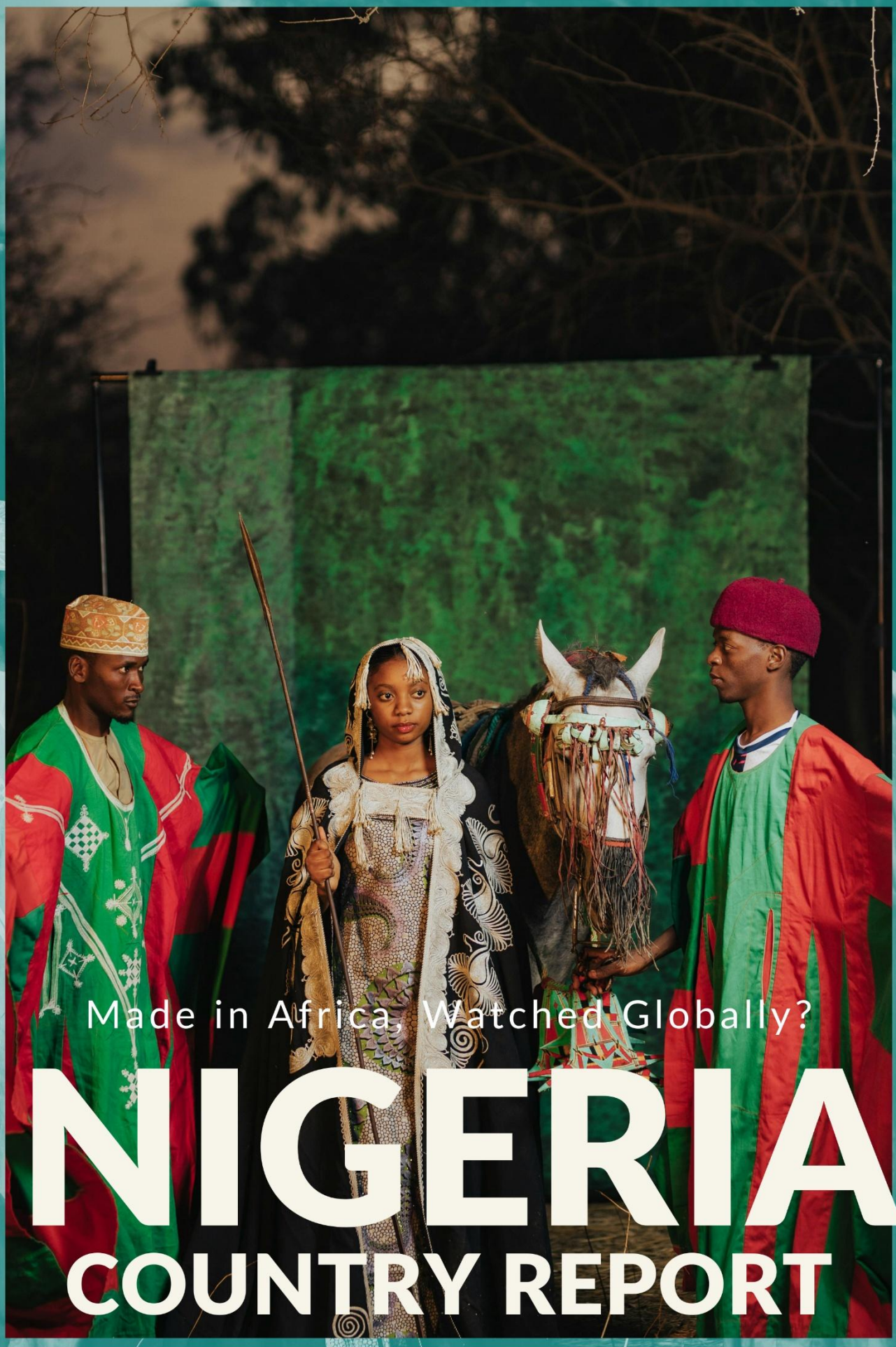


Made in Africa, Watched Globally?

NIGERIA
COUNTRY REPORT

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

Foreword

For too long, the conversation around Nigeria's film industry has been driven by hype, anecdotes, and outdated assumptions. As this report makes clear, we are well past the point of treating Nollywood merely as a cultural phenomenon. It is a multi-billion-naira asset class, and it demands to be analyzed and invested in as one.

The numbers from 2025 speak for themselves. Funke Akindele's Behind The Scenes crossed the ₦2.76 billion mark. We recorded a ₦15.6 billion theatrical box office. Local productions are outperforming major Hollywood franchises on our own turf. The demand for Nigerian storytelling is no longer a question; it is an established economic fact.

But scale without strategy does not equal sustainability.

While our top-tier productions break records, the broader ecosystem remains constrained by structural fragmentation. Average ticket prices have surged, yet total admissions are still fighting to recover. We have a rapidly growing digital audience, yet piracy and disjointed distribution networks continue to bleed revenue. We cannot keep relying on the sheer willpower of independent filmmakers to carry the industry forward. We need infrastructure to support them.

You cannot invest in the present by using assumptions from the past. That is why this report, commissioned in partnership with GIZ and Afreximbank/CANEX, matters. We did not set out to write another high-level overview. We set out to map the realities of African film distribution, audience behavior, and financing, and to provide a clear, evidence-based basis for decisions that actually move the needle.

The findings in these pages are a direct challenge to policymakers, financiers, and distributors. From IP-backed financing to community cinema expansion to centralized market intelligence, the path forward is here. The talent is undeniable, the audience is hungry, and the cultural export value has never been higher.

Now it is time to build the systems, infrastructure, and funding frameworks that can sustain what we have already built.

I invite you to read this not just as a reflection of where we are, but as a foundation for where we go next.

Yours sincerely,

Motunrayo Ojo

Consumer & Audience Insights Expert, African Media.

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Executive Summary

Nigeria's film industry, popularly known as Nollywood, remains one of the most influential cultural and creative industries globally and a major driver of Africa's creative economy. With an estimated population of approximately 230 million people, Nigeria provides one of the largest domestic content consumption markets in the world, supporting strong audience demand for locally relevant storytelling. The creative sector, including film and music, contributed approximately ₦154 billion to Nigeria's GDP in 2023 and supports over 4.2 million jobs, with projections indicating continued expansion if structural constraints are addressed.

Nollywood has evolved significantly from its historical straight-to-home-video origins into a hybrid ecosystem combining theatrical exhibition, streaming platforms, television broadcasting, and informal digital circulation. Nigeria now ranks second globally in film production volume after India, with over 2,500 films produced in 2020 alone and more than 1,000 titles produced annually on average. However, despite this scale and cultural influence, the industry continues to operate as a dual economy comprising a small tier of professionally structured high-budget productions alongside a large number of undercapitalized productions dependent on informal distribution systems.

Stakeholders consistently described the Nigerian film industry as a major economic and cultural force constrained by structural weaknesses, fragmented governance, and uneven infrastructure development. Urban centres dominate both cinema infrastructure and digital connectivity, while rural areas continue to face barriers related to electricity access, internet affordability, and limited exhibition infrastructure. Despite these constraints, Nollywood continues to demonstrate remarkable adaptability through private-sector innovation, entrepreneurial production models, and growing international demand for African stories.

The ecosystem has also undergone important institutional evolution. Key milestones include the rise of the home-video era following Living in Bondage (1992), the revival of cinema culture through Silverbird Cinemas in the mid-2000s, the growth of Africa Magic and Pay TV distribution, and the entry of international streaming platforms such as Netflix and Amazon Prime. At the same time, private initiatives such as the MultiChoice Talent Factory and newer distribution platforms like Circuits TV are increasingly filling gaps in training, funding, and alternative distribution pathways.

Nevertheless, stakeholders repeatedly identified weak intellectual property enforcement, limited industry coordination, fragmented regulation, and poor access to financing as major constraints limiting long-term industry sustainability and monetisation.

Film Distribution

Nigeria's distribution ecosystem has evolved into a complex hybrid structure combining formal theatrical exhibition, Pay TV, OTT streaming platforms, mobile-first distribution systems, and extensive informal circulation networks. The country contributes over 93% of the Anglophone West African box office, positioning it as the dominant theatrical market in the region.

The theatrical market has experienced significant expansion over the last decade. Nigeria now has approximately 118 cinema locations and 352 cinema screens nationwide, representing substantial infrastructure growth compared to earlier years. However, this still translates to approximately one cinema screen for every 653,000 people, highlighting severe under-screening relative to global standards. The market remains heavily concentrated around major urban centres such as Lagos, Abuja, and Port Harcourt, with Lagos alone accounting for more than half of total box office revenue.

The cinema market recorded ₦15.6 billion in box office revenue in 2025, representing strong year-on-year growth. However, this increase was driven primarily by aggressive ticket price increases rather than substantial growth in admissions. Average ticket prices increased

significantly over the past five years while admissions remained below pre-COVID levels, illustrating a broader industry shift toward premium, event-based cinema experiences.

Nollywood continues to dominate local audience engagement within cinemas. Local productions accounted for approximately half of total box office revenue and ticket sales in 2025, with major commercial successes such as Behind The Scenes, Everybody Loves Jenifa, and A Tribe Called Judah demonstrating the strong commercial viability of culturally resonant local storytelling. The "Detty December" festive season has emerged as the industry's most commercially important theatrical window, further reinforcing the role of event-driven local cinema culture.

At the same time, digital distribution has become the dominant everyday viewing channel for many audiences, particularly younger and urban consumers. Nigeria is now one of Sub-Saharan Africa's largest and fastest-growing OTT and Pay TV markets. Platforms such as Netflix, Showmax, Amazon Prime, YouTube, EbonyLife ON, Circuits TV, NdaniTV, and Accelerate TV have transformed content access and audience behaviour.

YouTube, in particular, emerged as the most widely referenced platform among stakeholders because of its relatively open access model and ability to bypass traditional gatekeepers. Nigerian-first content platforms collectively account for approximately 73% of OTT users, demonstrating the continued strength of local storytelling and audience demand for culturally familiar content.

However, the digital ecosystem also reflects significant structural challenges. Subscription fatigue, low purchasing power, prepaid consumption behaviour, and high platform rotation rates mean that Nigeria operates more as a high-volume, low-margin attention economy rather than a traditional subscription-driven market. This has major implications for filmmakers, making rights retention, multi-window monetisation, and long-tail distribution strategies increasingly important.

Alternative exhibition models are also emerging to bridge infrastructure gaps. Community cinemas, cottage cinemas, open-air screenings, and university-based exhibition models are increasingly being explored as mechanisms to expand access outside major cities. Stakeholders highlighted the commercial success of community-driven screenings and mobile exhibition approaches, particularly in underserved regions.

Despite these innovations, piracy remains a major structural challenge. Audiences frequently rely on unofficial streaming platforms, Telegram channels, IPTV services, and pirated distribution networks due to affordability concerns and limited access to legal platforms. Stakeholders consistently identified piracy as one of the most significant barriers to sustainable revenue recovery and long-term industry profitability.

Audience Development

Nigeria demonstrates one of the continent's strongest and most culturally engaged film audiences. Audiences maintain strong emotional and cultural attachment to Nigerian storytelling because of its relevance to local realities, humour, family structures, religion, aspirations, and language diversity.

Audience engagement increasingly extends beyond passive viewing into broader digital participation. Social media platforms such as TikTok, Instagram, YouTube, and Facebook now play a central role in film discovery, audience mobilisation, celebrity engagement, and marketing amplification. Nigerian audiences actively participate in online discussions, fan communities, talent promotion, and peer-to-peer recommendations, making social engagement a major driver of film visibility and audience acquisition.

Cinema attendance remains strongest among urban middle-class audiences and during major cultural release windows. However, audience behaviour indicates that convenience and

accessibility increasingly outweigh traditional cinema appeal. Survey findings showed that 54% of audiences prefer waiting to watch films on alternative platforms, while time constraints (35%) and distance to cinemas (23%) were major barriers to theatrical attendance.

Stakeholders noted that audiences are becoming increasingly selective about cinema attendance, treating theatrical viewing as a premium event-based experience rather than an everyday entertainment option. The high total cost of cinema-going—including transport, refreshments, and ticket prices—further accelerates the shift toward home-based streaming and mobile viewing.

The findings also highlight changing youth consumption patterns. Younger audiences demonstrate high digital fluency and strong mobile-first viewing habits, creating opportunities for targeted digital engagement strategies, telecom partnerships, and flexible subscription models. Platforms offering lower-cost access models and mobile-optimized distribution pathways are particularly well-positioned within the Nigerian market.

At the same time, stakeholders identified several underdeveloped audience segments and genres with strong future growth potential. Animation, anime-inspired content, documentaries, historical epics, biopics, and children's programming were repeatedly highlighted as major opportunity areas with growing audience demand but limited local production.

Social Impact

Film plays a major social, cultural, and political role within Nigeria. Beyond entertainment, Nollywood functions as a powerful vehicle for cultural representation, identity formation, and public discourse. Nigerian films frequently explore themes related to governance, corruption, migration, religion, gender relations, entrepreneurship, youth aspirations, and social inequality. Through mainstream entertainment formats, filmmakers are able to engage audiences with socially relevant issues while maintaining strong commercial appeal.

Nollywood's influence also extends internationally, shaping global perceptions of African culture, fashion, music, language, and urban identity. The industry has become a major instrument of African cultural soft power and visibility globally.

Stakeholders further noted that social impact storytelling increasingly occurs through partnerships with NGOs, advocacy organisations, development partners, and international cultural institutions. However, the ecosystem for impact-oriented filmmaking remains relatively underdeveloped compared to commercial entertainment production. Dedicated financing streams for impact films remain limited, and filmmakers often balance social messaging with broader market demands in order to ensure financial viability.

Alternative distribution models such as community screenings and open-air cinema were also identified as particularly valuable for social impact films, especially in underserved areas without formal cinema infrastructure. These models create opportunities for more localized audience engagement and community-level discussions around socially relevant themes.

Despite structural challenges, the scale and reach of Nigerian film position it as one of Africa's most powerful platforms for shaping narratives, influencing social behaviour, and strengthening cultural representation across the continent and the diaspora.

Opportunities and Strategic Levers

Nigeria's film industry presents substantial opportunities for long-term growth, monetisation, and international expansion. One of the strongest opportunities lies in strengthening rights ownership and improving intellectual property monetisation systems. As global demand for African content grows, ensuring that Nigerian filmmakers retain greater ownership over their productions will be critical for sustainable wealth creation.

The continued expansion of OTT, AVOD, FAST, and hybrid streaming models presents significant opportunities for scale. However, the report emphasizes that sustainable value creation will depend less on one-off licensing deals and more on stacked monetisation strategies combining cinema, Pay TV, OTT, advertising, diaspora markets, and long-tail digital revenue streams.

There is also strong potential to expand cinema infrastructure and alternative exhibition systems beyond major cities. Community cinemas, cottage cinemas, and mobile screening models offer important pathways for increasing access in underserved regions while reducing overreliance on urban theatrical markets.

Audience development opportunities remain particularly strong among younger digital consumers. Telecom partnerships, university-based engagement models, flexible subscription pricing, and localized digital marketing strategies could significantly strengthen audience conversion and retention.

Stakeholders also identified several underdeveloped content areas with strong future growth potential, including animation, anime, children's programming, documentaries, historical narratives, and regional-language content. Investments in these genres could diversify the ecosystem while expanding audience reach both domestically and internationally.

Finally, Nigeria's strong diaspora networks and international cultural visibility create major export opportunities. Diaspora-focused theatrical releases, international festival participation, co-productions, and strategic global licensing arrangements continue to strengthen Nollywood's global footprint.

Financing and Enabling Environment

Nigeria's financing ecosystem remains active but highly fragmented. Funding sources include private investment, producer self-financing, brand partnerships, streaming commissions, Pay TV licensing, and limited public-sector initiatives. While international streaming platforms initially injected substantial capital into Nigerian productions, stakeholders noted that commissioning activity has become more selective and concentrated among established producers.

Currency instability and inflation have emerged as major operational threats to the industry. Stakeholders consistently highlighted the devaluation of the Naira as a critical challenge affecting equipment imports, production budgets, logistics costs, and long-term financial planning. Rising inflation has also reduced audience purchasing power, further affecting cinema attendance and discretionary entertainment spending.

The financing ecosystem is further constrained by weak intellectual property enforcement, inconsistent revenue-sharing systems, and limited access to structured financing mechanisms. Filmmakers repeatedly cited unfair revenue splits with exhibitors and low licensing fees from local broadcasters as barriers to profitability.

Stakeholders also emphasized the absence of centralized industry data as a major investment barrier. Fragmented market intelligence, inconsistent viewership reporting, and limited transparency around streaming performance make it difficult for investors, producers, and policymakers to assess industry potential accurately.

Nevertheless, Nigeria benefits from a highly entrepreneurial creative ecosystem, strong private-sector participation, and growing global demand for African stories. Existing initiatives such as the Creative Economy Development Fund and growing co-production partnerships with countries such as South Africa, France, and Brazil indicate emerging pathways toward stronger industry formalization and investment mobilisation.

The Path Forward

Nigeria's film industry stands at a critical transition point. Nollywood has already established itself as one of the world's most recognizable cultural industries, but sustaining long-term growth will require moving beyond scale-driven production toward stronger institutionalization, improved monetisation systems, and greater investment in infrastructure, rights ownership, and professionalization.

The future growth of the industry will depend heavily on improving collaboration across filmmakers, distributors, broadcasters, telecom companies, regulators, streaming platforms, financiers, and development partners. Expanding cinema infrastructure, strengthening anti-piracy enforcement, improving access to structured financing, and building reliable industry data systems will be critical to unlocking sustainable growth.

Equally important will be the ability to retain the cultural authenticity that continues to differentiate Nollywood globally. Nigerian films succeed because they remain deeply rooted in local realities while simultaneously resonating with wider African and diaspora audiences. Strengthening this balance between cultural specificity and global competitiveness will be essential to maintaining Nigeria's leadership within Africa's creative economy.

Ultimately, Nigeria's greatest strength lies not only in its production volume but in its ability to shape narratives, influence audiences, and drive cultural conversations across the continent and beyond. With stronger policy support, more sustainable financing models, and improved distribution systems, Nollywood is well positioned to consolidate its role as one of the world's most influential creative ecosystems.

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.

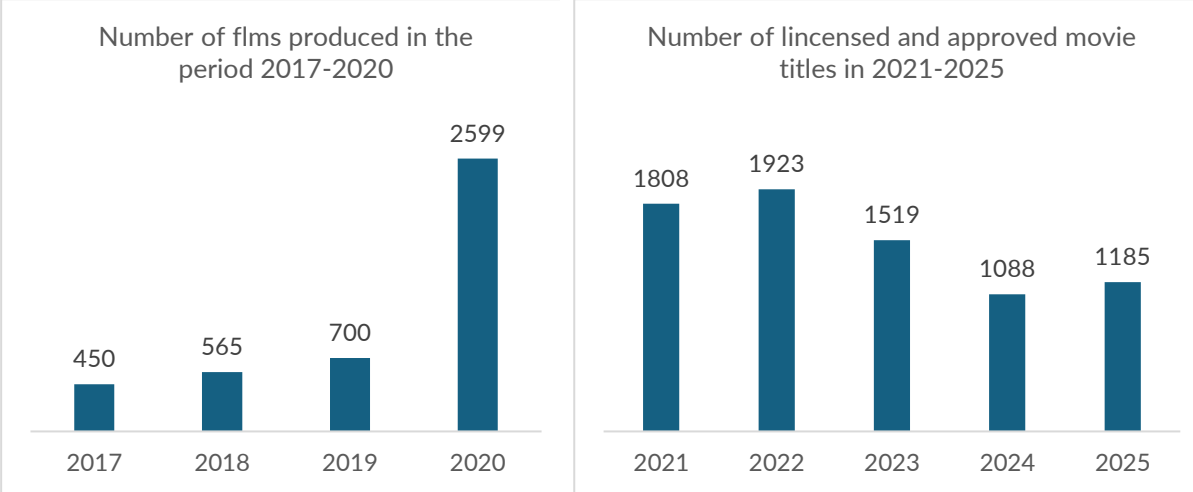
1.5 Limitations

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

Nigeria's film industry, popularly known as Nollywood, represents a cornerstone of the nation's creative economy and a significant driver of its cultural soft power. As of 2025, the country's population is estimated at approximately 230 million, providing a massive domestic base for content consumption. The creative sector, including film and music, contributed roughly ₦154 billion to Nigeria's GDP in 2023 and currently supports over 4.2 million jobs, with projections suggesting the addition of another 2.7 million jobs by 2027 if structural constraints are addressed. Historically, Nollywood was defined by a high-volume, informal, straight-to-home-video model, but it has recently evolved into a hybrid system where theatrical exhibition, international streaming platforms, and traditional television broadcast represent material revenue streams. This transformation has positioned Nigeria as a global leader in production volume, second only to India, with a spike of over 2,500 films produced in 2020 alone and an average annual production of 1,000+ films. Despite this scale, the industry remains characterized by a dual economy: a small tier of professionally structured, high-budget productions and a "long tail" of under-capitalized films that rely on informal distribution channels.



Source: Nigeria Bureau of Statistics (NBS) Source: National Film and Video Censors Board (NFVCB)

Figure 1: Distribution of films produced and classified in the period 2017 -2025

Key informants described Nigeria's film industry as a major economic and cultural force, yet one whose growth is constrained by structural weaknesses and uneven infrastructure. Urban centres dominate both cinema screens and internet connectivity, while rural areas lag due to high data costs and limited electricity. The industry's commercial potential is evidenced by recent box-office records, but stakeholders emphasised that these successes are driven by private initiative rather than coordinated government support. A government official noted the urban-rural divide in consumption: *"Economic power is more prevalent within the cities than the villages."*

2.1. Overview of national film ecosystem

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

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

"…we started MTF, is MultiChoice Talent Factory. It's a film school. It's the corporate social investment of MultiChoice. It's a fully funded film school. Meaning that scholars who are privileged to attend MTFs, do not pay a dime, but they get quality education around the art and the business of film. MultiChoice saw a gap in that and decided that, we are going to tackle this aspect, this will be our contribution to the industry." Government official, Nigeria

Despite these institutional advances, stakeholders consistently identified the lack of formal structure as the industry's most critical weakness. The sector operates with fragmented oversight, weak enforcement of intellectual property rights, and limited integration between production and distribution. Producers and distributors highlighted the absence of a unified practitioners' council that would professionalise entry and ensure accountability. Furthermore, the government regulators acknowledged that existing policies, while present, are insufficient to manage the complexities of a rapidly digitising market.

2.2. Impact of currency fluctuations on film industry

While structural issues persist, the industry is currently facing a more immediate external threat from the broader economy. Recent currency fluctuations, particularly the sustained devaluation of the Naira, have sharply increased production overheads across Nigeria's film industry. Filmmakers consistently cited the exchange rate as a critical barrier, especially for acquiring imported equipment such as high-end lenses and cameras that are priced in dollars. Beyond equipment, the unpredictability of the currency undermines budget planning: a production budget set in naira can be rendered insufficient overnight, leaving producers unable to honour commitments to investors or cover escalating logistics costs. This volatility hits independent filmmakers hardest, as they lack the financial buffers of larger studios.

"You go to bed and you wake up the next morning and inflation has happened, prices have … by another a hundred percent. And you don't know how to go back to the investor and say, sir, the money I asked for is not working again…" Filmmaker, Nigeria

The impact of currency instability extends across the value chain, from production through to distribution. Distributors noted that while cinema ticket prices have risen in naira terms, their real value in dollars has declined, eroding revenues for both producers and exhibitors. Government agencies acknowledged the broader macroeconomic challenges but have yet to introduce targeted measures such as import duty waivers or stabilization funds, to cushion the sector. Consequently, filmmakers often resort to reducing budgets, compromising technical quality, or delaying projects, reinforcing a cycle of under-capitalization. Illustrating this erosion of market value, a distributor observed the impact on ticket prices:

"7,000 naira is less than 5 dollars, you know, which is below the global standard of tickets of five dollars. So I don't think it's expensive pricing." Film distributor, Nigeria

The stakeholders also noted that inflation and currency depreciation have eroded audience purchasing power, making cinema-going a high-cost leisure activity relative to alternatives.

They observed that audiences weigh the full cost of attendance such as tickets, transport, and refreshments, against more flexible and lower-cost options such as home viewing via mobile data, which is widely perceived as better value for money. These pressures are even more pronounced for families, as flat pricing structures make group attendance prohibitively expensive, accelerating a shift toward streaming and informal viewing. Cinema attendance has also become increasingly seasonal, peaking during festive periods when higher-spending diasporan audiences return, further highlighting how regular participation by local, Naira-earning audiences has declined.

