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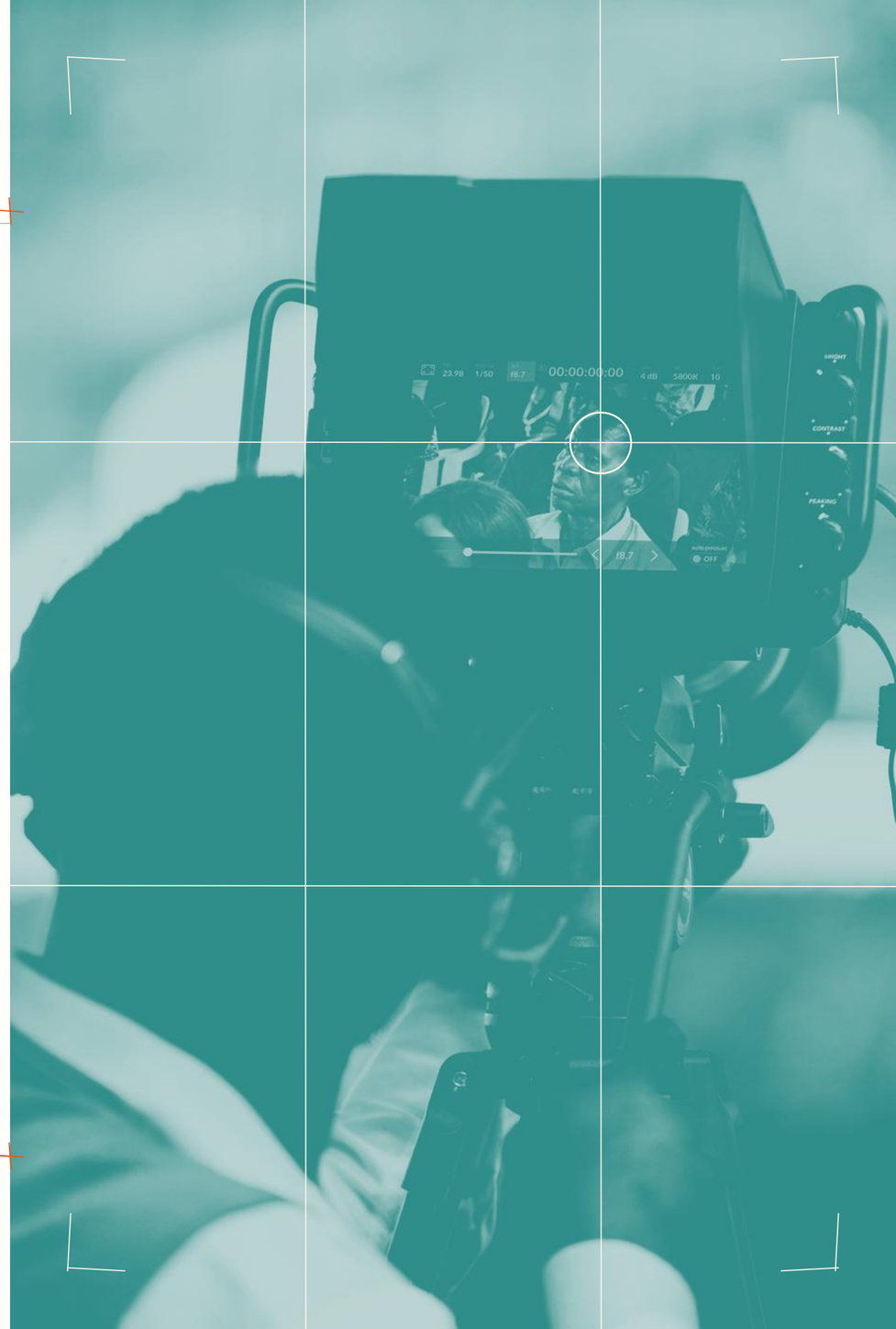
CANEX Creations Inc

Dalberg

MADE IN AFRICA, WATCHED GLOBALLY?

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

November 2026



Executive Summary

Africa does not have a content problem. It has a route-to-market problem.

Audiences want local stories and production is growing, but the systems that turn viewing into revenue (screens, pricing, distribution finance and data) have not kept pace.

Five findings

787,000	people per cinema screen. Routes to paying audiences are narrowing as global streamers pull back.
+212% / −15%	Nigeria box office vs. admissions, 2021–25. Revenue grows by pricing out the mass audience.
3.1%	of monthly income buys 1GB of data. Demand is strong; affordability is the binding constraint.
1 of 6	markets has an operational film tax incentive; distribution finance is almost absent in all six.
9–18%	of viewers want purely escapist content. Film shifts behaviour and policy, but impact is not measured.

Five moves

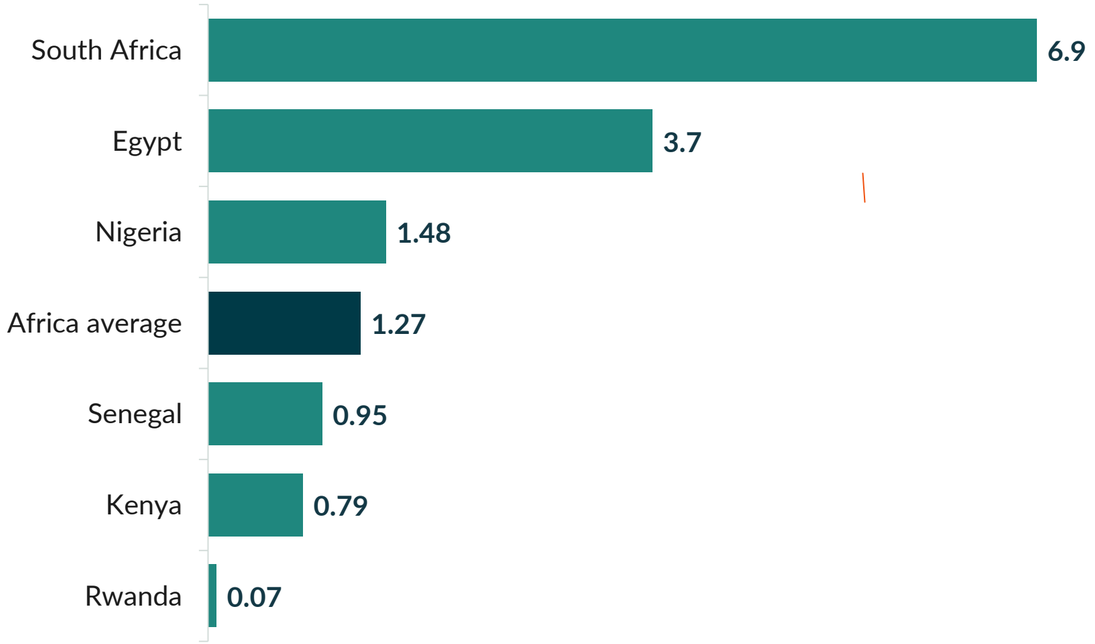
1. **Build the evidence base first**
2. **Fund the last mile of distribution**
3. **Rebuild the missing middle on existing platforms**
4. **Price for African wallets**
5. **Make film an investable asset class**

Source: Dalberg, Made in Africa, Watched in Africa (2026): audience survey (n=1,630), 91 key informant interviews, desk review across six markets.

Finding 1: The Routes to Paying Audiences Are Narrowing

Production is rising, but screens are scarce, buyers are few, and global streamers have pulled back from all but one market.

Cinema screens per million people (United States: 115)



~90x fewer screens per person than the US. Rwanda has one commercial cinema for 14M+ people; 75%+ of Kenya's screens are in Nairobi.

Global streamers have retreated to one anchor market

2016–22 — Netflix invests ~USD 175M across South Africa, Nigeria and Kenya; no originals in Senegal or Rwanda.

2021–24 — Netflix puts ~USD 250M into South Africa alone; Nigeria becomes a licensing market (283 titles).

2024 — Amazon Prime Video stops commissioning African originals, removing a buyer from the mid-budget tier.

Apr 2026 — Showmax closes. Africa loses its "missing middle": 6,500 hours a year of local content in 22 languages.

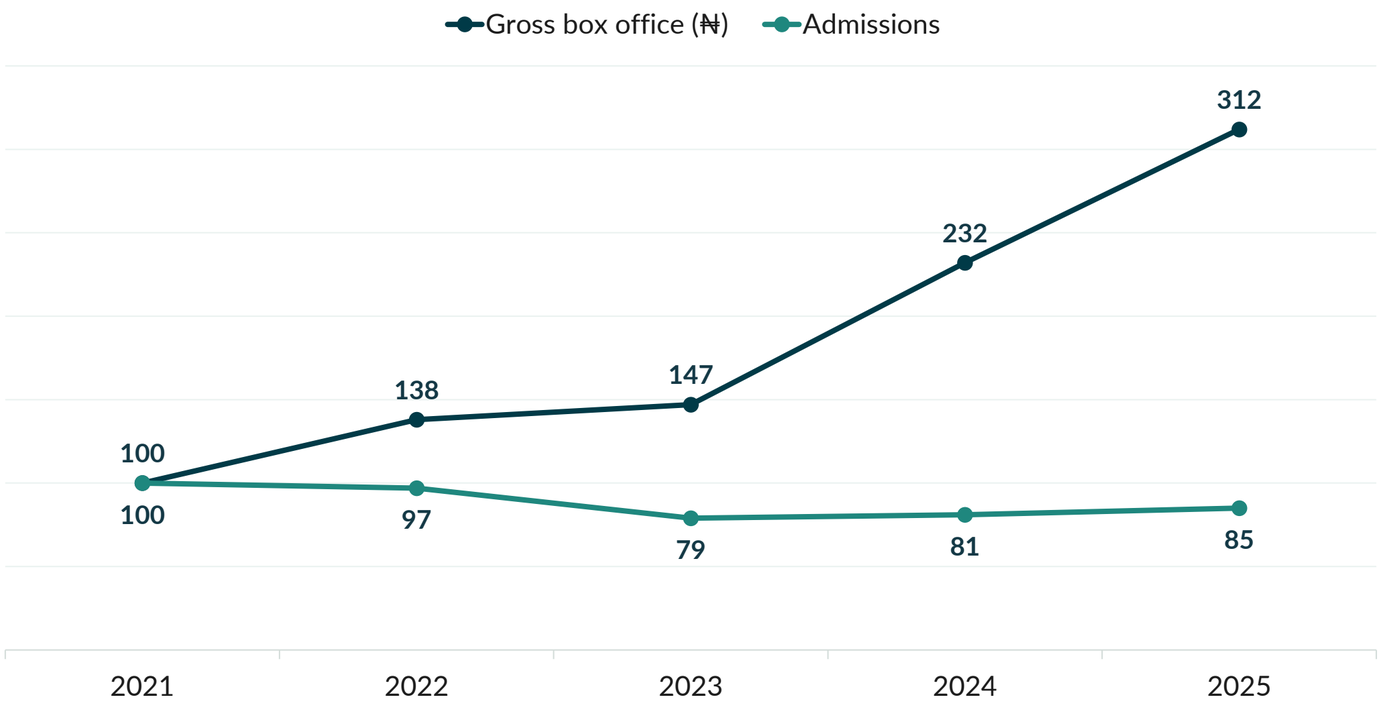
So what: over 90% of Nigeria's classified films never reach a cinema, and most producers sell to a handful of buyers. Prices fall and new entrants are squeezed out.

Source: Report Sections 2.2 and 4.1; UNESCO; Netflix Africa Impact Report (2024); MultiChoice; NFVCB. See slides 16–18.

Finding 2: Box Office Grows by Pricing Out Viewers

In the two largest theatrical markets, revenue and audience reach are moving in opposite directions.

Nigeria: box office vs. admissions (index, 2021 = 100)



So what: exhibitors earn more from a smaller, wealthier urban audience. The mass market, and local films, are being priced out of cinemas.

₦5,596

Nigeria's average ticket price in 2025, up ~270% in five years. Box office reached ₦15.6B while admissions stayed below the 2021 peak.

+14% / −11%

South Africa, 2023: admissions rose 14.2% but box office fell 11.2% to R575M. Audiences came back only at discount prices.

<1%

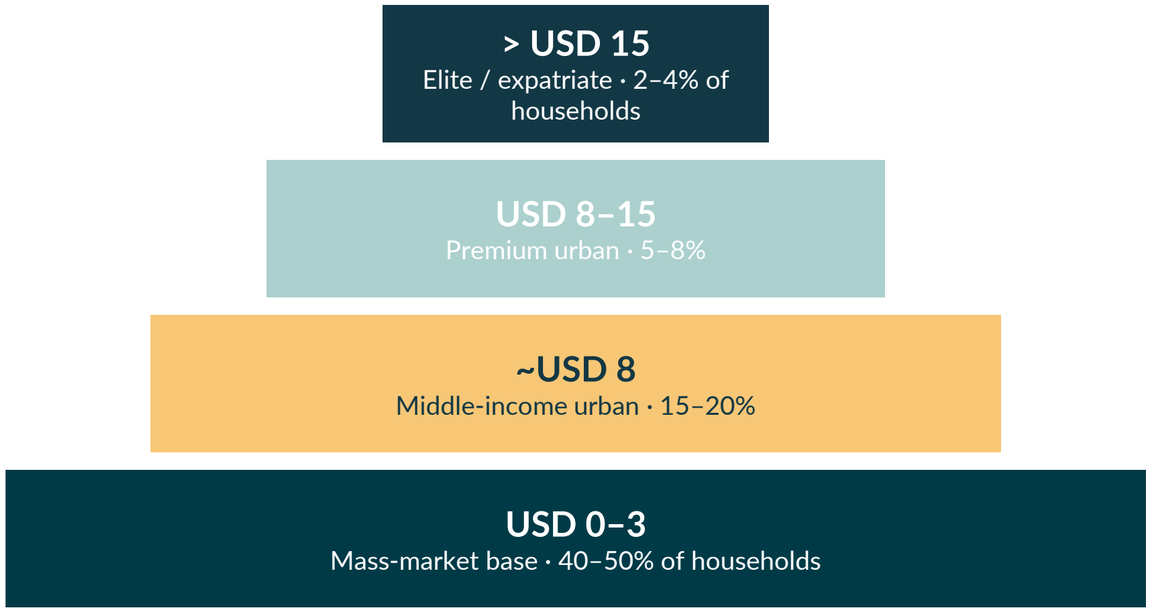
of South African box office went to local titles in 2023, despite making up 3% of releases.

