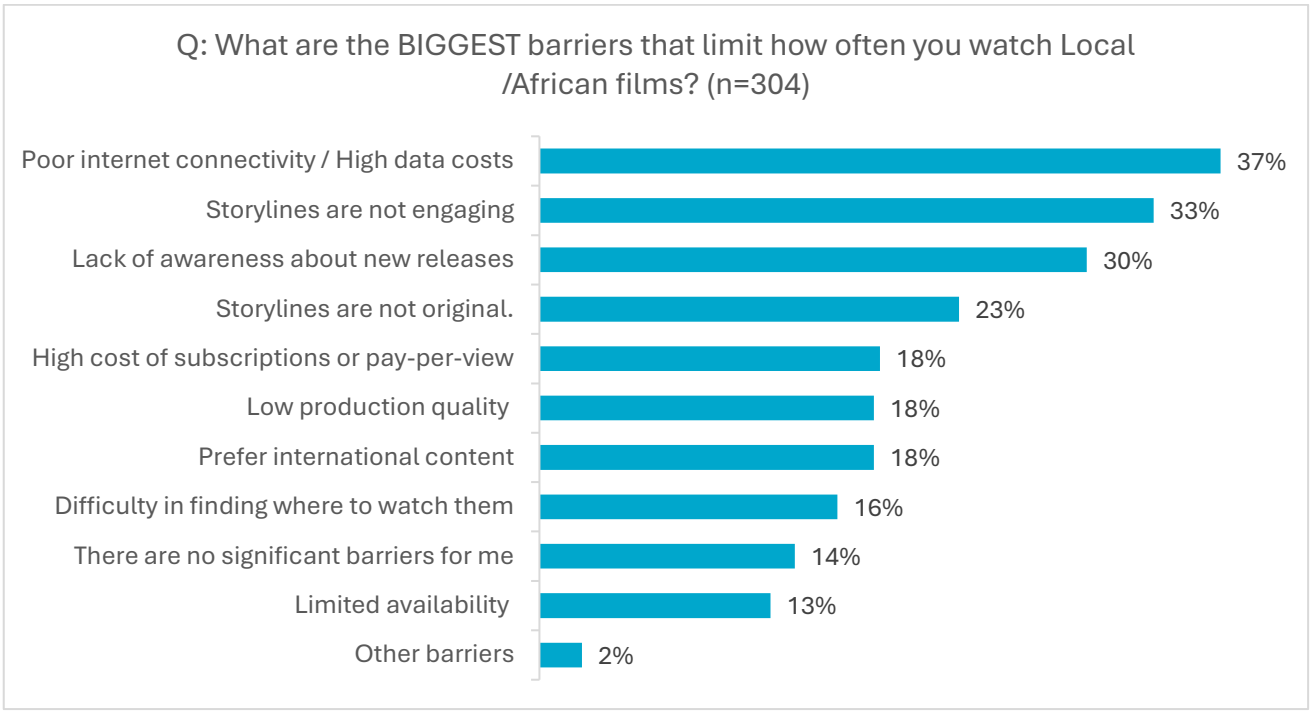


Figure 21:Barriers to watching Kenyan or African films | Source: Survey data

Audiences hold a largely positive view of the current state of local and African cinema, particularly regarding quality and authenticity. A strong majority (63%) agree that production quality has improved significantly in the last 5 years, and over half (59%) feel the films tell authentic and relatable stories. This positive sentiment extends to monetization, with 55% of audiences willing to pay for high-quality content. However, this willingness is tempered by significant accessibility and marketing challenges. A majority (52%) agree that it is difficult to find these films on mainstream platforms, and even more (51%) believe the films are not promoted or marketed effectively. This indicates that while the product itself is resonating with audiences, distribution and awareness remain critical bottlenecks preventing wider engagement.

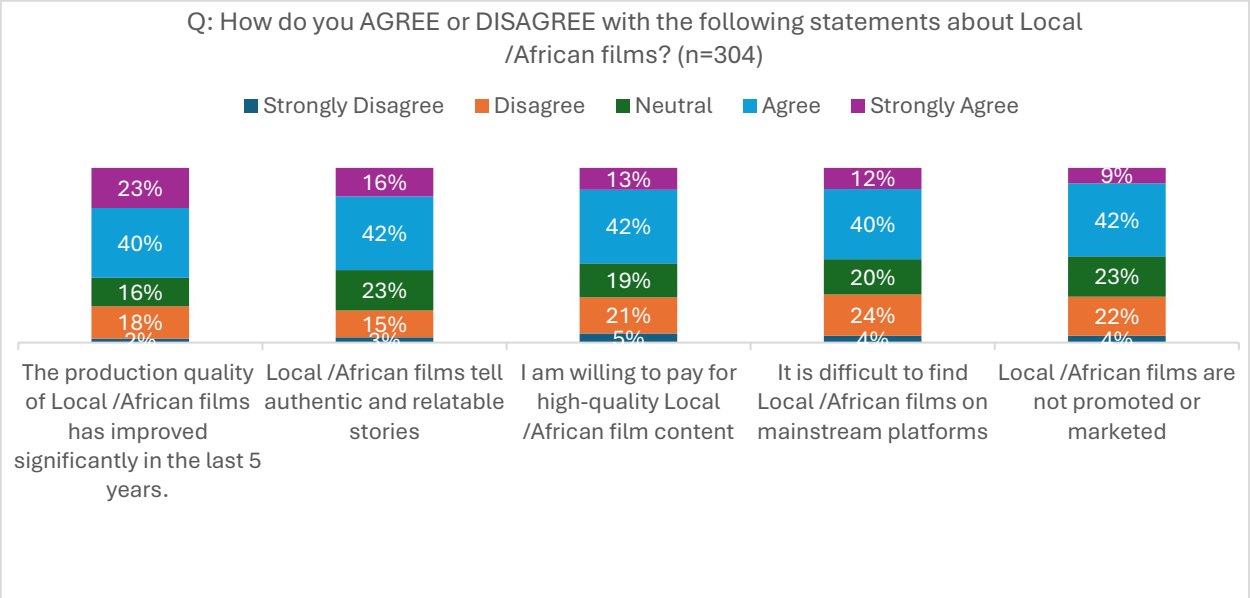


Figure 22:Perceptions on local/African films in Kenya | Source: Survey data

These barriers point to a gap between audience curiosity and actual viewing behaviour. Interest in local and African cinema exists, but it is weakened by issues around storytelling appeal, awareness, and accessibility. Addressing these gaps will be central to audience development, as stronger narratives, better marketing, and easier access could help convert passive interest into regular viewership.

3.2.8. Audience engagement and word-of-mouth

Kenyan audiences are highly active and engaged viewers, with word-of-mouth being the most powerful driver of film discovery. The most common post-viewing action is recommending the film to someone in person (55%), significantly outweighing digital sharing, as only 11% post about it on social media. This indicates that personal recommendations are the primary channel for film promotion. Furthermore, there is a strong appetite for exploring related content, with 43% of viewers looking for more films from the same country, suggesting that a single film can serve as a gateway to broader regional cinema. While 23% take no specific action, the high rates of personal advocacy and cross-border exploration highlight an engaged audience base that can be leveraged through targeted marketing and sequel or franchise development.

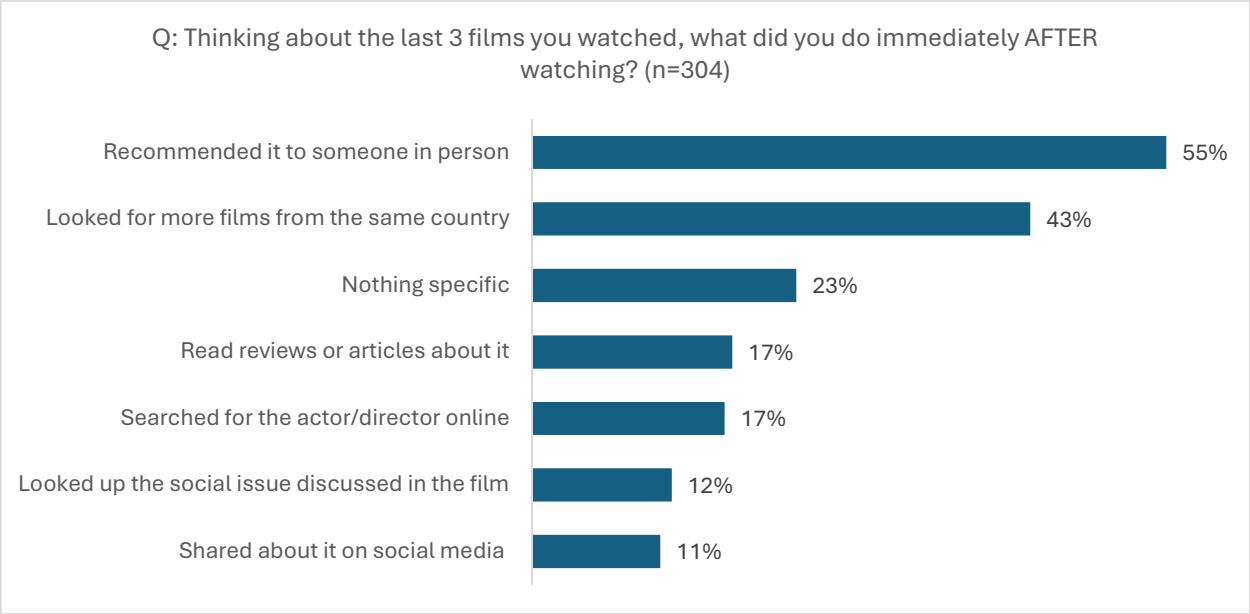


Figure 23: Actions after watching a film (Kenya) | Source: Survey data

There is significant disparity in how Kenyan audiences actively engage with local and African films, revealing a strong preference for digital ownership and direct access over formal or communal viewing channels. The most prevalent action taken is actively searching for and downloading a film (47%), which is nearly three times higher than paying for content on a digital platform (17%). This suggests that while there is high demand for content, audiences may be bypassing official paid channels, possibly due to cost or accessibility barriers. Engagement with creators is moderate, with 21% following a film director or actor on social media, indicating an opportunity for talent-driven marketing. However, formal and communal viewing experiences remain niche, as only 4% went to a cinema specifically for a film and 5% attended community screenings. Notably, nearly a third (31%) reported doing none of these activities, pointing to a large segment of passive consumers who have yet to be converted into active film supporters.