3. Findings

3.1 Film Distribution

3.1.1. Overview

Current distribution in Nigeria is a complex mix of formal theatrical exhibition, rapidly expanding digital streaming, and a persistent informal market. FilmOne 2025 Yearbook reports that Nigeria contributes over 93% of the Anglophone West Africa Box Office. The theatrical infrastructure consists of 118 cinema locations with 352 screens nationwide, translating to a population-to-screen ratio of approximately 653,000 people per screen—a figure that indicates severe under-screening compared to global standards (~20–40 cinema screens per 1 million people). The market is dominated by major exhibition chains such as Filmhouse, Silverbird, and Genesis, though newer entrants like Nile Cinemas are attempting to expand into secondary cities. While theatrical revenue saw a massive 34.7% increase in 2025 to reach ₦15.6 billion, this growth was primarily driven by aggressive ticket price hikes rather than increased admissions, which grew by only 4% to 2,795,276 admissions. Digital distribution has become the primary consumption channel for younger, urban demographics. These platforms have significantly influenced content strategy, often prioritizing prestige dramas or thrillers with international appeal. However, the vast majority of Nigerian films, roughly over 93% of those classified, never reach the cinema, instead moving directly to streaming, television, or informal street-level distribution via USB and DVD.

3.1.2. Distribution channels

The Nigerian film market is a hybrid ecosystem defined by the convergence of theatrical exhibition, vertically integrated broadcast networks, and a rapidly expanding mobile-first digital landscape. Unlike markets with distinct boundaries between cinema and television, Nigeria's structure is characterized by cross-platform dominance, where major players often control both the production and the primary broadcast or streaming windows. As the industry undergoes a structural shift, access is increasingly dictated by the interplay between premium theatrical events and the democratized reach of global streaming and indigenous telecommunications platforms. The following analysis explores the specific roles of these players and the infrastructure currently shaping audience access.

i. Distributors

Analysis of stakeholder feedback identifies several distribution companies as the dominant players in the Nigerian film market. FilmOne Entertainment emerged as a leading distributor, with a representative describing its decade-long journey and its role in both cinema and streaming distribution: Blue Pictures was cited by multiple informants as a key cinema distributor, often working on major releases. Nile (also referred to as Nile Productions) was mentioned in connection with community screenings and distribution. Genesis Deluxe Cinemas was noted as a pioneer in releasing box-office data and a major distributor/exhibitor, while Silverbird was acknowledged as one of the earliest cinema chains that helped revive theatrical exhibition.

"If you'll recall, cinemas came back around 2004 with Silverbird [name of film]. They were showing a lot more Hollywood films, but we were then… we were premiering Nigerian films." Film distributor.

Other distribution players mentioned include Cinemax, Koga (a now-defunct platform), and Terra Kulture, which was referenced in the context of theatrical releases and premieres. The role of sales agents was also highlighted, particularly in international distribution. A filmmaker described working with a foreign sales agent to take "The Weekend" to over 40 film festivals and negotiate distribution in multiple territories.

ii. Cinemas

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

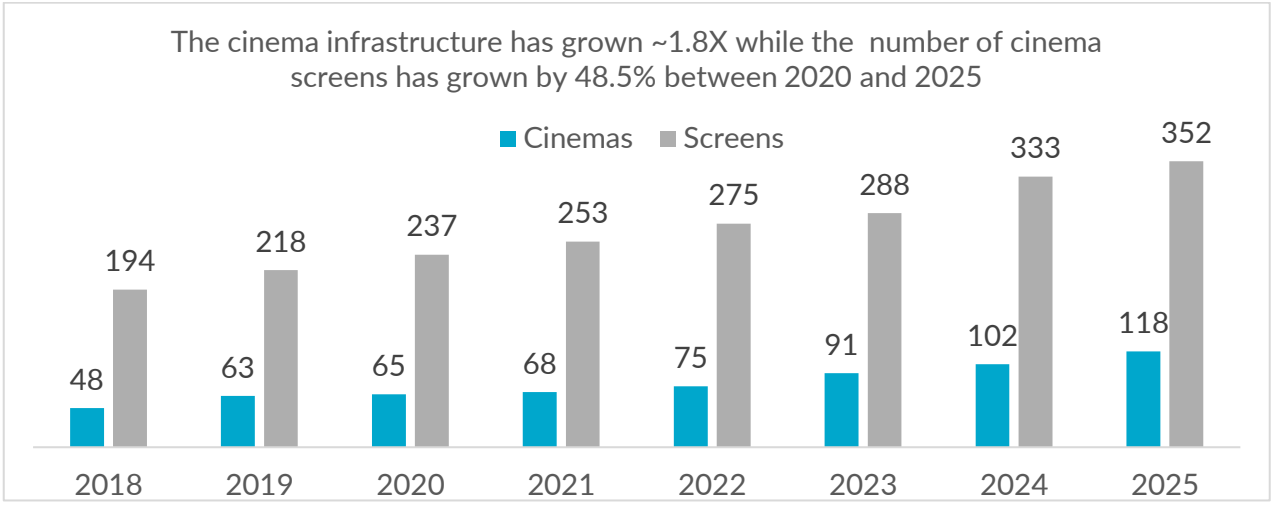


Figure 2: Cinema infrastructure growth in Nigeria | Source: FilmOne, Comscore

Infrastructure saw steady expansion throughout the first half of the decade. By the close of 2025, the territory operated 118 cinema locations representing a 16% increase in cinema count year-on-year. This expansion contributed to a record-breaking total of ₦15.6 billion in box office revenue. Lagos remains the engine room of the industry, generating over 50% of total revenue and 45.9% of admissions from 41 locations. However, states like Edo (driven by Genesis Benin City) and Rivers are showing strong "location quality" and high yields, suggesting that future growth lies in optimising regional hubs outside the capital.

Market share remained highly concentrated among three major players: Filmhouse Cinemas (26% GBO share), Genesis Cinemas (19.3%), and Silverbird (19%). A notable trend in 2025 was the diversification of exhibition formats; alternative models like Imagine Cinema and Nile Cinemas successfully brought the theatrical experience to non-traditional venues and university campuses, broadening the industry's geographic reach.

This evolution in the theatrical landscape has been accompanied by a significant shift in audience consumption patterns. Audience survey data shows that 54% of audiences prefer to wait and watch films on other platforms, while 35% cite time constraints, and distance remains a significant barrier (Figure 51). Cost is cited by 12%, while piracy (10%) and lack of interest (11%) are less prominent factors. Overall, the data indicates that cinema is no longer the most convenient or accessible viewing option for most audiences, with flexibility and proximity emerging as more decisive factors than price alone.

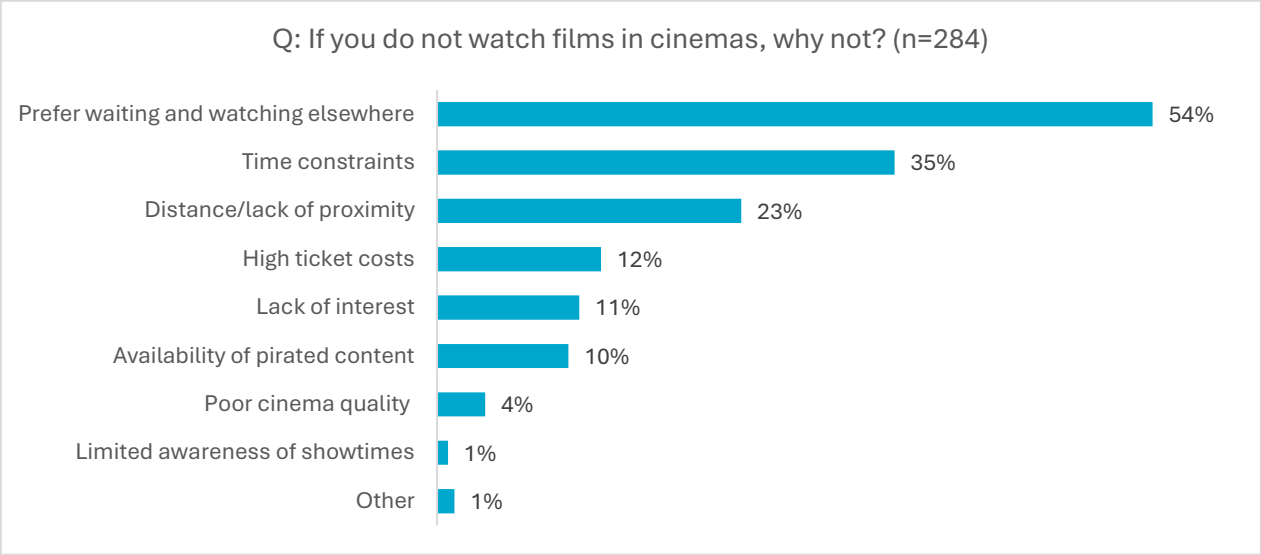


Figure 3: Reasons for not going to cinemas in Nigeria | Source: Survey data

Qualitative insights reinforce and deepen this pattern. Stakeholders consistently describe cinema-going as constrained less by demand and more by practical access barriers, particularly distance, traffic congestion, and limited leisure time. The concentration of screens in a few cities means that for many audiences, cinema attendance requires significant time investment, reducing its frequency and making it more event-based. Cost also emerges as a combined burden rather than a standalone issue, where transport, group spending, and time costs make cinema less competitive compared to home-based viewing. In contrast, streaming is perceived as more flexible and cost-efficient, allowing audiences to watch content on their own schedule. There is also evidence that audiences are becoming more selective, with rising expectations around quality shaping decisions on whether a cinema visit is worthwhile. This sentiment is echoed by a leading industry distributor:

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

The constraint in Nigeria is not demand for cinema, but the practicality of accessing it. Limited infrastructure, combined with time, distance, and total cost, is pushing audiences toward flexible, on-demand channels. As a result, cinema is shifting from a primary distribution channel to a premium, event-based experience, while digital platforms absorb the bulk of everyday viewing.

Box Office and admissions: The premium pivot

The most striking trend of 2025 was the decoupling of revenue growth from sheer volume. Total revenue surged by 35% year-on-year, and a staggering 212% compared to 2021 levels. However, admissions remained a point of focus for consultants; while 2025 saw a gradual recovery to nearly 2.8 million admissions, the market did not return to the 2021 high of 3.3 million.

The primary growth engine was the Average Ticket Price (ATP), which rose by approximately 270% over five years to reach ₦5,596 in 2025. This shift confirmed that exhibitors successfully passed increased operating costs to a consumer base that prioritised high-value, "must-see" theatrical experiences over frequent, casual attendance.

Table 1: Key Five-Year Growth Metrics | Source: FilmOne, Comscore

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

Content performance: Nollywood vs. Hollywood

Out of the 248 films that reached cinemas in 2025, Hollywood released 6% more titles than Nollywood (Nolly vs. Holly share of title releases stood at 47% and 53% respectively). A total of 83 titles Nollywood titles were released with FilmOne and Nile Media Entertainment leading the way giving 24 and 18 movies respectively. Hollywood still commands the lion's share of revenue, led by Warner Bros. (33.8%) and Disney (32.5%). However, Nollywood is breaking records in speed and cultural impact proving it is no longer just a supporting player; it is the commercial anchor of the most vital windows.

The local industry dominated the value chain:

- **Nollywood Share:** Secured a historic 49.4% to 53% of total ticket sales (approx. 1.5 million tickets). The industry produced 83 Nollywood titles, with 14 surpassing the ₦100 million mark.
- **Hollywood Share:** Accounted for 48.8% of GBO revenue, led by franchises like *Sinners* (₦775M) and *Superman* (₦493M).
- **Other Markets:** Indian cinema maintained a steady presence with 52 titles released. Ghallywood accounted for 23 titles as a niche presence.

Nollywood's dominance was anchored by "Event Cinema." Funke Akindele's *Behind The Scenes* became the highest-grossing Nigerian film of all time, earning over ₦2.76 billion, crossing the ₦1 billion mark in just 19 days. Toyin Abraham's *Oversabi Aunty* (₦1.17 billion) further cemented the "Box Office Queens'" influence, with their combined productions accounting for 33% of the Nollywood gross.

The "Detty December" period solidified its status as the Nigerian film industry's most critical commercial window, accounting for nearly 19% of the year's total revenue. Despite intense competition from concerts and lifestyle events, the cinema recorded ₦2.95 billion in gross earnings from 487,606 admissions. This period was a definitive triumph for Nollywood, which commanded the majority of the market share with ₦2.03 billion in local title grosses. The month was dominated by the record-breaking performance of *Behind The Scenes* (BTS), which captured 45% of the December gross and became the fastest film in West African history to cross the ₦1 billion mark. Alongside *Oversabi Aunty* (16%), these culturally aligned comedies proved that local content remains the primary driver of audience mobilisation during the festive season, comfortably outperforming major Hollywood sequels like Avatar: Fire & Ash and Zootopia 2.

Table 2: Nigeria Monthly Box Office Data - 2025 | Source: FilmOne, Comscore

Month	GBO (in Billions ₦)	Admissions	ATP (₦)
Jan	1.74	334,056	5,206
Feb	0.96	178,402	5,359

Mar	0.79	149,529	5,283
Apr	1.30	242,262	5,365
May	1.64	299,647	5,463
Jun	1.33	238,617	5,575
Jul	1.24	208,435	5,937
Aug	1.11	192,318	5,762
Sep	0.90	156,605	5,757
Oct	0.85	150,677	5,657
Nov	0.84	157,134	5,330
Dec	2.95	487,608	6,055
Total	**15.65**	**2,795,290**	**5,599 (Avg)**

International reach & diaspora performance

In 2025, the international reach of Nollywood transitioned from a secondary revenue stream into a vital strategic signal of the industry's global ambition. Performance was anchored by diaspora audiences in the United Kingdom, Ireland, and North America, where releases targeted high-density West African communities through community mobilisation and event-driven screenings.

International distribution for Nollywood operates through a hybrid, rights-holder-led model, rather than a single, vertically integrated export distributor. In most cases, Nigerian producers or domestic distributors retain international rights and coordinate overseas releases through partnerships with diaspora-based exhibitors, promoters, and specialised aggregators. Established Nigerian distributors such as FilmOne Entertainment and Nollywood Pictures play a coordinating and licensing role in structuring release windows, marketing assets, and rights packages while on-the-ground exhibition logistics in the UK, Ireland, and North America are typically handled by independent diaspora cinema operators, community screening networks, or African-focused exhibition circuits. In parallel, Pay TV and digital aggregation channels, notably through CANAL+ / Africa Magic and emerging global African-content platforms, provide structured international distribution for Nollywood titles outside the theatrical window.

The 2025 Nigeria Box Office Yearbook data highlights a clear distinction between cultural export and commercial scale. While few titles achieved massive box office traction abroad compared to local earnings, they succeeded in reinforcing long-term brand equity and visibility for Nigerian stories.

Key Regional Performance Highlights:

- **UK & Ireland:** *Behind The Scenes* led the territory with a cumulative of £144,348, followed closely by *Everybody Loves Jenifa* at £129,397. Other notable performers included *A Tribe Called Judah* (£86,943) and *Oversabi Aunty* (£49,773).
- **North America (US & Canada):** *Behind The Scenes* set a strong benchmark with $219,000, significantly outperforming *Everybody Loves Jenifa* ($143,000) and the legacy title *Battle On Buka Street* ($130,000).

Ultimately, international premieres and festivals played a complementary role, facilitating industry-level conversations and future acquisition opportunities, even when they did not directly drive immediate revenue on a scale.

Table 3: Performance of Nollywood titles released in North America, UK and Ireland | Source: FilmOne

Title	North America Releases		UK & Ireland Releases	
	Cumulative($)	Date	Cumulative($)	Date
Behind The Scenes	219,000	09/01/2026	144,348	12/12/2025
Everybody Loves Jenifa	143,000	20/12/2024	129,397	20/12/2024
Battle On Buka Street	130,000	30/12/2022	-	-
A Tribe Called Judah	-	-	86,943	29/12/2023
A Tribe Called Judah	-	-	86,943	29/12/2023
Oversabi Aunty	-	-	49,773	26/12/2025
The Wedding Party 2	-	-	45,812	29/12/2017
Born Again Stripper	42,000	13/01/2023	-	-
Battle On Buka Street			38,462	30/12/2022
Labake Olododo	19,000	09/05/2025	24,328	25/04/2025
Gingerrr	-	-	13,028	31/10/2025
Ori - Rebirth	-	-	12,369	13/06/2025
Mami Wata	14,000	29/09/2023	10,632	17/11/2023
Born Again Stripper	-	-	10,534	13/01/2023
Your Excellency	-	-	9,372	20/12/2019
Red Circle	-	-	8,294	20/06/2025
Radio Voice	-	-	6,654	23/05/2025
Ajosepo	-	-	5,335	19/04/2024
Wives On Strike 3 - The Uprising	-	-	5,209	08/11/2024
Ireke: Rise Of The Maroons	-	-	4,758	25/07/2025
Owambe Thieves	-	-	4,311	09/05/2025
Amanyanabo	-	-	4,162	29/08/2025
Merry Men 2	-	-	3,711	27/12/2019
The Waiter	-	-	3,626	17/01/2025
Malaika	-	-	3,168	05/01/2024
Owambe Thieves	3,000	16/05/2025	-	-

iii. Digital platforms - Pay TV and OTT

Nigeria is the largest Pay TV and OTT market in Sub-Saharan Africa by population and by absolute subscriber potential, and one of the most structurally influential for African film distribution. According to GMI, Nigeria's Pay TV and OTT market expanded from approximately USD 1.10 billion in 2022 to USD 1.24 billion in 2025, with projections reaching USD 1.52 billion by 2030, implying a compound annual growth rate of roughly 5.9% between 2026 and 2030. Furthermore, Nigeria anchors regional growth across Pay TV, OTT, and hybrid video consumption models, accounting for a disproportionate share of total subscribers even though Average Revenue Per User (ARPU) remains below global benchmarks. This duality in scale without proportional monetisation defines the Nigerian video market and shapes how filmmakers can realistically extract revenue from distribution.

The Nigerian market is characterised by intense competition, rapid consumer behaviour shifts, and a high tolerance for platform rotation. Video consumption is mainstream, daily, and cross-platform, but household spending capacity places sharp constraints on long-term subscription commitments. As a result, Nigeria functions less as a classic subscription market and more as a high-volume, low-margin attention economy, with critical implications for film revenue models.

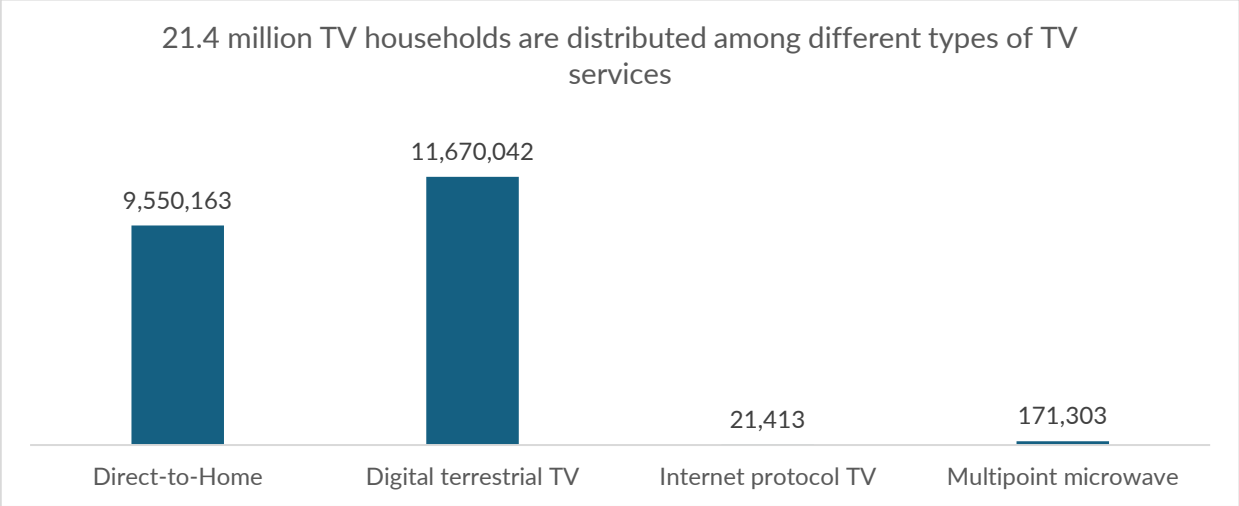


Figure 4: Nigeria TV Market, 2024 | Source: satellitewordtoday.com

Pay TV: Large Base, Slowing Momentum

Pay TV remains a structurally significant but mature pillar of Nigeria's video ecosystem. Satellite Pay TV continues to dominate household penetration, driven by historical infrastructure, broad channel lineups, and strong sports programming. In the domestic market, MultiChoice's Africa Magic channels, specifically Showcase, Urban, Yoruba, Hausa, and Ebru, were consistently cited by stakeholders as the most important broadcasters of Nigerian content. Consequently, DSTV and GoTV (also MultiChoice) serve as the primary Pay TV platforms for most of the population. However, Pay TV growth has slowed relative to OTT, reflecting mounting affordability pressure, currency volatility, and competition from mobile-first video alternatives. GMI estimates Pay TV growth in Nigeria at approximately 3–4% annually, well below OTT growth rates.

For filmmakers, Pay TV plays two roles. First, it remains a reliable downstream licensing window, offering predictable but modest fees, particularly for library content and nonpremium films. Second, it provides scale and national reach, which is valuable for brand building and audience familiarity. However, Pay TV is no longer a primary commissioning engine for independent Nigerian films. Commissioning budgets increasingly prioritise series, reality, and low risk formats, while feature films are often acquired opportunistically rather than strategically.

Critically, Pay TV economics favour volume and repeatability over originality, which disadvantages independent, one-off feature films unless they are backed by proven talent, stars, or prior theatrical success. This reinforces a concentration dynamic where a small group of established producers captures a large share of Pay TV linked film revenues.

Table 4: Nigeria PayTV platform level subscriber numbers | Source: GMI

Platform	Platform Type	2024 Subscribers	2025 Subscribers
MultiChoice (DStv)	Satellite DTH	5.8M	5.6M
MultiChoice (GOtv)	Digital Terrestrial	4.2M	4.5M

StarTimes	DTH/DTT Hybrid	3.5M	3.8M
Canal+ Nigeria	Satellite DTH	1.2M	1.3M

OTT: Growth Engine, But with Structural Friction

Nigeria is one of the fastest growing OTT markets in Africa, driven by smartphone penetration, expanding mobile broadband, and deep consumer familiarity with digital video. The GMI 2026 report indicates that OTT growth consistently outpaces Pay TV growth, with SVOD, AVOD, FAST, and hybrid models all expanding at different rates and levels of monetisation. GMI estimates that the market now reaches approximately 4.33 million unique OTT users, of whom about 1.08 million are paid subscribers, while the remaining 3.25 million access content via free or ad-supported platforms, underscoring the importance of AVOD models for scale and reach. Across 10 active OTT platforms (four global and six local) Nigerian-first services account for roughly 73% of users, positioning domestic platforms as the dominant film distribution channels and reinforcing their growing influence over content commissioning, release strategies, and audience access within Nigeria's film and television ecosystem.

Table 5: Breakdown of Nigeria OTT by Subscription Model and Content Focus - 2025 | Source: GMI

Subscription Type	Platforms examples	Total Users
SVOD	Showmax, Netflix, Amazon Prime, YouTube Premium, EbonyLife ON	1,198,000
TVOD	Circuits TV, Kava, MyMoviesAfrica	1,082,000
AVOD and FAST	Majorly, channels that are hosted on YouTube	30.5 M (12.8% of the population)[1]

Within this broader OTT distribution landscape, stakeholder accounts point to a clear differentiation in how individual platforms function and are perceived by filmmakers. Among these models, YouTube was overwhelmingly cited as the most dominant streaming platform, often described as the democratised channel that allows independent filmmakers to bypass gatekeepers. Netflix and Amazon Prime were recognised as major international entrants, though informants observed a slowdown in their local commissioning after initial enthusiasm. Showmax, owned by MultiChoice, was praised for its strong African content library and investment in series such as Wura and Etiti.

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

Newer indigenous platforms were also identified. Circuits TV, per-view model specifically designed for independent African filmmakers, with a presence in over 189 countries. IrokoTV was described as a pioneer in local streaming, though it later shifted its focus to diaspora audiences. Kava, EbonyLife On Plus, Ibaka TV, and Konga TV were mentioned as emerging local platforms. AfroLandTV and AfroStream were referenced in the context of earlier streaming efforts. Additionally, Apple TV and Hulu were launched in December 2024, operates a pay noted as international platforms that have acquired Nigerian content, though their market share in Nigeria remains small.

Subscription Video on Demand (SVOD) has been the most visible driver of industry attention, particularly due to high profile platform investments in Nigerian originals during the early

[1] DataReportal. The "state of digital" in Nigeria in 2026 - YouTube users in Nigeria. Link.