Source: FilmOne Yearbook 2025 (Nigeria, all titles screened); NFVF Annual Report 2024 (South Africa). Report Section 2.3.3; see slide 18.

Finding 3: Demand Is Strong; Affordability Is the Constraint

84% of viewers watch films from their own country, yet most households cannot pay what current models charge.

Household monthly budget for entertainment



Pure subscription (SVOD) models serve the top of the pyramid. The mass market can pay only USD 0–3 a month, which caps SVOD growth.

3.1%

of monthly income buys 1GB of mobile data, above the 2% affordability threshold. Data doubles or triples the real cost of content.

60%+

of streaming subscribers sign up for a single title and cancel straight after.

–1.2M

MultiChoice subscribers lost after a 31% price rise in FY25. Viusasa's USD 0.08 daily pass reaches the mass market.

63%

of Nigerian viewers who use pirated sources say legal options are too expensive. Piracy signals unmet demand.

So what: price, not interest, decides who watches. Daily passes, mobile money and data bundles are the route to scale.

Source: Dalberg audience survey (n=1,630); A4AI; MultiChoice Integrated Annual Report 2025. Report Sections 2.3.2 and 2.3.6; see slides 33–37.

Finding 4: Capital Funds Production, Not Distribution

Financing is uneven across markets and missing almost everywhere at the stage that decides whether a film earns back its cost.

Market	Film tax incentive	How films are mainly financed
South Africa	Operational	35% QSAPE rebate, broadcaster pre-sales, co-productions
Egypt	Not yet operational	Broadcasters; EGP 500M Cinema Revival Plan (2025)
Nigeria	Proposed	Private and self-funded; 25% rebate proposed
Kenya	None	Grants and development partners; Docubox
Senegal	None	FOPICA: critical but chronically underfunded
Rwanda	None	Public investment and partnerships (Canal+)

The gap: almost no money for marketing, subtitling, dubbing, festival access or release, the most consistently cited gap across all six markets.

Investable models already exist

25–40% target returns now attracting private investors to high-end Nigerian productions

19–20% USD returns from the IP assignment model (MBO Capital), which turns film rights into collateral

USD 2B Afreximbank's CANEX facility for the creative economy: institutional capacity now in place

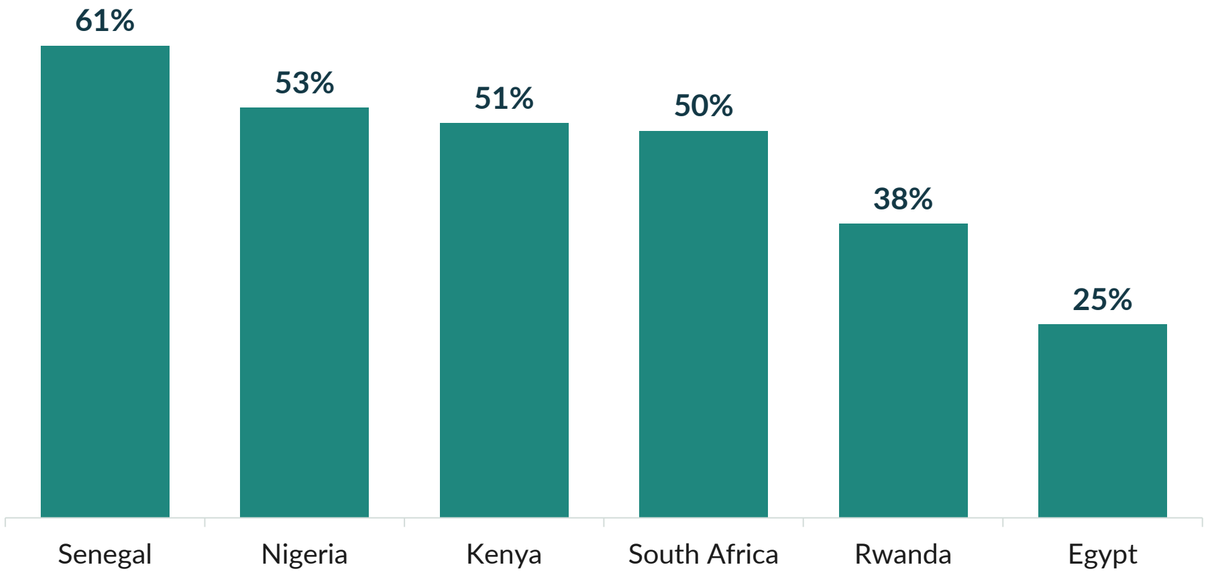
So what: the risk is not production; it is the last mile. Finance that follows the film to audiences unlocks returns.

Source: Report Sections 2.1, 2.5 and 5.3; national film commission and fund reports; key informant interviews. See slides 56–58.

Finding 5: Film Drives Change, but Impact Goes Unmeasured

Socially relevant storytelling is a mainstream expectation: only 9–18% of viewers want purely escapist content.

Interest in “youth opportunity & aspiration” stories (% of viewers)



Youth opportunity is the top-ranked theme in every market; gender equality and governance follow.

Documented outcomes

- **Shuga (KE / NG / SA):** declines in STI and early-marriage rates after broadcast
- **L’utilité et l’attachement (SN):** presidential instructions to compensate displaced communities
- **Le silence des mots (RW):** an 11-year-old closed legal case reopened in France
- **Yaay 2.0 (SN):** more men seeking fertility tests; national advocacy for state support

Impact–commercial trap

Impact funders judge reach, distributors judge box office; social films fail both tests.

No measurement system

No standard way to track behaviour or policy change, so institutional capital stays away.

So what: impact is real but anecdotal. Standard, longitudinal measurement is what turns impact film into an investable proposition. The sector employs ~5M people today, with potential for 20M+.

Source: Dalberg audience survey (n=1,630): D8 (themes); case reviews; UNESCO. Report Sections 2.4 and 5.2; see slides 53–54.

Five Moves to Turn Demand Into a Sustainable Market

	Move	What it means in practice	Who leads
1	**Build the evidence base first**	National and regional film observatories; mandatory box-office and platform reporting as a condition of public incentives; common indicators for reach, revenue and impact.	Governments, film commissions, public film funds
2	**Fund the last mile**	Ring-fenced national and regional distribution funds for marketing, subtitling, dubbing and release; distribution and audience plans required in every funding application.	Public film funds, donors, DFIs
3	**Rebuild the missing middle**	Growth capital and minimum guarantees for mid-budget African titles on existing platforms with proven audiences, tied to local commissioning and data sharing. No new continental platform from scratch.	DFIs, private co-investors
4	**Price for African wallets**	Daily passes, micro-payments and ad-supported tiers on mobile money and carrier billing; data bundles and zero-rating; VAT relief for low-bandwidth local platforms.	Platforms, telcos, regulators
5	**Make film investable**	IP accepted as collateral; slate-level, blended, distribution-linked finance; predictable multi-year incentives; intra-African co-production treaties under AfCFTA.	DFIs (e.g., Afreximbank via CANEX Creations Inc), governments, private investors

Sequencing: move 1 comes first because every other intervention depends on reliable data; moves 2–5 can then run in parallel.

Source: Report Section 6 (Recommendations) and 2.5.4; see slides 51 and 63.

What This Means for Afreximbank, GIZ and Partners

DFIs, incl. Afreximbank

- Back existing platforms, distributors and exhibitors with proven audiences; avoid financing new platforms from scratch
- Use blended, slate-level, distribution-linked instruments and accept IP as collateral
- Fund shared infrastructure as public goods: payment rails, cross-border settlement, rights registries, audience measurement

Development partners & donors, incl. GIZ

- Shift from single-film grants to ecosystem investment in distribution, audience engagement and data
- Fund impact distribution, local-language subtitling and impact measurement as separate budget lines
- Protect editorial independence; structure impact funds to crowd in private capital

Governments & regulators

- Harmonise classification and licensing through AfCFTA
- Replace production quotas with enforceable screen-time and catalogue obligations
- Make incentives predictable and conditional on audience data; pair piracy enforcement with affordable legal access

Platforms, broadcasters & telcos

- Offer daily passes, micro-payments and ad-supported tiers on mobile money
- Bundle content with data or zero-rate access
- Commission mid-budget local titles, curate African collections and share performance data with producers

The opportunity: a USD 5B sector with the potential to reach USD 20B and 20M+ jobs. Coordinated action on data, distribution finance and pricing is what moves it.

Source: Report Section 6.5 (Recommendations by stakeholder); UNESCO.

Study Background

African filmmaking in Africa is vibrant but under-resourced. **UNESCO** estimates the sector currently contributes about **US$5 billion to Africa's GDP and employs ~5 million people**, with potential to reach US$20 billion and 20 million jobs if constraints are eased.

Piracy still erodes an estimated 50–75% of revenues, and only 44% of African countries have a film commission or coherent film policy; gaps that hit African films hardest.

The reach of African films and their contribution to national and international discourses face several challenges.

On the sales side, a lack of technical expertise and a lack of international networking are the main deficits. In addition, the focus is mostly on **commercial films, and "African", socially oriented film productions** are at a disadvantage, although there is an emerging segment in the form of social impact producers.

Still without sufficient access to sources of financing and with a wealth of experience in marketing campaigns still developing, there is great potential for the dissemination of new African narratives.

At the level of the filmmakers themselves, the lack of data on viewer preferences makes it difficult to develop films in a target group-oriented manner.

The African Export-Import Bank, commonly known as **Afreximbank**, has emerged as a strategic champion for Africa's creative economy, including film, music, gastronomy and culinary arts, literature, fashion, sports and visual arts, through its **Creative Africa Nexus (CANEX)** initiative.

Launched in 2020, CANEX initially pledged US $500 million, doubled to a US $1 billion facility by late 2022, and increased to **US $2 billion in 2024**, earmarked for the creative economy.

Study Background

As a service provider in the field of international cooperation for sustainable development and international education work, the Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) GmbH works with its partners to deliver effective solutions that offer people better prospects and sustainably improve their living conditions.

As a federal enterprise, **GIZ supports the German Federal Government** and many other public and private clients **in a wide variety of areas**, including economic development and employment promotion, energy and the environment as well as and peace and security.

Africa has roughly 1,500 cinema screens—about one per **~790,000 people—so theatrical options** for independents are scarce.

South Africa leads in screen infrastructure regionally and tracks box-office closely, but local indies still compete with Hollywood for showtimes.

Entertainment in Senegal, audience preference and pricing often favor big-budget imports over national productions, limiting local runs.

Most reports suggest a **growth trajectory** with annual double digit growth rates predicted for streaming platforms.

The Covid pandemic accelerated the digital adoption in Africa, further boosting streaming consumption.

The African streaming market is growing, with international brands investing heavily and regional platforms thriving through local content and affordability.

Regional platforms cater to underserved markets, offering affordable options and localized content.

Strategic Context & Research Objectives

The Why

Africa's combined Pay TV + OTT market projected to grow from USD 4.3B (2025) to USD 5.2B by 2030

Africa's combined Pay TV + OTT market projected to grow from USD 4.3B (2025) to USD 5.2B by 2030

Nigeria produces 1,000+ films p.a. - 2nd globally after India - yet 93% of classified titles never reach a cinema screen

1 screen per 787,000 people vs. 1 per 8,700 in the United States

Production growth is NOT matched by proportional expansion in distribution & monetisation

A persistent 'Value Gap' exists: disconnect between creative potential and commercial sustainability

Near-total absence of centralised industry data creates an 'Evidence Gap', deterring institutional capital

Research Objectives

1 **Map Distribution Landscape**
Identify key channels, emerging models & bottlenecks across Egypt, Kenya, Nigeria, Rwanda, Senegal & South Africa

2 **Analyse Audience Development**
Understand patterns of access, platform use, and engagement across 1,630 surveyed viewers

3 **Assess Social Impact Films**
Review financing structures, marketing campaigns and audience preferences for social-purpose content

4 **Map Film Financing Ecosystem**
Document successful investment models including IP assignment, blended finance & public incentives

5 **Opportunities and Priority Areas**
Surface business models and partnerships that can strengthen the continental ecosystem

MARKET CAGR BY COUNTRY (2025–2030): Egypt 5.3% | Kenya 5.5% | Nigeria 5.9% | Rwanda 4.9% | Senegal 5.1% | South Africa 6.8%

Research Design & Methodology

Secondary Research

Literature review of distribution barriers, financing gaps & market access challenges

Industry databases: NFVCB catalogues (2021-2025), GMI Pay TV / OTT, KFCB, NFVF, El-Cinema, IMDb and Lumiere projections

Box office aggregates from FilmOne Yearbook, NFVF, elcinema.com, Box Office Mojo

Social media & YouTube engagement metrics (Marodi TV, Zacu TV etc.)