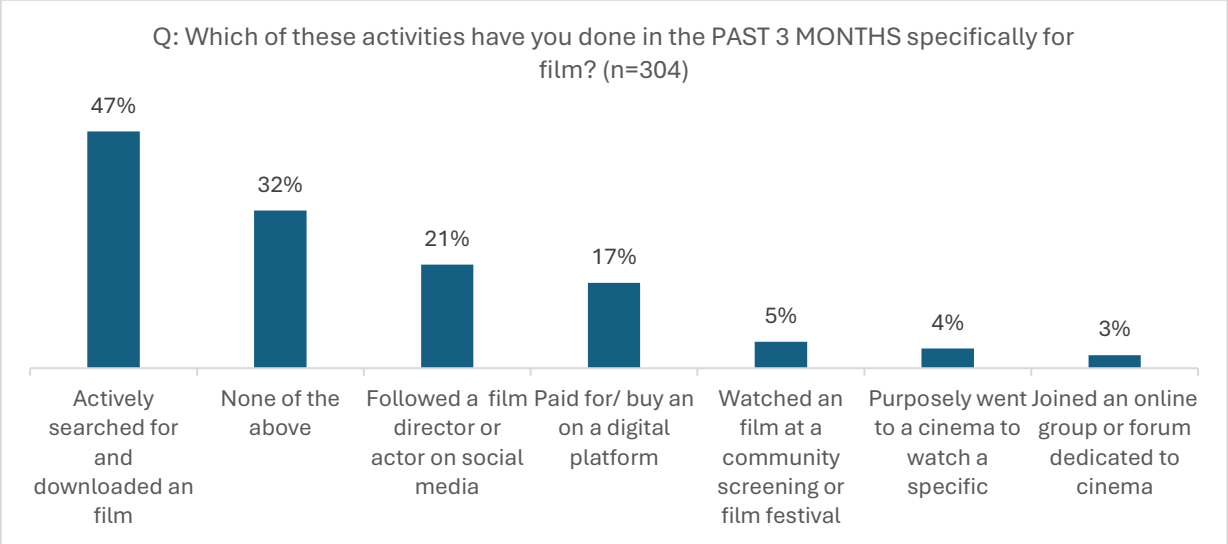


Figure 24:Engagement in past 3 months for Kenyan Audience | Source: Survey data

There is an extremely low Net Promoter Score (NPS)of -46 indicates that local films are currently failing to meet audience expectations, resulting in low advocacy levels. This score points to several issues, potentially related to production quality, storytelling, accessibility, and

marketing, that must be addressed to convert Detractors into Passives and, eventually, Promoters. Prioritizing improvements in content quality and audience engagement will be essential to shifting this perception and building a stronger base for local films.

The findings demonstrate that Kenyan audiences can play an active role in expanding film reach. Personal recommendations remain the strongest form of promotion, while curiosity about films from the same country suggests a pathway for audiences to explore broader catalogues of regional content. However, the low NPS score signals that stronger audience satisfaction will be necessary to turn viewers into advocates for organic promotion.

3.2.9. Audience development: Role of festivals, national film events, campus circuits, cultural institutes

i. Rural audience development

Film festivals, national events, and community screenings play a central role in audience development by creating structured opportunities for exposure, engagement, and habit formation among viewers. While many festivals currently cater to industry insiders, those that extend beyond urban centres demonstrate how audience development can be achieved through accessibility, localized programming, and community-centred outreach. For instance, the Kitale Film Week has become a recurring regional platform that not only showcases films but also introduces consistent local viewing opportunities outside Nairobi, helping normalize film consumption in underserved regions. Similarly, the Kilifi Creek Film Festival adopts a grassroots approach by removing cost barriers and actively engaging families and children in the community, deliberately building new audiences from the ground up.

Yet the ability of these festivals to fulfil their audience development role remains fundamentally constrained by an unstable and fragmented funding model. Government allocations, the primary source for flagship events like the Kalasha Awards, have proven deeply unreliable, with the Kenya Film Commission's budget slashed from Sh442.7 million to Sh166.5 million in a single year, leading directly to the cancellation of the 2025 Kalasha Awards due to a Sh40 million shortfall. While corporate sponsors such as Equity Bank's Sh25 million commitments to the Kenya National Drama and Film Festival and international donors like the Ford Foundation provide critical supplementary support, these injections remain ad-hoc and insufficient to offset systemic underfunding. The reliance on this precarious patchwork leaves festivals vulnerable to annual budget cycles, undermining their capacity to plan, scale, and consistently build the very audiences they are positioned to cultivate.

"The way Kalasha has been funding recently is too constrained. The government cannot manage the Kalasha effectively on its own. We need more creative stakeholders and private sector players on board." Government entity, Kenya.

ii. Cultural and industry platforms in audience development

At a broader level, festivals and national events contribute to audience development by creating visibility, anticipation, and cultural legitimacy around film as both an art form and a shared social experience. Events such as the Kalasha International Film and TV Market position film within a broader ecosystem of trade, networking, and exposure, attracting attention that can trickle down to general audiences, although their impact is constrained by inconsistency in implementation. Regional initiatives like the Aftercare Film Festival in Lodwar further extend audience development by combining screenings with capacity-building and community engagement, particularly among underserved and refugee-host communities:

"I did a master class there for documentary filmmakers who are from like Kakuma and just from the gen-hosts and non-hosts, communities." Filmmaker, Kenya.

These interventions, alongside community screenings that include post-viewing discussions, help deepen engagement, foster dialogue, and build sustained interest in local content. However, the lack of coordination across events limits their cumulative effect, preventing the emergence of a continuous, nationwide film culture. Centralized coordination through a shared scheduling body, joint marketing, and pooled funding mechanisms would replace the current fragmented festival landscape with a continuous, nationwide film culture that festivals alone cannot achieve.

iii. Educational and training Institutions in audience development

Education and training institutions further contribute to audience development by shaping both the supply of content and the formation of audiences themselves. While film schools and training programs primarily focus on production skills, they indirectly influence audience development by improving the quality and relevance of content, making it more appealing to viewers. At the same time, schools, universities, and drama festivals provide early exposure to storytelling, creating a foundation for lifelong engagement with film. For example, the school drama festival circuit has historically introduced young people to performance and narrative, with one filmmaker recalling: *"We used to do the drama festival and everything… then after that I started writing Swahili stories."* Filmmaker, Kenya. Similarly, campus-based screenings and university film clubs represent untapped opportunities to cultivate informed, engaged audiences among young adults. However, as noted by stakeholders, distribution, marketing, and audience engagement are rarely embedded in training curricula. Strengthening these elements within education systems would ensure that future filmmakers are not only creators but also active participants in building and sustaining audiences across the ecosystem

""I've sat in a lot of forums where I've talked about this, that distribution is never looked at being funded. And I think that needs to change because we are what can be the voice of that content, but we are also struggling because it's like an egg and chicken situation.." Distributor, Kenya.

iv. Marketing and Promotion Practices: Social Media and Influencers

Marketing remains one of the most underfunded and overlooked elements of Kenya's film value chain. Filmmakers consistently prioritize production over promotion, often allocating minimal or no budget to marketing. As a result, marketing is frequently treated as an afterthought rather than an integral part of the film lifecycle. In contrast, international studios typically allocate significant resources, sometimes up to 50% of production budgets, to marketing. This gap leaves many Kenyan films with limited visibility despite strong creative quality. Survey findings reinforce the critical nature of this gap, with 69% of audiences identifying marketing campaigns, including ads, social media, and influencer promotions, as a primary factor when choosing a film. This gap leaves many Kenyan films with limited visibility despite strong creative quality. In fact, when asked for a direct message to the industry, 21% of respondents explicitly urged "*Improve your marketing. We don't know about your great films*"

"Any film that these studios release, they need to at least spend another half a million dollars on marketing." Distributor, Kenya

The consequences are significant: without adequate marketing, films fail to reach audiences. Poorly resourced campaigns result in low-quality promotional materials, weak audience engagement, and limited anticipation. Stakeholders noted that effective marketing should begin early, with sustained "hype-building" over time rather than last-minute promotion. In Kenya, however, campaigns are often launched close to release with little prior awareness-building, resulting in missed opportunities for audience traction and engagement. This is particularly evident among "International Quality Seekers," who rely on high-quality trailers, a feature 63% of audience survey respondents cited as a top priority for improving how local films are showcased.

“The poster, the trailer, these are the two first phases, that a customer sees and decides whether they're interested or not.” Streaming platform, Kenya

Social media has emerged as the primary marketing channel, but it is often underutilized and not strategically managed. Platforms such as YouTube, Facebook, Instagram, TikTok, and WhatsApp each serve different functions. YouTube acts as both a promotional and distribution platform, while Facebook and Instagram support targeted advertising and community building. For "African-First Family Streamers," YouTube is a dominant force (94% usage), while "Cross-Platform Cultural Explorers" show higher engagement across Netflix and Instagram. TikTok is increasingly important for reaching younger audiences, with content consumption patterns shaped by short-form, fast-paced engagement. WhatsApp, on the other hand, is critical for grassroots communication, particularly outside urban centres where informal networks and group sharing drive awareness. However, filmmakers often lack the data, expertise, and coordination needed to use these platforms effectively. This is not merely a skills gap but a reflection of a structural problem where filmmakers are expected to be marketers, a role for which they are neither trained nor resourced. In a mature ecosystem, strategic marketing would be handled by specialised film marketing agencies, but such professional services remain scarce in Kenya, leaving filmmakers to navigate complex digital landscapes alone.

"I've seen from that initiative, I've seen some of the participant coming out with companies, marketing companies. I've not seen anything major they've done." Distributor, Kenya

Regional differences further complicate marketing strategies. Urban audiences in cities like Nairobi tend to be reached through digital platforms and online trailers, while audiences in places such as Kisumu or Mombasa rely more heavily on WhatsApp groups, vernacular radio, and community-based outreach. This necessitates tailored, localized marketing approaches rather than a one-size-fits-all strategy. The fragmentation of platforms also creates resource and management challenges, especially for productions with limited budgets and marketing capacity.

“How you market in Nairobi is not the same way you market in Kisumu. In Kisumu,it’s WhatsApp groups that are the big thing” Filmmaker, Kenya

Influencer marketing is an emerging but cautiously adopted strategy. While influencers offer access to large, engaged audiences, stakeholders expressed scepticism about their actual impact on conversion. Selection must therefore go beyond follower counts to consider relevance, authenticity, and alignment with the film. Increasingly, influencers are being integrated into casting and content strategy, reflecting a shift toward leveraging personal brands for audience reach. Successful campaigns demonstrate that influencers are most effective when meaningfully embedded in the creative and promotional process rather than used as standalone promotional tools.

“Do we want to use them or not… a lot of times influencers don’t necessarily actually move people.” Distributor, Kenya

Insights from stakeholder interviews highlight that successful audience development often requires a localized, multi-channel approach. They highlighted that strategies such as vernacular radio appearances, physical posters, estate-level activations, and community engagement. These methods are labour-intensive but have proven successful in building awareness and driving attendance, especially when combined with localized outreach. Stakeholders noted that some broadcasters such as KBC and adopt a “360-degree” approach, integrating multiple channels, radio, TV, digital, billboards, and community engagement, to maximize reach. However, such comprehensive strategies require coordination, resources, and institutional capacity that many independent productions lack.