2020s. However, SVOD penetration remains structurally capped by affordability, payment friction, and churn. Subscription stacking is limited; households and individuals rotate platforms rather than maintain multiple ongoing subscriptions.

Advertising based models (AVOD and FAST) are therefore strategically more aligned with Nigerian consumption behaviour. While advertising yields are lower on a per viewer basis, these models enable scale and repeat viewing particularly for local language and genre content. For filmmakers, this shift implies that monetisation increasingly occurs over time rather than upfront, through cumulative views rather than single licence payments. To monetise YouTube in Nigeria, creators must join the Partner Program by reaching 1,000 subscribers and 4,000 watch hours, after which they can earn through ads, sponsorships, and affiliate marketing. While earnings vary by niche, Nigerian YouTubers typically receive between ₦300 and ₦6,000 per 1,000 views, with payments deposited monthly into their bank accounts once they reach a USD 100 threshold.

Transactional and hybrid OTT models, while smaller, are also relevant for premium titles, cinema linked releases, and diaspora consumption, offering selective upside for well-marketed films with strong audience awareness.

3.1.3. Subscription economics and what they mean for filmmakers

One of the most important insights from the Sub-Saharan Africa market data is the dominance of prepaid and short cycle consumption behaviour in Nigeria. Prepaid vouchers, daily passes, and short-term bundles account for the majority of digital video access, while long-term postpaid contracts grow more slowly.

This shift toward flexible, prepaid access is primarily operationalized through telecommunications giants who have pivoted into the roles of both distributor and facilitator. MTN operates as both a distributor and facilitator of film content in Nigeria, exemplified by MTN DoBox, a mobile movie platform developed with Do Media that offers Nigerian (Nollywood) films in various local languages. The company has also partnered with Sony Pictures Television to enable rental of Hollywood movies via MTN data (Sony One App) and with StarTimes to provide VOD and live streaming at reduced data costs, while its announced collaboration with Synamedia points toward a new pan-African VOD platform tailored to local viewing habits. Etisalat (9mobile) primarily acts as a facilitator, offering cheaper data bundles that lower the cost barrier for audiences to access third-party streaming services, a model one distributor described as enabling “streaming bundles for films” in partnership with local streamers. Vox Africa and Urban Movie Channel were referenced as international broadcasters that acquire Nigerian content.

This has direct consequences for film revenue. Nigerian audiences are willing to pay but they pay frequently, flexibly, and in small increments. This favours:

- Episodic and serialised content
- Films that retain rights across multiple windows
- Libraries that can generate repeat or long-tail value

Conversely, it weakens the economics of once off sales unless fees are sufficiently high to compensate for limited downstream participation. For independent filmmakers, rights retention and windowing strategy become as important as production value.

Content Mix and the Advantage of Local Stories

Content composition data underscores the centrality of Nigerian stories to audience engagement. Platforms focused on Nigerian-first content account for approximately 73% of total OTT users, despite accounting for a minority of subscription revenue. Movies and

entertainment are projected to grow faster than overall market averages, outperforming news and non-entertainment genres. While global SVOD platforms allocate less than one percent of catalogue hours to Nigerian content, local platforms typically carry between 60% and 100% Nigerian titles, confirming that demand is not the constraint, distribution leverage is. Nigeria exemplifies this dynamic more strongly than almost any other African market.

Local films resonate because of language, cultural familiarity, and star systems. However, resonance alone does not guarantee revenue unless distribution is aligned with consumer economics. Films that perform best commercially are those that combine:

- Local relevance
- Aggressive multi-platform distribution
- Theatrical, digital, and broadcast visibility

This explains why a small cohort of Nigerian producers successfully monetise across cinema, Pay TV, and OTT, while the majority struggle to translate audience attention into income.

Table 6: Content Library Breakdown - 2025 | Source: GMI

Platform Name	Operator	Active Subs (K)	Total Hours	Local			Regional			International		
				Titles	Hrs.	%	Titles	Hrs.	%	Titles	Hrs.	%
Showmax	MultiChoice	580	5,520	180	360	6.5	420	840	15.2	3,600	4,320	78.3
Netflix	Netflix Inc	420	13,600	28	56	0.4	85	170	1.2	6,687	13,374	98.4
Prime Video	Amazon	150	10,800	12	24	0.2	45	90	0.8	5,343	10,686	99
EbonyLife ON	EbonyLife Group	28	554	176	528	95	7	14	2.5	2	12	2.2
NdaniTV	GTBank	1,200	840	280	840	100	0	0	0	0	0	0
Accelerate TV	Accelerate Films	850	780	166	664	85	22	88	11.3	7	28	3.6
Circuits TV	Circuits Ent	285	598	178	534	89	12	36	6	5	28	4.7
Kava	Kava Media	780	2,355	685	1,370	58	245	490	20	20	495	21
MyMoviesAfrica	Independent	50	368	68	136	36	135	270	73	12	24	6.5

Outlook (2026–2030): Scale will grow faster than value per user

Looking ahead, Nigeria's Pay TV market is expected to stabilise rather than expand rapidly, while OTT, especially AVOD, FAST, and hybrid models, will drive most incremental growth. The total addressable audience for film will continue to expand, but per viewer revenue will remain constrained unless advertising markets deepen, data costs fall sharply, or new bundling models emerge.

For filmmakers, Nigeria's Pay TV and OTT market is best understood not as a single revenue source, but as a stacked monetisation ecosystem. Sustainable value creation will accrue to those who can design distribution strategies around platform rotation, prepaid access, and cumulative revenue rather than relying on one off platform deals. In this sense, Nigeria represents both the greatest opportunity and the clearest warning for African film: scale without strategy does not equal sustainability.

Table 7: Nigeria Pay TV and OTT Market 2022-2025 with projections from 2026-2030 (USD Million) | Source: GMI

Market Value	2022	2023	2024	2025	2026	2027	2028	2029	2030	CAGR (%)
USD Million	1,101	1,114	1,119	1,236	1,279	1,328	1,377	1,447	1,520	5.9
Pay TV platform										

Pay TV platform	944	940	932	1,038	1,059	1,083	1,104	1,135	1,173	3.1
Cable TV	102	96	79	87	88	90	91	93	95	2.5
Satellite TV (DTH)	741	743	750	833	850	868	884	908	938	3.0
IPTV	101	101	104	118	121	125	129	134	140	4.1
OTT platform	157	174	187	198	220	245	273	312	347	14.6
SVOD	126	139	149	158	175	195	218	249	274	14.2
AVOD	21	23	25	27	30	33	36	41	47	16.2
FAST	4	5	5	6	6	7	8	9	11	16.0
TVOD	3	3	3	3	3	4	4	4	5	11.6
Hybrid OTT Models	4	4	5	5	6	7	8	9	10	19.6
By Subscription Model										
Postpaid	**336**	**341**	**343**	**380**	**395**	**411**	**427**	**450**	**474**	**6.2**
Monthly contracts	274	278	280	311	323	336	350	369	389	6.3
Annual contracts	62	63	63	69	72	75	77	81	85	5.9
Prepaid	**765**	**773**	**776**	**856**	**885**	**917**	**950**	**997**	**1,046**	**5.8**
Daily passes	71	72	72	79	82	85	88	92	97	5.7
Weekly passes	121	122	122	134	138	143	148	155	162	5.5
Monthly prepaid vouchers	573	580	582	642	664	689	714	750	787	5.8
By Content Type										
Movies & entertainment	**265**	**269**	**272**	**301**	**313**	**326**	**339**	**357**	**376**	**6.3**
Sports	362	366	368	406	420	436	452	475	498	5.9
News & current affairs	84	84	84	92	94	97	100	104	109	5.0
Cartoon/animation	**68**	**69**	**69**	**76**	**79**	**82**	**84**	**89**	**93**	**5.7**
Music & lifestyle	236	239	240	266	275	286	297	313	329	6.1
Others (docus and educ)	**86**	**87**	**87**	**95**	**98**	**102**	**105**	**110**	**115**	**5.4**
By Content Origin										
Regional content	669	679	683	756	784	816	848	893	940	6.2
International content	432	435	436	480	495	512	529	554	580	5.5
By End Users										
Residential	**962**	**974**	**979**	**1,081**	**1,120**	**1,163**	**1,206**	**1,268**	**1,332**	**6.0**
Commercial	**139**	**140**	**140**	**155**	**160**	**165**	**171**	**179**	**188**	**5.6**
Offices	8	8	8	8	8	9	9	9	10	4.6
Hospitality (Hotels, Restaurants)	114	116	116	128	133	138	143	150	157	5.8
Public transportation	3	3	3	4	4	4	4	4	4	3.2
Others	13	13	13	14	15	15	16	16	17	4.9

3.1.4. Alternative distribution channels

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

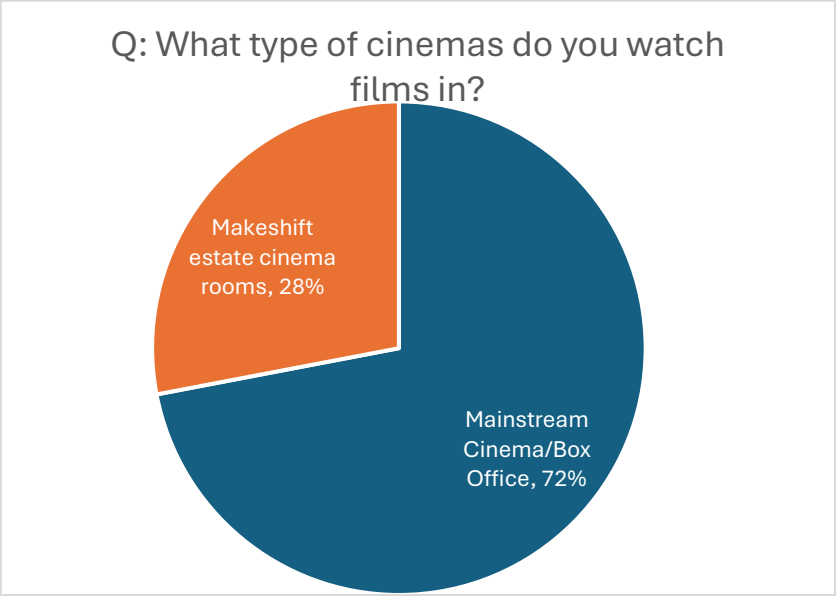


Figure 5: Engagement with formal vs. makeshift cinema venues in Nigeria

Community screenings, similarly, were described as emerging models rather than established distribution channels. A funder highlighted the commercial success of community-based exhibition: *"Look at what Femi Adebayo has done recently with community cinemas and in less than a week he had generated almost half a billion Naira from communities."* A government official noted efforts to formalise such venues through "cottage cinemas" that can be moved to different communities. As such, both quantitative and qualitative insights suggest that while festival and community screenings currently account for a negligible share of overall viewership, they are being explored as viable pathways for social impact content and for expanding access in areas without formal cinema infrastructure. Their limited appearance in the survey data reflects their nascent stage rather than an absence of potential.

While community screenings improve access, they raise questions on sustainability. Most operate with free or subsidized entry. Stakeholders noted reliance on external funding or sponsorship. There is limited evidence on long-term financial viability at scale.

3.1.5. Informal distribution and piracy

When both formal and alternative channels fail to meet audience needs for affordability or immediate access, viewers frequently pivot to the informal economy. Of the audiences who admitted to using unofficial or pirated websites and apps to watch films, 63% reported that these platforms are their primary viewing method. A further 29% used them occasionally, while only 8% said they rarely rely on such sources.

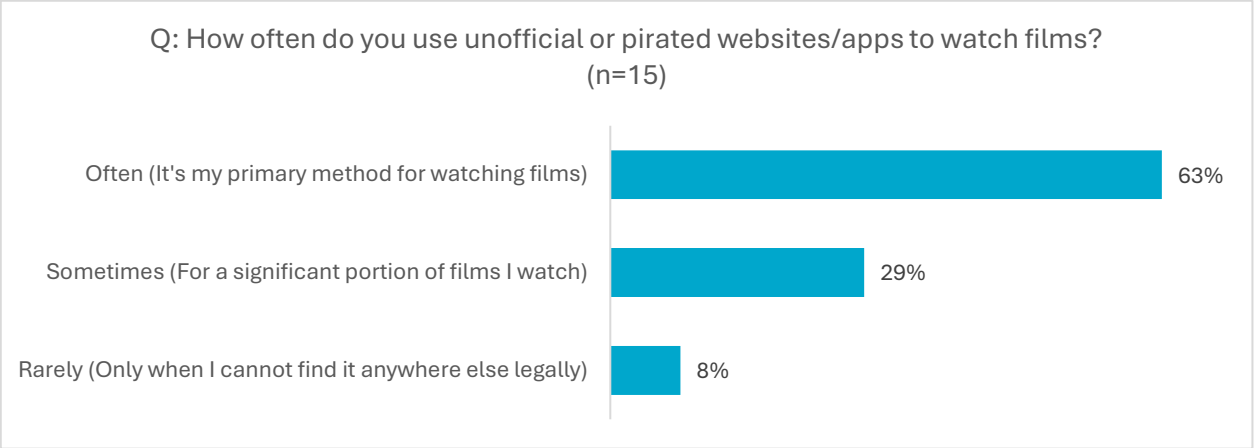


Figure 6: Piracy frequency in Nigeria | Source: Survey data

Cost plays an important role in this behaviour. 63% of audiences cited expensive subscription services as a reason for using unofficial platforms. Limited variety on mainstream platforms was mentioned by 58% while 42% said they turn to these sources to watch films that are not yet available on official services. Other reasons appear less frequently, including access to films not shown in the African region (8%) or access to sports content (8%). These responses suggest that piracy is closely linked to perceived gaps in cost and content availability within formal distribution platforms.

3.1.6. Market intelligence and revenue streams

The ability to address these structural gaps, from infrastructure shortages to piracy, is currently hampered by a lack of centralized market intelligence. Data on box office performance remains fragmented, with no single authoritative source aggregating figures across Nigeria's cinema landscape. The Cinema Exhibitors Association of Nigeria (CEAN) and ComScore were identified as the primary bodies collecting and releasing data, with one distributor confirming that ComScore serves as the industry standard for tracking theatrical releases. Despite this, stakeholders noted that comprehensive, real-time data is often proprietary to exhibitors and not consistently shared with producers or the public. While this marked a significant step toward transparency, the lack of centralised data collection continues to limit the industry's ability to accurately assess its economic contribution.

Box office performance has shown remarkable growth in recent years, with several films achieving unprecedented commercial success. *Battle on Buka Street* crossed ₦1 billion, while *A Tribe Called Judah* exceeded ₦2 billion, setting new benchmarks for Nigerian cinema. A funder remarked: *"Funkẹ Akindele broke a record to have made over 2 billion naira, which is over 1.5 million dollars in box office. And I don't think in sub-Saharan Africa, there's been any record like that by an African, a black African filmmaker"*. However, revenue sharing between producers and exhibitors means that only a fraction of box office earnings returns to the filmmaker, with cinemas retaining a significant portion.. Despite these headline successes, cinema admissions have not returned to pre-COVID levels, dropping from approximately 5 million annually to between 2.7 and 3 million.

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

Television revenue data is largely proprietary to broadcasters, with producers consistently reporting that licensing fees from local channels remain disproportionately low relative to production costs. A filmmaker recounted receiving an offer that was so inadequate it rendered the economics of the series untenable, reflecting a widespread industry frustration: *"I've had an*

offer of 30,000 EUR for a 22-episode series, 30,000 EUR really? … you're telling me I'll come and take 30,000 EUR ". Pay TV platforms such as DSTV and Africa Magic reach across Africa, but their subscriber data is not publicly disaggregated, and free to air television, while widely viewed, generates minimal direct revenue for producers. This disparity between audience reach and producer returns underscores the structural challenges facing television as a revenue channel. A distributer official noted: *"Most of the time, the offers you get from local TVs is so poor and it's so small. So, you are struggling if you have to put your film on a local channel."*

Streaming revenue models vary widely, with YouTube offering the most transparent viewership data but low per-view returns between ₦300 and ₦6,000 per 1,000 views, while international platforms such as Netflix and Amazon provide higher licensing fees that have become less frequent. A filmmaker explained the shift: *"Netflix usually offers… they're not offering up to a million dollars now for Nigerian content. That's the offer within the range of USD 250,000 to USD400,000."* Showmax licenses content in naira, with rates reportedly ranging from ₦10 million to ₦15 million for series. Emerging platforms like Circuits TV have introduced pay-per-view models that allow producers to earn monthly payments based on sustained viewership. A Circuits executive reported: *"We have producers now who are earning millions on a monthly basis through the pay-per-view system."* The platform also cited a case where a film generated 300% profit relative to its investment, demonstrating the potential of alternative distribution models.

Ancillary revenue streams including airlines, festivals, and international sales, provide important but often unpredictable income for filmmakers. Airlines offer a steady albeit modest source of revenue, with some filmmakers licensing their work to carriers for inflight entertainment over fixed periods. International film festivals serve dual roles as prestige platforms and market entry points, where filmmakers can build relationships with distributors and secure future sales. Co-production treaties with countries such as South Africa, France, and Brazil offer pathways to international funding and distribution networks, though specific revenue figures from these arrangements are not publicly available. The Nigerian government's Creative Economy Development Fund, a ₦200 million (approximately USD 200 million) initiative, was noted as a financing mechanism, though its impact on distribution revenue remains unclear.

Across all channels, stakeholders consistently identified the absence of centralised, reliable data as a critical limitation to industry growth and investment. A government official lamented: *"One of the problems we have in this country is to have a central data system".* A funder observed that data is often "cooked" or inconsistent, making it difficult for investors to assess opportunities. A filmmaker added that transparency around viewership numbers remains elusive, particularly with streaming platforms. This lack of reliable, comparable data hampers investment decisions, limits the industry's ability to demonstrate its economic contribution, and constrains strategic planning by both private actors and government agencies.

3.1.7. Gaps and Opportunities

The concentration of cinema infrastructure in Lagos, Abuja, and Port Harcourt leaves vast regions of Nigeria without formal access to theatrical exhibition, creating a critical geographic gap. This disparity presents a significant opportunity for investment in community cinemas, cottage cinemas, and mobile exhibition models that can reach underserved populations. The government is exploring such alternatives, with one official describing efforts to promote "knockdown cinemas" that can be moved to different communities, while a filmmaker highlighted the potential of university-based screenings as a viable model.

"If you go to universities, people are on their phones. So, that's why platforms like Showmax would have university special offers. Like we go to universities and we're like, oh, you get this price. It's not the normal price, but because we know that that's a hub, you have 15,000 students, and if you're saying 15,000 students, should buy 700 Naira, she pays 700 Naira monthly, that's chicken change. They'll pay the seven and and have access to your content." Ecosystem partner

The stakeholders noted that while comedy, romance, and family dramas dominate Nigerian screens, several genres remain underexplored despite demonstrated audience appetite. Action films have gained traction as producers experiment with localised storytelling, and horror is slowly being introduced to the market. Animation and anime were identified as areas with significant potential but limited local production, with AI tools offering a pathway to reduce costs and expand creative possibilities. A festival organiser noted that *"There's a lot of talk about anime, so the Japanese government has engaged us continuously during the festival. But now with AI, anime is going to get a lot easier to make."* Children's content was repeatedly cited as a major gap, with one filmmaker observing that this represents "the future of Nollywood". Documentaries, historical epics, and biopics were also identified as under-exploited opportunities, particularly for international buyers and for preserving Nigeria's cultural narratives.

Nigeria's multilingual landscape presents both gaps and opportunities beyond the dominance of English-language films. The National Film and Video Censors Board has initiated programs to support minority language films through awards and cash grants, yet content in Igbo and other minority languages remains under-represented in formal distribution channels: *"We encourage them to produce films in their own language, bring it to us and we select the best. We encourage them by giving them awards like maybe even the cash gifts of 5 million, 10 million to help them in their production."* A streaming executive observed that language directly influences viewership patterns, with Yoruba films drawing audiences from the Southwest and Hausa films from the North. The opportunity lies in producing content that reflects Nigeria's linguistic diversity while ensuring accessibility through subtitling a strategy one platform employed to reach international audiences by transcribing content into French, Portuguese, and Spanish. Dubbing into Francophone and Lusophone African languages was identified as a further pathway to expand regional distribution.

Emerging opportunities across these gaps converge around targeted investment in production and distribution infrastructure, supported by new technologies and cross-border frameworks. Interviews across the value chain suggest that the Africa Continental Free Trade Area (AfCFTA) was cited as a mechanism that could facilitate digital asset distribution across the continent. The rise of vertical films optimised for mobile consumption represents a rapidly growing format that aligns with the viewing habits of younger audiences, while AI tools offer cost-effective solutions for expanding genres such as animation and visual effects. Co-production treaties with countries such as Brazil, South Africa, and France were noted as mechanisms for accessing new markets and funding streams, with a government official describing efforts to *"facilitate trade, we facilitate cultural exchanges, we facilitate co-productions"*. These opportunities, if leveraged strategically, could address the structural gaps that currently constrain Nigeria's film ecosystem.

3.2 Audience Development

3.2.1. Overview

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

significant barriers to audience growth remain, including high data costs for streaming and rising cinema ticket prices that exclude lower-income segments.

3.2.2. Nigerian film audience segmentation

The Nigerian audience segments show clear differences in content preference, platform use, and openness to local versus international films.

- Global action streamers: This segment leans strongly toward international content, particularly American films, with limited engagement in local titles. Viewing is mobile-first, supported by Smart TVs and Pay TV, with YouTube and Netflix as key platforms. Preferences centre on action, horror, and drama. Engagement with local films is constrained by concerns around production quality and storytelling.
- Nollywood loyalists: This is a female-led, mobile-first audience with a strong preference for local films. Viewing is driven by drama, comedy, and relatable storytelling, with discovery shaped largely by word-of-mouth and social media. Platform spending is relatively low, but support for Nollywood is high. Affordability and limited awareness of new releases affect deeper engagement.
- African story seekers: This segment shows strong interest in both local and broader African storytelling. Viewing spans multiple platforms and devices, including YouTube, Netflix, Showmax, and Pay TV. Preferences are story-driven, with strong uptake of drama, comedy, and documentaries. Engagement is influenced by content quality, subscription costs, and visibility of local films.
- Hollywood-first streamers: This group is heavily oriented toward international content, with minimal engagement in African films. Viewing is mobile-first, led by Netflix, with higher reliance on pirated content than other segments. Preferences focus on action and high-intensity genres. Local films are often overlooked due to perceived gaps in quality and storytelling.

The segments reflect a split between strong local loyalty and global content preference. Expanding the reach of Nigerian films will depend on improving production quality, strengthening discovery, and aligning distribution with mobile-first viewing habits.

Table 8: Nigeria film consumer segments | Source: Survey data

Dimension	Segment 1: Global Action Streamers	Segment 2: Nollywood Loyalist	Segment 3: African Story Seekers	Segment 4: Hollywood-First Streamers
Segment distribution	n = 45 (15%)	n = 130 (43%)	n = 72 (24%)	n = 57 (19%)
Gender	78% male	72% female	53% female and 47% males	70% male
Age distribution	25 - 44 years - 76%	25 - 44 years - 76%	25 - 44 years - 75%	25 - 44 years - 74%
Content preference	American -73%	Local films - 89%	Local (98.6%) and African films (81%)	International films 74% with American films 81%
Top genres	Action (76%), Drama (62%) and Horror (60%)	Drama (80%), Comedy (62%) and Romcom (54%)	Drama (96%), Comedy (86%), Action (75%), Romcom (67%)	Romcom (83%), Horror (49%) and Drama (32%)
Primary device	Smartphone (81%) and Pay TV (66%)	Smartphone (82%) and Pay TV (56%)	Pay TV (88%) Smartphones/tablets (81%) and Smart TVs (58%)	Smartphone/Tablet (87%), Smart TV (25%) and Pay TV (33%)

Main platforms	YouTube - 82% and Netflix - 74%	YouTube - 89% and Netflix 36%	YouTube - 80% and Netflix 75%	Uses mainly and Showmax 46%
Fallback option	DVDs/USB sticks (33%) and Low-cost Pay TV (33%); Free-to-air TV (27%)	Low-cost Pay TV - (39%) and Free-to-air TV (33%)	Low-cost Pay TV (53%)	Low-cost TV pay (30%)
Main motivations	High quality narratives- 82% and Entertainment (73%)	Entertainment (77%) and recommendations (63%)	High quality storytelling (88%), Cultural connection (85%) and Entertainment (60%)	Entertainment (66%), High quality storytelling (61%) and Educational / Learning about social issues (28%)
Key barriers to watching local films	Storylines that are not engaging (47%) Storylines that are not original (42%)	Poor connectivity (32%), High-cost subscription (28%) and story lines not engaging (21%)	High subscription cost (40%), lack of awareness (35%) and low production quality (33%)	Stories not engaging (38%), Prefer international content (30%) and Low production quality (28%)
Median monthly streaming spend	~$11.6	~$7	~$8	~$6
Avg. streaming platforms	2	1	2	1
Cinema willingness to pay	~$9	~$11	~$5.76	~$6.30
Net Promoter Score African films	-4%	78%	38%	-65%
Growth triggers	Better personalization and recommendations-54%	Better personalization and recommendations-38%	High quality originals (61%) and better personalization and recommendations (58%)	High quality originals (53%)

3.2.3. Film discovery and marketing channels

The youth-led nature of these segments dictates how information travels through the ecosystem, with film discovery functioning more as social currency than a result of traditional advertising. An overwhelming 82% of audiences rely on recommendations from friends and family, while 60% cite social media as their primary discovery tool (figure 55). Word of mouth dominance, paired with the high impact of social media, indicates that film awareness functions as social currency rather than a product of direct advertising. In response, festival organisers and cultural institutions have positioned their events as catalysts for organic word of mouth, creating communal viewing experiences that generate authentic peer recommendations. The Africa International Film Festival (AFRIFF), for example, makes screenings free and prioritises audience engagement, turning attendees into active brand ambassadors within their personal networks. An ecosystem partner explained: *"During the festival, we don't charge for watching films. You just come and you watch. So, we always have a huge audience…. a lot of people premier the movies at the*

festival." Campus circuits and cultural institutes similarly serve as launchpads for viral discovery, leveraging concentrated student populations and culturally aligned programming to spark conversations that extend far beyond the screening room. This bottom-up strategy built on community engagement and digital talkability, has proven more effective than high spend traditional media campaigns, which now show diminishing returns.