Film commission reports, festival sales catalogues, Comscore theatrical data

Key Informant Interviews (KIIs)

91 total interviews across 7 geographies

Countries:

- Kenya: 16
- Rwanda: 13
- Nigeria: 15
- South Africa: 16
- Egypt: 13
- Senegal: 14
- Germany: 4

Stakeholder types: filmmakers, distributors, streaming platforms, funders, government agencies, ecosystem partners

Focus: barriers, platform decision-making, distribution economics

Audience Survey (Quantitative)

1,630 total respondents across 6 markets:

- Kenya: 304
- Nigeria: 304
- South Africa: 434
- Egypt: 213
- Senegal: 210
- Rwanda: 165

Cluster analysis: 4 psychographic and behavioural audience segments

Dimensions: viewing habits, platform use, willingness to pay, content preferences

Case Studies

5 case studies with:

- Goree Cinema (Senegal)
- Kalista Production (Senegal)
- Between Women Filmmakers Caravan (Egypt)
- Searching for Amani (Kenya)
- MBO Capital IP Model (Nigeria)

SECTION 2

Cross-Market Comparative Analysis

Egypt · Kenya · Nigeria · Rwanda · Senegal · South Africa



TOPIC A: Film Distribution · TOPIC B: Audience Development · TOPIC C: Social Impact · TOPIC D: Financing & Enabling Environment
TOPIC E: Opportunities

Film Distribution

Topic A



Cross-Market Physical Infrastructure & Screen Deficits

Country	Cinemas	Screens	Screens per Mn Pop.	GBO 2025 or last reported (USD)	Admissions 2025	Avg. Ticket (USD)
Egypt	140	437	3.70	USD 37M	14.3M	USD 3.50
Kenya	14	45	0.79	USD 386K	-	USD 5.00
Nigeria	118	352	1.48	USD 10.4M	2.8M	USD 4.00
Rwanda	1	1	0.07	-	-	USD 1.80
Senegal	8	18	0.95	-	-	USD 8.50
South Africa	69	450-500	6.9-7.7	USD 30.1M	5.4M	USD 4.20

Rwanda
1 screen for 14M+ people - total exhibition collapse following Canal Olympia Rebero closure (late 2025)

Egypt / Senegal
90% of Egyptian screens in Cairo & Alexandria. 83% of Senegal's 18 screens in Dakar - geographic monopoly

Kenya
75%+ of 45 screens are concentrated in Nairobi. Kisumu, Eldoret and Mombasa have one screen each. Nakuru and other regional cities have zero formal screens

South Africa
33% reduction in major cinema sites between 2015–2025; closures concentrated in lower-priced regional venues

US benchmark: 1 screen per 8,700 people | Africa average: 1 screen per 787,000 people

Cross-Market Digital Transition & Platform Economics

PAY TV & OTT SUBSCRIBERS + YOUTUBE USERS (2025)

Country	Pay TV Subs (Mn) [% pop]	OTT Subs (Mn) [% pop]	YouTube Users (Mn) [% pop]	CAGR to 2030
Egypt	5.1M [4.5%]	4.93M [4.2%]	49.3M [41.5%]	5.3%
Kenya	1.7M [3.0%]	0.75M [1%]	12.1M [20.9%]	5.5%
Nigeria	8.2M [3.5%]	2.28M [1%]	30.5M [12.8%]	5.9%
Rwanda	0.4M [3%]	0.23M [1.6%]	1.35M [9.2%]	4.9%
Senegal	0.55M [3%]	0.15M [1%]	5.42M [28.5%]	5.1%
South Africa	6.7M [10.5%]	3.42M [5.4%]	26.9M [41.4%]	6.8%

SVOD vs. AVOD SPLIT: YouTube (AVOD) leads by audience reach in ALL 6 countries. SVOD commands a smaller but higher-value segment. Egypt most SVOD-committed (4.93M OTT subs = 4.2% of pop).

Local Platform Primacy

EG
- Arabic platforms led by SHAHID VIP (2.15M subs) and WATCH iT (1.25M) hold ~88% of paid OTT
- YouTube = 59% of users from audience survey
- Strong preference for Arabic-language SVOD

KE
- 'Kadogo' economy: Viusasa offers KES 10–20 (USD 0.08–0.15) 24-hr rentals
- OTT growing at 14% CAGR vs. Pay TV 1.6%

NG
- Kava (780K users) leads local pay-per-view.
- 93% of NFVCB-classified films skip cinema for digital or informal channels.

SN
- MARODI TV: 8.67M YouTube subscribers, 4.6B views. 40% diaspora viewership (France + other African nations)
- YouTube-first, ad-supported model with no paywall

RW
- ZACU TV: Evolved YouTube → niche VOD → Canal+ 100%. Kinyarwanda channel
- Blank-slate market: hyper-localisation model

SA
- AVOD/FAST accounts for 55.2% of OTT market (4.22M users)
- Showmax CLOSED April 2026 (Canal+ USD 2B acquisition)
- Netflix invested USD 250M in SA content (2021-2024)

Revenue vs. Admissions Paradox & Global Streamer Retraction

The Pricing–Admissions Paradox

Nigeria 5-Year Metrics (all titles screened, local + foreign):
2021: ₦5B GBO | 3.3M admissions | ₦1,512 ATP
2022: ₦6.9B | 3.19M | ₦2,163 ATP (+43%)
2023: ₦7.36B | 2.60M | ₦2,825 ATP (+31%)
2024: ₦11.6B | 2.67M | ₦4,341 ATP (+54%)
2025: ₦15.6B | 2.80M | ₦5,596 ATP (+29%) | 83 Nollywood titles

South Africa 2023: admissions +14.2% (7.3M -> 8.3M) but GBO fell -11.2% to R575M - audiences returning via deep discounts only. In 2024 (246 titles, 18% local): GBO dropped further to R549.3M; admissions fell 34.5% to 5.4M

Egypt: 14.3M admissions; 60%+ of GBO captured by local films (top: Siko Siko at USD 3.7M). Saudi Arabia earned Egyptian films USD 53M in 2024 - double domestic box office.

Nigeria ATP Surge

₦5,596

Average ticket price 2025

↑ 270%

over 5 years

Multichoice Subscriber Loss

-1.2M

linear subs lost (8% drop)
FY2025 triggered by

+31%
price hike

to offset USD 293M FX loss

YoY Change 2025 (Nigeria: +34.7% revenue vs +4% admissions)
(S. Africa 2024: admissions −34.5%, revenue −4.5%.)

Streamer Retraction Impact by Market Tier

Platform	Egypt	Kenya	Nigeria	Rwanda	Senegal	S. Africa
Netflix	No Originals	2 Originals (historic)	3 Originals + 280 licensed	None	None	16 Originals · USD 250M (2021-24)
Amazon Prime	None	None - Paused 2024	Gangs of Lagos only - Paused 2023	None	None	Paused 2023
Showmax	None	12 Originals in 2024. CLOSED Apr 2026	High - CLOSED Apr 2026	None	None	Largest base - CLOSED Apr 2026

MultiChoice Group (Showmax's parent) produced 6,500 hrs. of local content p.a. across 22 languages, held a library of 84,871 hrs., and generated ZAR 20.9B (~USD 1B) in revenue. Showmax was the primary continental distribution vehicle for this pipeline, and its closure removes that access layer entirely.

Audience Segmentation

Topic B. Part 1



A tech-savvy, higher-income audience that actively streams both African and international films, values high-quality storytelling, and drives local film discovery.

Dimension	SEGMENT 1: PREMIUM HYBRID VIEWERS
Segment distribution	n = 411 (25%)
Gender	Mixed gender 53% male and 47% female
Age distribution	Mixed age distribution with a strong representation of 25 – 44 years – 67%
Content preference	Watches both African (Local – 88% and regional – 79%) and international films – 84%, but with a strong preference for local content.
Top genres	Highly drawn to action - 76%, drama – 65% and documentary – 64%
Primary device	Smartphone / Tablet – 67%
Main platforms	Uses mainly YouTube – 83% and Netflix – 63%
Fallback option	Free-to-air TV - 37%
Main motivations	Entertainment (70%), High-Quality Storytelling (67%), Education (45%)
Key barriers - Local/African content	High cost of subscriptions – 31% and Lack of awareness about new releases – 29%
Median spend	~$10.10 per month on streaming (Average 2 paid streaming platform); cinema Willingness To Pay ~$7.00
Net Promoter Score	The NPS for African local films is +10%, indicating a moderate audience advocacy
Growth triggers	Better content recommendations and discovery, Higher-quality original African films productions, More reliable offline download features

This segment represents digitally connected audience who are among the most engaged film consumers in the market. They are slightly male-skewed (53%), concentrated in the 25–44 age group, and most commonly found in South Africa, Nigeria, Kenya, and Senegal

Despite their global viewing habits, local content is highly valued. Over half (56%) say local films are very important, and 47% strongly value representation on screen. Encouragingly, 56% believe the quality of local films has improved significantly, suggesting growing confidence in the industry

However, several barriers still affect their viewing. Cost (31%), awareness of available films (29%), data/internet limitations (26%), and perceived production quality gaps (25%) remain the main constraints.

A female-leaning, TV-first audience that prioritizes local African films, strongly advocates for local storytelling, and engages mainly via free or satellite TV

Dimension	SEGMENT 2: AFRO-LOYAL MAINSTREAMERS (TV FIRST)
Segment distribution	n = 508 (31%)
Gender	64% female skewed
Age distribution	Mixed age distribution with a strong representation of 25 – 44 years – 64%
Content preference	Dominant preference for local content – 96%.
Top genres	Highly drawn to drama and comedy at 64% each
Primary device	Smart TV – 48%
Main platforms	Uses mainly YouTube – 74%
Fallback option	Free-to-air TV - 59%
Main motivations	Entertainment (68%)
Key barriers - Local/African content	High cost of subscriptions – 26% and Data/connectivity – 21%
Median spend	~$6.70 per month on streaming (Average 1 paid streaming platform); cinema Willingness To Pay ~$3.50
Net Promoter Score	The NPS for African local films is +30%, indicating a moderate audience advocacy
Growth triggers	More reliable offline download features, 'Free with ads' tiers on major platforms, Higher-quality original African films productions

This segment is a predominantly female audience with a strong and consistent preference for local and African content. They are defined by their TV-first behavior. Unlike more digitally driven segments, they rely heavily on traditional viewing channels such as Smart TVs, free satellite TV, and Pay TV, with comparatively low engagement on mobile devices and streaming platforms.

Behaviorally, they are more passive than other segments. A significant portion does not actively search for new content, instead relying on scheduled programming or familiar sources. While they are likely to recommend content they enjoy, they are also the most likely to take no further action after viewing, reflecting a habitual rather than exploratory consumption style.

Overall, they are the core audience for local content, engaged, and highly receptive to culturally resonant storytelling. Winning with this segment requires prioritizing accessible distribution channels (especially TV), maintaining a strong pipeline of relatable, feel-good local content, and reinforcing cultural authenticity over technical sophistication.

Younger, family-oriented viewers who primarily watch on mobile devices, value both local and international content, and are highly influenced by language and subtitles.

Dimension	SEGMENT 3: FAMILY SHARING, MOBILE FIRST
Segment distribution	n = 350 (21%)
Gender	Mixed gender 55% female and 44% male
Age distribution	Mixed age distribution with a strong representation of 25 – 44 years – 67%
Content preference	Watches both African (Local – 76% and regional – 42%) and international films – 99%, but with the strongest preference for international content.
Top genres	Highly drawn to drama – 59% and comedy at 55%
Primary device	Smartphone / Tablet – 68%
Main platforms	Uses mainly YouTube – 77% and Netflix – 55%
Fallback option	Free-to-air TV - 49%
Main motivations	Entertainment - 68%
Key barriers - Local/African content	Data/connectivity - 20%
Median spend	~$9.60 per month on streaming (Average 2 paid streaming platform); cinema Willingness To Pay ~$5.40
Net Promoter Score	The NPS for African local films is +2%, indicating a moderate audience advocacy
Growth triggers	Better content recommendations and discovery, Higher-quality original African films productions, More reliable offline download features

This segment represents family-oriented viewers who consume content in shared household environments, with a strong reliance on mobile devices. Smartphones dominate as the primary viewing device, while Smart TV ownership and usage are comparatively lower. Their content preferences are broad and inclusive, with a strong inclination toward both international and local films.

Cost and discoverability are less of a concern, though data usage and occasional production quality issues still play a role. Despite favorable perceptions, their Net Promoter Score for local content is mixed, indicating that while expectations are being met in some areas, there is still room to strengthen loyalty and advocacy.

Overall, they are high-volume, multi-user consumers who value accessible, relatable, and family-friendly content. Winning with this segment requires optimizing for mobile experiences, supporting shared viewing, and investing in language accessibility, while continuing to deliver culturally relevant and educational storytelling that appeals across age groups.

A globally-oriented audience focused on high-quality acting and production, willing to pay, rent, or pirate content, and driven by technical excellence.