"We have what we call inside KBC, 360. 360 means we use all our platforms to ensure that we are promoting all our programs. On radio, on television, on the digital platforms."Governemnt, Kenya

3.3 Social Impact

3.3.1. Overview

Kenya's film industry has a long-standing tradition of producing socially relevant content that tackles critical societal issues. Early examples include *The Rugged Priest* (2011), which addressed politically sensitive topics, and *In My Genes* (2009), which focused on the prejudice faced by people with albinism. Today, filmmakers are increasingly using the medium for advocacy, covering themes such as climate justice, land rights, and mental health. Documentary filmmaking, in particular, has utilized the international festival circuit to gain visibility for issue-driven storytelling, as seen with films like *Softie* (2020) and *How to Build a Library* (2025).

A primary case study for social impact is *The Battle for Laikipia* (2024), which sparked extensive online discourse regarding indigenous rights and environmental struggles. The film's impact was amplified through strategic partnerships with NGOs and activists, who used the production as a springboard for broader conversations on land justice. Social media analysis indicates that the film's promotion was driven by festival premieres and advocacy hashtags like #ClimateCrisis and #IndigenousRights, demonstrating how film can move beyond entertainment to influence policy and public attitude. NGOs and international cultural funds like Docubox remain vital in supporting this impact-oriented content, often providing the necessary grants that commercial platforms may overlook.

Defining Social Impact in Film: Perspectives from Kenya

Across stakeholders in Kenya's film and streaming ecosystem, there is no single, standardized definition of "social impact" in film. Instead, the concept is fluid, evolving, and interpreted differently depending on the stakeholder's role. For many, social impact is not treated as a formal genre or category, but rather as an emergent property of storytelling, something that arises organically from the narrative rather than being intentionally engineered from the outset.

For streaming platforms operating in Kenya, social impact is primarily understood through the lens of **audience engagement and content performance**. Content that resonates strongly with audiences, particularly by addressing social inequalities or lived realities, tends to be prioritized. In this sense, social impact is not explicitly defined upfront but is inferred from viewing patterns and audience preferences, especially where content reflects issues that audiences identify with.

"The content that has won over time is the content that speaks to social iniquity, and how do we actually redress that." Streaming platform, Kenya

Social impact content is also closely associated with **documentaries and docu-series**, particularly those emerging from film festival circuits. These platforms act as important pipelines for socially driven storytelling, often focusing on real-life experiences, trauma, and systemic issues. However, there is a growing preference for serialized formats over standalone documentaries, reflecting both audience engagement patterns and commissioning strategies within the Kenyan market.

"You do actually have a stronger pipelining of documentaries coming through… on linear television it's less standalone documentaries, but docu-series." Streaming platform, Kenya

Funders in Kenya tend to avoid rigid definitions of social impact altogether, instead emphasizing a **story-first approach**. From this perspective, films are supported based on the strength and authenticity of their narratives, with social impact emerging as a byproduct rather than a primary criterion. This highlights a broader industry orientation where storytelling quality takes precedence over thematic labeling.

"We don't support films because they're social impact films. We support documentaries because there's a story to be told." Funder, Kenya

At the same time, there is a strong resistance among filmmakers to overly prescriptive or utilitarian interpretations. Many argue that all films have the potential for social impact, regardless of genre or intent, and caution against placing the burden of social change solely on filmmakers. Instead, they emphasize the role of film as an art form, where impact begins with connection and relatability.

"I think all films are in a way… did someone feel seen, heard, relatable? That is impact." *Filmmaker, Kenya*

Distributors in Kenya tend to define social impact in more practical and audience-facing terms, focusing on **awareness creation, community engagement, and dialogue generation**. For them, the value of social impact lies in a film's ability to spark conversations, particularly around difficult or underrepresented issues, and to create spaces where audiences can actively engage with the content.

"It's a very good space to provoke audiences, bring out conversations… especially hard conversations." Distributor, Kenya

A distinctive feature of the Kenyan ecosystem is the emphasis on **community-based engagement models**. Screenings in informal settlements and community spaces, often followed by facilitated discussions such as "Bunge Mtaani," illustrate how impact is localized and participatory. In these contexts, films act as catalysts for dialogue, enabling audiences to interpret, question, and respond to the issues presented in ways that are directly relevant to their lived experiences.

"After the film, we would have a Bunge Mtaani… people air their views… conversations erupt after watching the film." Distributor, Kenya

3.3.2. Audience interest in socially relevant storytelling

When asked about the types of social themes they would be interested in watching, audiences pointed to a wide range of topics, with clear clustering around aspirational, economic, relational, and socially reflective narratives. The strongest interest is in stories about young people pursuing opportunities (51%) and those centred on money, business, and survival (47%), reflecting the central role of economic realities in shaping audience preferences. This is largely driven by lived experience, where financial pressure, unemployment, and the pursuit of upward mobility dominate everyday life. These findings suggest that both aspirational and survival-driven narratives function as key entry points for audience engagement.

"I think anything that has to do with economic… realities… it is their day-to-day reality… that is preoccupying them." Distributor, Kenya.

Relational and human-centred storytelling also emerges as a major driver, with 45% of audiences expressing interest in love, relationships, and family health challenges. This reflects the universal appeal of stories grounded in everyday interpersonal dynamics, which cut across demographic and geographic divides and provide emotionally accessible narratives. Stakeholders emphasize that such themes resonate because they mirror familiar experiences and create space for audiences to see themselves on screen. These types of narratives often serve as effective vehicles for embedding broader social issues within relatable contexts.

"People also like stories that have that element of family drama." - Filmmaker, Kenya.

At the same time, there is strong demand for socially conscious and issue-driven content, particularly around gender and governance. Stories about strong women overcoming challenges (44%) and those addressing power, politics, and corruption (44%) indicate that audiences are actively engaging with themes of justice, accountability, and empowerment. This is shaped by ongoing societal conversations and advocacy efforts, particularly around gender-

based violence and women's rights, with one stakeholder noting, *"There were conversations about… how they dealt with issues of gender-based violence." - Streaming platform, Kenya.* However, engagement with political themes is often dependent on narrative framing, as audiences respond more positively when such issues are embedded within compelling and entertaining storylines.

"Once there's politics in any form, they like that… there's journalism like the exposes." - Filmmaker, Kenya.

Interest in identity, culture, and social cohesion also features prominently, with 40% of audiences drawn to stories about cultural and religious coexistence and 37% to themes of identity and belonging. This reflects a desire for authentic representation and storytelling that captures the complexity of lived experiences across different communities. Such narratives are particularly resonant among underrepresented groups, as they provide visibility and validation. These themes, while not always mass-market drivers, play a critical role in building deeper emotional connections and audience loyalty.

"It's about this kind of in-between situation… when they go to Somalia, they're not considered Somali." - Distributor, Kenya.

More introspective and emerging themes, including mental well-being (36%) and environmental issues (33%), indicate a gradual broadening of audience interests, though their appeal remains more situational. Engagement with these topics is often influenced by how they are packaged, with audiences responding more strongly when they are integrated into character-driven and emotionally engaging narratives rather than presented in isolation. This aligns with stakeholder observations that audiences prefer content that balances depth with accessibility. In parallel, the prominence of themes such as climate change is also shaped by funding and institutional priorities, which influence the types of stories that are produced.

"People were laughing, people were crying… it wasn't like a deep sad conversation." - Filmmaker, Kenya.

Finally, while there is clear interest in socially relevant content, 18% of audiences indicate a preference for purely entertainment-driven films, underscoring the importance of storytelling approach. This highlights that entertainment is not separate from social impact, but rather the primary vehicle through which audiences engage with complex issues. Content that successfully blends humour, emotion, and compelling narratives with underlying social themes is more likely to resonate, reinforcing the importance of entertainment-led storytelling in driving both reach and impact.

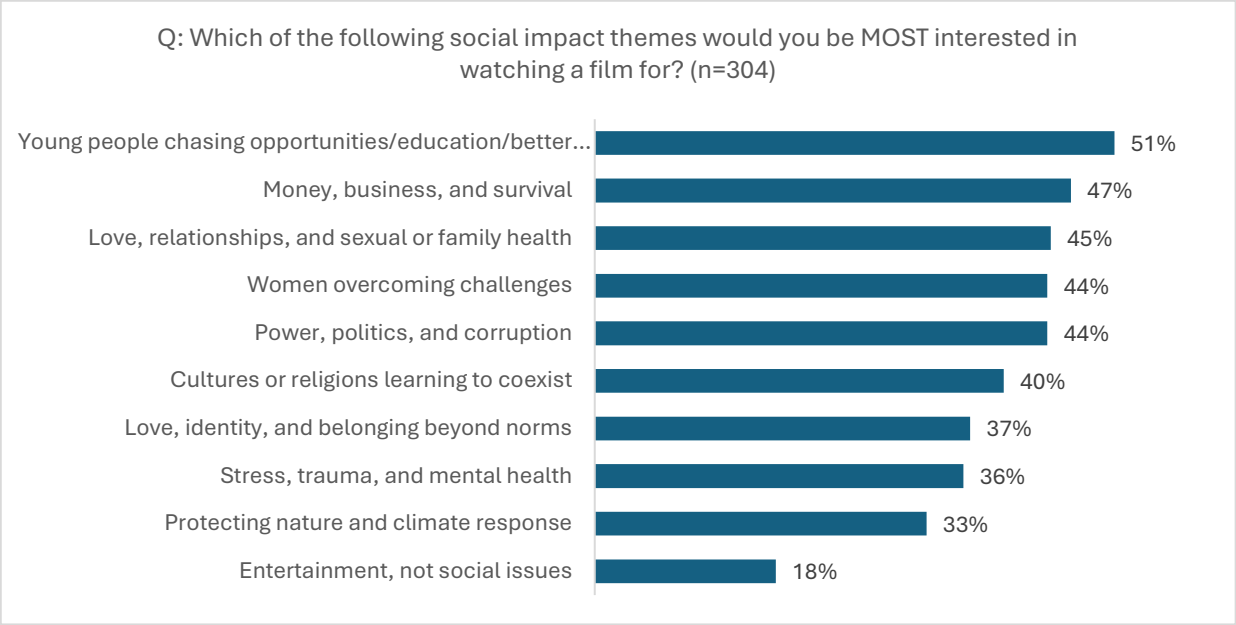


Figure 25: Social impact themes Kenyan audiences want to watch | Source: Survey data

These responses suggest that while audiences primarily seek entertainment, many are open to films that reflect real-life challenges and social experiences. Notably, the data on figure 29 also show that films can spark discussion, shape curiosity, and sometimes push audiences to explore the issues behind the story. Even simple actions like recommending a film or searching for related content help extend its reach beyond the initial viewing experience.