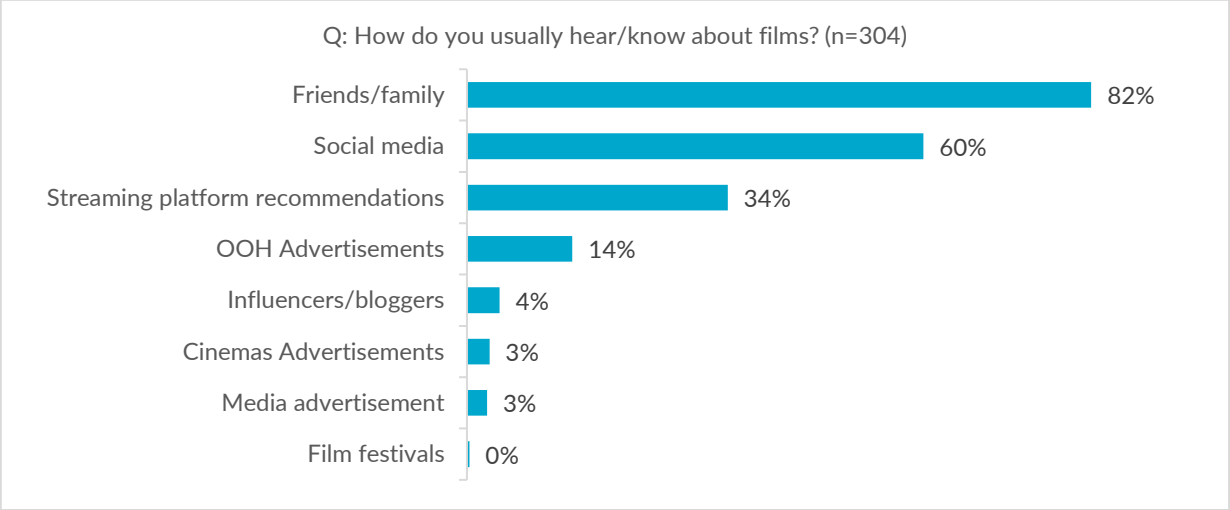


Figure 7:How audience in Nigeria know/hear about new films | Source: Survey data

To maximize audience development in Nigeria, filmmaker, producers, agencies should pivot marketing budgets away from traditional billboards and radio toward incentivizing organic word-of-mouth, as peer recommendations drive over 80% of discovery. Focus on creating highly shareable digital assets for social media and streaming platforms to capture the 60% of the market that relies on viral discovery. Success depends on building a community-first campaign that turns early viewers into active brand ambassadors within their personal networks.

3.2.4. What drives audiences to watch films

If social discovery brings an audience to a film, the intrinsic quality of the story is what keeps them engaged. Nigerian film audiences are primarily driven by emotional fulfilment, with 70% seeking entertainment and relaxation. Beyond mere leisure, there is a sophisticated demand for substance, as evidenced by the high value placed on high-quality storytelling (62%) and the role of cinema in educating viewers on social issues (43%) and reinforcing cultural identity (42%). While external factors like affordability and star power (actors/directors) play a role, they are secondary to the core narrative experience and the recommendation factor from trusted circles, suggesting that a film's intrinsic value and relatability are the most significant drivers for audience engagement in the region.

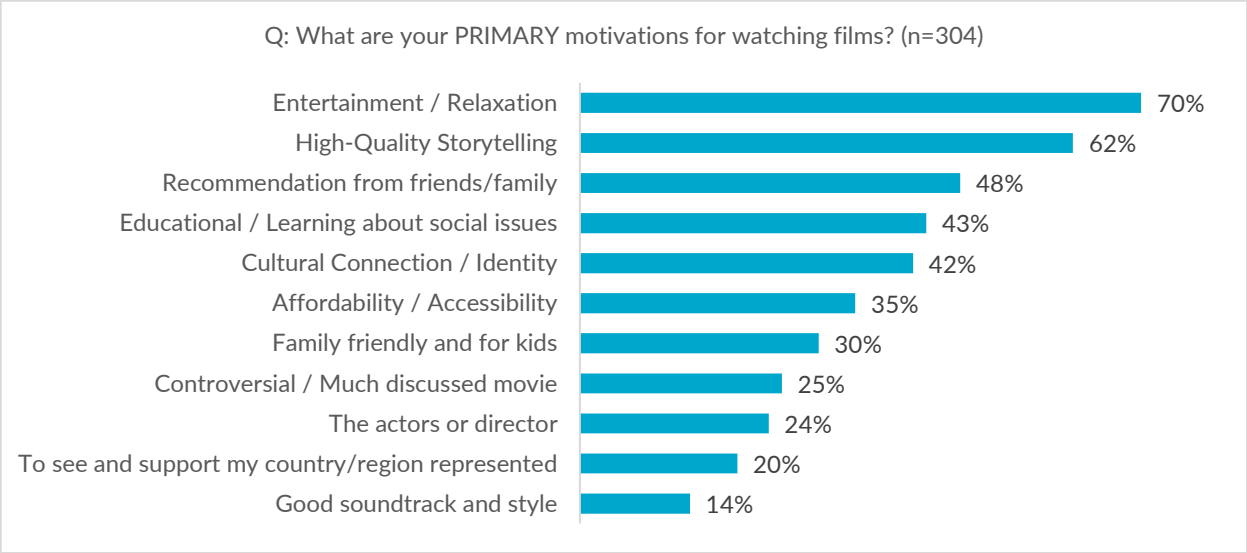


Figure 8: Primary motivations for watching films in Nigeria | Source: Survey data

When selecting a film, Nigerian audiences are overwhelmingly driven by the core elements of storytelling and craft, with acting quality (98%), plot / theme (96%), and technical quality (96%) being considered nearly universally important. The format (Series or Movie) and peer influence (word of mouth) are also critical decision-making factors. While actors (92%) and a film's Popularity (92%) hold significant sway, there is a notable dip in importance for elements related to industry credibility and cultural context. Factors like the producer/director (73%), Awards (77%), and even Representation of African cultures (77%), while still important to a majority, are clearly secondary, suggesting that viewers prioritize the immediate quality and buzz of a film rather than whether it has won a lot of official awards or been praised by critics in a formal setting.

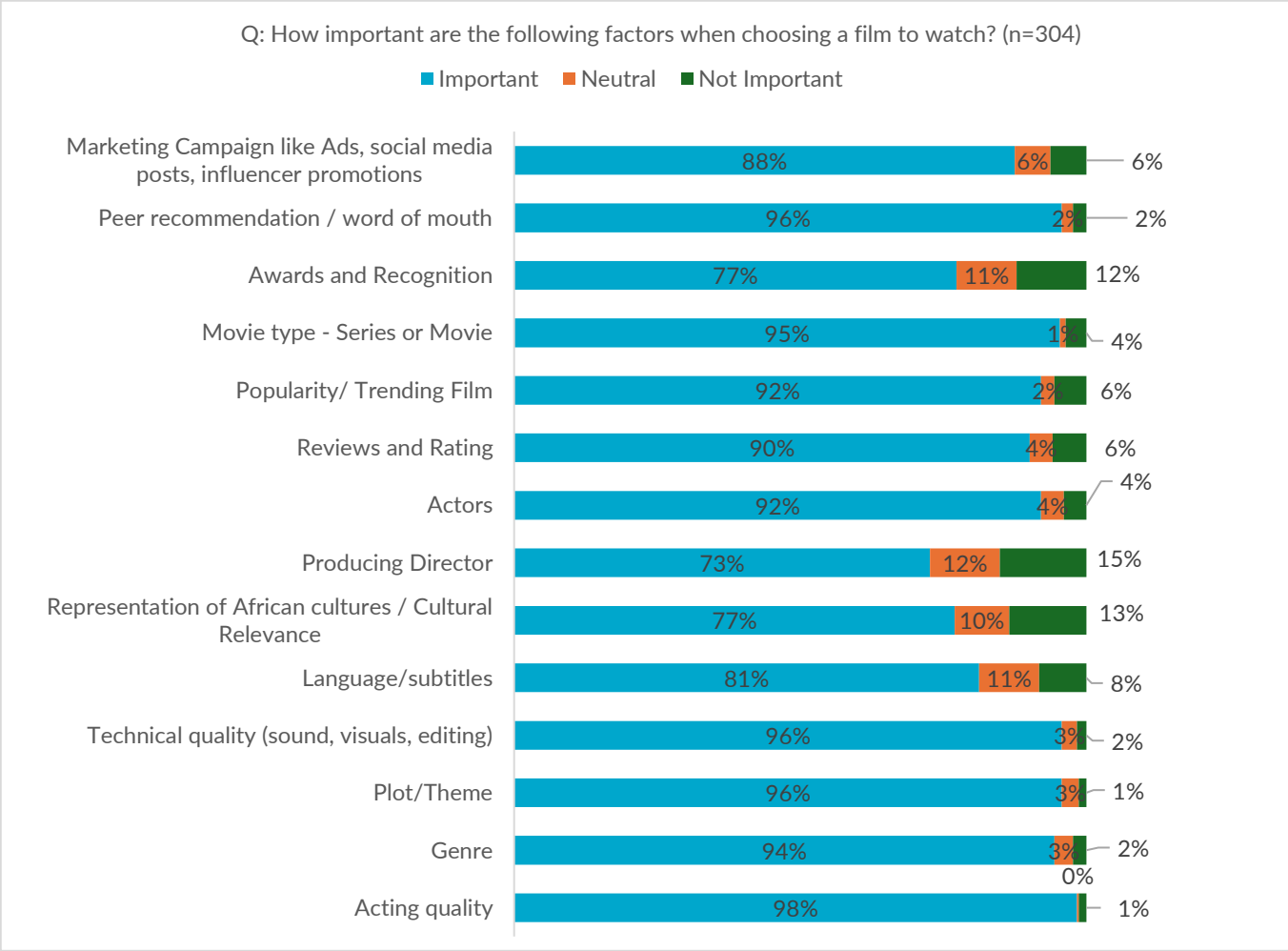


Figure 9: Important factors when choosing film to watch in Nigeria | Source: Survey data

The findings suggest that Nigerian audiences are highly engaged viewers who prioritize the core craft of filmmaking and meaningful storytelling. Strong acting, compelling plots, and high technical quality are the most decisive factors in film selection, indicating that audiences place significant value on the overall viewing experience. While films are primarily consumed for entertainment and relaxation, viewers also show interest in stories that provide intellectual engagement, address social issues, and reflect cultural identity. Social influence, particularly word-of-mouth recommendations, also plays an important role in shaping viewing choices. Overall, the results indicate that attracting Nigerian audiences depends less on industry prestige signals such as awards or reputation and more on delivering high-quality, relatable stories supported by strong performances and production standards.

3.2.5. Audience viewing platforms and access to films

The demand for high-quality storytelling is met almost exclusively through private, mobile-first environments. Audience survey data shows that 83% of viewers use smartphones or tablets to watch films, while TVs (70%) and laptops (12%) account for much smaller shares (see figure 53).This pattern is driven by the affordability of mobile devices, the proliferation of data bundles, and the flexibility of on-demand viewing. Stakeholders consistently noted that audiences now expect to watch films on their own schedules, in private spaces, rather than being tied to fixed cinema or broadcast timetables.

Video-on-Demand platforms are the primary channel through which Nigerians access films, with 81% of audiences indicating they mostly watch via VOD services. YouTube leads this

space, cited by 77% of audiences, followed by Netflix (58%) and Showmax (18%), (figure 54). The dominance of YouTube reflects its zero-subscription cost, direct creator-audience relationship, and its role as a democratised distribution tool for independent filmmakers. Netflix and Showmax occupy the premium tier, though qualitative evidence suggests that international platforms have reduced local commissioning, while regional players like Showmax continue to invest in Nigerian series and films.

This indicates that film distribution in Nigeria is overwhelmingly concentrated in private, home-based environments, accessed primarily through mobile devices and VOD services, and supported by television and Pay TV platforms. Public or location-specific distribution channels, such as cinemas, as well as broadcast-only technologies, reach a comparatively small share of the audience. This distribution pattern highlights an ecosystem in which films most commonly reach Nigerian viewers through digitally enabled, flexible access points rather than through traditional theatrical or broadcast pathways.

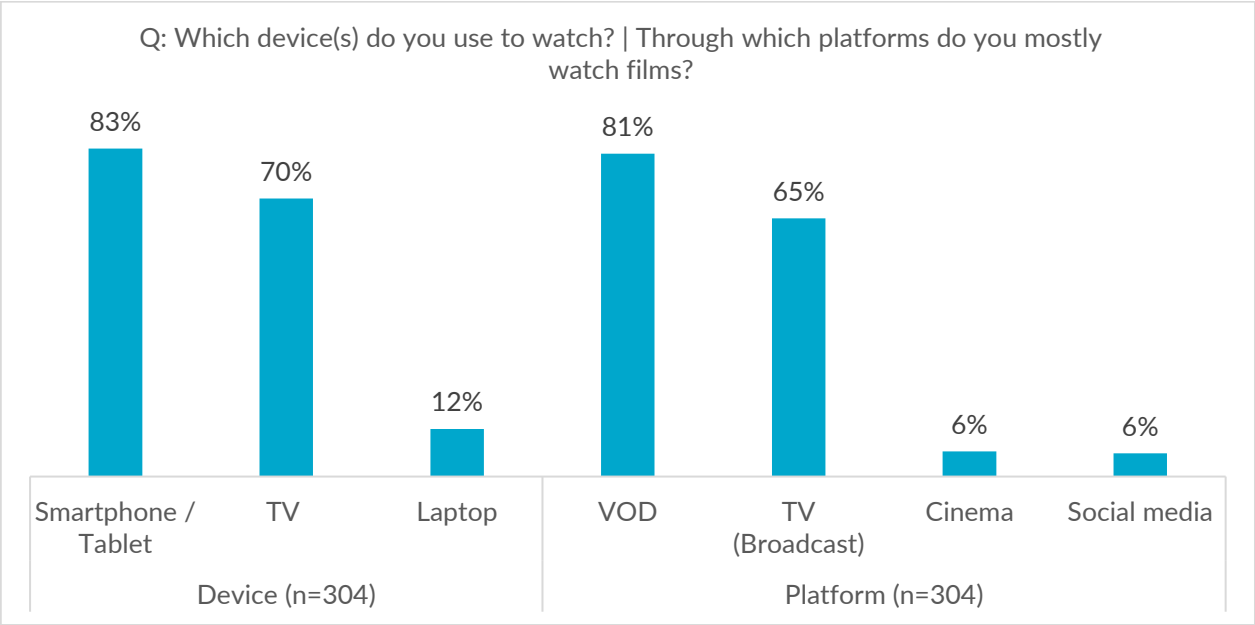


Figure 10: Platforms and modes used to watch films in Nigeria | Source: Survey data

Television continues to play a major role, with 65% of audiences using TV and 59% using Pay TV to watch films. Pay TV platforms such as DSTV, through dedicated Africa Magic channels (Showcase, Urban, Yoruba, Hausa), aggregate Nigerian content and provide steady reach.". However, qualitative insights reveal that television's role is increasingly secondary from a revenue perspective; producers complain of low licensing fees and diminishing returns relative to production costs. A filmmaker explained: *"most of the time, the offers you get from local TVs is so poor and it's so small. So, you are struggling if you have to put your film on a local channel."* Thus, while television reaches a wide audience, it functions more as a complementary distribution channel than a primary revenue driver.

Cinema attendance (6%) and social media (6%) account for small shares of primary film viewing, though each serves distinct functions within the ecosystem. Cinema has become largely seasonal, with stakeholders noting that box-office records are typically set during festive periods when diasporans return home and are willing to pay premium ticket prices. Social media, while rarely the primary platform for full-length film consumption, is a critical promotional and discovery tool; platforms such as TikTok, Instagram, and Facebook are used extensively for teasers, trailers, and influencer marketing that drive audiences to VOD services.

Beyond formal platforms, informal circulation particularly piracy, remains a significant channel. Audience survey data shows that 6% of them use digital pirated websites, while smaller shares cite Telegram, Snaptube, and NetNaija as sources. Qualitative evidence indicates that the true scale of piracy is substantial, with stakeholders describing how films are routinely shared via Telegram and WhatsApp groups, often within hours of release. In response, some platforms have adopted innovative countermeasures, including converting pirates into legitimate marketers. A streaming platform executive explained: *"We have recruited people from telegram and TikTok as our marketers... we saw them pirating content. And we said, why are you pirating content? You can actually come and be our marketers and earn a fee from it legitimately."*

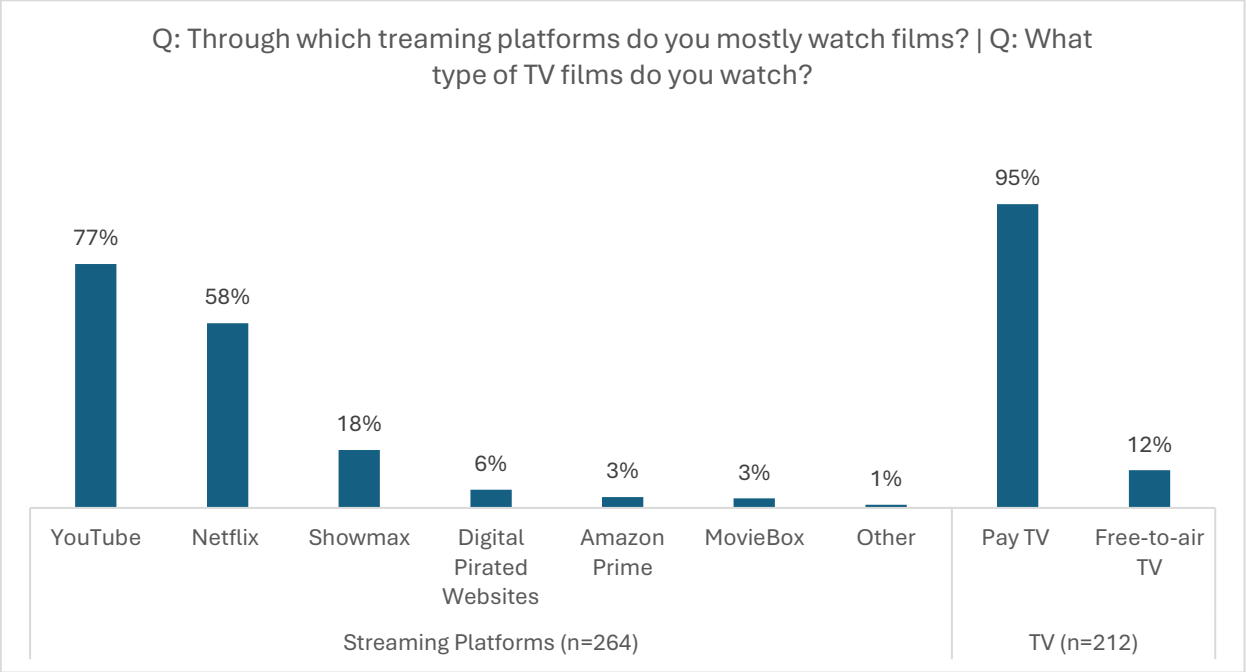


Figure 11: Streaming platforms used in Nigeria | Source: Survey data

This suggests a growing disparity between mass visibility and commercial sustainability. While broad reach via television remains a structural reality for the population, stakeholders are increasingly focusing development efforts on high-yield segments. Targeted seasonal theatrical releases and digital conversion strategies are now used to mitigate the low returns found in traditional broadcast spaces. Successful audience engagement now depends on aligning these distribution tactics with the specific content origins that Nigerian viewers prioritize.

3.2.6. Streaming behaviour and platform preferences

The shift toward digital conversion is underpinned by clear audience preferences for specific film origins. Streaming platforms host a wide range of content, but viewing habits are heavily concentrated. Nigerian films appear most prominently, cited by 67% of audiences. American films follow closely at 62%. Films produced in other African countries were mentioned by 28% of viewers. Korean dramas were cited by 15% of audiences, while films from India, China, and Europe were mentioned by smaller shares. These figures suggest that local and American productions form the core of streaming consumption, while films from other regions occupy a smaller portion of viewing activity.

Platform-specific viewing patterns show a noticeable difference between YouTube and Netflix. On YouTube, Nigerian films dominate viewing activity. 77% of audiences who watch films on the platform reported viewing local productions there. American films follow at 52%, while films from other African countries appear at 25%.

On Netflix, the pattern shifts toward international content. American films lead at 72%, while Nigerian films account for 58%. African films from other countries appear at 33%.

This contrast suggests that audiences turn to different platforms depending on the type of content they want to watch. YouTube appears to serve as an important space for accessing locally produced films, while Netflix attracts stronger engagement with international titles. Worth noting, though with low numbers, Showmax is also a key go-to-platform for local films at 77%.

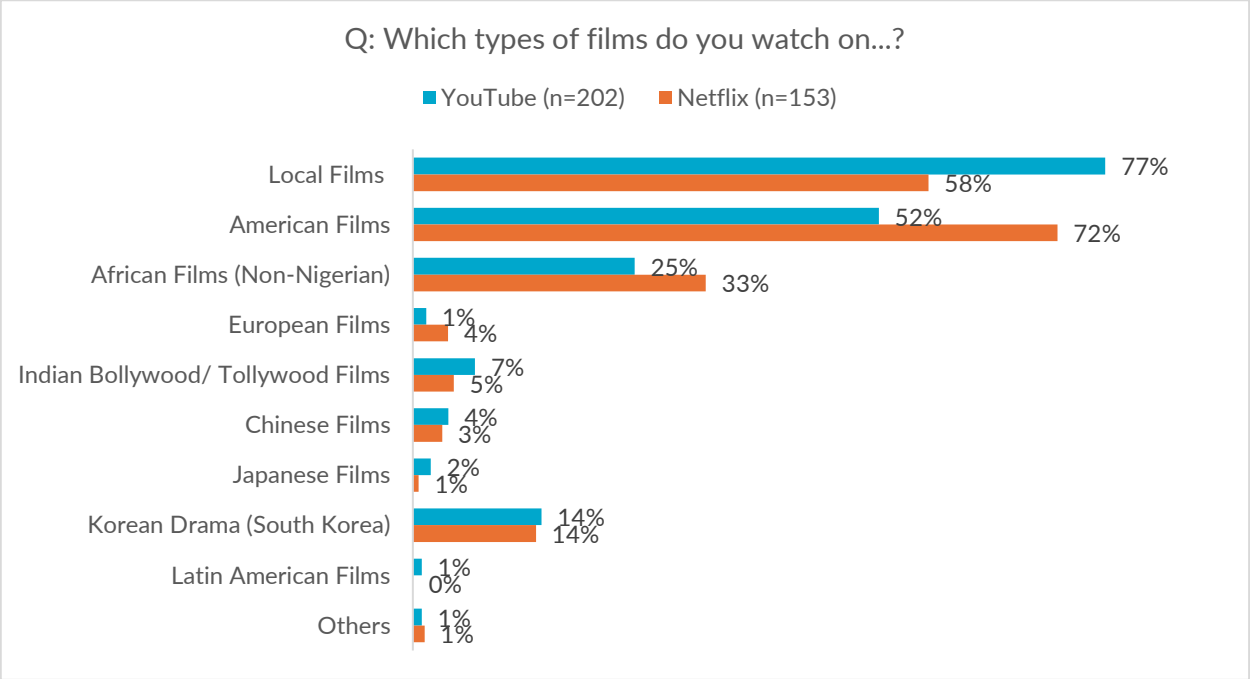


Figure 12: Films streamed on YouTube & Netflix in Nigeria | Source: Survey data

Nigerian films are watched daily by 45% of audiences and weekly by 46%. American films follow a similar pattern, with 36% reporting daily viewing and 55% weekly viewing. African films from other countries appear even more frequently in daily viewing responses, cited by 62% of audiences. Other regions show lower daily engagement and appear mainly in weekly or occasional viewing patterns.