Dimension	SEGMENT 4: ACTION FIRST QUALITY CHASERS
Segment distribution	n = 361 (22%)
Gender	Mixed gender 54% male and 46% female
Age distribution	Mixed age distribution with a strong representation of 25 – 44 years - 70%
Content preference	Watches both African (Local – 73% and regional – 27%) and international films – 92%, but with a strong preference for local content.
Top genres	Highly drawn to action - 72%, drama – 65% and comedy - 54
Primary device	Smartphone / Tablet – 73%
Main platforms	Uses mainly YouTube – 76% and Netflix – 50%
Fallback option	Free-to-air TV - 36%
Main motivations	High-Quality Storytelling – 73%, Entertainment (70%) and Recommendation from friends/family (67%)
Key barriers - Local African content	Unengaging storylines – 34%
Median spend	~$9.60 per month on streaming (Average 1 paid streaming platform); cinema Willingness To Pay ~$7.00
Net Promoter Score	The NPS for African local films is +9%, indicating a moderate audience advocacy
Growth triggers	Better content recommendations and discovery, Higher-quality original African films productions, More reliable offline download features

This segment is a digitally savvy audience that prioritizes high-quality, fast-paced storytelling particularly in action and drama genres. They are heavy mobile-first consumers, with near-universal smartphone ownership and strong adoption of Smart TVs and laptops. Their viewing behavior is platform-agnostic and convenience-driven, with high usage of mainstream platforms like YouTube and Netflix, alongside the highest engagement with pirated sites.

While they consume both local and international films, they show the strongest tilt toward international-only content, alongside a balanced appreciation for both American and local productions. European content also holds relatively higher appeal within this segment.

Overall, they represent a high value but demanding audience. To capture and retain them, content providers must deliver cinematic-quality productions, compelling narratives, and strong talent, supported by effective discovery and distribution strategies.

Deep Dive into Audience Development

Topic B, Part 2



The 6-country Market Matrix

	Kenya	Rwanda	Nigeria	South Africa	Egypt	Senegal
Dominant channel	Streaming 81%	Streaming 89%	Streaming 81% / TV 65%	TV 62% / Streaming 59%	TV 96%	Streaming 85% / TV 74%
Primary barrier	Connectivity/Data (37%)	Cost (41%)	Storylines not engaging (28%)	Cost (31%)	No major barrier (36%)	Discoverability (28%)
Audience NPS	-46 (Quality crisis)	+1 (Neutral)	+29 (High advocacy)	+41 (Enthusiastic)	+54 (Enthusiastic)	-3 (Neutral)
Opportunity signal	Telco bundling (25%)	Price-sensitivity fixes	Storytelling investment	Affordable plans (50%)	Ad-tier ready (36%)	Issue-driven viewing (61%)

Egypt is 96% TV-Led. Streaming (mostly free YouTube) leads in four markets; TV leads in Egypt (96%) and South Africa (62%). Cinema is the main channel for only 5–11% in most markets.

Source: B2 (main viewing platforms, multi-select, % of respondents); E2 (biggest barrier, top answer per country); F3 (Net Promoter Score); H2 (what would make viewers more willing to pay) and D8 (social-impact themes) for the opportunity signal. Country bases: Kenya 304, Rwanda 165, Nigeria 304, South Africa 434, Egypt 213, Senegal 210.

The Industry Paradigm Shift & Mapping the Demand Engine

The industry assumption: we need to persuade African audiences to watch more local content

84%

44% Cross-Border

Audiences overwhelmingly consume their own nation's content (B1: 84%), while 44% also watch films from other African countries (B1: 725/1,630).

QB1

46%

Of streamers who use piracy at all, say it's their primary method.

QC1.8

35%

Cite educational / social-issue learning as a primary motivation.

QD7

African audiences want their own stories. The true investment opportunity lies in discoverability and monetization. Audiences will not watch a film just because it is African, they need high-quality entertainment layered with cultural relevance

The Retention Drivers

ENTRY POINT	Entertainment and star power are the initial hooks
RETENTION	Cultural identity and relatable storytelling sustain engagement
DEEP ADVOCACY	Social learning and word of mouth drive recommendation

Formal Vs. Social Discovery

Among people who watch films on social media, Facebook leads in Nigeria (83%), South Africa (76%) and Egypt (75%). TikTok leads only in Kenya, Rwanda and Senegal

Platform algorithmic recommendations influence only a small minority of viewers

Gen Z & Millennials spend 40-60% of viewing time on short-form video (data cost: 20-25x cheaper than long-form)

Over 82-93% of discovery is through social/peer channels, not marketing or institutional signals

Awards influence 34-54% of viewers across the 6 markets

Source: B1 ("Which types of films do you watch?", n=1,630); C1.8 ("How often do you use unofficial or pirated websites/apps?", n=143 streamers who reported any piracy use); D7 ("What are your PRIMARY motivations for watching films?", n=1,630); F2 (post-viewing activities). n=1,630.

Campaigns cannot rely on paid media. They require theme message fit (Youth Opportunity) and community ambassador seeding to ignite word-of-mouth networks

>60%
Egypt population under 35

74%
Mobile internet traffic (peak markets)

57%+
SVOD viewing via smartphone

THE MARKETING REALITY

Formal advertising (OOH, radio, cinema ads combined) reaches under 15% of the audience

YOUTH OPPORTUNITY

The single strongest cross-country anchor theme for development-financed content (D8: 48% total), Peaks at 61% in Senegal, 53% in Nigeria

PLATFORM POWER

31% rely on platform curation to discover films, 47% actively demand platforms improve trailers for African content.

THE DISCOVERY ENGINE

73% rely primarily on word of mouth (friends/family) to hear about new films.

Family content functions as adult content acquisition.
47% of households share devices for watching films , and the Smart TV is the device shared most often -by 63% of device-sharing households . Investing in high-quality children's and family programming captures the entire household's viewing block

ADULT SOLO VIEWING

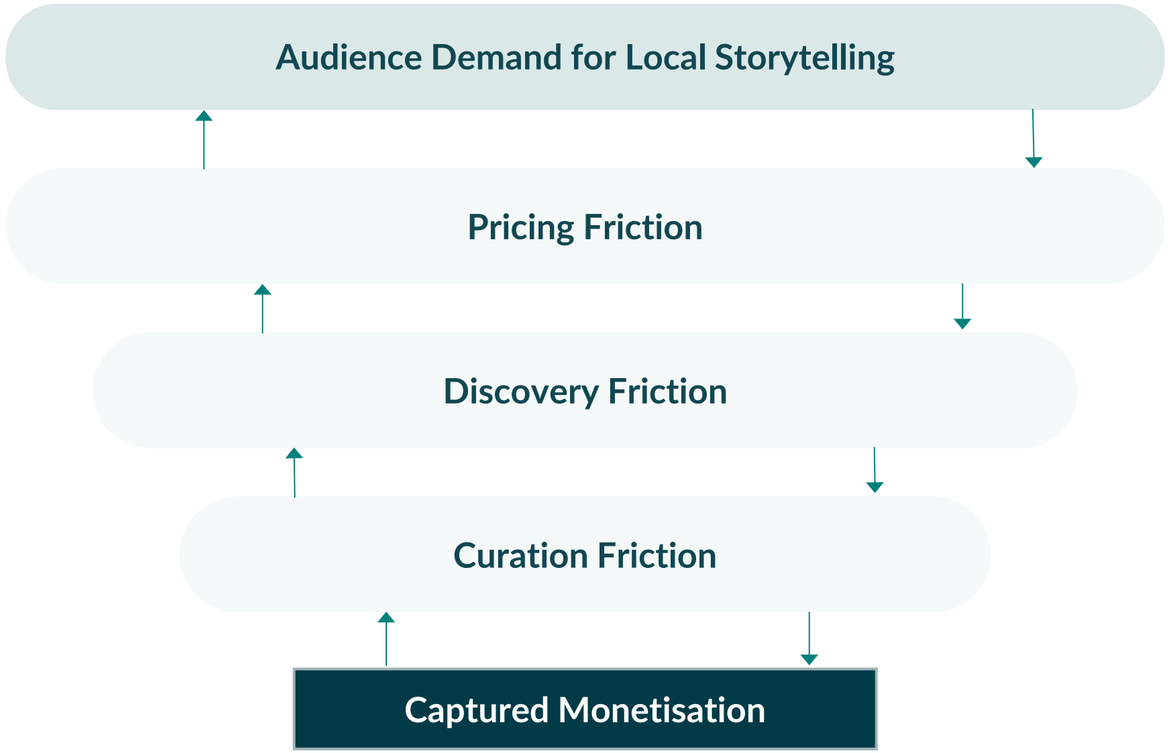
Motivated by specific social themes, complex narratives, and personal screen use (smartphones/laptops). Highly fragmented consumption.

FAMILY CO-VIEWING

Over 30% of audiences in South Africa and Egypt actively seek family-friendly, co-viewing content. Co-viewing is the norm.

Source: D8 ("Which social impact themes would you be MOST interested in?", n=1,630); D6 (discovery channels); H3 ("How can streaming platforms improve...", 46.6%≈47%).
D7 (motivations, "Family friendly and for kids": Kenya 13.8%, Rwanda 24.8%, Nigeria 29.9%, South Africa 33.4%, Egypt 32.4%, Senegal 15.7%); A14/A15 (device sharing, n=1,630 / n=1,161).

The Distribution Disconnect



Pricing Friction

Rigid, premium-only subscription models do not match local wallet realities. Overall cost was cited as the biggest barrier by most of the respondents (23%) Rwanda having most of the respondents at 41%

Discovery Friction

While 55% of the audience cited, they usually hear /know about films via Social media, formal marketing reached <15% of the audience, this is OOH -12%, Media advertisement - 8%. 73% of the audience rely on friends and family to hear about new films, because paid discovery infrastructure basically isn't much appreciated.

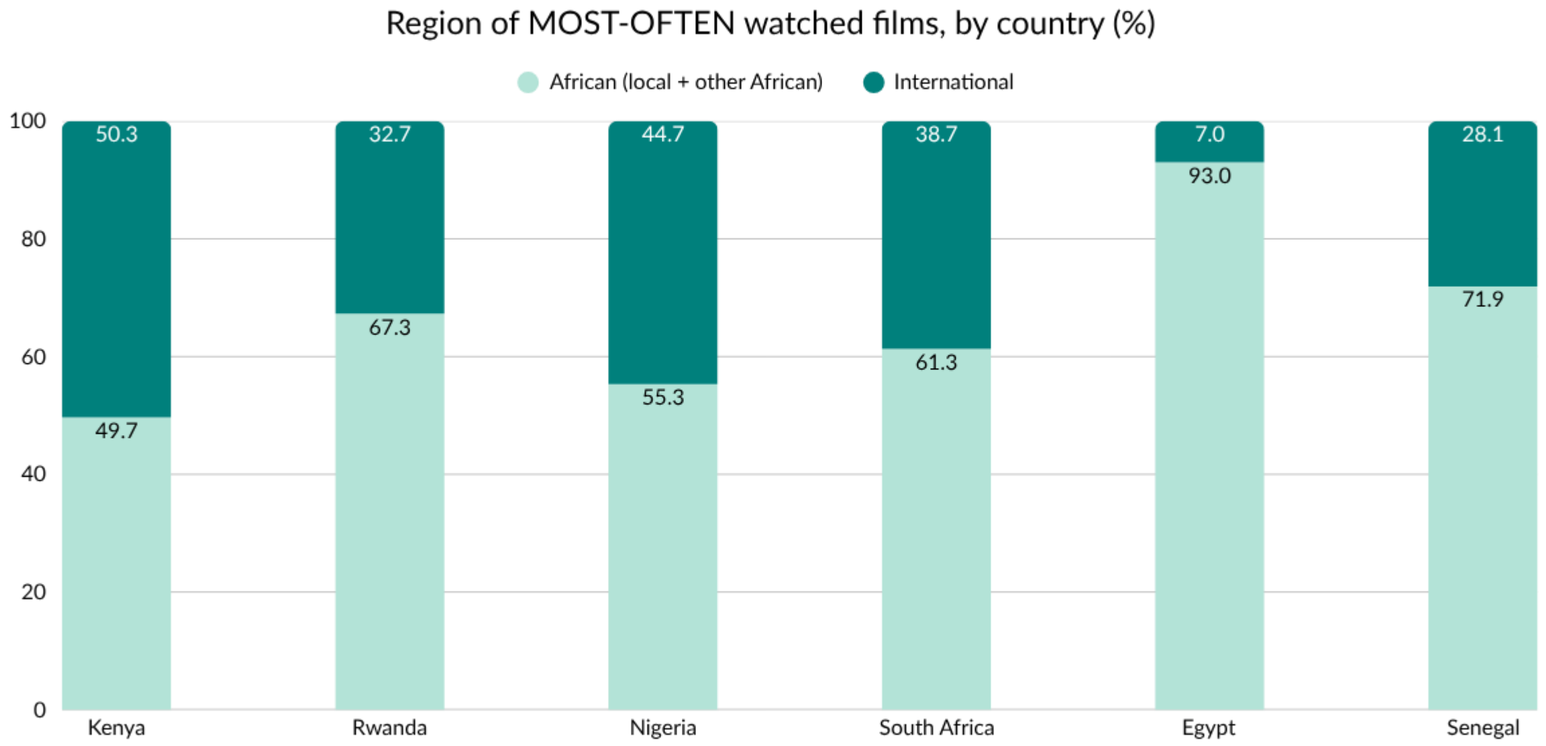
Curation Friction

Algorithms under-recommend local content; platforms fail to surface African titles to audiences actively searching. 54% and 47% of the audience recommended that streaming platforms could invest in more high-quality African original series and films as well as ***improve marketing and trailers for African content***, respectively. 40% of the audience cited better use of social media and influences to promote new releases was the most important thing that could be done to make it easier to discover and watch African films.