3.3.3. Priority themes

Key informants indicated that priorities for the types of stories, themes, or filmmakers supported are largely influenced by donor interests rather than fixed organizational preferences. Funders explained that the thematic focus of supported films typically aligns with the priority areas of specific donors, for example, some donors fund projects addressing social issues such as gender equity or sexual and reproductive health, while others focus on different thematic areas depending on their strategic objectives.

As a result, the types of films supported can vary widely and are often shaped by the funding available at a given time rather than a predetermined set of storytelling priorities. Some filmmakers also expressed uncertainty about how thematic priorities are determined, reflecting a broader perception that funding structures and external agendas play a significant role in shaping which stories receive support within the ecosystem.

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

Funders indicated that filmmakers who tend to attract funding are those who demonstrate both creative and business acumen. Key factors include having a strong and competent team, clear production and distribution plans, prior experience or a proven portfolio, and partnerships that strengthen the project's feasibility.

Funders also assess operational practices, such as fair contracts, timely payments, and adherence to labour standards, to ensure a healthy working environment. Additionally, filmmakers who understand the realities of production financing, such as the delayed revenue

cycles typical in film, are better positioned to access loans or investment, particularly through partnerships with banks like NCBA Bank.

"If you need a loan and you're going into production, it means that you wouldn't be able to pay back maybe until after production and until you've gone into distribution and start earning revenue". – Funder, Kenya

3.3.4. Underexplored and untapped themes in Kenyan film and content production

Stakeholders across Kenya's film ecosystem highlight that while certain social themes are widely covered, there remain significant gaps in representation, particularly around gender dynamics and audience segmentation. There is a growing recognition that men and women may engage differently with content, yet this distinction is not fully understood or reflected in storytelling. For example, narratives around women in male-dominated spaces, such as sports, remain underdeveloped, pointing to a broader gap in how gendered experiences are portrayed and consumed.

"There is a dichotomy of what women and men want to watch… there is a gap there and we are trying to define what that gap looks like". Distributor, Kenya

Another major gap lies in the underrepresentation of rural stories, particularly those produced with high production value. While rural narratives exist, they are often perceived as limited in scope or quality compared to international or regional benchmarks. Stakeholders suggest that Kenyan storytelling still leans toward familiar, urban-centred narratives, missing opportunities to explore diverse local histories, cultures, and lived realities in more ambitious and visually compelling ways.

At the same time, there is a broader concern that story development is prioritized over audience strategy, resulting in missed opportunities to connect untapped themes with the right audiences. Distributors note that while creativity is heavily invested in production, less attention is given to how stories are positioned, marketed, and distributed. This limits the visibility and impact of potentially rich but underexplored narratives.

"A lot of times filmmakers focus only on making the film… but there is creativity that needs to go into how you release it." – Distributor, Kenya

In the social impact space, filmmakers point to a paradox of over-concentration and under-exploration. While certain themes, such as governance, health, or gender, are frequently revisited, this repetition can lead to audience fatigue. At the same time, many other relevant issues remain underexplored, suggesting a need for greater thematic diversity and innovation in storytelling approaches.

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

A related gap lies in the limited exploration of human complexity and nuance. Filmmakers argue that many stories rely on simplified "social issue" frameworks or archetypes, rather than reflecting the layered, contradictory nature of real human experiences. This results in narratives that feel didactic or predictable, rather than deeply authentic and engaging.

"*We are very complex… but what we are doing is a lot of social archetypes… very specific, black and white stories." Filmmaker, Kenya*

Additionally, there is a call to expand the understanding of impact storytelling beyond documentaries to include fiction, series, and animation. While documentaries dominate the social impact space, stakeholders emphasize that fiction can be equally powerful in addressing underexplored themes, particularly when it reaches wider audiences through more accessible and entertaining formats.

"Fiction can also be a great source of impact… it doesn't necessarily have to be documentaries." Filmmaker, Kenya

3.3.5. Illustrative film examples and their interpretation of social impact

The documentary *Softie* provides a clear example of how social impact is intentionally designed and executed within the Kenyan context. The film follows activist Boniface Mwangi during his political campaign and was accompanied by a structured impact strategy, including community screenings, civic education toolkits, and messaging focused on voter awareness and accountability. Its distribution across cinemas, television, and digital platforms demonstrates how impact-driven storytelling can coexist with wide audience reach.

The docu-series The Last Door represents another approach, where social impact is embedded in storytelling that explores trauma and real-life experiences through a journalistic lens. This type of content aligns with platform strategies that prioritize narratives addressing societal issues while maintaining strong audience engagement.

Other films illustrate more subtle and less direct forms of impact. For instance, *Kenyan on Mars* highlights how storytelling can inspire aspiration and imagination. By documenting an individual's dream of becoming an astronaut, the film sparked conversations among audiences about their own ambitions and possibilities, demonstrating that social impact can also manifest as inspiration and personal reflection rather than explicit advocacy.

Similarly, *Float* explores themes of body image, gender dynamics, and authority through the story of a young swimmer criticism. Its impact lies in its emotional resonance, allowing audiences to see themselves in the character and reflect on similar experiences in their own lives. This reflects a more intimate, character-driven form of social impact.

3.4 Financing and Enabling Environment

3.4.1. Overview

The financing landscape in Kenya has shifted from a heavy reliance on personal savings and "soft loans" from friends and family to a more diversified model involving international grants and streaming giants although Netflix and Amazon prime have had policy changes that have impacted the commissioning of originals in Africa. The government has theoretically increased its budget for the creative economy, with the Sports, Arts, and Social Development Fund receiving significant allocations. However, filmmakers frequently cite "bureaucratic friction" as a major hurdle in actually accessing these public funds. This gap highlights the "On-Paper vs. On-the-Ground Reality," where aspirational policy statements regarding incentives often fail to translate into bankable financial support for local creators.

International co-production and treaties such as those with Tanzania (2019), China (2023), and South Africa (2022) provide essential frameworks for high-end productions, as seen with the film *Rafiki*, the first Kenyan feature film to be selected for Cannes International Festival. *Rafiki* (2018) was produced as a multi-country co-production involving Kenya, South Africa, France, Lebanon, Norway, the Netherlands, Germany, and the USA. While directed by Kenyan Wanuri Kahiu, the film was spearheaded by South African producer Big World Cinema and supported by European partners. The Kenya-Tanzania co-production MoU has seen the production of films such as *The Christmas Run (2024)*.

Additionally, streaming platforms like Netflix and Showmax have become the "new giants" of high-budget funding, though their model is often based on licensing rather than full commissioning. Despite these advancements, the industry continues to struggle with an 80% informality rate, which limits its potential for large-scale investment. Capacity building remains a priority, with institutions like the KFC and GIZ offering skill-based training in scriptwriting and editing to help professionalize the ecosystem.

3.4.2. Incentives, grants, tax credits, funds, and co-production schemes

Kenya's film sector operates without the core incentive structures such as tax rebates and production incentives that are standard in competing markets, significantly limiting its ability to

attract international productions and scale local filmmaking. This policy gap has reduced Kenya's competitiveness as a filming destination despite its historical strength in this area, with productions increasingly shifting to countries with more supportive frameworks.

"South Africa has a tax rebate… Kenya would have something similar… it is not there" Distributor, Kenya.

Grant funding provides some support but remains highly concentrated, creating dependency and limiting the breadth of content that can be produced. A small number of organizations carry a disproportionate share of industry support, which constrains both access to funding and diversity of storytelling. This reliance on limited funding sources means that the sustainability of the sector is closely tied to the priorities and continuity of a few actors.

"DocuBox is still the main one, still, unfortunately." - Filmmaker, Kenya.

Co-production schemes are emerging as an important pathway to access larger budgets and international markets, but they are often shaped by unequal power dynamics. In the absence of strong local financing, Kenyan filmmakers frequently enter partnerships from a position of limited leverage, which can affect creative control and narrative authenticity.

"Your main actor should be a white girl from France because the money is from France." - Filmmaker, Kenya.

While proposed policy interventions such as the Creative Economy Bill signal potential progress through dedicated funds and incentives, the current landscape continues to constrain both creative autonomy and industry growth.

3.4.3. Business models and revenue mixes across distribution channels

The Kenyan film industry lacks standardised, investor-ready business models. Most production remains grant-driven, structured to recover costs at the production stage rather than from market returns. However, a few emerging models have demonstrated viability and are beginning to attract both local and international funding.

Audience-funded production

This model operates on pre-sales and crowdfunding model which reduces reliance on traditional grants. Instead of seeking post-production distribution deals, they raise money directly from audiences before a film is made. This model aligns production with demonstrated audience demand, reduces risk for investors, and builds a committed viewership before release. An example is Phil-It as this model has enabled them to produce multiple commercially viable films and operate its own VOD platform (Phil-IT TV), creating a vertically integrated revenue loop from pre-production crowdfunding through to direct-to-audience distribution.

"They raise money from their audiences in advance. So they tell the audiences we're making this film, they take them through the journey… they get individual investors who say, 'I'll give you 100K, 200K' kind of like a crowd funding. And audiences watch the films that they enjoy to watch, not the ones that have been imposed on them." Funder, Kenya

Niche-focused production and distribution

This model focuses on specialization. Rather than pursuing broad commercial appeal, the filmmakers focuses on documentary and impact-driven content, building a dedicated audience and distribution pipeline for that niche. This model attracts funding from impact-oriented donors and foundations such as Open Society and Ford Foundation while also generating revenue through festival sales, community screenings, and licensing to platforms. An example is LBX, where they concentrate on a defined genre and audience, and have been able to

produce award-winning documentaries such as Softie, Battle for Laikipia that achieved extended theatrical runs and international distribution.

"LBX recently launched the story outfit, which is going to be focused on documentaries and impact stories." Distributor, Kenya

The revenue-share platform model

Local streaming platforms like Yakwetu operate on a pure revenue-share basis, offering no upfront Minimum Guarantees (MGs). Instead, they split income 50/50 with filmmakers after deducting digital vending costs.

This model aligns incentives where the platform invests in marketing and data analytics, while filmmakers are motivated to promote their own content. Although revenue per title remains modest, the model has enabled a steady flow of local films onto a digital platform without the high upfront costs that have caused international streamers to retreat from Kenya. For filmmakers, it provides a non-exclusive, low-barrier entry to digital distribution, with transparent (if small) monthly reporting.

"Currently we do licensing as a revenue share model with filmmakers. And that's basically a 50/50 is what we offer… We generally do not buy outright. We don't pay MGs because African content is not yet established, meaning there isn't enough data." Streaming platform, Kenya

Financing business models

Beyond production-level models, organisations like provide growth capital to film businesses based on their business model soundness, not just individual projects. HEVA, as an example, evaluates production companies on team, vision, financial discipline, partnerships, and fair labour practices. It offers loans from under $10,000 to $250,000 for working capital, equipment, and marketing, often with revenue-share or extended grace periods. Its partnership with NCBA Bank aims to mainstream commercial lending to creative businesses, a rare example of institutional finance flowing into Kenyan film.