This suggests that streaming platforms support a routine viewing habit for several film categories, particularly Nigerian and American productions.

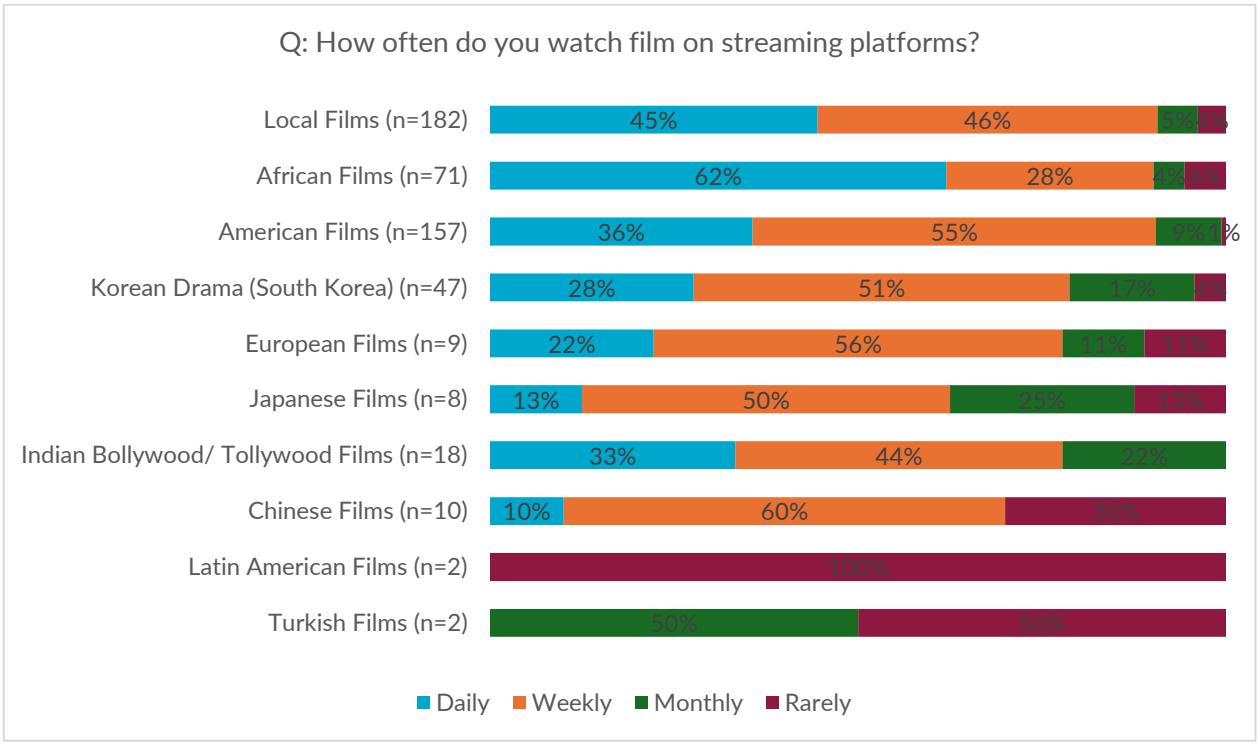


Figure 13: Frequency of streaming in Nigeria | Source: Survey data

Spending patterns suggest relatively cautious expenditure on streaming subscriptions. The median monthly amount spent on streaming services is ₦8335 (USD 6.12). Reported values range from ₦2452 (USD 1.80) to ₦63442 (USD 46.58). The number of subscriptions also remains limited. The median number of paid streaming services used by audiences is one, and the average is also one. Some audiences reported having no paid subscriptions, while a small number reported up to seven. Taken together, these figures indicate that most viewers rely on a small number of paid platforms rather than maintaining several concurrent subscriptions.

3.2.7. Demand for local and African content

Nigerian audiences demonstrate a decisive preference for locally produced films, with 80% reporting that they watch films made by Nigerian filmmakers. This highlights the continued dominance and cultural relevance of the domestic film industry. At the same time, American films also maintain substantial reach, with 60% of viewers consuming them, suggesting that Nigerian audiences balance strong local loyalty with interest in global mainstream content. Films from other African countries (32%) also have a notable presence, indicating some level of regional content exchange within the continent. In contrast, viewership of films from other global markets remains relatively niche, including Korean dramas (17%), Indian Bollywood/Tollywood films (15%), and very small shares for Chinese (4%), European (3%), Japanese (3%), Latin American (1%), and Turkish films (1%). Overall, this shows that while Nigerian audiences are open to international content, local films dominate viewing habits, followed by globally popular industries such as Hollywood, with other regional film industries occupying smaller but emerging audience segment.

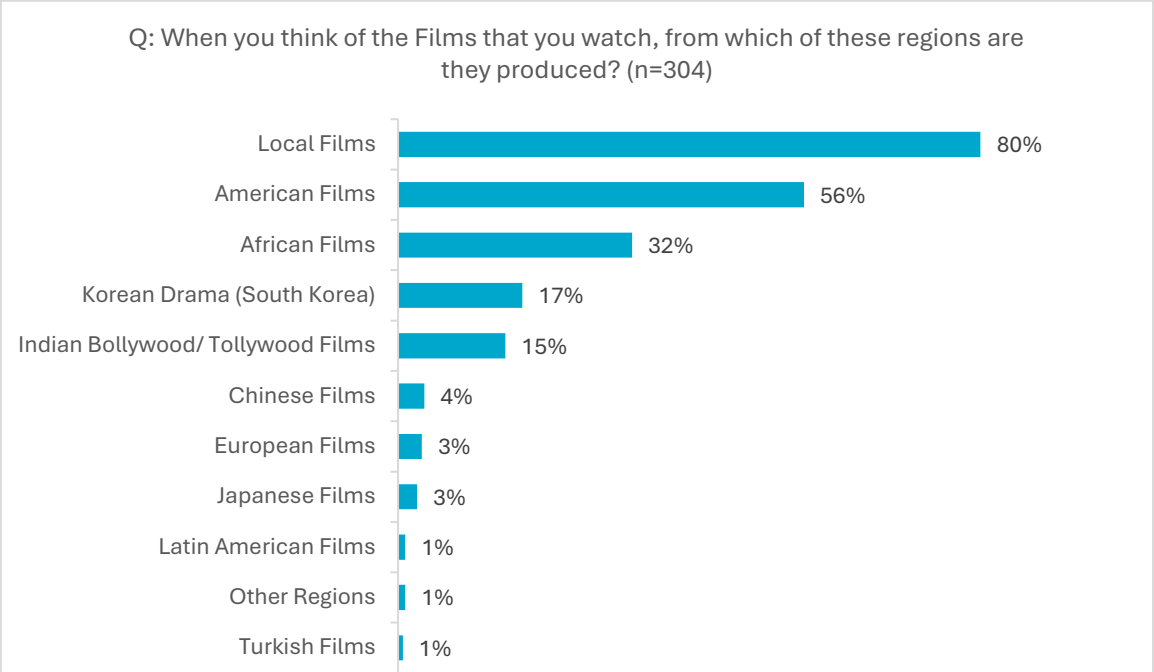


Figure 14:Regions of films watched by Nigerian Audience | Source: Survey data

Nigerian audiences most often watch locally produced film series, with 55% indicating that the films they watch most frequently are made by Nigerian filmmakers. This highlights the strong dominance of local content in regular viewing habits and reflects audiences' strong connection to stories, themes, and characters that reflect their own cultural and social context. American series rank second at 31%, demonstrating the continued influence of Hollywood and international streaming platforms, though at a notably lower level than local productions. Other international content occupies much smaller shares of frequent viewing, including Korean dramas (8%) and Indian Bollywood/Tollywood series (4%), suggesting niche but visible audience segments. Series from Japan (1%) and those produced in other African countries, Europe, China, and Latin America are rarely among the most frequently watched.

Local production is a highly valued attribute for Nigerian audiences, with a strong majority indicating that it matters in their viewing choices. Nearly six in ten audiences (59%) say it is very important that a film is locally made or produced, highlighting the strong cultural relevance and audience affinity for domestic content. An additional 21% consider it somewhat important, meaning that roughly four in five viewers (80%) attach at least some importance to local production. overall, this indicates a clear audience preference for locally produced films, suggesting that cultural familiarity and local storytelling significantly influence audience engagement.

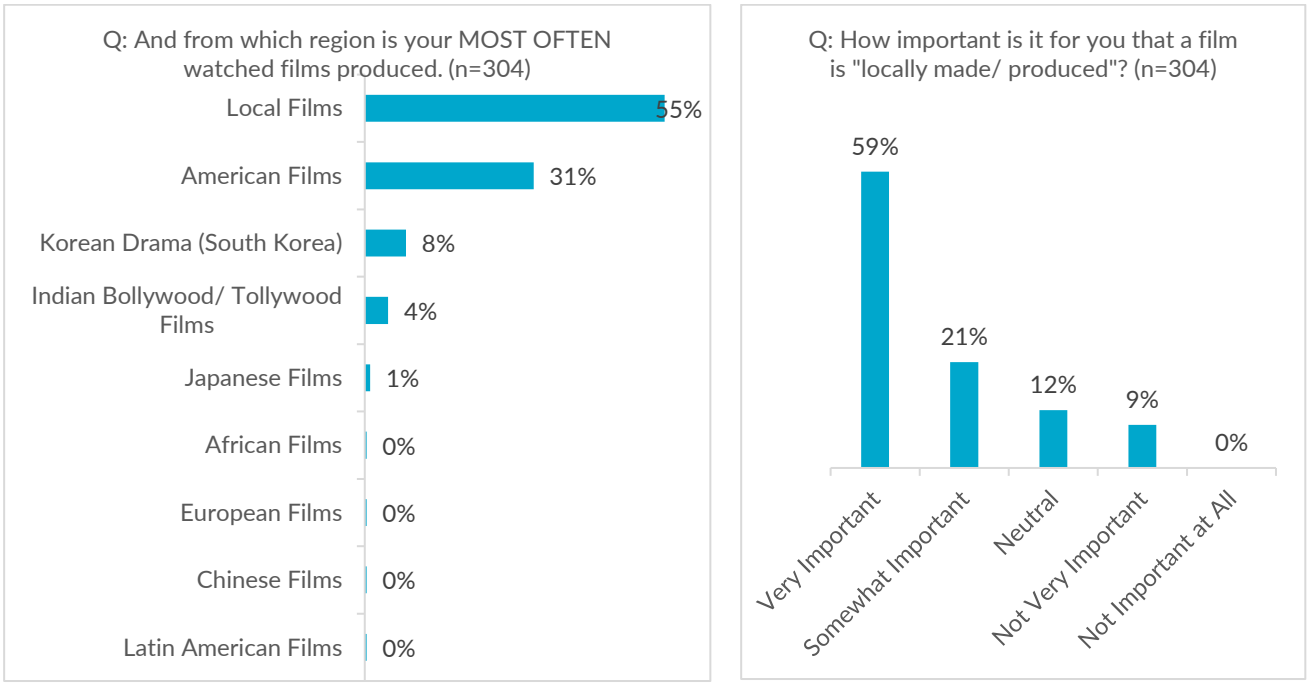


Figure 15: Most frequently watched region and Importance of films being locally produced (Nigeria)| Source: Survey data

Overall, the findings shows that Nigerian audiences demonstrate a decisive preference for local films and series, which dominate both general and frequent viewing. This trend is reinforced by the 80% of viewers who prioritize local production due to its cultural relevance and familiar social contexts. While American content maintains a significant secondary presence, the domestic industry remains the primary driver of engagement. Stakeholders should therefore prioritize high-quality local narratives while strengthening distribution to compete globally.

3.2.8. Barriers to audience growth for local films

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

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

"Before now, when we had like end of year reports, you would see that Hollywood would be somewhere around 70% and Hollywood's around 80/20 but we've seen a shift and it is ranking 50/50 in favour of Nollywood or even 51/49 in favour of Nollywood." Film distributor, Nigeria

American films retain substantial reach (60%) in part because they are perceived as setting a global standard for technical quality and storytelling, though stakeholders noted that Nigerian audiences now approach Hollywood content more selectively. The stakeholders observed that while Hollywood films continue to draw viewers, the gap is narrowing. The sustained interest in American cinema also reflects the long-standing influence of Western media, but stakeholders pointed out that Nigerian audiences increasingly expect local films to match that quality, a demand that has driven significant improvements in Nigerian production values.

Films from other African countries (32%) occupy a smaller but notable space, yet qualitative accounts suggest that distribution barriers and language differences limit their reach. However, a growing interest in pan-African content, particularly at festivals and through co-productions

was noted. This suggests that while regional content currently occupies a niche, there is untapped potential for greater cross-border exchange if structural barriers are addressed.

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

For the subset of the audience that avoids local or African content, the barrier is largely psychological rather than structural. A significant 50% of these viewers cite a fundamental disinterest in current themes or a settled preference for international cinema. This is compounded by a quality gap concern, with 35% of non-viewers perceiving local production values as unappealing. Interestingly, logistical barriers, such as platform availability (8%) or language (4%), are negligible. This suggests that the industry's primary challenge is not one of access, but of content relevance and the need to overcome a deeply ingrained perception of global superiority.

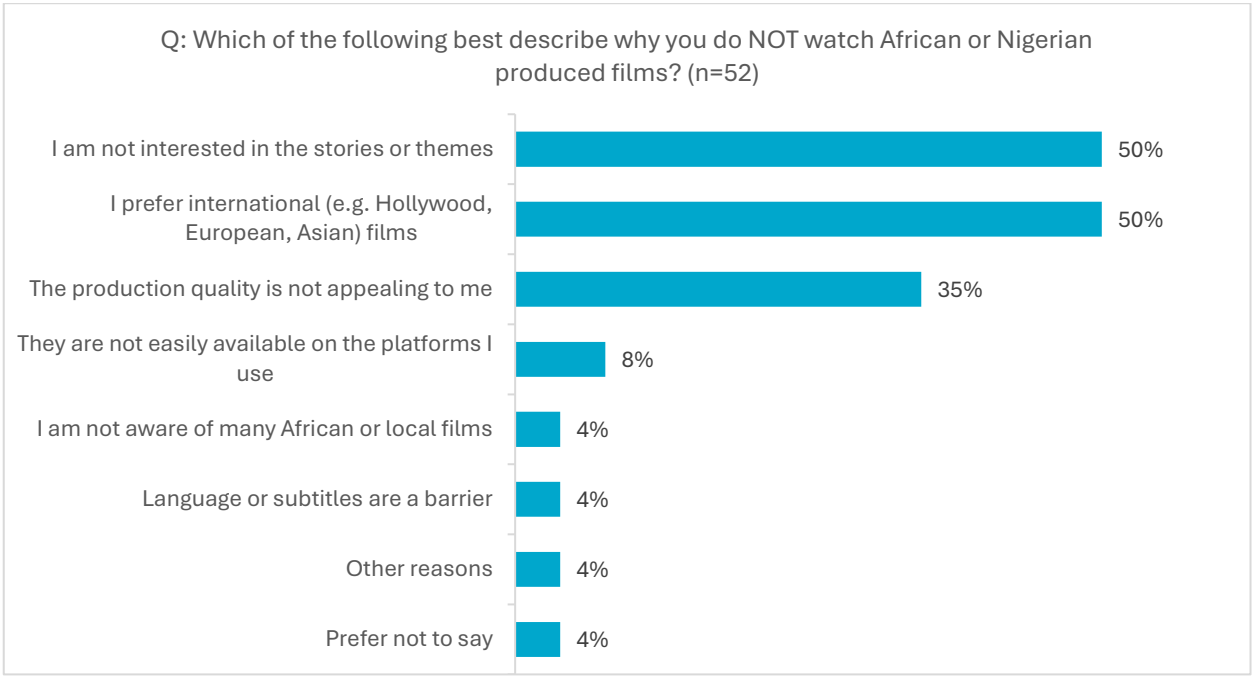


Figure 16:Why audience in Nigeria do NOT watch Local or African films | Source: Survey data

When asked about barriers limiting their consumption of local content, Nigerian audiences pointed to a blend of creative shortcomings and practical frustrations, with cost emerging as a more significant barrier than in previous years. The most critical issue identified was creative quality, led by storylines that are not engaging (28%) or lack originality (26%). Stakeholders across the industry echoed this concern, noting that while technical production has improved, storytelling has become formulaic. Below are some of the sentiments shared by the stakeholders.

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

Running neck-and-neck with creative concerns is the financial barrier of high subscription or pay-per-view costs (25%), marking a shift from earlier data where cost was a non-issue. Stakeholders further indicated that affordability is now a primary consideration for audiences. This cost sensitivity reflects broader economic pressures and has prompted some platforms to

introduce offline download options and lower-mb streaming to accommodate budget-conscious viewers. In their own words:

"Nigerians are the same over the world. They want to answer the question, is it cheap? Is it worth my money? Can I get a cheap cheaper elsewhere? And is this value for money?" Streaming executive

Infrastructural problems, particularly poor internet connectivity and high data costs (24%), affect nearly a quarter of viewers. Stakeholders frequently cited data expenses as a structural barrier that limits access to legitimate streaming platforms. A filmmaker lamented: *"People that cannot afford data go to file sharing sites to download. And the owner of the content doesn't get the value back."* A government official noted that even where networks exist, the cost of data remains prohibitive for many, especially in rural areas where electricity and connectivity are unreliable. A distributor added that the lack of screens exacerbates this, as audiences in regions without cinemas have few options beyond mobile viewing, yet data costs constrain even that channel.

Notably, a substantial segment of the audience (25%) reports no significant barriers at all, suggesting a ready and willing market segment. This aligns with stakeholder observations that when content is compelling and accessible, audiences respond enthusiastically. While low production quality (22%) remains a notable concern, it is slightly less prominent than the core issues of storytelling, cost, and connectivity, painting a picture of an audience that is engaged but increasingly discerning and sensitive to both value for money and the burden of data consumption.

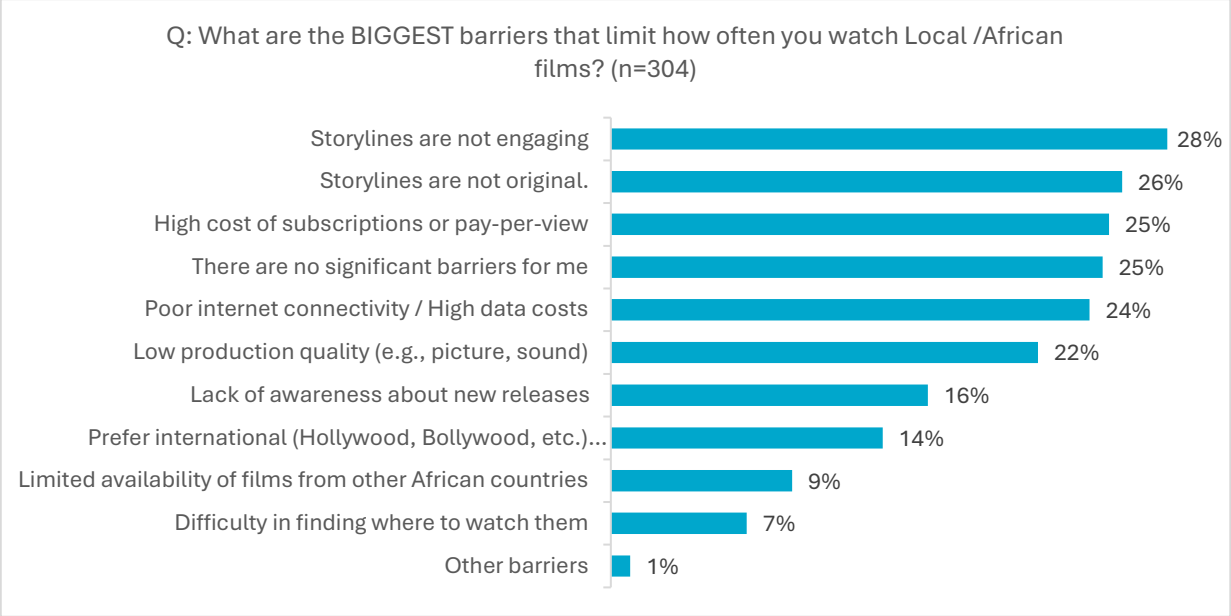


Figure 17:Barriers to watching Nigerian or African films | Source: Survey data

Nigerian audiences hold a largely positive and encouraging view of local content, with strong majorities acknowledging progress and expressing a willingness to support the industry financially in terms of paying to watch high quality content. An overwhelming 59% agree or strongly agree that production quality has improved significantly in the last 5 years, while an even larger 64% feel that local films tell authentic and relatable stories, indicating that the creative direction is resonating with viewers on a cultural level. This positive sentiment translates into commercial potential, as 56% state they are willing to pay for high-quality local content. However, these optimistic views are tempered by significant criticisms of distribution and marketing. Audiences are divided almost evenly on whether films are hard to find on mainstream platforms, but a notable 45% agree or strongly agree that local films suffer from poor promotion and marketing, suggesting that while the product itself is winning over hearts,

the industry is failing to effectively announce its presence and guide audiences to where they can watch.

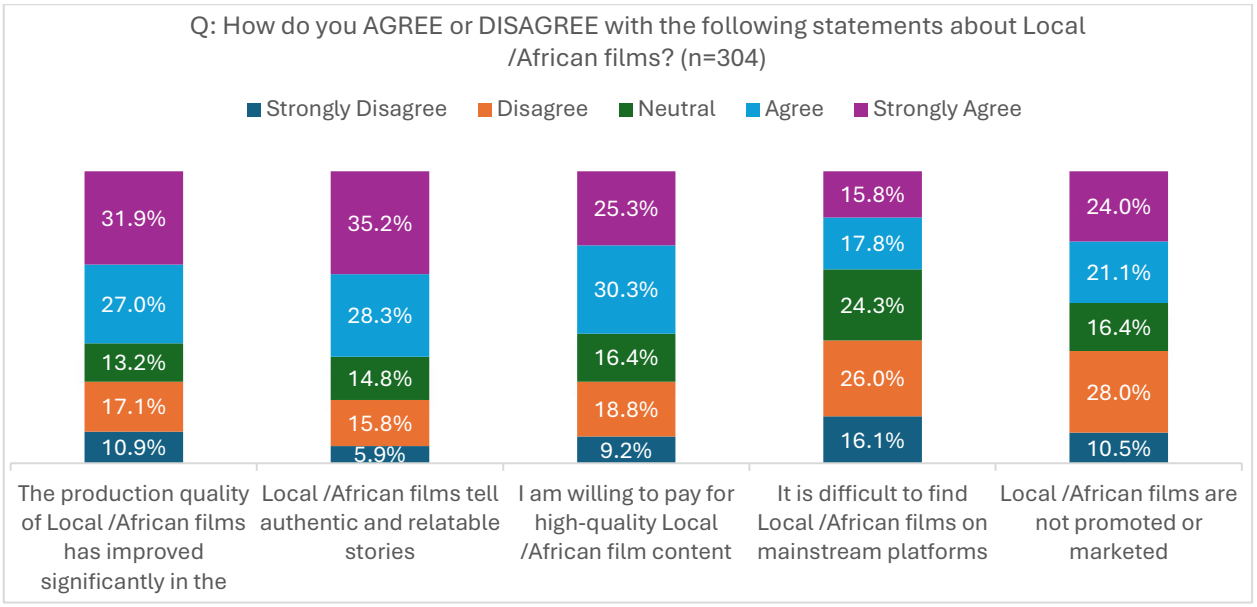


Figure 18:Perceptions on local/African films in Nigeria | Source: Survey data

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

3.2.9. Audience engagement and word-of-mouth

When Nigerian audiences finish watching a film, their most common reaction is to become active advocates, with the overwhelming majority (63%) choosing to recommend it to someone in person, highlighting the immense power of word-of-mouth in this market. Beyond personal recommendations, a sizeable portion of viewers translate their engagement into deeper exploration, as 28% seek out more films from the same country and 20% search for information about the actors or directors, indicating that a compelling film can successfully build cultural bridges and elevate industry talent. While social media sharing (25%) is also a notable behaviour, it is less common than direct personal endorsement. Importantly, only a small fraction of audiences (19%) does nothing after watching, meaning the vast majority are primed for further engagement. However, the relatively lower numbers for reading reviews (17%) or looking up social issues (12%) suggest that post-viewing behaviour is driven more by social connection and talent discovery than by critical analysis or deeper thematic exploration.