The common thread across Cinema, TV, and Streaming is friction. Legal channels have failed to align with where audiences actually live and how they wish to transact. Closing the gap between distribution design and audience reality addresses all three friction points at once

E2 (pricing barriers); D6 (discovery - formal marketing reaches <15%); H3/H4 (curation - 47% want better platform curation of African titles). n=1,630.

Cross-Viewership: Local/African vs. International, by Country



Source: General Film Consumption Habits tab, B1a ("And from which region is your MOST OFTEN watched films produced?"). Base: n=1,630 (country n=165–434)

Most local-loyal

Egypt: 93% most-often watch African (overwhelmingly own-country) films - the strongest local-content loyalty of any market.

Most internationally-leaning

Kenya: the only market where international content (50%) edges out African content (50%) as the most-often-watched region.

For stakeholders

Financiers: Kenya is the highest-risk market for international-content displacement - pair any content investment there with the quality fixes flagged on its country profile.

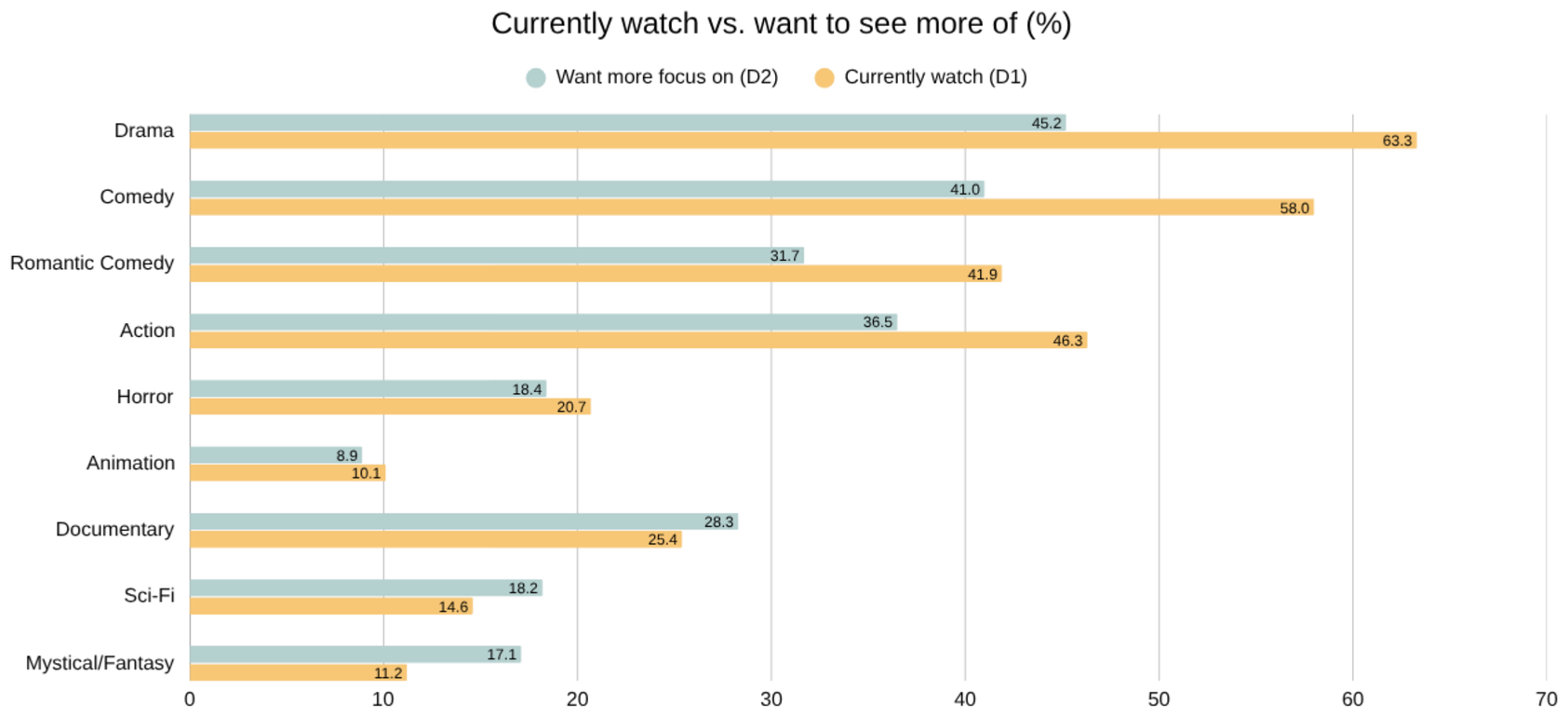
Genre Preferences, by Country

Genre	Kenya	Rwanda	Nigeria	South Africa	Egypt	Senegal	Total
Drama	66%	35%	72%	68%	76%	47%	63%
Comedy	62%	49%	57%	43%	79%	72%	58%
Action	39%	33%	57%	57%	44%	35%	46%
Romantic comedy	38%	39%	48%	36%	55%	40%	42%
Documentary	32%	13%	31%	35%	1%	23%	25%
Horror	12%	2%	31%	31%	17%	17%	21%
Mystical / fantasy	11%	6%	16%	14%	3%	10%	11%
Animation / cartoons	11%	5%	15%	12%	7%	7%	10%
Sci-Fi	19%	6%	19%	13%	1%	27%	15%

Documentary ranges from 35% (South Africa) to just 1% (Egypt). Horror is embraced in Nigeria/South Africa (31% each) but nearly absent in Rwanda (2%). Romantic comedy ("chick flick") peaks in Egypt (55%), lowest in South Africa (36%). Comedy dominates Egypt (79%) far above South Africa's 43%.

Source: Content, D1 ("What genre of films do you watch?", multi-select). Base: n=1,630 (country n=165–434)

Genre Demand Gap
What's Watched vs What Creators Should Make



White-space opportunities

Mystical/Fantasy (+5.9pp), Sci-Fi (+3.6pp) and Documentary (+2.9pp) are the only genres where desire outpaces current viewing - genuine under-served demand for creators to target.

Oversaturated

Drama, Comedy, Romantic Comedy and Action are widely watched but show the largest negative gaps - still valuable, but less differentiated for new investment.

Source: Content Preference tab, D1 (currently watch) vs. D2 ("And which ones would you like to see focus on?"). Both n=1,630, gap = D2 − D1.

Household Spend Across Channels

Channel (median)	Kenya	Rwanda	Nigeria	South Africa	Egypt	Senegal	Total
Cinema, per visit	$6.24	$6.90	$7.20	$12.10	$3.25	$9.00	**$7.11**
Streaming, per month	$7.80	$6.90	$6.12	$17.92	$3.15	$9.54	**$9.00**
TV subscription, per month	$8.77	$6.21	$6.12	$19.20	$2.10	$9.00	**$9.00**
Video rental, per video	$0.23	$0.14	n/a	$6.40	n/a	n/a	**$0.23**
Festival / screening, per visit	$1.95	$3.45	$1.44	$13.44	n/a	n/a	**$3.45**

**n/a: sample too small or question not applicable in that market (see Data Appendix for base sizes).*

South Africa spends the most across every paid channel (cinema $12.10, streaming $17.92, TV $19.20) -a genuinely premium, monetisable market end-to-end.
Egypt spends the least across every channel (cinema $3.25, streaming $3.15, TV $2.10) despite near-universal engagement -a high-volume, low-value market that needs ad-funded models, not higher price points.
Mobile data spend and YouTube were not captured as direct spend questions -YouTube is predominantly free/ad-supported, and mobile data cost is best read through the connectivity barrier (E2: 37% in Kenya) rather than a spend figure.

Source: Cinema (Mainstream & Makeshift) tab, C2.4; Platform Specific Modules tab, C1.6; TV-Broadcasting Stations tab, C5.6; Video Rentals tab, C4.5; Film Festivals & Screening tab, C3.5. All medians, USD.

Streaming Platform Landscape, by Country

Platform	Kenya	Rwanda	Nigeria	South Africa	Egypt	Senegal
YouTube	87%	74%	77%	61%	59%	98%
Netflix	37%	36%	58%	67%	20%	43%
Showmax	15%	0%	18%	56%	0%	0%
DStv Stream	6%	0%	0%	38%	0%	0%
Canal+ Online	0%	53%	0%	0%	0%	14%
Watch iT (local)	0%	0%	0%	0%	49%	0%
Shahid (regional)	0%	0%	0%	0%	20%	0%
Digital pirated sites	14%	4%	6%	4%	6%	2%

Best performer

Senegal: near-universal YouTube reach (98%) plus strong Canal+ penetration (14%) - the most platform-saturated market, ideal for a low-cost pilot distribution deal.

Least served

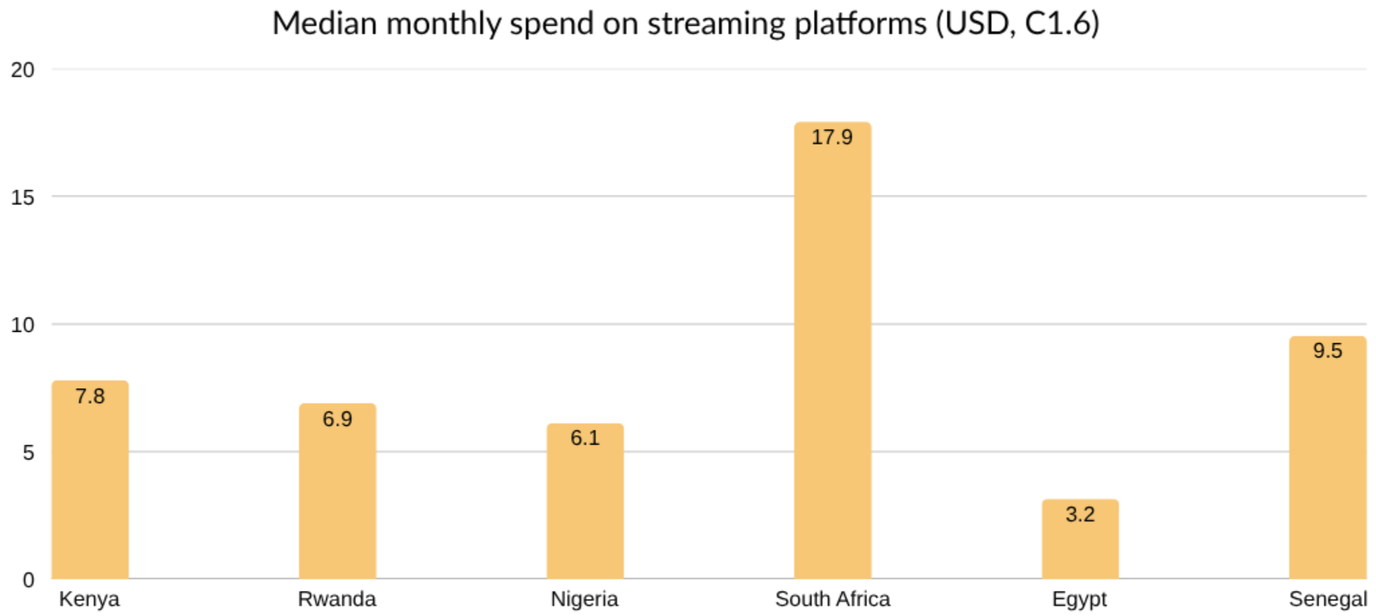
Egypt: underserved by global streamers (Netflix 20%, Showmax/DStv 0%). Why: online piracy, est. 30–40% of market losses; low price points (Watch iT ~EGP 30/mo vs Netflix ~EGP 350); and a strong preference for Arabic-language platforms (Watch iT 49%, Shahid 20%).

For stakeholders

Platforms: enter Egypt through low-price Arabic tiers or partnerships (Watch iT, Shahid), not premium pricing. Regulators & rights holders: pair any entry with anti-piracy enforcement and site-blocking, building on the 2024 shutdown of MENA's largest piracy site. Filmmakers: optimize for YouTube first.

Source: Platform Specific Modules tab, C1.1 ("Which streaming platforms do you regularly use?"). Base: streaming users, n=1,167 (Kenya 252, Rwanda 147, Nigeria 264, South Africa 266, Egypt 49, Senegal 189). Shahid: Egypt country chapter; – = not reported. Piracy loss estimate: ScreenDaily (2024).

Streaming Spend & Willingness to Pay for Quality



"I am willing to pay for high-quality Local/African film content" - Agree + Strongly Agree (E1)

Kenya 55% Rwanda 47% Nigeria 56% South Africa 65% Egypt 43% Senegal 59% (Total 56%)

Best performer: South Africa

Highest spend ($17.92/mo) AND highest willingness to pay for quality (65%) - a mature, monetisable market that can anchor premium pricing.

Least performer: Egypt

Lowest spend ($3.15) and willingness to pay (43%), but not a weak market. Egyptians watch mainly on free-to-air TV (96% watch films on TV) and free or low-price platforms (YouTube 59%, Watch iT ~EGP 30/mo). The model that fits is ad-funded reach plus low-price local tiers, not higher subscription prices.