3.4.4. Key constraints and promising innovations

Data scarcity remains one of the most significant structural constraints in Kenya's film industry, limiting evidence-based decision-making across production, distribution, and investment. The absence of reliable consumption, viewership, and box office data forces stakeholders to rely on assumptions, which increases risk and discourages investment. This lack of data also affects government planning and private sector confidence, as there is no consistent benchmark to assess performance or demand. Piracy further constrains the industry by undermining legitimate revenue streams and distorting market behaviour, though it also indirectly reflects unmet demand. The widespread availability of low-cost pirated content through informal channels such as IPTV and online groups reduces incentives to pay for licensed content, weakening both distributors and platforms. At the same time, piracy patterns reveal what audiences are actively consuming, offering an informal proxy for demand in a data-poor environment.

"*IPTV is big in this market… people are blatantly selling it… you get everything pirated…. illegal things… are indicators of the direction of how things go." Ecosystem Partner, Kenya.*

In response to these constraints, the industry is generating bottom-up innovations that attempt to bypass structural limitations in infrastructure, distribution, and technology. Alternative

screening spaces, filmmaker-led VOD platforms, and encrypted distribution systems [1]are emerging to expand access and retain value within the local ecosystem. These innovations are not only filling gaps left by traditional systems but are also reshaping how audiences engage with content outside formal cinema networks. Additionally, technological solutions such as encrypted streaming and server-side ad insertion are being used to both combat piracy and generate new data-driven revenue streams, signalling a gradual shift toward more adaptive and resilient business models.

"We created a service within [the app], so they, the client in the US for example, they'll just have to log into the service, go in and select the film, select the venue. We will place a charge based on what their anticipating number of people are. They pay, we will send them a link… which only plays on our service, on our players, so that it's encrypted, so it cannot be duplicated copied in any form." Streaming platform, Kenya

3.4.5. Film ecosystem development: capacity building, collaborations, and mentorships

Human capital development in Kenya's film industry is constrained by gaps in practical, business-oriented training, particularly in areas such as distribution, rights management, and contracts. These gaps affect how filmmakers engage with partners and often lead to misunderstandings that weaken professional relationships and limit revenue potential. Without a clear grasp of distribution timelines and processes, filmmakers may prematurely judge partnerships as ineffective, not recognizing the longer cycles involved in sales and licensing. This misalignment reflects a broader lack of structured industry education that integrates both creative and commercial competencies.

"Distribution is never looked at being funded… we are also struggling… because of the lack of education… if the results are not seen right away, they get the impression that distributor's not working." Distributor, Kenya.

The need to professionalize the industry through business training and mentorship is widely recognized, as many creatives operate primarily from a production mindset rather than an entrepreneurial one. This limits their ability to position films as assets within a broader value chain that includes marketing, licensing, and audience engagement. Stakeholders emphasize that transitioning from a purely creative approach to a hybrid creative-business mindset is essential for sustainability, especially in a resource-constrained market.

"You have to take off your creative hat and think like a business person… treating the film as a business, not as just a creative site." Distributor, Kenya.

Collaborations and mentorships are emerging as critical mechanisms for building capacity and expanding market access, particularly through cross-border partnerships and structured industry programs. Co-productions and regional collaborations help filmmakers pool resources, share expertise, and access new audiences, while mentorship initiatives and cohort-based programs are beginning to institutionalize knowledge transfer.

Cross-border distribution partnerships have begun to take shape, such as ScreenConnect, a venture launched by a Nigerian marketer, a Kenyan documentary filmmaker, and a Rwandan filmmaker while he Moving Pictures initiative, supported by GIZ and implemented by Some Fine Day Pix, brought together distributors from Kenya, Nigeria, and Rwanda to develop collaborative distribution models that transcend national boundaries. Structured industry programs are also institutionalising capacity building. The MultiChoice Talent Factory operates as a pan-African training program with academies in Kenya, Nigeria, and Zambia.

[1] These are technologies that prevent unauthorized copying and sharing of film content, allowing filmmakers and distributors to control access and monetize screenings outside traditional cinema or open digital platforms.

"There was one that launched last year called ScreenConnect, where it's, it's run by a Nigerian, a Nigerian marketer, a Kenyan documentary filmmaker and a Rwandan, a random filmmaker. So you see, yeah, in essence, when they're working together... you automatically already start to build a situation where you can take a Kenyan film across the board. You can take it to Nigeria, you can take it to Rwanda, you can take it to Uganda." Ecosystem Partner, Kenya

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

Kenyan children and teenagers primarily consume American films, making them the most dominant content category among both children (74%) and teenagers (64%). Local films also show strong appeal, particularly among children (49%) compared to teenagers (39%), highlighting the continued relevance of Kenyan storytelling among younger audiences. African films from other African countries maintain moderate and relatively consistent engagement across both groups (31% among children and 30% among teenagers). Children are also more likely to watch European films (37%) than teenagers (30%). Meanwhile, teenagers demonstrate slightly broader exposure to international niche content, including Indian films (9%), Korean dramas (5%), Chinese films (5%), and Latin American films (3%). Film consumption overall is

widespread, with only about 3% of respondents in either group reporting that they do not watch films.

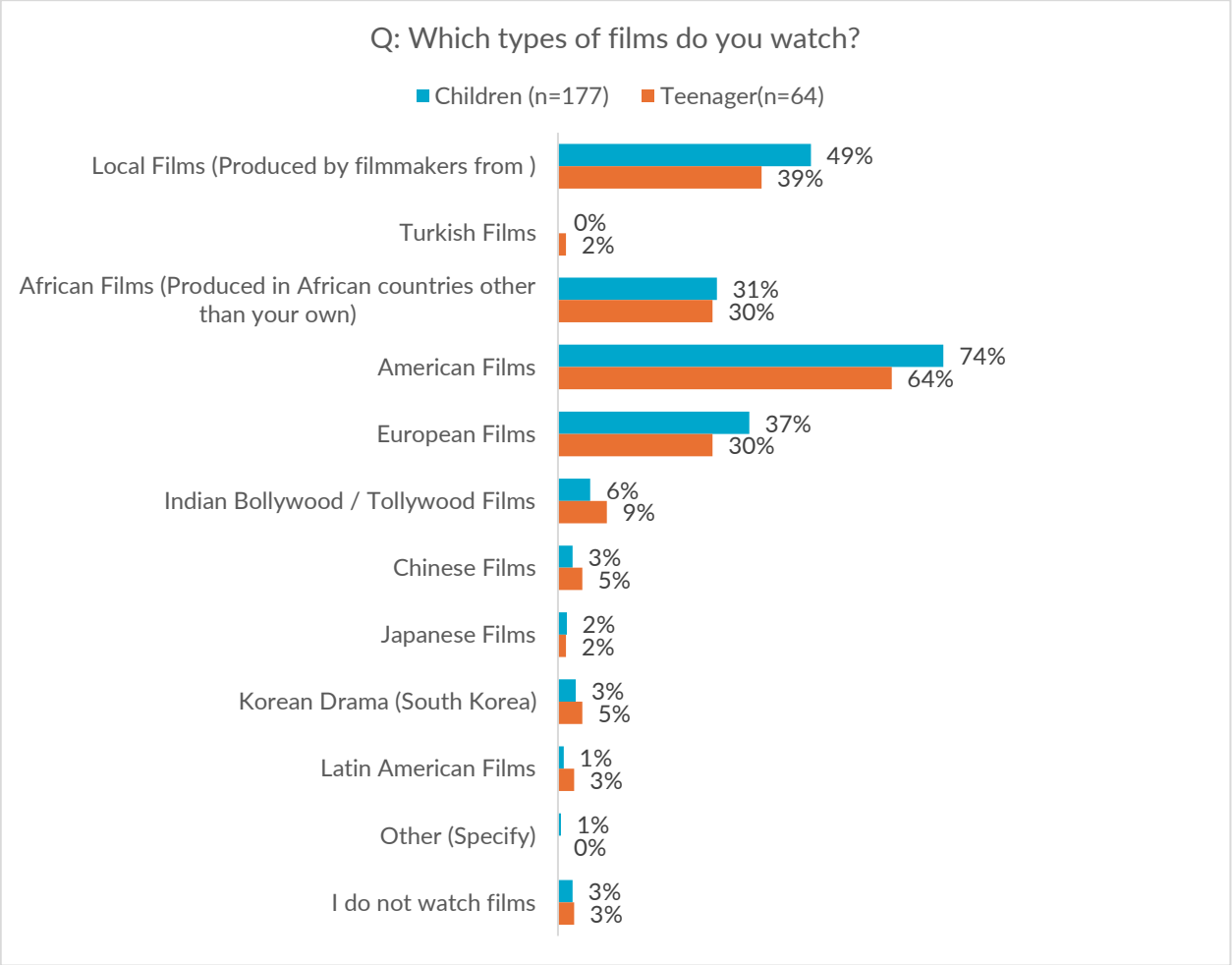


Figure 26: Type of films watched by teenagers and children in Kenya | Source: Survey data

3.5.2. Genre preferences among young audiences

Animation and cartoons are the most preferred genre among Kenyan children, with an overwhelming 94% reporting interest in this category, compared to 55% of teenagers. Teenagers, however, show much stronger preference for more mature and story-driven genres, particularly comedy (57%), drama (52%), and action films (50%), all significantly higher than among children.

Comedy is also popular among children (38%), though at a lower level than teenagers, while drama attracts only 17% of children compared to over half of teenagers. Action films similarly show a large age divide, with teenagers (50%) far more engaged than children (11%).

Teenagers are also more likely to consume documentaries (19% compared to 8%), horror films (13% vs. 2%), sci-fi (8% vs. 3%), and fantasy-related content (7% vs. 3%), indicating broader genre exploration as audiences grow older. Romantic comedy remains relatively niche across both groups, though teenagers (7%) engage with it slightly more than children (4%).

Overall, the findings suggest a clear transition in genre preferences with age: children strongly gravitate toward animated and light entertainment content, while teenagers increasingly shift toward action-oriented, comedic, dramatic, and more mature storytelling genres.