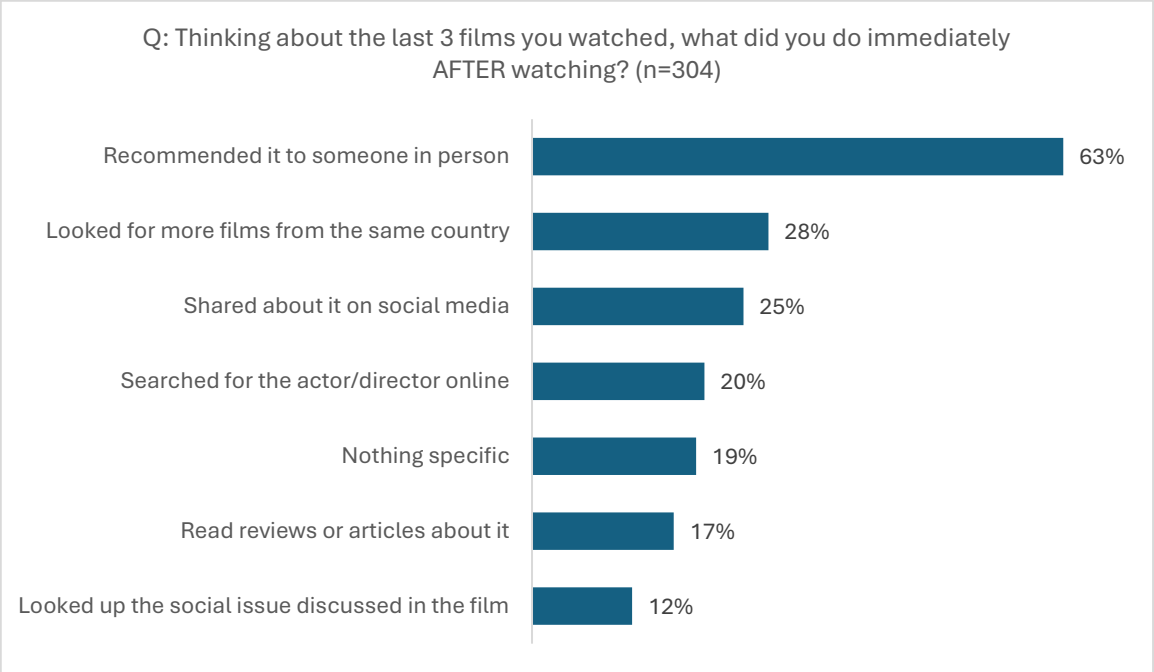


Figure 19: Actions after watching a film (Nigeria) | Source: Survey data

In the past three months, the audiences have demonstrated a strong preference for active, self-directed acquisition of film content, with the most common activity being actively searching for and downloading films (41%). This outpaces legal paid access, though a substantial 32% have paid for or bought a film on a digital platform, indicating a significant and willing paying audience exists alongside the downloading culture. Notably, nearly a quarter of audiences (23%) engaged in no film related activities at all during this period, representing a substantial pool of passive consumers who may be harder to reach or activate. Social media engagement with talent (15%) has emerges as a meaningful touchpoint, surpassing traditional out-of-home viewing experiences like cinema visits (11%) or community screenings (6%). The relatively low participation in communal viewing formats and online forums (4%) suggests that film consumption in Nigeria remains a largely individual or private activity, with audiences preferring to access content on their own terms rather than seeking out shared or communal experiences.

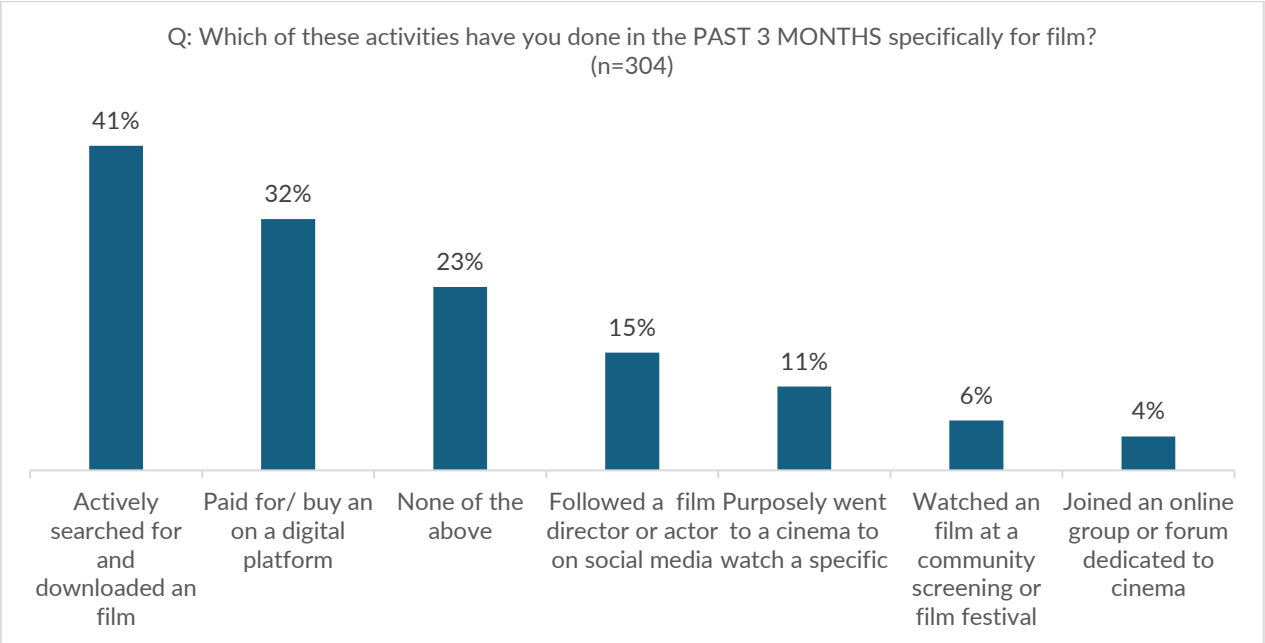


Figure 20: Engagement in past 3 months for Nigerian Audience | Source: Survey data

With a Net Promoter Score (NPS) of 29, Nigerian audiences demonstrate a moderately positive relationship with local films, indicating more promoters than detractors but with significant room for growth. Most viewers (53%) are classified as Promoters, loyal enthusiasts who are likely to recommend local films to others, providing a strong foundation for organic growth through word-of-mouth. However, nearly a quarter of audiences (24%) are Detractors, representing dissatisfied viewers who may actively discourage others from watching local content. While the positive NPS suggests the industry is heading in the right direction and has a healthy base of advocates to build upon, the significant combined weight of Passives and Detractors (47%) signals that quality and experience remain inconsistent. Converting Passives into Promoters by addressing the recurring concerns around storytelling and accessibility, while simultaneously winning over detractors, represents the clearest path to accelerating audience growth and loyalty.

Nigerian audiences are naturally wired for advocacy, with personal recommendations serving as the primary engine of film discovery and popularity. When viewers connect with a film, their first instinct is to share that experience directly with others, making word-of-mouth far more powerful than social media promotion or critical reviews. This enthusiasm often extends beyond the film itself, driving curiosity about the talent behind it and a desire to explore more content from the same source, suggesting that compelling films can successfully build cultural bridges and elevate industry profiles. However, engagement patterns reveal a preference for private, self-directed consumption, audiences would rather seek out and acquire content on their own terms than participate in communal viewing experiences. While a loyal base of enthusiastic promoters exists and actively champions local films, a nearly equal combined weight of passive and dissatisfied viewers signals that experiences remain inconsistent. Converting casual viewers into passionate advocates by addressing recurring concerns around storytelling quality and accessibility represents the clearest path to sustainable audience growth.

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

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

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

3.2.11. Marketing and promotion practices

i. Social media

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

ii. Influencers

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

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

iii. Segment-specific marketing effectiveness

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

a) **Nollywood loyalists:** This female-led audience is the primary driver of organic growth. They respond most to relatable storytelling and community-based social media "hype." Marketing success here depends on word-of-mouth and high-visibility social engagement.
b) **African story seekers:** This group is driven by story quality and platform visibility. They engage across multiple streaming services like Showmax and Netflix. Effective marketing for this segment requires highlighting "narrative depth" and ensuring the film is prominently featured on digital carousels.
c) **Global action streamers:** This segment is the most critical of local production. They respond to high-fidelity trailers and technical quality signals. To convert them, marketing must emphasize international-standard action tropes and professional cinematography to overcome their quality concerns.
d) **Hollywood-first streamers:** This group is the hardest to reach through formal channels due to a higher reliance on pirated content. They are motivated by high-intensity genres and global trends. Winning them over requires massive "event-style" digital marketing that creates a sense of cultural FOMO.

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

3.3 Social Impact

3.3.1. Overview

Film in Nigeria is increasingly recognized as a potent tool for social advocacy and behaviour change, particularly in thematic areas such as democracy, gender rights, and migration. While most Nollywood productions focus on entertainment, a subset of films intentionally attaches social impact campaigns to their release strategies. For instance, the film *No U-Turn* utilized community screenings and vernacular-language discussions to raise awareness about the risks

of irregular migration. Partnerships with NGOs and educational institutions allow these impact-driven films to maintain visibility long after their theatrical or platform premiere, facilitating sustained engagement that commercial releases often lack. Media monitoring of public discourse in 2025 indicates that over half of audience interactions centre on critiquing storytelling and production quality, though significant debates also occur regarding the industry's role in representing Nigerian identity on the global stage. Despite these qualitative insights, there is a notable lack of quantitative evidence measuring the long-term behaviour change resulting from specific film campaigns.

3.3.2. Defining social impact in Nigerian film

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

3.3.3. Audience interest in socially relevant storytelling

The finding that 43% of audiences are motivated by educational and learning-related content, and 42% by cultural connection and identity, reflects a broader shift stakeholders have observed toward stories that speak to audiences' lived realities and social concerns. Filmmakers noted that audiences now seek films that "hold a mirror to society" and enable them to learn and unlearn practices by showing physical examples of what the repercussions of an action or a held notion in the country can have. This shift away from pure escapism toward socially engaged viewing was repeatedly cited as a defining characteristic of the contemporary Nigerian audience.

"I think it's the social political culture. I think it's the social political nature of the stories. I think to a large extent the social political or maybe the commentary aspect, social commentary aspect of those stories tend to resonate. I'll mention so like this year, like when you look at a film or a series like King of Boys, which is about crime, crime syndicates, you know, crime is social commentary. Like that's a film that is giving you an expose on criminal enterprise in Nigeria, for instance. So that is social commentary and that in itself popularized that film." Filmmaker, Nigeria.

The strong audience interest in stories about young people chasing opportunities, education, or a better future (53%) aligns with qualitative accounts of filmmakers responding to the realities of youth unemployment, migration aspirations, and economic pressure. A filmmaker noted that *"the social commentary aspect of it, what youths are going through unemployment, you know, child trafficking, crime in that aspect, social crime… those things tend to resonate now in the name because of… just because of the current landscape that we are as a country"*. A funder observed that the japa (emigration) phenomenon has become a recurring theme, with audiences seeking narratives that reflect their own aspirations and anxieties about building a future in or outside Nigeria. The interest in love, relationships, and health challenges (51%) similarly mirrors stakeholder observations that audiences gravitate toward stories that combine personal experience with broader social questions, particularly around family dynamics, reproductive health, and gender relations.

The high interest in stories about strong women overcoming challenges (46%), power and corruption (45%), and survival and livelihood (45%) is reinforced by qualitative accounts of the kinds of films that have achieved both critical and commercial success. A funder added that

"Governance because some of the biggest crises that face society is as a result of poor governance," explaining why films addressing political and structural issues continue to draw viewers. This suggests that audiences are not only interested in these themes but actively seek out films that engage with systemic challenges.

The moderate but meaningful interest in environmental themes (40%), mental well-being (35%), and intercultural coexistence (34%) was less frequently discussed in stakeholder interviews, though some pointed to the growing role of development agencies in funding such content. A filmmaker who worked on MTV Shuga noted that the Gates Foundation and other partners specifically funded content addressing health and social issues, and that measurable outcomes such as reduced STI rates, demonstrated audience engagement with these themes. A government official added that social impact films are often supported by ministries and NGOs precisely because they can reach audiences in ways that traditional public awareness campaigns cannot. This indicates that while these themes may not dominate commercial production, they occupy a significant niche supported by institutional partnerships.

The finding that only 9% of audiences prefer films purely for entertainment underscores a qualitative consensus that audiences have become more discerning and socially conscious. A distributor observed: *"The audience are getting more informed… they are mostly scrutinizing films more. They're having more intelligent discussions, intelligent debates about film and how it looks."* An ecosystem player added that the audience now expects films to offer *"something they can connect with… that gives them a sense of belonging,"* rather than mere distraction. A filmmaker concluded that while comedy and romance remain popular, they increasingly incorporate social commentary because *"you can't just make a serious film and expect people to just be serious all through. You still have to find a way to make it"* entertaining while still meaningful. This suggests that for the vast majority of Nigerian audiences, social relevance is not a niche preference but an integral expectation of the films they choose to watch.

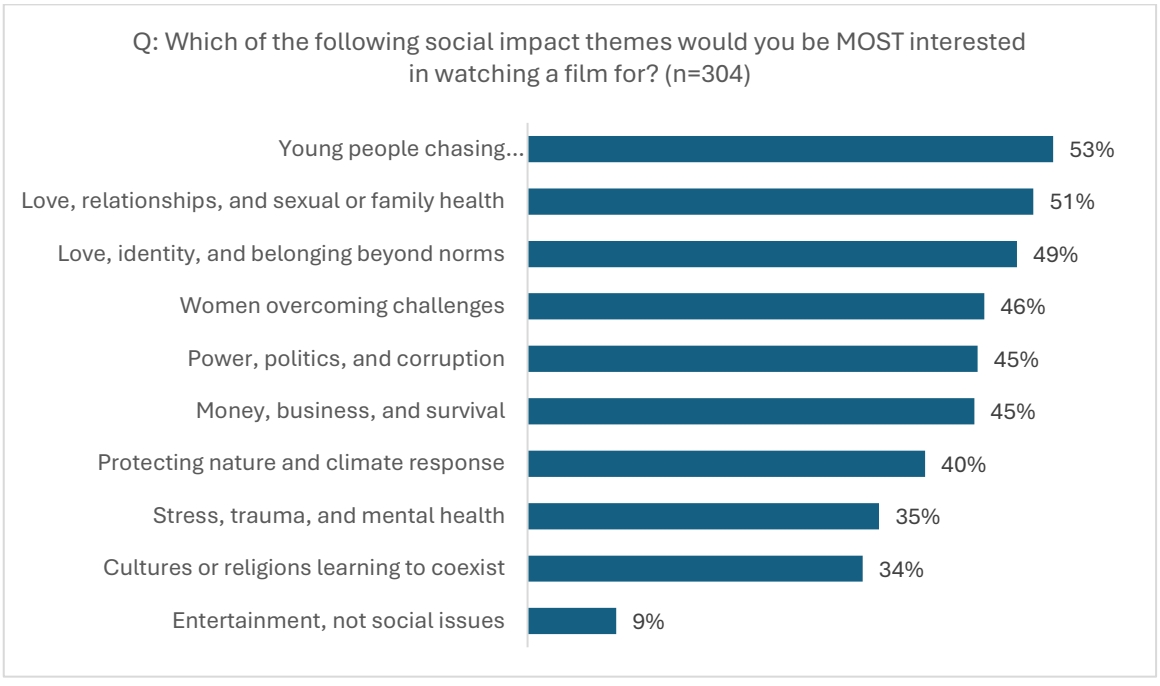


Figure 21: Social impact themes audiences want to watch in Nigeria | Source: Survey data

3.3.4. Priority and underexplored social impact themes

i. Themes with strong audience resonance and institutional support

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

ii. Underexplored themes with high growth potential

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

3.3.5. Challenges and Opportunities

i. Challenges

Despite their potential for social impact, films addressing societal issues face significant commercial and structural hurdles. A filmmaker observed that such films often lack mainstream appeal, making them reliant on grants rather than box office revenue: *"Social impact stories are not commercial… you cannot sell. There's also a problem of buying, a person doesn't want to go to the cinema and watch a documentary"*. This commercial viability gap means that producers must often seek funding from development agencies, NGOs, or government ministries rather than private investors seeking returns. A funder explained that even when grants are available, they are typically modest, ranging from $10,000 to $40,000, and are intended for short films or documentary projects rather than feature-length productions.

Regulatory sensitivity poses another significant barrier. A filmmaker noted that films addressing sensitive topics like early marriage, political corruption, or religious issues may face classification delays or outright rejection from the National Film and Video Censors Board. A filmmaker explained: *"We have a film censors board that is shaped by cultural norms and values… you cannot just decide that I want to produce this movie for a cost for commercial consumption. It might not get licensed, reason being that they feel it's a detriment to either the government or it's a detriment to how Nigeria is being seen."* A government official confirmed this, noting that *"any film that borders on national sensitivity"* or could "stir up political or social unrest" is subject to heightened scrutiny. This regulatory environment can discourage producers from tackling controversial themes, limiting the range of social issues addressed in Nigerian cinema.

ii. Opportunities

Stakeholders identified partnerships with universities, cultural institutes, and festivals as key pathways for reaching audiences with social impact content. Community screenings and university circuits were also cited as effective channels; a filmmaker noted that with Ford Foundation support, they screened a documentary across the six geopolitical zones of Nigeria,

reaching audiences that commercial cinemas would not serve. These curated settings allow for post-screening discussions and engagement that amplify the impact of social impact films.

Emerging technologies are creating new opportunities for producing and distributing social impact content at lower cost. A filmmaker noted that AI tools *"make work easy"* and are *"cost effective as it gets trying to build these films the way they make them in the West"*. This is particularly relevant for animation, visual effects, and post-production, which have traditionally been prohibitively expensive for social impact projects with limited budgets. Additionally, the rise of digital platforms and streaming services offers alternative distribution channels that bypass traditional gatekeepers. A streaming executive observed that platforms can reach audiences directly, and *that "offline download options and lower mb watching"* make content more accessible to viewers with limited data. These technological advances, combined with institutional partnerships, create a more favourable environment for scaling social impact content that addresses Nigeria's most pressing social challenges.

3.3.6. Examples of socially impactful films and campaigns

MTV Shuga is the most frequently cited example of a social impact campaign that combined entertainment with measurable behavioral outcomes. Produced by MTV Base in partnership with the Gates Foundation, the series addressed HIV/AIDS, family planning, and gender-based violence across multiple African countries. A filmmaker who worked on the Nigerian season explained how the project embedded evaluation from the outset: *"We had a whole class where they explained things to us and they gave us materials to read we had an intimacy coach that was going to walk us through some of the sex scenes and scenes of violence to make sure that we're able to show the violence and show the intimacy in a way that is not promoting it, but amplifying what the meaning of the scene is"*. The campaign's impact was rigorously tracked, with post-broadcast surveys showing significant declines in STI rates and early marriage in Kenya and Nigeria, making it a model for donor-funded social impact storytelling.

Dry, directed by Stephanie Okereke Linus, tackled the intertwined issues of child marriage and vesicovaginal fistula (VVF). The film followed a young girl forced into marriage who suffers obstetric fistula and went on to achieve both critical recognition and policy engagement. A festival organizer noted its broader influence: *"It went around different markets in Africa. She went to the UN to talk about it. It gave her a sit at a table to talk about this issue"*. Though not a commercial blockbuster, Dry demonstrated how a focused social impact film could elevate a neglected health issue to national and international policy platforms.

Women in Power Documentary , a documentary focusing on women in political leadership was supported by development partners and screened at festivals and academic institutions. A filmmaker described the project: "*It's based on women in power political… we had funding for that. I didn't have to worry about money. And each time I did more work, my producer ensured that I was paid extra every time"*. The documentary featured interviews with prominent female politicians, including a former deputy governor, and was used in worKesops and university courses to inspire young women and advocate for greater female representation in governance.

Ministry Sponsored Social Impact Films, such as a film sponsored by Ministry of Mineral Resources on mining to educate communities about the sector's risks and opportunities. Such collaborations allow government agencies to use film as a public education tool, reaching audiences that traditional awareness campaigns often miss. These films are typically screened in community centers, schools, and at public events, with the government providing logistical support and distribution.

3.3.7. Role of public broadcasters, NGOs, donors, and foundations in impact-oriented content

i. Public broadcasters

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

ii. NGOs

Non-governmental organisations function as both funders and strategic partners in the production and distribution of social impact films. Beyond funding, NGOs contribute expertise in behaviour change communication, evaluation frameworks, and community outreach. The Society for Family Health, for instance, partnered with MTV Shuga to embed action points including phone numbers for health services, directly into episodes, creating a direct link between narrative and service access. A filmmaker explained: "We also had an intimacy coach that was going to walk us through some of the sex scenes and scenes of violence to make sure that we're able to show the violence and show the intimacy in a way that is not promoting it, but amplifying what the meaning of the scene is". This collaboration ensured that the content was both sensitive and effective.

iii. Donors and Foundations

International donors and philanthropic foundations provide the financial resources that enable social impact films to be produced at scale and evaluated rigorously. GIZ (German Development Agency) was cited by stakeholders as a key funder of socially oriented films, supporting projects that align with its thematic priorities such as health, governance, and climate resilience. The Tony Elumelu Foundation, while focused on entrepreneurship, supports media and entertainment entrepreneurs whose businesses produce social impact content, providing grants of $5,000 alongside training and mentorship. Donors increasingly require evaluation frameworks that demonstrate social return on investment, making them ideal partners for projects designed with measurable outcomes.

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

"When we give funding, we don't just give funding, we do mentorship too… we help them get into film festivals, you know, around the world". Funder, Nigeria.

iv. Collaborative Models

The most effective social impact initiatives often involve collaboration across all four actor types. The Circuits Creative Impact Fund for States exemplifies this: Benue State signed a $50 million agreement to train young people, fund production of commercially viable content, and distribute that content through Circuits TV's platform. Similarly, the government's Creative Economy Development Fund, a ₦200 million initiative, involves collaboration between the Ministry of Arts and Culture, the Nigerian Film Corporation, and private banks to support content that aligns with national development goals. These collaborative models demonstrate that impact-oriented content thrives when funding, production expertise, distribution channels, and evaluation capacity are aligned across public, private, and non-profit actors.

"Number one, people within the state are trained. Number two, they can produce commercial viable content across all creative economy. And number three, we have the platform to help them sell that content" Streaming platform, Nigeria.

3.4 Financing and Enabling Environment

3.4.1. Overview

The financing landscape for Nigerian film is undergoing a "premium pivot" toward formalization, moving away from the era where producers relied solely on personal savings and informal loans. High-tier productions now attract equity from high-net-worth individuals and institutional investors, with some asset managers eyeing Nollywood for returns as high as 25–40%. Significant institutional support has emerged through Afreximbank's Creative Africa Nexus (CANEX), which recently expanded its funding facility to USD 2 billion to support production, distribution, and infrastructure across the continent. Furthermore, streaming platforms like Netflix invested USD 23 million in Nigerian content in 2023 alone. On the regulatory side, the National Film and Video Censors Board (NFVCB) has shifted from a "censorship" to a "classification" model to allow for greater creative freedom. However, the industry is severely hampered by intellectual property theft, with piracy estimated to drain 50–75% of potential revenue. While the government has announced incentives such as a two-year tax waiver for community cinema investors and plans to revitalize the National Film Institute, many of these policies are yet to be fully implemented on the ground.

3.4.2 Overview of public, private, and international financing for film

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

Private financing dominates the Nigerian film industry, ranging from self-funding and family investments to structured equity partnerships and venture capital. A filmmaker described the most common model: *"The first film I made in 2013, it was self-funded in conjunction with other private equity stakeholders. So, people brought money and we made the film for a reasonable budget"*. In recent years, a model has emerged where actors and celebrities pool resources to co-produce films, sharing both risk and returns. A filmmaker noted*: "One of the highest grocery films this year is a film called Ginger. Ginger. Was co-produced by four ladies, you know, four actors, you know, so they brought in X amount of money"*. The Tony Elumelu Foundation provides non-refundable grants of USD 5,000 to entrepreneurs across sectors, including media and entertainment, alongside training and mentorship. A foundation representative explained: *"We have disposed of over 100 million dollars in grants… from 2015 till now we have got twenty-four thousand entrepreneurs and these twenty-four thousand entrepreneurs are from all African countries"*. Venture capital has also begun to enter the space, some films have been funded by people from tech industries and capital, and bankers". However, stakeholders emphasised that private financing is often patient capital, as returns are realised over years through multiple distribution windows.