For stakeholders

Financiers: benchmark ROI expectations per market rather than a flat continental model. Platforms: lead with premium tiers in South Africa; ad-supported and low-price local tiers in Egypt.

Source: Platform Modules tab, C1.6 (median monthly streaming spend, USD, n=1,004); Drivers & Barriers tab, E1 (willingness to pay for quality, n=1,630).

Social Media as a Film Discovery & Viewing Channel

Platform	Kenya (n=118)	Rwanda (n=15)	Nigeria (n=24)	S.Africa (n=93)	Egypt (n=102)	Senegal (n=31)
TikTok	87%	93%	58%	66%	36%	87%
Facebook	52%	47%	83%	76%	75%	39%
Instagram	25%	60%	13%	18%	11%	39%
Telegram	20%	0%	21%	14%	21%	36%
X (Twitter)	3%	20%	0%	8%	0%	0%

Note: Rwanda (n=15) and Nigeria (n=24) are small, self-selected bases (respondents who said they watch films via social media) - treat as directional only.

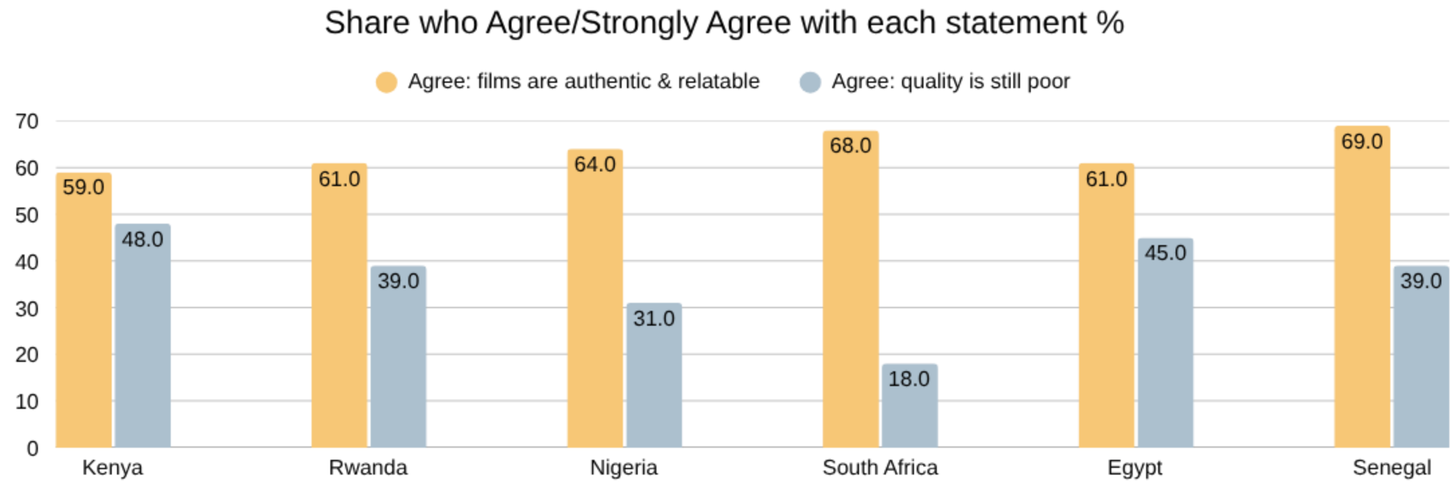
Source: Social Media tab, C6.1 ("Which social media platforms do you use often to watch films or series?"). Base: n=383 respondents who watch films via social media.

Best performer
Kenya & Senegal: TikTok-led discovery (87% each) - a young, highly shareable audience primed for short-form marketing.

Different pattern
Egypt & Nigeria: Facebook-led (75% / 83%), not TikTok - a generic "TikTok-first" strategy would miss these audiences entirely.

For stakeholders
Platforms & filmmakers: match the channel to the market - TikTok/ambassador seeding in Kenya, Senegal, South Africa; Facebook-led campaigns in Egypt and Nigeria.

Sentiment Deep-Dive: Authenticity vs Quality Perception



Engagement Drivers (% rating 'important')

Driver	Nigeria	Kenya	South Africa	Egypt	Rwanda	Senegal
Acting Quality	98%	97%	97%	100%	96%	93%
Plot / Theme	96%	86%	77%	100%	91%	94%
Technical Quality	96%	94%	87%	98%	93%	95%
Awards	77%	34%	61%	54%	79%	65%

Best performer: South Africa

Lowest quality complaints (18%) and among the highest authenticity scores (68%) - directly explains its +41 NPS.

Least performer: Kenya

Highest quality complaints (48%) despite believing in the authenticity of local stories (59%) - a paradox: the instinct is right, the execution isn't. Directly explains its -46 NPS.

For stakeholders

Financiers: fund script development and post-production in Kenya; use South Africa as the co-production quality benchmark.

Source: Drivers & Barriers tab, E1 ("How do you AGREE or DISAGREE..."), Agree + Strongly Agree combined. D5 (drivers, Somewhat + Very Important) n=1,630.

Markets Scorecard

Country	NPS (F3)	Spend/mo (C1.6)	"Poor quality" (E1)	Piracy reliance* (C1.8)	Read
Egypt	+54	$3.15	45%	20% (n=5)	Star advocacy, low monetization - free-TV/AVOD model
South Africa	+41	$17.92	18%	20% (n=20)	Star- premium, scalable, quality benchmark
Nigeria	+29	$6.12	31%	63% (n=24)	High potential, distribution-constrained
Rwanda	+1	$6.90	39%	18% (n=11)	Neutral - price-sensitive
Senegal	-3	$9.54	39%	38% (n=8)	Neutral - discoverability-constrained
Kenya	-46	$7.80	48%	55% (n=75)	Fragile - quality-crisis market

Note: Piracy reliance bases vary widely in size (n=5 to n=75)

For top performers (Egypt, South Africa): scale what's already working - free-to-air/AVOD and low-price local tiers in Egypt, premium subscription in South Africa.
For the fragile market (Kenya): fund script and post-production upgrades and telco bundling before further marketing spend - audiences already show up, quality is the failure point.
For mid-tier markets: targeted fixes - Nigeria (storytelling + discovery), Rwanda (pricing), Senegal (discoverability).

Composite view synthesised from F3, C1.6, E1, and C1.8 (see individual slides in this section for full sourcing and caveats).

Six Markets, One-by-One

Kenya • Rwanda • Nigeria • South Africa • Egypt • Senegal
Each market's platform mix, spend, sentiment, barriers, and recommended next step.



Kenya

Lowest local-film loyalty and lowest satisfaction: half of viewers mostly watch international films, and quality is why.

-46	72%	$7.80	48%
Net Promoter Score	Watch Local Films	Median Spend/mo	Say Quality is Poor

PLATFORM MIX

YouTube 87% • Netflix 37% • Showmax 15% • Digital pirated sites 14% (highest piracy platform share of any market). YouTube dominates; paid platforms reach a minority.

SOCIAL MEDIA LEADER

TikTok 87%, joint-highest with Senegal among markets with robust bases; short-form, youth-led discovery

TOP BARRIER

Poor connectivity / high data costs: 37%, the highest connectivity barrier of any market. It's followed by unengaging storylines (33%) and lack of awareness of new releases (30%).

TOP GENRE & MOTIVATION

Drama (66%) and Comedy (62%).
Entertainment/relaxation cited by 89% — the highest of any market.

Bottom line

Kenyans already watch local film (72%) but rate it poorly (48%).

Fix quality where it is cheapest to fix: audiences rank acting (97%), technical polish (94%) and plot (86%) above spectacle, so script development, sound and editing matter more than bigger budgets. 70% say better quality would make them more willing to pay, the highest of any market.

Test this through a pilot (a small, time-bound, measured trial on a defined slate of films before scaling) and cut data costs through telco bundling.

Source: B1, B2, C1.1/C1.8, C6.1, D1/D7, E1/E2, F3. Base: n=304 (piracy subsample n=75, social media subsample n=118).

Kenya: Actions by Stakeholder

Who does what to win back viewers from international content

Governments & regulators

Fund the Film Industry Satellite Account and require cinemas to report admissions per film (Kenya Film Commission, KNBS).

Create a film fund covering the full value chain, including distribution and marketing, plus tax incentives for investors.

Back data-cost relief for local platforms so legal viewing is cheaper than piracy.

Financiers (DFIs, funds, investors)

Provide catalytic capital to consolidate and scale existing local VOD platforms, not new ones, through a public-private partnership.

Fund the quality pilot: finishing grants for sound, grade and edit, and script development, which cost a fraction of production.

Make funding conditional on distribution plans, marketing budgets and data sharing.

Filmmakers & producers

Invest in script development and sound first: “storylines not engaging” is cited by 33% of viewers. Invest in script development and sound first: “storylines not engaging” is cited by 33% of viewers, and 70% would pay more for higher quality.

Budget for marketing from the start; many filmmakers currently allocate nothing, while 69% of viewers say campaigns influence their choice.

Use TikTok (87%) and creator partnerships for short-form discovery.

Platforms, distributors & telcos

Price for the kadogo economy: KES 10–50 pay-per-title via M-PESA.

Bundle or zero-rate local film with mobile data to tackle the 37% connectivity barrier. Bundle or zero-rate local film with mobile data: 25% say bundles would make them pay more (the highest of any market), and 37% cite data costs.

Match pirate-site convenience (fast loading, curated local collections, release alerts) and share performance data with producers.

Source: Dalberg report, Sections 3.2.3, 3.2.6 and 6.5; audience survey (B1a, D5, E1/E2, H2, C6.1). Base: n=304.

Rwanda

Highest local-film viewership in the study - held back almost entirely by price

+1	89%	$6.90	39%
Net Promoter Score	Watch Local Films	Median Spend/mo	Say Quality is Poor

PLATFORM MIX

Canal+ Online 53% (the only market where a pay-TV-linked platform leads); YouTube 74%. Very low Netflix reach (36%) relative to other markets

TOP BARRIER

Cost of subscriptions/pay-per-view - 41%, the single highest cost-barrier score of any market

SOCIAL MEDIA LEADER

TikTok reported at 93% and Instagram at 60%, but this is a very small base (n=15) - directional only, not a reliable ranking

TOP GENRE & MOTIVATION

Comedy (49%) and Drama (35%). Entertainment/relaxation 72%; below-average appetite for social-impact themes (Youth Opportunity 38%, among the lowest of the six).

Bottom line

Rwanda has the audience (89% watch local films); price is the blocker (41% cite subscription cost, the highest of any market). Lead with affordability (lower-cost and ad-supported tiers, mobile-money payments, bundled Canal+ offers) and rebuild screening access after the loss of the country's main cinema

Source: B1, B2, C1.1, C6.1 (n=15, small base), D1/D7, E1/E2, F3. Base: n=165 (piracy subsample n=11).

Rwanda: Actions by Stakeholder

Who does what to turn a loyal audience into a paying one

Governments & regulators

Fully operationalise the National Film Fund and design its criteria with working filmmakers.

Offer tax exemptions and promotion grants to local streaming platforms; harmonise content rules with EAC partners.

Formalise collective management organisations so royalties flow, and enable local payouts for YouTube creators.

Financiers (DFIs, funds, investors)

Back locally owned screening spaces in youth centres and secondary cities such as Musanze.

Finance pooled East African distribution (Rwanda, Uganda, Kenya, Tanzania) to share marketing costs.

Fund shared equipment pools to cut “revenue leakage” from hiring kit and crews abroad.

Filmmakers & producers

Price community screenings at RWF 100–500 to build a paying habit.

Release locally alongside festival runs, and involve communities from development to build an audience before release.

Make shorter, lighter formats for Gen Z, using the national reach of Kinyarwanda.

Platforms, distributors & telcos

Launch low-cost and ad-supported tiers with mobile-money payments, and bundle with Canal+ (53% reach).

License local films for in-flight entertainment and intercity buses.

Embed film technical skills in TVET centres with industry partners to build the crew pipeline.

Source: Dalberg report, Sections 3.4.3, 3.4.6 and 6.5; audience survey (C1.1, E2). Base: n=165.

Nigeria

High advocacy despite the continent's highest piracy reliance - a distribution problem, not a content problem

+29	80%	$6.12	31%
Net Promoter Score	Watch Local Films	Median Spend/mo	Say Quality is Poor

PLATFORM MIX

Netflix 58%, Showmax 18%, YouTube 77%. 45% most-often watch international content - the second-highest international share after Kenya

TOP BARRIER

Storylines not engaging - 28%, Nigeria's single biggest barrier (ahead of cost or access)

SOCIAL MEDIA LEADER

Facebook 83% - not TikTok (58%). A Facebook-first, not TikTok-first, market (small base n=24, directional)

TOP GENRE & MOTIVATION

Action (57%) and Drama (72%). Highest "high-quality storytelling" motivation of any market (62%) - Nigerian audiences hold local films to a high creative bar

Bottom line

Nigerians rate local films highly (+29 NPS) yet lean on piracy (63%, small base), so legal access and price are the constraint. Fixing distribution means cheaper legal ways to watch outside Lagos (which earns over half of box office), scaling pay-per-view models that already work (Circuits TV, Kava), and box-office data investors can trust.

Source: B1, B1a, B2, C1.1, C1.8 (n=24, small base), C6.1 (n=24, small base), D1/D7, E1/E2, F3. Base: n=304

Nigeria: Actions by Stakeholder

What fixing distribution looks like, and who does it

Governments & regulators

Pass the Motion Picture Practitioners' Council and Nigerian Film Commission bills.