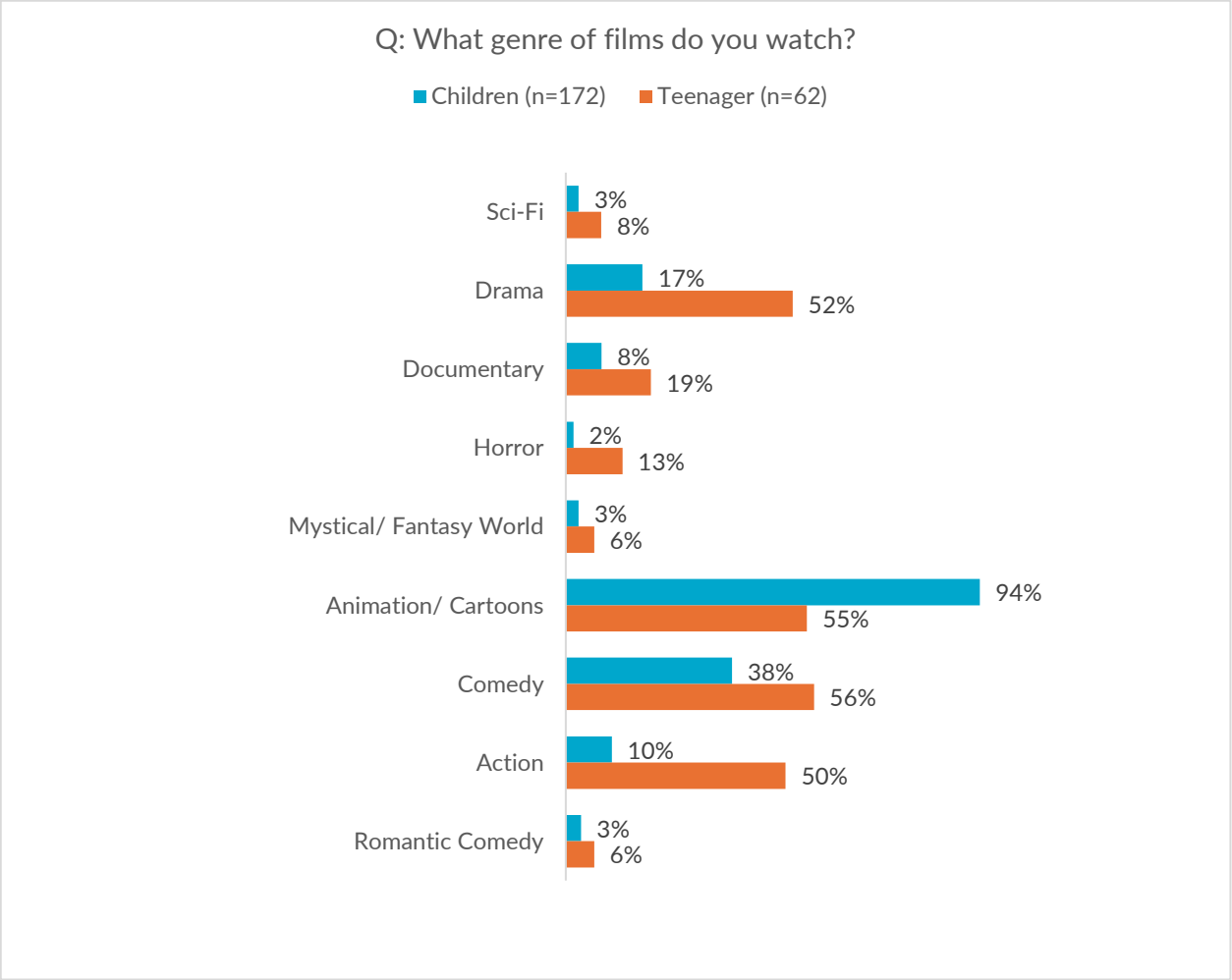


Figure 27: Genre of films watched by children and teenagers in Kenya | Source: Survey data

3.5.3. Digital platforms dominate film access

YouTube and YouTube Kids are by far the dominant film-viewing platforms among Kenyan children and teenagers, used by 83% of children and 71% of teenagers. This highlights the central role of free, mobile-accessible digital video platforms in shaping young audience consumption habits.

Traditional television also remains relevant, with approximately one-quarter of both children (27%) and teenagers (26%) watching films through free-to-air TV. Teenagers, however, show slightly stronger engagement with more formal subscription-based viewing channels, including Pay TV (27% vs. 17% among children) and streaming platforms such as Netflix, Showmax, and Amazon Prime (27% vs. 23%).

Social media platforms such as TikTok, Facebook, and Instagram play a relatively limited role in film viewing, though children (11%) report slightly higher usage than teenagers (8%). Use of pirated websites remains very low across both groups (3% among children and 2% among teenagers), while cinema attendance is almost non-existent, with only 2% of teenagers reporting use of mainstream cinemas and no reported use among children.

Alternative community-based viewing channels, including film festivals, community screenings, makeshift cinema rooms, and video rentals, record negligible engagement. Overall, the findings suggest that Kenyan young audiences primarily consume films through highly accessible digital and home-based platforms, with YouTube serving as the dominant gateway to film content.

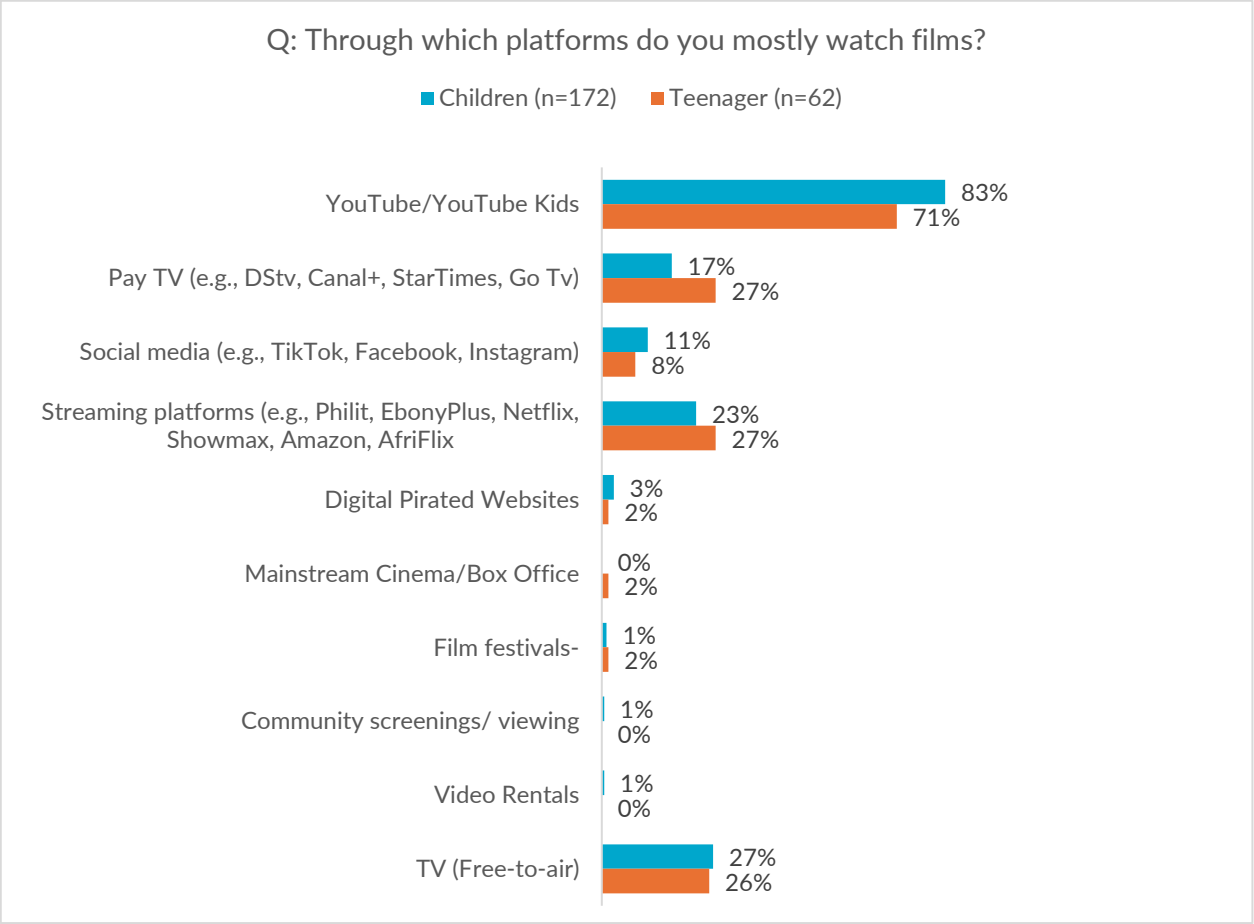


Figure 28: Platforms used mostly by children and teenagers to watch films in Kenya | Source: Survey data

3.5.4. Film consumption frequency among young audience

Film consumption among Kenyan children and teenagers is highly frequent, with daily viewing emerging as the dominant behavior across both groups. Children demonstrate the highest intensity of engagement, with 81% watching films daily compared to 58% of teenagers.

Teenagers, while still highly engaged, are more likely than children to watch films on a weekly basis, with 37% reporting viewing films at least once a week compared to 19% of children. This suggests that teenagers may have slightly more varied media habits or competing activities compared to younger audiences.

Very few respondents report infrequent film consumption. Only 3% of teenagers watch films 2–3 times a month, while 2% report watching once every 2–3 months.

Overall, the findings suggest that film viewing is deeply embedded in the daily entertainment habits of Kenyan children and teenagers, particularly among younger children who demonstrate exceptionally high levels of daily engagement.

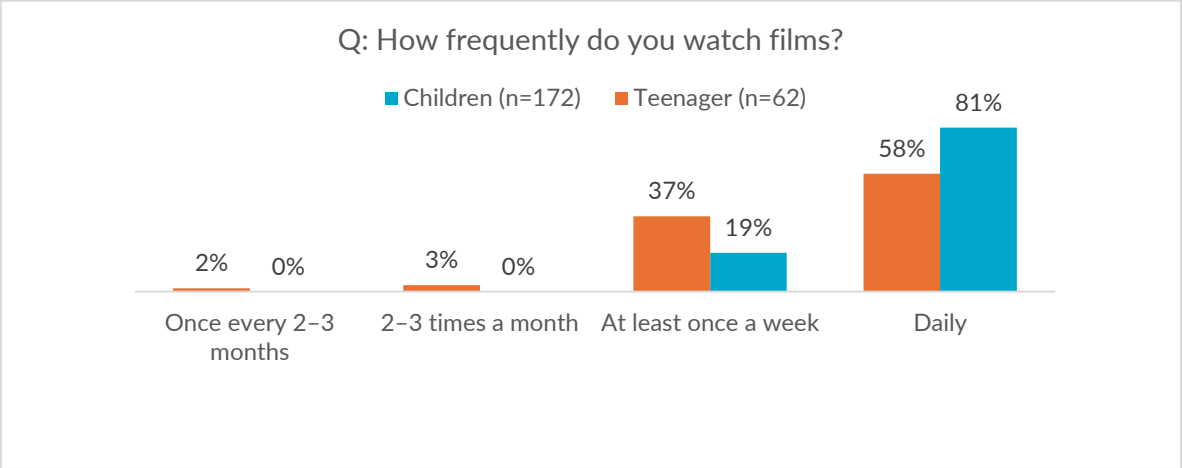


Figure 29: Frequency of children and teenagers watching films in Kenya | Source: Survey data

3.5.5. Family-Centered Viewing Behaviors

Film viewing among Kenyan children and teenagers is largely a social and family-oriented activity, with siblings and relatives emerging as the most common viewing companions for both children (56%) and teenagers (69%). This suggests that home and family environments play a central role in shaping film consumption habits among young audiences.