International financing has played a transformative role, particularly through streaming platforms, development agencies, and co-production treaties. Netflix and Amazon initially

made significant investments in Nigerian content, with licensing fees reportedly ranging from USD 200,000 to USD 400,000 per film. However, stakeholders noted that both platforms have reduced local commissioning in recent years.

International foundations such as the Gates Foundation, and the Ford Foundation fund social impact films aligned with their thematic priorities such as health and environment and climate change.

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

Emerging financing models

New financing models are emerging, particularly around digital platforms and innovative revenue sharing. Circuits TV introduced a pay-per-view model where producers earn monthly payments based on viewership, creating a sustainable revenue stream beyond upfront licensing fees. Crowdfunding and presales were also cited as growing avenues, with a distributor noting that *"pre-sales… where people can buy tickets or book tickets before the actual release date of the film"* can signal demand to investors.

Brand partnerships and product placement provide additional financing, particularly for commercial films. These diversified financing sources suggest a sector that is gradually moving beyond reliance on a few traditional funding streams toward a more complex, multi-source financing ecosystem.

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

1. Tax credits and incentives

Unlike South Africa, which offers a 35% rebate for film productions, Nigeria currently lacks a formal tax incentive scheme for the film industry. A government official noted: *"We don't have one. I know that we're currently working on something that will give you like 25% tax rebates. I don't think… we currently don't have any of those."* The absence of such incentives means that Nigeria is less competitive in attracting foreign productions compared to countries with established rebate programmes. However, the government has proposed a 25% tax rebate for productions that meet certain criteria, though implementation remains pending.

2. Accessibility of government grants for independent filmmakers

Despite the existence of government funds, independent filmmakers consistently report significant barriers to accessing them. A key constraint is the requirement for formal business registration, comprehensive business plans, and distribution strategies, elements that many independent producers lack. A funder explained: *"Get your paperwork properly done because if your paperwork is not done, you would not access these funds."* The application processes are perceived as opaque and favour established production companies with connections to government officials. A filmmaker observed: *"I think it's been all about who you know, not what you know, not how good you are. And that's the biggest problem we have."* This sentiment was echoed across multiple interviews, with stakeholders describing a system where "gatekeepers" and personal networks determine access rather than merit or creativity.

Moreover, the Creative Economy Development Fund, while substantial, will be distributed through a competitive process that many independents find inaccessible due to the complexity of application requirements. A filmmaker explained: *"We're having people who are not even in the industry who do not feel the pain point being in the position of power and we don't understand what people are going through"*.

3. Private sector grants and alternative funding

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

3.4.5 Structural Gaps and Proposed Solutions

Stakeholders consistently identified the lack of a unified practitioners' council as a major structural gap that limits access to funding. A government official noted that the proposed Motion Picture Practitioners' Council would register practitioners and create a framework for accountability, making it easier to vet applicants and disburse funds. The absence of such a council means that government agencies often lack reliable data on who the legitimate practitioners are, leading to risk-averse funding decisions that favour established players. A filmmaker concluded: *"We need to create a more accessible society where people who, with great talent, they don't have to know somebody to be able to get their skills and their ability out there for the world to, to experience"*. Addressing these systemic issues through contextualized application processes, capacity building, and transparent evaluation criteria, would significantly improve the accessibility of government grants for independent filmmakers outside major networks.

3.4.6. Key Constraints and Promising Innovations: Financing and Enabling Environment

i. Key Constraints

Structural fragmentation remains the most entrenched barrier. The absence of a unified practitioners' council and weak guild enforcement allow unregulated "gatekeepers" to control access to distribution channels, while outdated enabling laws leave regulatory oversight fragmented across multiple agencies. A filmmaker noted: *"If I could change one thing about the Nollywood ecosystem, it would be structure."*

Financing gaps persist due to investor hesitancy, unreliable data, and the lack of patient capital. Commercial lenders require evidence of returns that the industry cannot consistently provide, and currency volatility further undermines budget predictability. A funder observed: *"If you don't have your structure in place, your pitch deck is right, it's not going to be an easy road."* Policy gaps include the absence of a formal tax incentive scheme and a fragmented regulatory landscape. A government official noted that the enabling law has "never been amended" in nearly 50 years. Data opacity, no centralised system for box office, viewership, or industry metrics, further deters investment and strategic planning.

ii. Promising Innovations

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

Proposed regulatory reforms, including the Motion Picture Practitioners' Council bill and a 25% tax rebate, aim to professionalise the sector and create a more transparent enabling environment. Capacity-building institutions such as the MultiChoice Talent Factory and

National Film Institute are developing the skilled workforce needed to attract and manage investment. Collectively, these innovations address longstanding constraints, though their full impact depends on sustained implementation and broader accessibility.

3.4.7 Film Ecosystem Development

i. Capacity building as an enabler of financing

Training institutions are critical to creating a pipeline of skilled practitioners capable of attracting and managing investment. The MultiChoice Talent Factory (MTF) provides fully funded film education across Africa, equipping graduates with both the creative and business skills required to produce commercially viable content. The academy director explained: *"We teach students the app and the business of filmmaking. We connect them with industry giants… and they're able to make a change."* The National Film Institute in Jos offers professional diploma programmes that have produced many of the industry's technical crew. A filmmaker who trained at the institute noted that such formal training is essential for professionalising the workforce and meeting the quality standards demanded by international platforms. For funders and investors, a trained workforce reduces risk and increases confidence in the viability of projects.

ii. Collaborations as pathways to financing

Collaborative models are enabling independent filmmakers to pool resources and access funding that would otherwise be out of reach. A filmmaker described the emerging model of actor-led co-productions as noted in the Ginger film. This structure allows producers to share both risk and returns, making projects more attractive to investors. A festival organiser noted that collaborations across the continent such as Nigerian-Kenyan co-productions, open doors to regional funding pools and distribution networks: *"You also have international, but more like African, like Pan African Co productions. So, where Nigeria partners, for instance, with the Kenyan, you know, and they leverage each other's strengths. So a typical example would be the film that was released, I think it was last year, was it this year with OSAS, It's called Safari and it's a co- Nigerian Kenyan Co production."* The Africa International Film Festival (AFRIFF) serves as a networking hub where filmmakers connect with potential collaborators and funders, with the organiser describing it as "a beacon for the rest of Africa" where international partners come to identify talent.

iii. Mentorships as investment readiness

Structured mentorship programmes are helping emerging filmmakers navigate the complexities of financing and distribution. The Tony Elumelu Foundation pairs its grant recipients with mentors who are experienced entrepreneurs and industry executives. A foundation representative explained that mentorship is integral to their model: *"We will pair them with mentors. These are experts and entrepreneurs who are holding the hands of these young green entrepreneurs to be able to scale their businesses faster."* A filmmaker who benefited from such mentorship noted that it provided crucial guidance on structuring a business, negotiating contracts, and developing viable distribution strategy skills that are essential for attracting investment. The MultiChoice Talent Factory also incorporates mentorship, connecting students with established directors and producers who provide practical guidance on navigating the industry.

iv. Strengthening the enabling environment

These capacity-building, collaboration, and mentorship initiatives collectively strengthen the enabling environment by professionalising the workforce, creating transparent networks, and demonstrating the sector's bankability. A funder observed that investors are more willing to back projects when they see that the creative team has undergone formal training and has access to industry mentors. A government official added that the proposed Motion Picture Practitioners' Council would formalise these structures, creating a registry of trained

practitioners and accredited mentors that could serve as a quality signal to investors. Together, these elements are gradually addressing the structural gaps that have historically constrained financing in Nigeria's film industry.

3.5. Children's Consumption Landscape

This section examines children's film and media consumption behaviours within the Nigerian 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

American films dominate viewing habits among both Nigerian children (71.6%) and teenagers (65.0%), highlighting the strong influence of Hollywood content among younger audiences. Nigerian teenagers show stronger engagement with local films (48.3%) compared to children (37.8%), suggesting increasing preference for culturally relevant storytelling with age.

Teenagers are more likely to watch African films from other countries (20.0%) than children (10.8%), indicating broader regional content exposure among older youth audiences. Korean dramas have significantly higher reach among teenagers (13.3%) compared to children (2.7%), reflecting growing exposure to global digital entertainment trends.

Bollywood/Tollywood films maintain moderate appeal across both groups, with slightly higher engagement among teenagers (15.0%) than children (13.5%).

Turkish, European, and Latin American films have minimal penetration among Nigerian children and teenagers, suggesting limited accessibility or audience familiarity.

Overall, we find that while American content remains dominant, teenagers demonstrate more diversified viewing preferences, particularly toward local Nigerian, African, and Asian content.

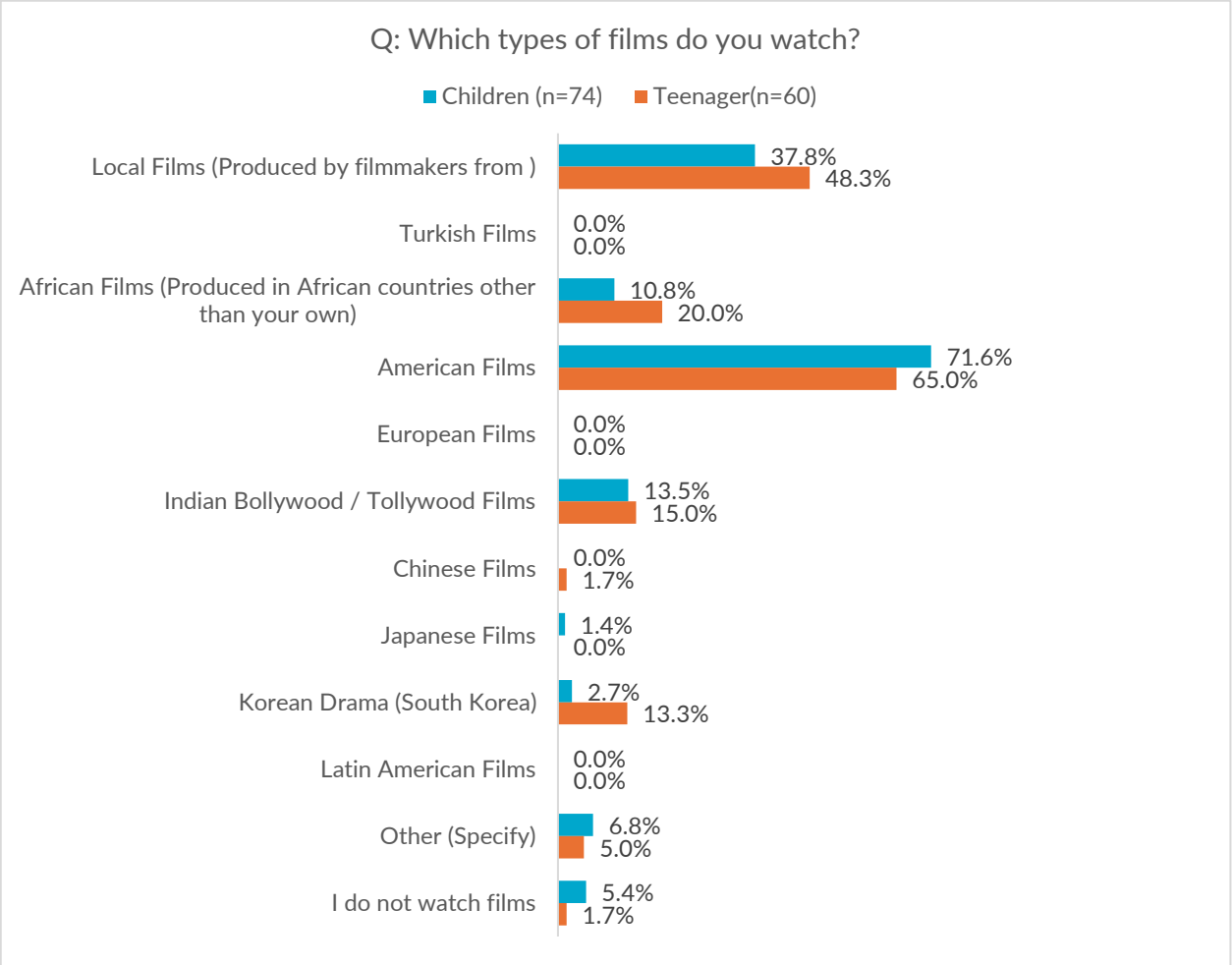


Figure 22: Type of films watched by teenagers and children in Nigeria | Source: Survey data

3.5.2. Genre preferences among young audiences

Animation and cartoons dominate viewing preferences among both children (81.4%) and teenagers (78.0%) in Nigeria, making them the most popular genre across younger audiences. Teenagers show stronger preference for drama (47.5% vs. 37.1%), comedy (33.9% vs. 18.6%), documentaries (22.0% vs. 14.3%), and action films (16.9% vs. 10.0%) compared to children, indicating more diversified viewing habits with age.

Romantic comedy has relatively low overall engagement but is more popular among teenagers (8.5%) than children (2.9%), reflecting evolving content interests during adolescence. Sci-Fi attracts modest and relatively similar interest across both groups, while horror and fantasy genres currently have limited appeal among Nigerian youth audiences.

Overall, Nigerian children and teenagers strongly prefer entertainment-driven content, with teenagers gradually shifting toward more mature, socially relatable, and diverse genres.

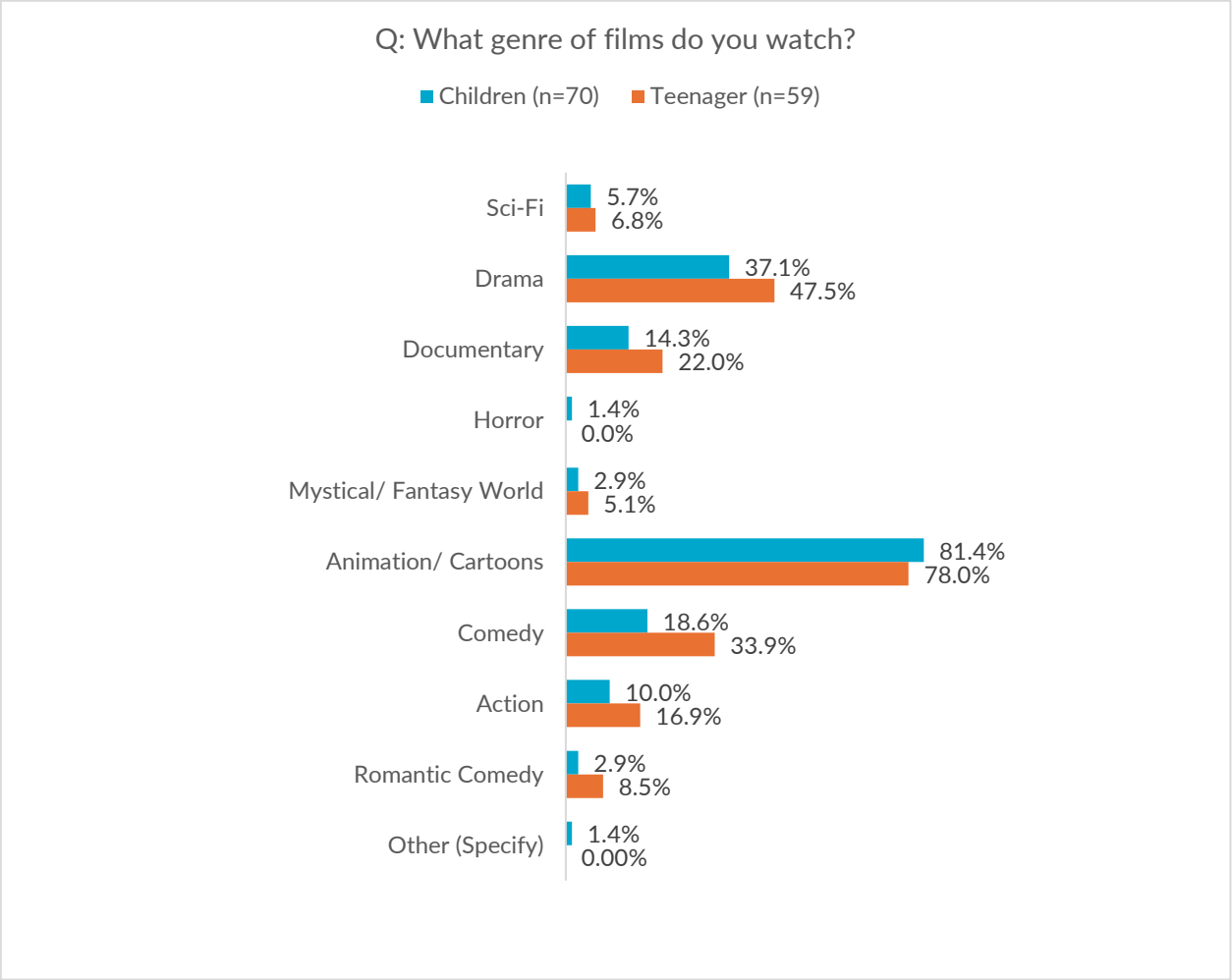


Figure 23: Genre of films watched by children and teenagers in Nigeria | Source: Survey data

3.5.3. Digital platforms dominate film access

Pay TV remains the dominant film viewing platform among both Nigerian children (67.1%) and teenagers (62.7%), highlighting the continued importance of platforms such as DStv, GOtv, StarTimes, and Canal+ in youth film consumption.

YouTube and YouTube Kids are also highly popular across both groups, used by 54.3% of children and 50.8% of teenagers, demonstrating the growing importance of digital and mobile-first viewing habits among younger audiences.

Teenagers are significantly more likely to use streaming platforms such as Netflix, Showmax, Amazon Prime, and EbonyPlus (35.6%) compared to children (14.3%), indicating increased exposure to subscription-based digital content with age.

Use of digital pirated websites is notably higher among teenagers (8.5%) than children (1.4%), suggesting greater independent online access and exposure to informal distribution channels among older youth audiences.

Traditional cinema attendance remains extremely low among both groups, with only 1.4% of children and 1.7% of teenagers primarily using mainstream cinemas or box office channels for film viewing.

Free-to-air television has limited relevance among younger audiences, particularly teenagers, reflecting the broader shift toward Pay TV and digital streaming platforms.

Overall, Nigerian youth film consumption is increasingly driven by digital and on-demand platforms, while traditional cinema and communal viewing channels play a minimal role in everyday viewing habits.

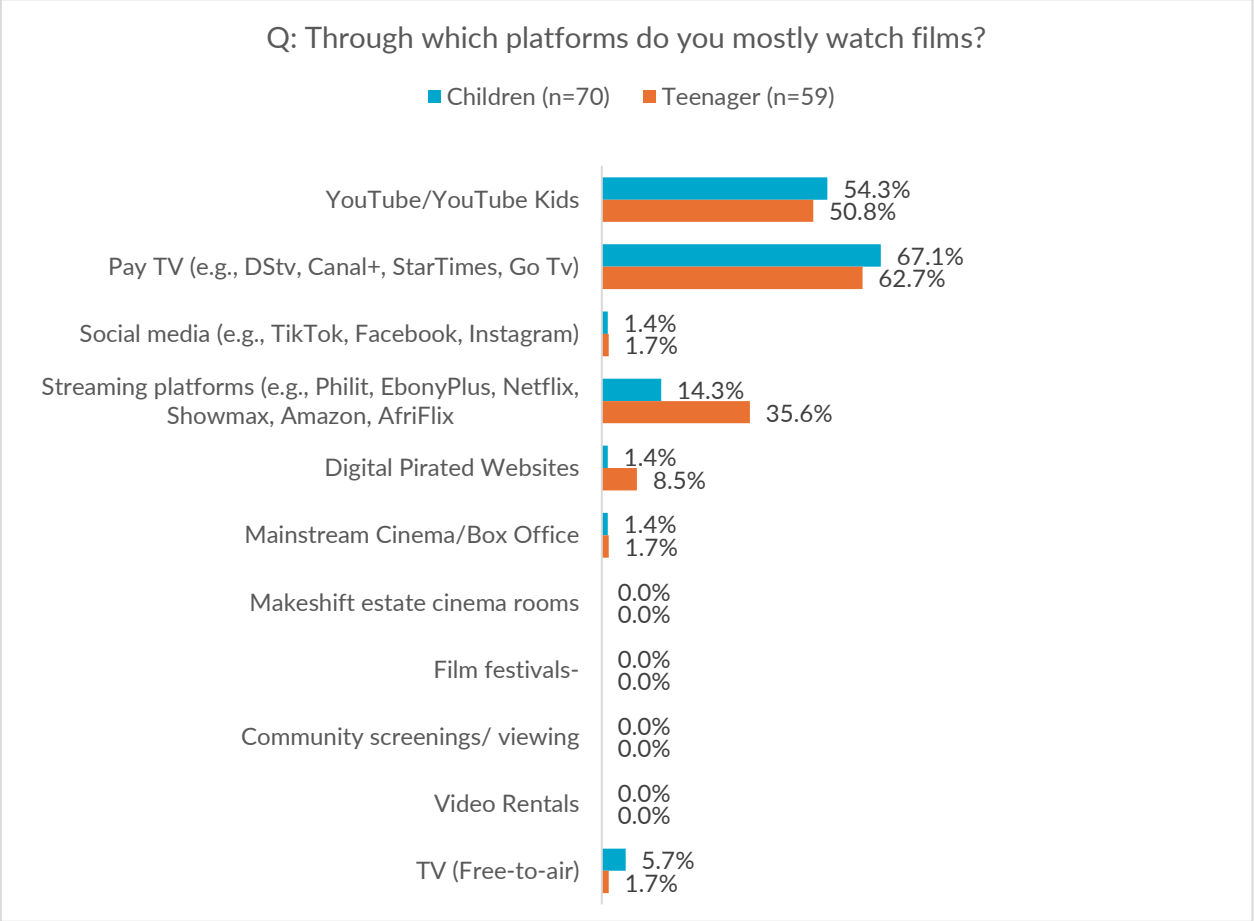


Figure 24: Platforms used mostly by children and teenagers to watch films in Nigeria | Source: Survey data

3.5.4. Film consumption frequency among young audience

Film watching is highly frequent among both Nigerian children and teenagers, with the majority watching films either daily or at least once a week. Daily film consumption is slightly higher among teenagers (55.9%) compared to children (48.6%), indicating stronger habitual engagement with film content among older youth audiences.

Children are slightly more likely to watch films at least once a week (50.0%) compared to teenagers (40.7%), suggesting consistently high engagement across both groups. Very few respondents watch films only a few times a month, while none reported watching films as infrequently as once a month or once every 2–3 months.

Overall, the findings highlight that film consumption is deeply integrated into the everyday entertainment habits of Nigerian children and teenagers, reflecting strong demand for accessible and continuous content consumption.

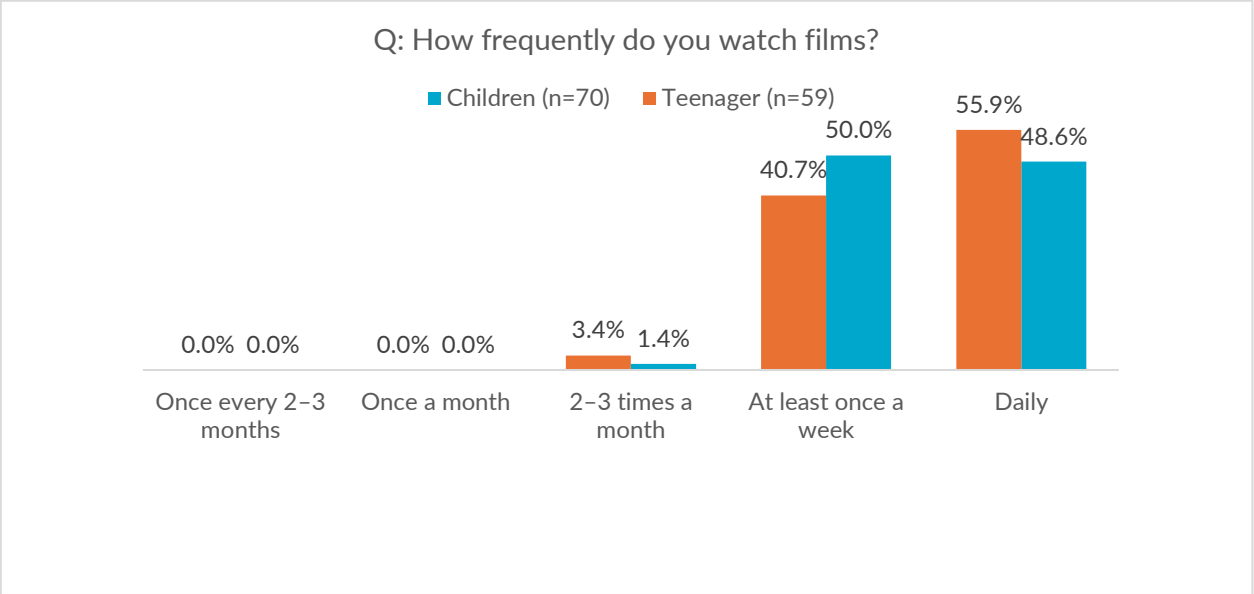


Figure 25: Frequency of children and teenagers watching films in Nigeria | Source: Survey data

3.5.5. Family-Centered Viewing Behaviors

Nigerian children and teenagers predominantly watch films with siblings and relatives, with this being especially common among teenagers (86.4%) compared to children (67.1%), highlighting the strong role of family-based viewing culture. Watching films alone is also highly common, particularly among teenagers (59.3%) compared to children (45.7%), suggesting increasing independence in viewing behavior with age.