Mandate a central box-office and streaming data repository; tie grants and tax incentives to verified reporting.

Implement the proposed 25% rebate and two-year tax waiver for community-cinema investors; pair IP enforcement with affordable legal access.

Financiers (DFIs, funds, investors)

Use tax credits and loan guarantees to finance community cinemas and regional hubs outside Lagos.

Give growth capital to local pay-per-view platforms (Circuits TV, Kava) tied to local commissioning and data sharing.

Back IP-backed film finance: accept the film's IP and pre-signed licensing deals as collateral, as MBO Capital did for about 20 films at 19–20% USD returns, adding equity where no buyer is signed.

Filmmakers & producers

Plan release windows before the shoot: cinema, then pay-per-view, subscription and free TV.

Subtitle into French and Portuguese and dub into African languages for regional markets under AfCFTA.

Develop under-produced genres with demand: animation, children's content, horror and documentaries.

Platforms, distributors & telcos

Scale pay-per-view and four-walling community screenings.

Offer student bundles and university circuits; commission vertical, mobile-first formats.

Market through Facebook (83%) rather than a TikTok-first approach.

Source: Dalberg report, Sections 3.3.2, 3.3.6 and 6.5; audience survey (C1.8, C6.1; small bases). Base: n=304.

South Africa

The scale market - highest spend, lowest quality complaints, and the benchmark for premium co-production

+41	83%	$17.92	18%
Net Promoter Score	Watch Local Films	Median Spend/mo	Say Quality is Poor

PLATFORM MIX

Netflix 67%, Showmax 56%, DStv Stream 38% - the most multi-platform market in the study, with real competition among legal options

TOP BARRIER

Cost - 31%, despite being the highest-spending market; affordability remains a live concern even for engaged, paying audiences

SOCIAL MEDIA LEADER

Facebook 76% and TikTok 66% both strong - a dual-channel market, unlike most others

TOP GENRE & MOTIVATION

Action (57%) and Drama (68%, among the highest).
Affordability/accessibility cited by 38% - high relative to spend levels.

Bottom line

Use South Africa as the premium anchor market and co-production quality benchmark, but layer in mid-tier or bundled pricing: cost is still the top barrier (31%) even here

Opportunity – pan-African co-production and technical-services hub: the DTIC rebate, co-production treaties and the study's most demanding audience on technical quality let South Africa supply post-production, training and co-production capacity to markets with quality gaps, such as Kenya.

Source: B1, B2, C1.1, C1.6, C6.1, D1/D7, E1/E2, F3. Base: n=434 (piracy subsample n=20).

South Africa: Actions by Stakeholder

Who does what to keep the premium market growing

Governments & regulators

Align NFVF, DTIC and provincial offices under one film strategy; use a time-bound task force to harmonise one incentive process within six months.

Shift to enforceable local-content obligations for streamers and broadcasters.

Resolve IP policy uncertainty that deters investors.

Financiers (DFIs, funds, investors)

Use tax breaks and clear recoupment terms to bring in private capital alongside public funds.

Fund shared research infrastructure that aggregates cinema, streaming and broadcast data.

Back pan-African co-productions and dubbing models (e.g. BraZulu) that open new markets.

Filmmakers & producers

Use co-production treaties to partner with producers in markets with quality gaps.

Make more local-language content to reach township and rural audiences.

Use short-form mobile formats as discovery tools for long-form IP.

Platforms, distributors & telcos

Add mid-tier and bundled pricing; cost is the top barrier (31%) even here.

Revive sponsored “bioskop” community screenings in townships, halls and schools.

Commission mid-budget local titles to fill the gap left by Showmax.

Source: Dalberg report, Sections 3.3.2, 3.3.6 and 6.5; audience survey (C1.8, C6.1; small bases). Base: n=304.

Egypt

The most satisfied, most TV-loyal audience in the study (96% watch on TV), and the lowest spender on every paid channel, needing a different model.

+54	100%	$3.15	45%
Net Promoter Score	Watch Local Films	Median Spend/mo	Say Quality is Poor

PLATFORM MIX

YouTube 59%, Watch iT (local) 49%, Shahid (MBC, regional) 20%, Netflix 20%. Arabic platforms hold ~88% of paid OTT subscriptions - the most locally anchored market in the study.

TOP BARRIER

No major barrier: 36% say nothing stops them, the highest of any market. Free-to-air TV and low-cost local platforms already meet most needs.

SOCIAL MEDIA LEADER

Facebook 75% dominant; TikTok only 36% - the lowest TikTok reliance of any market

TOP GENRE & MOTIVATION

Comedy (79%) and Drama (76%). Highest "humorous and uplifting" preference (64%) and lowest documentary interest (1%) of any market

Bottom line

High advocacy (+54) masks a quality gap (45% cite poor quality) and the lowest willingness to pay. Lead with ad-supported and low-price local tiers, and tackle piracy (est. 30–40% of market losses). 36% of Egyptians say “free with ads” would make them more willing to pay, the highest of any market surveyed.

Opportunity – local platform success model: Watch iT (~EGP 30/mo, 42% Egyptian content) and Shahid show that affordable, Arabic-language, locally commissioned catalogues out-reach global streamers (Netflix 20%), a model other markets can adapt.

Source: B1, B1a, B2, C1.1, C6.1, D1/D7, E1/E2, F3. Base: n=213 (piracy subsample n=5, streaming spend n=26 - both very small)

Egypt: Actions by Stakeholder

Who does what to monetise a loyal, low-spending audience

Governments & regulators

Strengthen digital IP enforcement and site-blocking, building on the 2024 shutdown of MENA's largest piracy site.

Make censorship decisions predictable and timely.

Require anonymised viewing and exhibition data as a condition of public funding; create a distribution fund for marketing and booking costs.

Financiers (DFIs, funds, investors)

Extend public capital (e.g. the EGP 500M Cinema Revival Plan) from production to distribution.

Fund mobile cinema units and revived cinema clubs beyond Cairo and Alexandria (90% of screens) to build audiences; only 10.5% mainly watch at the cinema.

Offer matching grants that reward producer collectives for pooling resources.

Filmmakers & producers

Embed social themes in character-driven stories; didactic films struggle with audiences.

Use template contracts and legal support to negotiate fair licensing and data access.

Lead campaigns on Facebook (75%) and with micro-influencers, and design for word of mouth (93% hear about films from friends and family).

Platforms, distributors & telcos

Create dedicated independent-cinema sections on Watch iT, Shahid, OSN and Netflix, with fairer licensing and data sharing.

Offer ad-supported and low-price local tiers (36% say 'free with ads' would make them pay, the highest of any market), and secure free-to-air TV windows (e.g. MBC) for local films.

Formalise intra-Arab distribution through festival and distributor exchange agreements.

Source: Dalberg report, Sections 3.1.2, 3.1.6 and 6.5; ScreenDaily (2024); audience survey (B2, C1.1, C6.1, D6, H2). Base: n=213.

Senegal

Near-universal platform reach and the strongest appetite for social-impact themes - let down by discoverability

-3	92%	$9.54	39%
Net Promoter Score	Watch Local Films	Median Spend/mo	Say Quality is Poor

PLATFORM MIX

YouTube 98% - the single highest platform-penetration figure recorded anywhere in the study. Canal+ Online 14% a distant second

TOP BARRIER

Difficulty finding where to watch - 28%, a pure discoverability problem in an otherwise platform-saturated market

SOCIAL MEDIA LEADER

TikTok 87%, matching Kenya as the joint-highest TikTok market

TOP GENRE & MOTIVATION

Comedy (72%). Highest cultural-identity motivation (51%) and highest educational/social-issue motivation (49%) of any market; Youth Opportunity theme peaks here at 61%.

Bottom line

Audience and platform reach already exist (YouTube 98%); the gap is discoverability (28% can’t find where to watch). Build a curated, YouTube-native hub for Senegalese and African films anchored in youth-opportunity and cultural-identity themes and turn reach into revenue through mobile wallets (Wave, Orange Money).

Source: B1, B2, C1.1, C6.1, D1/D7, D8, E1/E2, F3. Base: n=210 (piracy subsample n=8, small).

Senegal: Actions by Stakeholder

Who does what to turn reach into revenue

Governments & regulators

Reform FOPICA: regular calls for proposals, transparency and blended-finance vehicles.

Strengthen IP enforcement through SODAV with an industry anti-piracy strategy.

Set up a central ticketing and box-office data system.

Financiers (DFIs, funds, investors)

Sponsor solar-powered mobile cinema units (MobiCiné) and community digital hubs across all 14 regions.

Fund the curated discovery hub and digital marketing infrastructure.

Co-finance Francophone co-productions with Côte d'Ivoire, Mali and Cameroon.

Filmmakers & producers

Make genre content (action, comedy, romance) for mainstream audiences.

Build direct audience relationships through digital marketing, supported by short training courses.

Anchor stories in youth opportunity (61%) and cultural identity (51%).

Platforms, distributors & telcos

Integrate Wave and Orange Money payments to reach audiences without bank accounts.

Curate playlists, metadata and release alerts on large YouTube channels such as Marodi TV.

Build on Canal+ Afrique and diaspora partnerships for paid windows.

Source: Dalberg report, Sections 3.5.6 and 6.5; audience survey (C1.1, D8, E2). Base: n=210.

STRATEGIC RECOMMENDATIONS

Priority	What	Who leads	How
Cost accessibility	Tiered, mobile-only and ad-supported pricing to overcome high subscription costs	**Platforms and telcos; communications regulators**	Micro-payments and daily passes through mobile money and carrier billing; data bundles or zero-rated viewing; VAT relief for low-bandwidth local platforms
Technical quality	Finance post-production so sound and picture meet international standards	**Public film funds, DFIs and donors; producers**	Ring-fenced finishing grants (sound, grade, edit) and script labs; film technical skills in TVET systems; South African post-production and co-production capacity
Discoverability	Curated “African Stories” hubs and better metadata for search	**Streaming platforms and broadcasters; producers**	Curated collections and recommendation tuning; local-commissioning and data-sharing conditions on growth capital; producers supply metadata, trailers and subtitles
YouTube integration	Use YouTube as a top-of-funnel discovery tool that drives audiences to paid platforms	**Filmmakers and channel owners (e.g. Marodi TV); platforms**	Free trailers and first episodes linked to paid windows; revenue-share deals with large channels; local payout routes for creators
Marketing focus	Mandatory, ring-fenced budgets for marketing and audience development	**Public film funds, donors and financiers; distributors**	Require distribution and audience plans in funding applications; national or regional distribution funds; budget lines for marketing, subtitling and dubbing

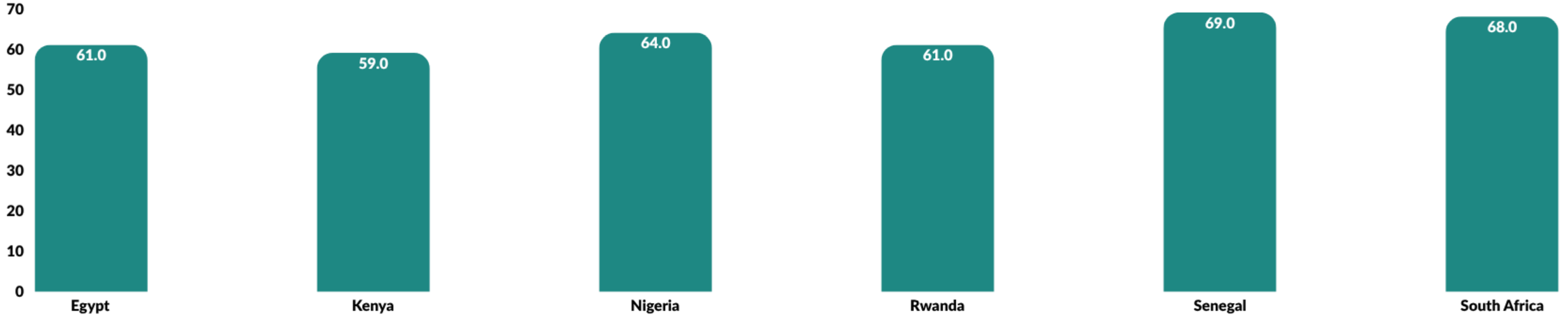
Social Impact

Topic C



Narrative Sovereignty

% Agreeing Local Films Tell Authentic, Relatable Stories



Thematic Preference Rankings

Theme	KE	NG	SN	SA	EG	RW
Youth Opportunity & Aspiration	51%	53%	61%	50%	25%	38%
Gender Empowerment	44%	46%	54%	47%	11%	23%
Governance & Accountability	44%	45%	42%	29%	15%	24%
Intercultural / interfaith	40%	34%	40%	26%	20%	16%

Source data: E1 (authenticity), D8 (themes, n=1,630), n=1,630)

Edutainment Benchmarks & Direct Policy Impact

KE / NG / SA **MTV Shuga / Shuga Global Campaign**	**THE CONTENT** Long-running edutainment drama (Shuga Mashariki–KE, Shuga Naija-NG, Shuga Down South–SA) - the continent's most-cited edutainment model.	**THE IMPACT** Post-broadcast evaluations document declines in STI rates and early-marriage rates; used as a global template for measuring edutainment policy impact.
RWANDA **Le silence des mots (feature film)**	**THE CONTENT** Dramatised account addressing the aftermath of the genocide.	**THE IMPACT** Credited with prompting the reopening of an 11-year-old closed legal case in France concerning genocide survivors - cinematic evidence driving institutional accountability.
SENEGAL **L'utilité et l'attachement (documentary)**	**THE CONTENT** Documentary examining unpaid compensation owed to communities displaced by the Regional Express Train project.	**THE IMPACT** Directly prompted the Head of State to issue formal instructions for redress following a public screening.
SENEGAL **Yaay 2.0: Male Infertility Series**	**THE CONTENT** Addresses male infertility - a subject largely absent from prior Senegalese content. Won 11 awards at the Gayne Festival.	**THE IMPACT** Documented increase in men seeking medical consultation; sparked national advocacy for operationalising Senegal's Medically Assisted Procreation centre and state subsidy calls.
EGYPT **Thank You for Banking with Us (comedy)**	**THE CONTENT** Comedy humanising Palestinian everyday ambitions and political struggle.	**THE IMPACT** Demonstrated cross-border narrative impact across the Arabic-language media ecosystem.