A significant proportion of respondents also watch films alone, particularly teenagers (63%) compared to children (48%), indicating growing independence in viewing behavior as audiences get older. Children are considerably more likely to watch films with their parents (55%) than teenagers (31%), reflecting higher parental supervision and shared viewing practices among younger age groups. Watching films with friends is equally common among both children and teenagers, with 24% in each group reporting this behavior, while viewing with classmates or schoolmates remains minimal across both groups (1% among children and 3% among teenagers).

Overall, the findings show that film consumption among Kenyan youth is primarily centered around family settings, while teenagers increasingly transition toward more independent viewing habits.

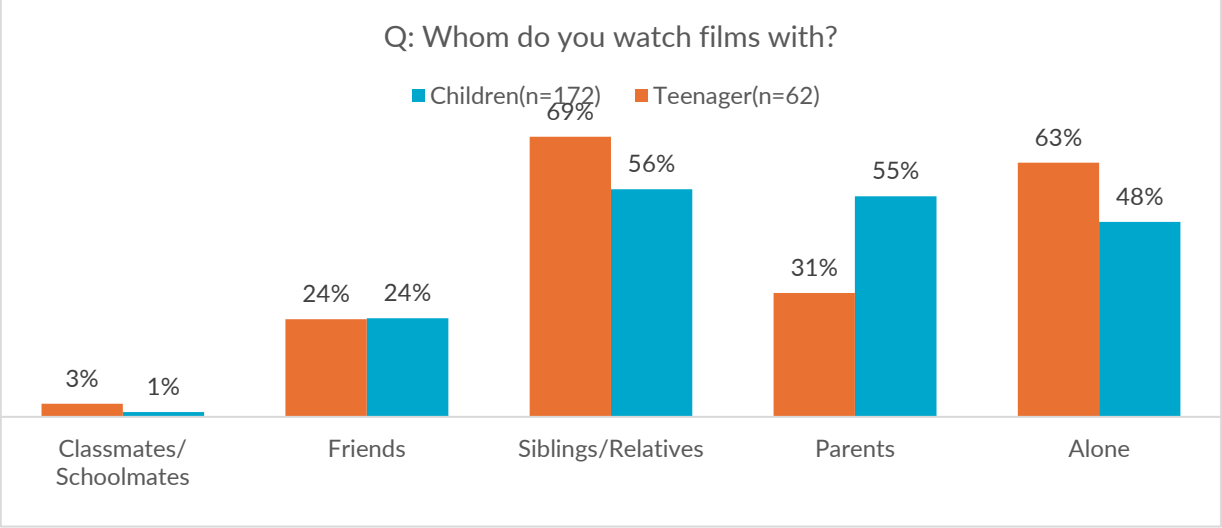


Figure 30: Whom do children and teenagers in Kenya watch films with | Source: Survey data

3.5.6. Film discovery pathways among young audiences

Friends and family are the primary source through which Kenyan children and teenagers discover new films, with particularly strong influence among teenagers (85%) compared to children (73%). This highlights the importance of word-of-mouth and peer-driven discovery in shaping young audience viewing choices.

Streaming platform recommendations also play a significant role, especially among children, where 45% rely on recommendations from platforms such as Netflix or YouTube, compared to 27% of teenagers. This suggests that algorithm-driven discovery is particularly influential among younger viewers.

Social media serves as a secondary discovery channel, with teenagers (19%) slightly more likely than children (16%) to learn about films through platforms such as TikTok, Instagram, or Facebook. Influencers and bloggers have relatively limited influence overall, though teenagers (5%) engage with them slightly more than children (3%). Traditional advertising channels, including radio, newspapers, magazines, blogs, billboards, and film festivals, have almost no influence on film discovery among both groups.

Overall, the findings suggest that film discovery among Kenyan youth is driven primarily by interpersonal networks and digital platform ecosystems, rather than traditional marketing channels.

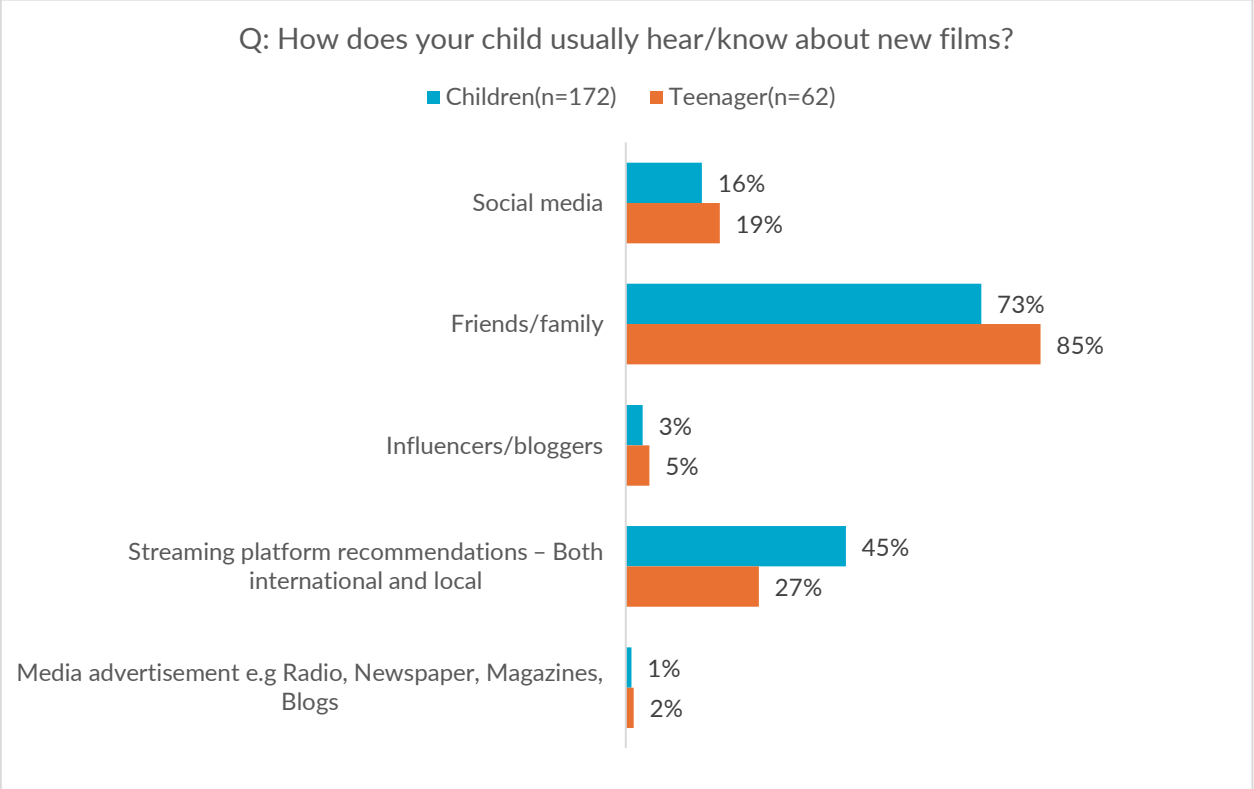


Figure 31: How children and teenagers hear about new films in Kenya | Source: Survey data

3.5.7. Motivations driving film consumption

Fun, entertainment, and relaxation are the leading motivations for watching films among both Kenyan children (87%) and teenagers (90%), showing that film consumption is primarily driven by leisure and enjoyment across both age groups.

Interesting and engaging storytelling is also a major driver, particularly among children (59%) and teenagers (53%), while educational value remains highly important, especially for teenagers (66%) compared to children (58%). This suggests that young audiences value films not only for entertainment but also for learning and personal development.

Teenagers are significantly more influenced by social and identity-related factors than children. Nearly half of teenagers (48%) are motivated by favourite actors, characters, or creators compared to only 26% of children. Teenagers are also more likely to watch films because they are popular with friends or family (33.9% vs. 17.4%) and because they feature familiar places, languages, or people like them (24% vs. 10%).

Children, however, place greater importance on films being suitable and safe for children or family-friendly (35%) compared to teenagers (27%). Visual appeal, including music and style, also resonates slightly more with children (28%) than teenagers (21%).

Ease and affordability of access have relatively limited influence on viewing decisions across both groups, cited by around 10% of respondents. Overall, the findings suggest that while entertainment remains the dominant motivation, teenagers increasingly seek identity, social connection, and aspirational appeal in films, whereas children are more influenced by safety, familiarity, and engaging storytelling

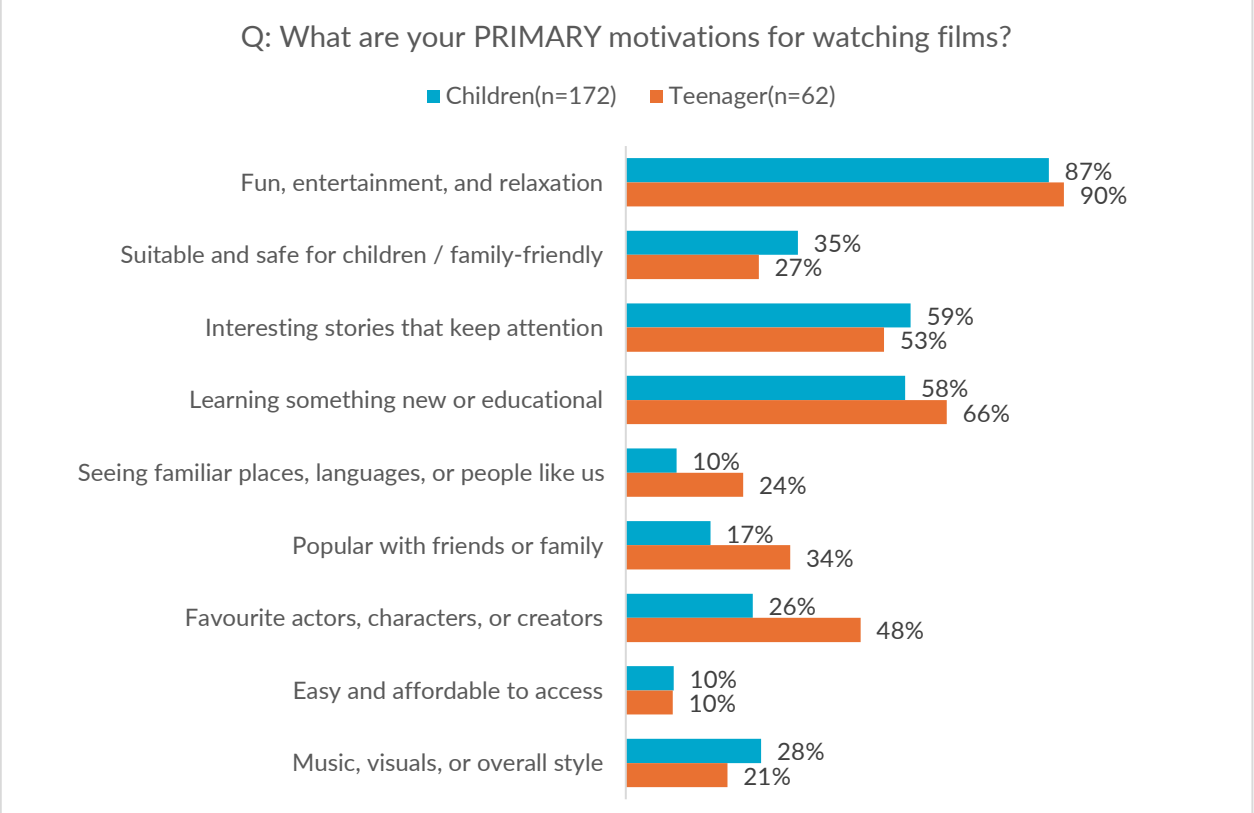


Figure 32: Primary motivation for children and teenagers to watching films in Kenya | Source: Survey data