Children are slightly more likely to watch films with parents (54.3%) than teenagers (49.2%), reflecting stronger parental involvement among younger audiences. Teenagers are more likely to watch films with friends (13.6%) and classmates/schoolmates (3.4%) compared to children, indicating more socially driven viewing habits among older youth audiences.

Overall, the findings suggest that film consumption among Nigerian youth remains strongly family-oriented, while teenagers increasingly adopt more independent and peer-influenced viewing behaviors.

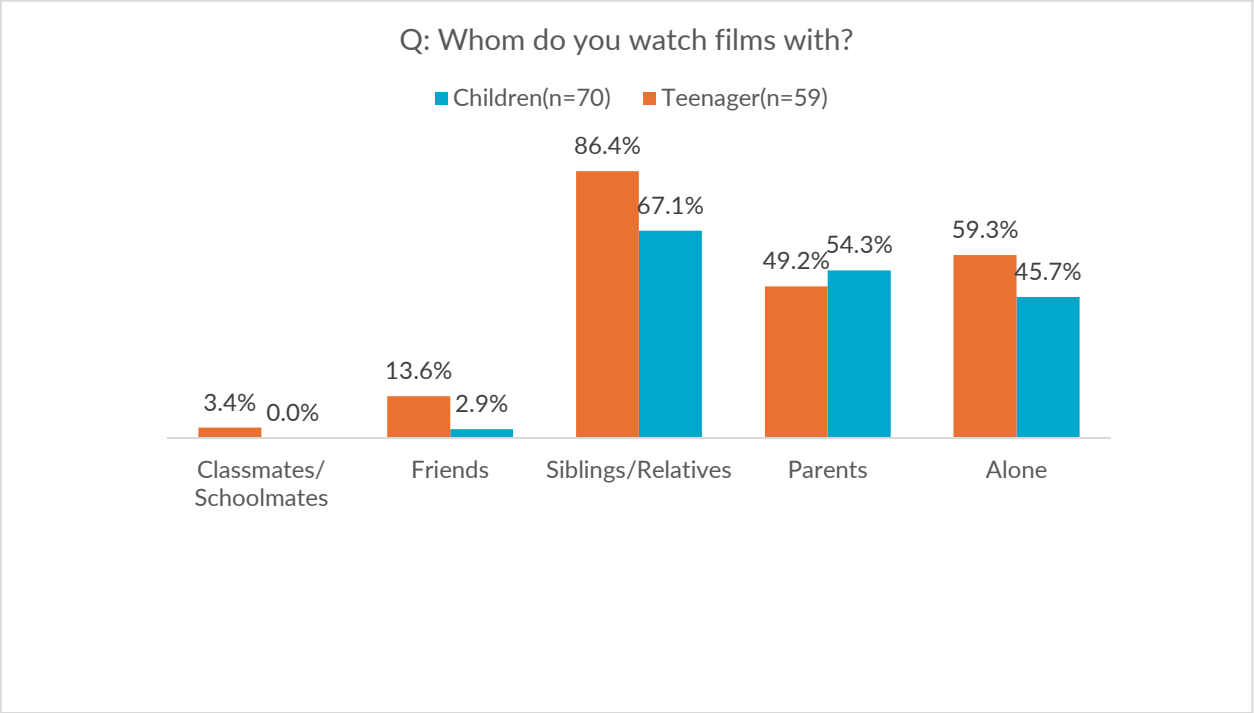


Figure 26: Whom do children and teenagers in Nigeria watch films with | Source: Survey data

3.5.6. Film discovery pathways among young audiences

Friends and family are the dominant source of film discovery among both Nigerian children (97.1%) and teenagers (98.3%), highlighting the strong influence of word-of-mouth and close social networks in shaping viewing choices. Social media plays a more important role among teenagers (20.3%) than children (12.9%), suggesting increasing influence of digital platforms on film awareness as audiences grow older.

Streaming platform recommendations have relatively low influence overall but are slightly more relevant among teenagers (3.4%) than children (1.4%). Traditional advertising channels such as billboards, radio, newspapers, magazines, and blogs have minimal influence on film discovery among both groups.

Influencers and bloggers currently play a very limited role in film awareness among Nigerian youth audiences.

Overall, the findings suggest that film discovery among Nigerian children and teenagers is heavily driven by personal networks and peer recommendations, while digital and social media influence becomes more prominent during adolescence.

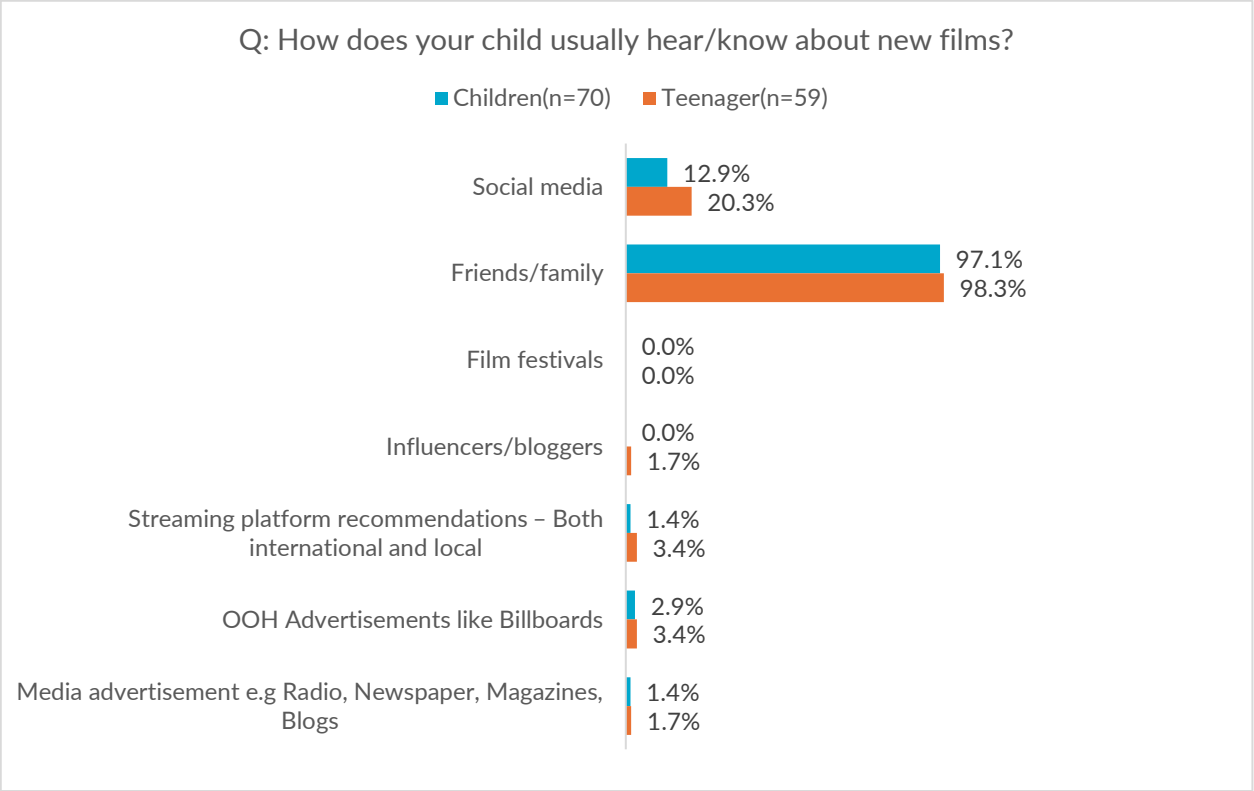


Figure 27: How children and teenagers hear about new films in Nigeria | Source: Survey data

3.5.7. Motivations driving film consumption

Learning and educational content is the leading motivation for both children (85.7%) and teenagers (74.6%) in Nigeria. Entertainment and relaxation are also key drivers, cited by 68.6% of children and 62.7% of teenagers.

Teenagers are far more motivated by engaging storytelling (61.0%) compared to children (42.9%). Safe and family-friendly content is equally important across both groups, with about two-thirds selecting this factor.

Social influence is stronger among teenagers, with 40.7% watching films because they are popular with friends or family, compared to 20.0% of children. Teenagers are more influenced by favourite actors, characters, and creators (18.6%) than children (8.6%). Accessibility and affordability matter more to teenagers (23.7%) than children (14.3%).

Overall, children are more motivated by educational and safe content, while teenagers show more interest in storytelling, peer influence, and entertainment trends.

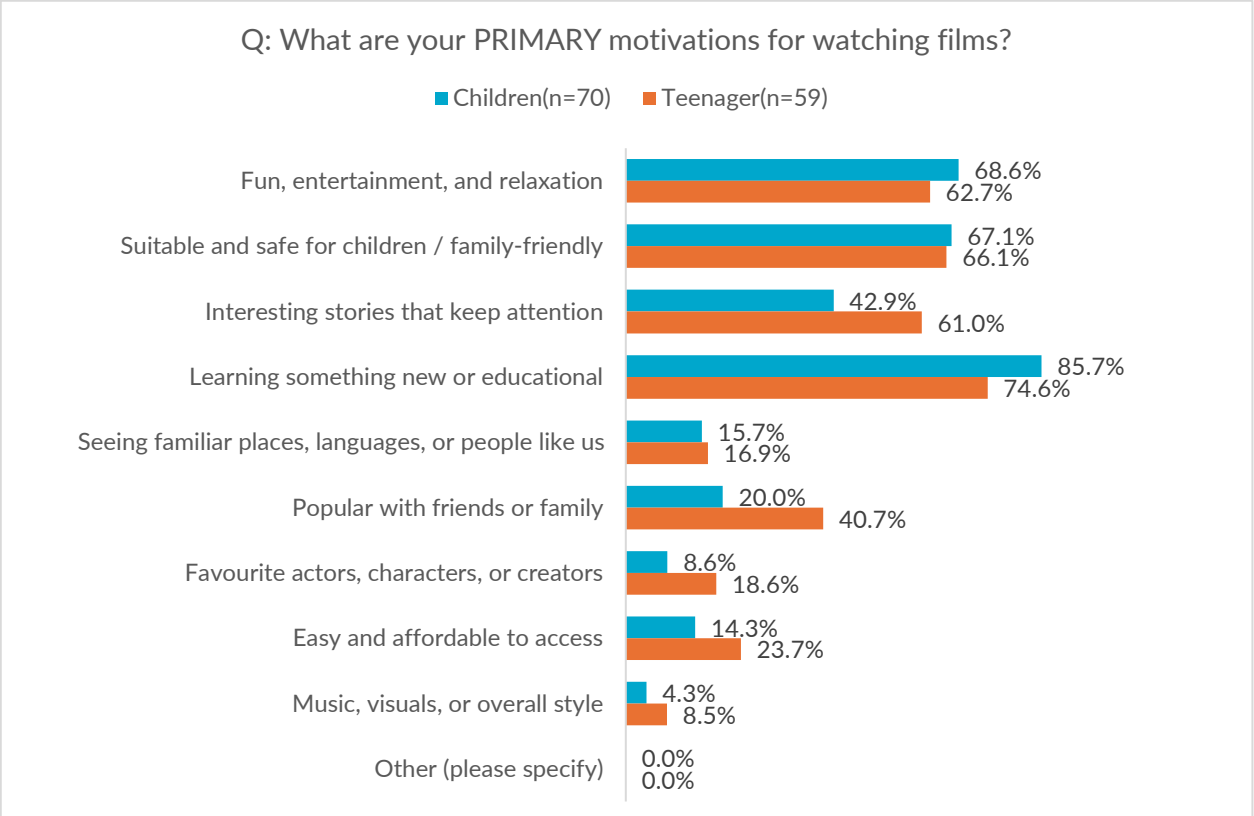


Figure 28: Primary motivation for children and teenagers to watching films in Nigeria | Source: Survey data

Conclusion:

Nigerian children and teenagers are highly engaged film audiences, with film consumption deeply embedded in their everyday entertainment and learning habits.

From the survey we see that Hollywood content continues to dominate viewing patterns, teenagers are gradually developing more diverse tastes, with stronger interest in Nigerian, African, and other international content compared to younger children. This suggests growing openness to culturally relevant and globally diverse storytelling as audiences get older.

Digital and on-demand platforms are increasingly shaping youth viewing behavior, particularly through Pay TV, YouTube, and streaming platforms, while traditional cinema attendance remains very limited. Teenagers, in particular, demonstrate more independent and digitally driven viewing habits, including greater exposure to streaming services and online discovery channels.

At the same time, family and peer networks remain central to how young audiences consume and discover films. Viewing is still largely family-oriented, especially among children, while teenagers increasingly rely on friends, social media, and peer influence in shaping their viewing choices.

Importantly, educational value, entertainment, safety, and engaging storytelling emerge as the strongest audience drivers, highlighting opportunities for filmmakers and distributors to create content that is both entertaining and culturally meaningful for younger audiences.

Overall, the findings point to a young Nigerian audience that is highly receptive, digitally connected, and increasingly sophisticated in its viewing preferences, presenting strong opportunities for locally relevant youth-focused content, digital distribution strategies, and audience development initiatives targeting the next generation of African film consumers.

4.0 Case study

4.1 Building a financing model

The IP assignment model

Background

MBO Capital's path into film finance began not with a passion for cinema but with a pattern in economic data. When Nigeria rebased its GDP in 2015 and formally measured the creative sector for the first time, one finding stood out: during the deep recession that followed, when oil and gas, agriculture, trade and financial services all contracted, the arts and entertainment sector kept growing. It was the only part of the Nigerian economy that did not go negative. That single observation planted a seed.

The firm's first move was cautious, a slate of three films that returned capital, but slowly and over several years. Rather than exit, they treated the experience as field research. They traced every bottleneck: where production money stalled, where post-production delayed delivery, where distribution failed to convert audience attention into revenue. By the time they re-entered the market after COVID-19, they understood the value chain from the inside.

The IP assignment model: Collateral without property

The insight that would define MBO Capital's model was deceptively simple: if African filmmakers have no physical assets to offer as collateral, use the intellectual property itself. Under their structure, a filmmaker arrived with a script, a production budget and ideally a signed contract with a streaming platform. MBO Capital provided the financing; IP ownership transferred temporarily to the firm during production. Once the film was delivered and the streamer paid, the debt was repaid and all rights reverted entirely to the creator.

Returns of 19 to 20% in USD terms made the model commercially compelling. Working initially with producers who already had signed Amazon Prime contracts eliminated both execution risk these were proven, filmmakers and offtake risk the buyer was already contractually committed. The firm financed approximately 20 films through this structure before adapting it further.

A non-negotiable principle ran alongside financial mechanics: creative non-interference. MBO Capital reviewed synopses to understand commercial contours but never requested script changes or influenced creative decisions. If a film succeeded or failed, it did so entirely on the merits of the people who made it. This principle was not only ethical, but it was also strategic. Removing the financier from creative decisions kept the relationship clean and preserved the artistic integrity that audiences actually respond to.

Adapting when the market shifted

The model faced its first major stress test when Netflix and Amazon Prime pulled back from commissioning African content, shifting from paying to have films made to licensing finished films at a lower cost. Producers who had relied on streaming advances as their primary source of development funding were suddenly without it. MBO Capital's response was to evolve rather than retreat: wherever no signed streaming deal existed, they introduced an equity component alongside the debt, sharing in the potential upside of a well-performing film rather than accepting only a fixed return. That hybrid structure that is part debt, part equity expanded the firm's portfolio and aligned its interests more directly with those of the producers it backed.

Understanding the theatrical economics makes clear why streaming was always central to the model's logic. In Nigeria, after government withholding tax, cinema-owner fees which run to 40–60% of remaining revenue and distributor commissions, a producer typically retains only 25 to 30% of box office gross. A film budgeted at one million dollars that earns two million at the box office yields its maker roughly USD 600,000 from cinema alone: a loss. Profitability requires stacking airline licensing rights, streaming deals across multiple geographic territories

and other secondary windows on top. A pre-signed streaming contract does not merely add a revenue line it fundamentally transforms the risk profile of the entire investment.

The three barriers and a long view
When asked to name the structural obstacles holding back not just their own portfolio but the wider Nigerian and African film sector, MBO Capital identified three interlocking barriers and ranked them in a counterintuitive order. Infrastructure came first: insufficient cinema screens, soundstages, post-production facilities, VFX capacity and trained creative technicians. Policy came second: the tax credits, production rebates, IP protection frameworks and government development funds that underpin mature film industries in France, South Korea and India are largely absent in Nigeria. Capital ranked third not because money is unimportant but because money deployed into a sector without functioning systems is largely wasted.

For example, the Korean analogy the firm draws on is worth taking seriously. The Korean Wave the global dominance of K-pop, K-drama and Korean cinema was not an accident of talent. It was the result of deliberate government policy channelling industrial surplus capital into cultural export infrastructure over a sustained period. African creative industries have achieved remarkable global traction with almost none of that institutional support. Sustaining it, and converting cultural influence into durable economic value, will require African governments to play a more intentional and structured role than they have to date.

Key lessons

- Private capital can enter African film finance both commercially and ethically but only if it is structured around the realities of the sector, rather than models borrowed from other asset classes that do not fit creative industries.
- IP assignment helps resolve the collateral challenge, creating a clearer asset base while still enabling filmmakers to unlock financing.
- Creative non-interference is critical, as it preserves the quality and authenticity of the content the very factors that ultimately drive audience demand and financial returns.
- Hybrid debt–equity models are better suited to the sector, as they absorb the revenue uncertainty that purely debt-based structures cannot accommodate.
- The most urgent investment need is not in individual films, but in the broader infrastructure of human capacity, physical systems, and enabling policy environments that make sustainable film production possible on a scale.

Recommendations

- For financing institutions: Adopt or adapt the IP assignment model as a replicable collateral mechanism across African markets. Structure investment at portfolio or slate level rather than film by film to spread risk. Introduce equity components wherever guaranteed offtake is absent. Establish a creative non-interference principle as a standard term of all film financing agreements.
- For policymakers (Nigeria and across Africa): Develop tax credit and production rebate frameworks Rwanda and South Africa demonstrate what targeted incentives can achieve. Strengthen IP law and anti-piracy enforcement to make IP-backed financing viable on a scale. Establish government-backed production development funds that provide early-stage 'soft money' to de-risk private investment and attract international co-productions.

5. Recommendations

5.1 Overview

Strategic priorities for Nigeria centre on addressing the extreme scarcity of distribution infrastructure, the fragmentation of financing, and the weak enforcement of intellectual

property rights. Based on stakeholder evidence, three realistic government priorities emerge: formalising the sector through a practitioners' council and film commission, de-risking community cinema investment through public-private partnerships and strengthening intellectual property enforcement with fast-track mechanisms. These priorities respond directly to the most cited constraints in the transcripts: structural fragmentation, lack of accessible screens, and revenue leakage from piracy.

5.2 Distribution: Building Community and Cottage Cinemas

The success of Circuits TV's pay-per-view model demonstrates that producers can earn recurring income based on sustained viewership, rather than relying solely on one-off licensing fees. To scale this model, government and development partners should provide technical assistance and seed funding to help additional indigenous platforms adopt pay-per-view or hybrid models. This would reduce producer dependence on exploitative gatekeepers and create more predictable revenue streams, particularly for independent filmmakers.

FilmOne Entertainment and Genesis Deluxe Cinemas have pioneered the release of box office data, with Genesis spearheading the practice of publishing gross figures. However, no industry-wide mandate exists. The proposed Motion Picture Practitioners' Council should require all distributors, exhibitors, and streaming platforms to submit standardised performance data to a central repository, with anonymised aggregates made publicly available. This would address the critical data gap that a government official called one of the problems we have in this country. Incentives such as tax reductions or priority access to government grants—should be offered to companies that comply transparently.

Nile Productions has demonstrated the viability of community screenings, while stakeholders estimated that Femi Adebayo's four-walling model generated almost half a billion Naira from communities in less than a week. To scale community cinema, state governments should partner with existing distributors like Nile and Blue Pictures to establish cottage cinemas in underserved regions. The federal government's knockdown cinema concept should be operationalised with dedicated funding or loan guarantees, not just policy rhetoric. Private investors should be encouraged to finance community cinemas in exchange for tax credits or accelerated depreciation on equipment.

FilmOne's annual yearbook and ComScore's box office tracking provide models for reliable data. However, a funder noted that the industry is dealing with falsified data. We therefore recommend that the proposed Nigerian Film Commission should certify data providers such as ComScore, FilmOne and require all cinemas and major streaming platforms to feed into a central secure database. Access to government grants and tax incentives should be conditional on submitting verifiable performance data. This would enable investors to assess opportunities and filmmakers to make strategic production decisions.

Finally, FilmOne's evolution from distributor to production and streaming partner illustrates the value of vertical integration. As such the government should offer investment matching or low-interest loans to distribution companies that expand into production, marketing, or international co-production. Co-production treaties with South Africa, France, and Brazil should be actively encouraged with other companies, enabling them to access foreign funding and distribution networks. Trade missions and film market participation should be subsidised for companies with proven track records.

5.3 Audience Development: Leveraging Local Festivals, Campus Circuits, and Cultural Institutes

Regional film festivals, campus circuits, and cultural institutes offer scalable platforms for audience development outside Lagos. The Africa International Film Festival (AFRIFF) model of

free screenings, post-film discussions, and international networking, has proven effective in building engaged audiences. The stakeholders noted that AFRIFF attracts buyers from Oman and Russia, turning attendees into ambassadors.

Consequently, scaling this model requires alternative income streams such as corporate sponsorship, diaspora fundraising, and hybrid ticketing such as subsidized for for students through donor support and general public paying the full amount. For festivals and campus circuits to scale, they must move beyond subsidy dependence and develop commercially sustainable revenue models as streaming platforms have demonstrated by having special packages for students.

4.4 Social Impact: State-Level Partnerships for Independent Filmmakers

Regional hubs are uniquely positioned to address social issues through locally relevant storytelling, but the focus must remain on independent filmmakers, not government advertising. The stakeholders note that development agencies such as GIZ and the Ford Foundation already fund independent social impact content. What independent filmmakers lack are distribution pathways and evaluation frameworks.

A promising initiative is the Circuits Creative Impact Fund for States, under which Benue State signed a $50 million agreement to train young people, fund commercially viable content, and distribute through Circuits TV. The grant entails three-part model: training, production funding, and a distribution Due to lack of data of fund's source, governance, and accessibility for independent filmmakers, we recommend piloting and independently evaluating the Benue model over a period of time then extend to other states such as Enugu and Lagos States, where discussions are already underway.

5.5 Scaling Potential: Policy Support, Infrastructure Investment, and Replication

To scale regional hubs effectively, stakeholders recommend a coordinated approach involving federal and state governments, private investors, and development partners. The proposed Motion Picture Practitioners' Council and Nigerian Film Commission bills would provide the regulatory framework to formalise regional production and distribution activities, ensuring quality standards and attracting investment. Infrastructure investment should prioritise state-level film villages and sound stages. Tax incentives and co-production treaties should also be leveraged to encourage location shooting and post-production in regional centres. By combining infrastructure investment, policy support, and replicable partnership models, Nigeria can build a truly inclusive film ecosystem that reaches audiences in every region.

5.6 Three Realistic Government Priorities

Based on the evidence, the following three priorities would have the highest impact on independent filmmakers and regional development.

First, formalise the sector by passing the Motion Picture Practitioners' Council and Nigerian Film Commission bills. This would create a central data system, register practitioners, and provide a single point of coordination for investment. A filmmaker captured the consensus: "If I could change one thing about the Nollywood ecosystem, it would be structure" (Filmmaker03).

Second, de-risk community cinema investment through a blended finance fund using government loan guarantees, private equity, and development bank loans at single-digit interest. This would address the screen scarcity that a funder called the industry's biggest problem.

Third, strengthen intellectual property enforcement by establishing specialised film courts or fast-track arbitration panels to handle piracy cases within a short period of time, mandating ISP blocking of pirated sites, and creating a whistleblower reward system. This would directly

address the revenue leakage that undermines both production and distribution. These priorities are realistic, evidence-based, and achievable within 6-24 months with modest public investment.

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 Nigeria, 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] SA-Single Response

2.Kisumu		2.Abuja	2.Cape Town		
3.Mombasa					

What is your name (open end)

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

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

A4. What is your age? SA

1. 18 - 24
2. 25 - 34
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.