Conclusion:

Overall, the survey findings indicate that film consumption is deeply embedded in the daily lives of Kenyan children and teenagers, with digital platforms, particularly YouTube and YouTube Kids, serving as the dominant gateways to content access and discovery. Young audiences demonstrate strong engagement with both global and local storytelling, balancing high consumption of American films with notable interest in Kenyan and broader African content. While children show stronger preference for animation, family-friendly content, and parent-supported viewing habits, teenagers increasingly gravitate toward more mature genres such as drama, comedy, and action, alongside more independent viewing behaviors.

Film discovery is largely driven by interpersonal networks and platform algorithms rather than traditional advertising channels, highlighting the growing importance of peer influence, digital ecosystems, and recommendation-based viewing. Entertainment and relaxation remain the

primary motivations for film consumption, though educational value, relatable storytelling, favourite actors, and social relevance also strongly shape engagement, particularly among teenagers.

The audience survey show that Kenyan youth audiences are highly accessible through mobile-first and digitally driven strategies but also retain a meaningful connection to local and culturally relevant storytelling. This presents a strong opportunity for filmmakers, distributors, broadcasters, and streaming platforms to invest in youth-focused African content that combines entertainment, relatability, and educational or social value while leveraging digital platforms and peer-driven promotion to strengthen audience engagement.

4.0. Case Study

4.1. Social Impact- Impact, access and limits of exposure

Searching for Amani-Five years, one hundred festivals

Searching for Amani began with two intentions that were in productive tension with each other: a desire to contribute to a culture of East African documentary filmmaking, and a specific subject climate change experienced not as a global statistic but as a lived reality reshaping individual lives and community bonds. The film's eventual central character, Simon, resolved that tension. He was a young Kenyan boy who, before any documentary crew arrived, had already begun investigating his father's death. A death linked to the climate-driven conflicts fracturing his community. He was not waiting to be helped. He was already acting.

That framing became the film's ethical and political core. *Searching for Amani* did not position Simon as a victim of forces beyond his comprehension. It accompanied him as an agent curious, determined, using his own resources and relationships to seek answers. The film's argument was implicit and powerful: the communities most affected by the climate crisis are not passive recipients of a catastrophe made elsewhere. They are people with full inner lives, active strategies and the right to be represented with full human complexity.

Building distribution without infrastructure

When production began in 2019, there was no established pathway for distributing a Kenyan feature documentary to the audiences it needed to reach. Everything that followed was improvised. The critical breakthrough came at Doc Forum in Amsterdam, where a connection through an executive producer introduced the film to Outlook, a European sales agent with an established international festival network. Outlook took on all rights except Kenya and East Africa, which it had no capacity to activate. For East Africa, LBx Africa (Bigger Motion), a Kenyan impact-distribution company, was engaged.

In Kenya, a one-week theatrical run at a single Nairobi cinema established Oscar eligibility, followed by a month-long run at the Unseen Cinema. Al Jazeera acquired worldwide broadcast rights and made the film free on YouTube globally. PBS acquired US rights and offered free online access. The distribution philosophy was stated clearly by the filmmakers: access mattered more than revenue. For a film about climate justice, a paywall was a contradiction. The film needed to reach educators, students, community groups and policy advocates and it did, across approximately 100 festival selections on every continent.

When the infrastructure fails

The practical limits of that first access decision were significant and revealing. Community screenings in Kenya the most direct way to reach the communities the film depicted remained in planning at the time of the interview, not for want of effort but for want of money. Organizing a community screening on a minimal budget is possible; monitoring its impact, sustaining the conversation it starts, and following up with participants all require resources that were not available.

Television broadcast inside Kenya was explored and abandoned. NTV, a major Kenyan broadcaster, quoted an advertising rate meaning the filmmakers would have had to pay per broadcast minute, at commercial advertiser rates, to air their own documentary to a national audience. The economics were not merely unhelpful; they were structurally reversed. The broadcaster's standard practice assumed that locally produced content carried no intrinsic value worth paying for.

YouTube reached a wide and genuinely global audience but generated negligible revenue for production. The monetization rates for African content particularly content consumed primarily by African continental audiences are a fraction of what equivalent diaspora or European viewership would yield. Streaming platforms offered licensing fees but came with exclusivity

clauses that locked the film away from the communities it had been made for. PBS, one of the film's two major broadcast partners, was subsequently defunded as part of wider US public broadcasting cuts, removing a distribution channel the filmmaker had relied on. Outlook, the sales agent that had made the film's international journey possible, did not take on the filmmaker's next project.

Each of these setbacks is individual. Together they describe a system: one in which social impact documentary filmmaking in East Africa is commercially unviable by default, dependent on foreign funding with narrative conditions attached, and structurally prevented from building the sustainability that would allow it to continue.

Overview of the impact

The filmmaker articulated impact through four dimensions: shifts in mindset, shifts in behaviour, shifts in perception, and shifts in legislation or the rule of law. Citing *Softy* and *Thank You for the Rain* as evidence that documentary films can move people toward action but paired that observation with a caution: single films are insufficient. Sustained change requires a sustained pipeline of production and distribution, not one powerful film every five years.

The most precise summary of the problem came in the comparison between what a Kenyan audience pays for imported entertainment and what it pays for local cinema. A ticket to watch Avengers costs 1,100 shillings. A ticket to watch Searching for Amani costs 1,100 shillings. The asymmetry is not in price; it is in the cultural conditioning that makes one feel like a normal consumer choice and the other feel like a charitable act. Dismantling that conditioning is a long-term project requiring consistent production, consistent distribution and consistent institutional investment in the value of locally made stories.

Key lessons

- Social impact filmmaking in East Africa has, by structure, become a non-profit enterprise not necessarily by choice, but by default conditions.
- The enabling infrastructure for commercial sustainability including functional broadcast economics, fair digital monetisation systems, community screening funds, and strong IP protection is still largely missing or underdeveloped.
- Access, impact, and commercial sustainability are not opposing forces; in practice, they are deeply interdependent.
- Ultimately, films that cannot sustain the people who make them cannot sustain the social missions they are meant to serve.

Recommendations

- For financing institutions and funders: Create dedicated funding streams for documentary distribution and community impact activation not just production. Fund monitoring and evaluation as a line item within impact-oriented projects from the outset. Develop East African distribution infrastructure by backing respective companies with institutional capital and long-term support.
- For policymakers in Kenya and East Africa: Establish a film production fund and tax incentive framework for Kenyan and East African productions. Reform broadcaster obligations to require carriage payments for locally produced documentary content rather than charging producers for airtime. Strengthen IP law and piracy enforcement to make digital distribution commercially viable for local creators
- For the research and impact community: Develop longitudinal frameworks for measuring film's social impact beyond viewership documenting shifts in mindset, behaviour and policy over time. Advocate with streaming platforms for monetisation equity across African markets and against exclusivity clauses that limit access for communities most relevant to social impact films.

5. Recommendation

5.1 Country-Specific Priorities and Opportunities

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

Financial Satellite Account (FISA), launched by Kenya National Bureau of Statistics (KNBS)for the creative economy, does not have operational funding and therefore remains a shell. Additionally, even if funded, FISA will not be able capture granular box office figures as cinemas treat these as confidential while streaming platforms viewership data as they consider it proprietary.

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

For macroeconomic measurement, FISA should receive dedicated annual funding from the Kenya Film Commission's budget or the proposed Creative Economy Fund to collect and validate data such as tax, employment, and registration or subscription data. The Kenya Film Commission would then compile, clean, and disseminate non-confidential data to stakeholders.

5.1.1. Priority opportunities in distribution

Scale up existing platforms

The Kenyan digital distribution landscape is characterised by fragmentation: dozens of small, filmmaker-run VOD platforms such as Phil-IT TV, Yakwetu, MyMoviesAfrica, Rafu TV, and Blackwell Films, operate in isolation, each with a limited catalogue and insufficient scale to market effectively or attract consistent audiences. This fragmentation prevents any single platform from achieving critical mass, while leaving consumers with no obvious, trusted destination for Kenyan content. The priority opportunity is not to build another new platform, but to consolidate and scale the ones that already exist. This could be achieved through targeted investment in the most promising existing platforms including technology upgrades, marketing support, content acquisition funds, or through mergers and partnerships that reduce redundancy and pool catalogues.

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

Micropayment to align payments with how Kenyans already spend

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

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

Hybrid model of funding and infrastructure development

Neither government alone nor private capital alone has succeeded in building a scalable local VOD platform. Government funding is inconsistent while private investors have been reluctant to back an unproven market with little data. The stakeholders suggested a hybrid model as the most viable path where public or development finance provides the initial capital for technology development, hosting, content licensing, and marketing, while private sector partners operate the platform and manage payments. This could be structured as a public-private partnership involving the Kenya Film Commission as convenor, a technology partner as operator, existing local platforms as content aggregators, and development partners as underwriter. The goal would not be permanent subsidy but catalytic investment, enough to prove the model, reach scale, and then transition to commercial sustainability.

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

5.1.2. Priority opportunities in audience development

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

"The box office in Kenya is… like 95% American film… the rest is Kenyan". Distributor, Kenya

5.1.3. Priority opportunities in social impact

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

"We did over 40 community screenings… and… conversations afterwards". Distributor, Kenya

5.1.4. Scaling potential: Strategic priorities

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

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 Kenya, 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**[2]

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)

[2] SA-Single Response

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
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.