Evidence gap risk
despite widespread claimed social impact, the industry lacks standardised frameworks for measuring behavioural change beyond raw audience numbers — this deters large-scale institutional capital.

ECONOMIC MULTIPLIER: Nigeria creative sector : 4.2M jobs (2023) | Kenya film industry : KES 86.9B gross output (USD 673M) + 42,823 jobs (2022) | Netflix SA/NG/KE :12,000 jobs + USD 218M GDP impact

Financing & Enabling Environment

Topic D



Public Funding Systems & Fiscal Incentives

Country	Primary Public Fund	Tax Rebate/Credit	Key Co-Production Treaties	Recent Public Investment
Egypt	Ministry of Culture grants; EFC one-stop shop (operational pending)	NOT YET OPERATIONAL EGP 500M Cinema Revival Plan (2025) announced; cash rebates pending	France, Morocco only; no intra-African treaties	EGP 500M (~USD 9.6M) Cinema Revival Plan, 2025
Kenya	KFC coordination	NONE Film commission working on incentive framework; no formal rebate in place	South Africa (2022); Tanzania MOU (2019); China (2023)	FISA initiative (unfunded shell); proposed Creative Economy Bill 2026
Nigeria	Creative Economy Development Fund (USD 200M via BoI); NFC	PROPOSED. IMPLEMENTATION PENDING 25% tax rebate proposed; not yet operational	South Africa, France, Brazil	USD200M Creative Economy Fund; USD 15M Benue-Circuits fund announced Dec 2025 (MoU stage)
Rwanda	Rwanda Film Office grants; RDB (Rwanda Development Board)	NONE No formal tax rebate in place; strong policy coordination noted	Canal+'s USD 2B acquisition of MultiChoice (private commercial deal)	Rwanda prioritises long-term ecosystem development over short-term output through public investment and international partnerships
Senegal	FOPICA: USD 2.1M across 49 projects in 2023; only 3 calls in 12 years	NONE FOPICA production financing is primary public instrument; no formal tax rebate	France (most active), Belgium/Wallonia, Canada, Morocco	Wawaw platform: CFA 7M (~USD 11K) seed funding, 2024
South Africa	NFVF grants; DTIC Section 12O rebate (unpredictable - freezes)	OPERATIONAL 35% QSAPE rebate on qualifying SA spend	France, Germany, Italy, UK, Canada, Australia, New Zealand, Kenya	Presidential Employment Stimulus Programme (PESP) - 6 editions since 2020

CRITICAL GAP: Near-total absence of dedicated distribution financing across ALL 6 markets. Only South Africa has a relatively established tax incentive framework. No other market offers formal tax rebates that meaningfully attract international shoots.

Private Capital Flow & Investment Risk

Nigeria

Model: Predominantly private & self-funded. Rapid recoupment model.

Distribution: : Cinemas keep up to 60% of box office; streaming license fees have fallen to USD 250–400K per title, so producers are moving to pay-per-view (Circuits TV, Kava).

Capital: High-tier productions projecting returns of 25–40%. MBO Capital IP assignment model: 19–20% USD returns. Netflix licensing (280+ titles).

Risk: IP collateral absent. Box office: producer retains only 25–30% of GBO after taxes & fees.

South Africa

Model: Most advanced architecture: public incentives + broadcaster pre-sales + international co-productions.

Distribution: DStv/MultiChoice + international streamers (Netflix USD 250M). Section 12O QSAPE rebate.

Capital: Strongest private equity access. Service productions cross-subsidise local content.

Risk: Showmax closure removes USD 1B-revenue content pipeline. 33% cinema site reduction 2015–2025.

Egypt

Model: Broadcaster finance + vertically integrated production entities. New govt capital injection.

Distribution: EGP 500M Cinema Revival Plan (2025). Shahid VIP + Watch iT as primary commissioners. Distributor advance model: 70–90% of production budget in exchange for exclusive rights - power concentrated with distributors.

Capital: Strong Arabic-language SVOD growth. Data treated as trade secret by platforms.

Risk: Geographic concentration of screens limits market visibility. No centralised distribution data.

Kenya / Rwanda / Senegal

Model: Fragmented and heavily dependent on grants, NGOs, development partners.

Distribution: Kenya: Phil-It crowdfunding + pre-sales. Senegal: 70–80% brand partnerships (Kalista). Rwanda: Canal+/Zacu.

Capital: Docubox, FOPICA critical but undersized. No dedicated distribution financing.

Risk: High donor dependency. Showmax closure devastating for Kenya scripted content pipeline.

Benue State announced Dec 2025 + Circuits TV (Nigeria) - USD 15M agreement aligning public funding, private distribution & skills development as emerging model | MBO Capital: ~20 films financed via IP assignment structure

Regulatory Frameworks & IP Enforcement

Country	Key Regulatory Bodies (Report-cited)	Copyright / IP Framework & Data Infrastructure	Piracy & Enforcement Context
Egypt	Egyptian Film Commission (EFC) Elcinema.com (metadata)	EFC working toward one-stop shop for permits. Long-established studio system. No centralised national distribution data repository. Cairo-centric monitoring.	No expedited takedown framework documented in report. Fragmented enforcement. Co-production treaties exist but limited in scope.
Kenya	KFC (Kenya Film Commission) KFCB (Kenya Film Classification Board) FISA (Film Industry Satellite Account)	CA enforces 40% local content quota with defined criteria. FISA initiative underway to measure film industry GDP contribution. KFC active on investment promotion. Broadcaster obligations need reform, producers currently pay airtime rates to broadcast their own content.	55% of Kenyans use piracy as primary access method; 67% cite content unavailability as driver. Limited specialist IP enforcement units documented.
Nigeria	NFVCB · NFC · NBC CEAN (Cinema Exhibitors Association of Nigeria)	NFVCB classifies titles annually, but 93% of classified films skip cinema entirely and move to digital or informal channels. No unified national admissions database. Comscore data available via FilmOne.	63% of audiences cite official platforms 'too expensive' as primary piracy driver. Enforcement alone insufficient — report frames piracy as market signal of pricing failure.
Rwanda	RFO (Rwanda Film Office) RDB (Rwanda Development Board)	Policy coherence and ease of doing business described as strongest of the 6 markets. No national admissions tracking. No OTT engagement data. Blank-slate market , Canal Olympia Rebero closed late 2025; only Cine Mayaka remains.	Enforcement framework nascent. Report notes blank-slate potential for building a clean regulatory architecture. International partnerships (Canal+/Zacu TV acquisition) prioritised.
Senegal	FOPICA · CNRA SODAV (rights management) OIF (Francophonie multilateral funding)	FOPICA plays a critical but undersized role in production financing. SODAV manages rights. CNRA regulates audiovisual. No theatrical admissions reporting. YouTube-led performance indicators only.	75% of potential revenue estimated lost to unauthorised circulation. Neighbourhood informal providers widely cited. File-sharing via Telegram/Xender perceived culturally as 'sharing with friends', not piracy.
South Africa	NFVF · ICASA · DTIC Section 12O (QSAPE rebate)	Most advanced framework of the 6 markets. NFVF publishes annual box-office reports. ICASA enforces 40% local content quotas with defined 'local' criteria. Strongest cross-institutional coordination.	Specialised IP units exist. Section 12O compliance-linked. Strongest enforcement regime of the 6 markets, acknowledged as the regional benchmark.

Opportunities & Strategic Levers

Topic E



Mobile Infrastructure & Micropayment Integration Potential

Mobile Money - VOD Billing Integration Pathway

01 Mobile Penetration Foundation

Kenya: mobile connections exceed total population. Nigeria: 140M+ online (Aug 2025, NCC). All 6 markets have dominant prepaid/mobile-first consumer base. Credit card penetration structurally low, mobile money is the de-facto payment layer.

02 Kadogo Economy Proof-of-Concept

Viusasa (Kenya): KES 10–20 (USD 0.08–0.15) per 24-hr rental. Safaricom Baze: carrier billing integration. Daily micro-subscription beats monthly paywall for 40–50% mass-market base with USD 0–3/month WTP.

03 Telecom Partnership Lever

Zero-rated / sponsored data partnerships dramatically reduce Connectivity Tax. Bundle streaming access with existing mobile data plans. Operator billing as payment bypass for unbanked users (no card required). MTN, Safaricom, Airtel as priority partners across all 6 markets.

04 Regional Scalability

Marodi TV (Senegal): 8.67M subscribers, 4.6B views via free AVOD. Diaspora in France generates higher monetisation rates than continental African views (YouTube monetisation inequity). Swahili (100M speakers) and Arabic as regional linguistic bridges for micropayment VOD bundling.

CREDIT CARD DEFICIT BYPASS STRATEGIES

All 6: Carrier Billing

Charge streaming to mobile bill - no card needed. Proven in Philippines, Indonesia. Applicable across all 6 markets.

Kenya: M-Pesa / M-Shwari VOD Layer

Direct M-Pesa integration into Viusasa & Safaricom Baze. Daily KES 10–20 micro-payments. Model replicable in Nigeria (OPay/Flutterwave), Senegal (Orange Money), Rwanda (MTN MoMo).

Nigeria: USSD Payment Gates

Unstructured Supplementary Service Data enables feature phone VOD payment. Reaches below-smartphone market. Circuits TV pay-per-view model creates recurring income beyond one-off licensing.

Senegal / Rwanda: Voucher / Top-Up Models

Physical scratch-card or e-voucher redeemable for content bundles. Culturally familiar. Orange Money (Senegal), MTN MoMo (Rwanda) as enablers.

Alternative Exhibition Network Expansion Potential

Community Cinema Revenue Proof

₦500M

≈ USD 350,700

Femi Adebayo's community cinema model in Nigeria generated in under ONE WEEK

Key Design Principles

- Free festivals build audiences but do NOT automatically create paying customers (Goree lesson)
- Symbolic micro-payment from first screening builds paying culture (Bioskop model)
- Mobile units beat fixed infrastructure cost in low-density markets
- Diaspora = primary distribution target, not secondary market
- YouTube-first is not a substitute for physical exhibition - it is a complement

Low-cost Exhibition Expansion Models

NG Community screenings model (Femi Adebayo) - proven USD 350K+ revenue in <1 week. Scale via mobile units targeting 80% regional population excluded from urban multiplexes. Integrate symbolic micropayments (not free) to build paying culture.

RW 30 existing Youth Centres available as scalable screening rooms. Blank-slate market - Canal Olympia Rebero closed late 2025, only Cine Mayaka remains. Youth centres = lowest-cost path to formal exhibition without construction. Zacu TV model: lightweight app - VOD - Canal+ full channel acquisition.

KE School networks as educational exhibition circuits - 40% local content quota enforceable in schools. University campus circuits (MultiChoice Talent Factory model). Mobile cinema units for Nakuru, Mombasa, Kisumu - 75% of screens in Nairobi only.

SN Goree Cinema model - open-air screenings (300-1,000 per screening) in market with no cinema screens. Pivot to premium 'Goree by Night' experience (hotel + restaurant + film) proved WTP exists for differentiated offering. 58% of 2020–2025 titles premiered on YouTube (Marodi TV).

EG 90% screens in Cairo/Alexandria - 10% for 80M+ outside these cities. Regional pop-up venues in Alexandria, Aswan, and Upper Egypt using DTH and IPTV. VOX/Renaissance control 70% of market - competition from low-cost community alternatives critical.

SA 33% reduction in cinema sites 2015–2025 - closures in regional venues. 'Bioskop' revival using converted community halls and existing township infrastructure. DStv Stream +38% - hybrid physical/digital model. PESP (Presidential Employment Stimulus) alignment for community exhibitor grants.

SECTION 3

Parting Shot

Conclusion



The Five Non-negotiable Imperatives

USD 4.3B

Combined Pay TV + OTT market (2025)

USD 5.2B

Projected by 2030 (4.9–6.8% CAGR)

1 per 787K

SSA screen-to-population ratio

USD 20B

Estimated industry potential

01 Close The Evidence Gap - Before Everything Else

Every structural dysfunction in this report, from piracy to streamer retraction to investor hesitancy, is compounded by the near-total absence of centralised, transparent distribution data. Without mandatory standardised reporting, every intervention is built on assumption. The Pan-African Film Observatory is not an optional institutional nicety. It is the precondition for all other reforms. Governments, film commissions, financiers and platforms should treat data infrastructure as a priority equal to production financing.

02 Price For Africa - Not For Global Arpu Benchmarks

The Connectivity Tax is real. The mass-market base (40–50% of households) has a monthly WTP of USD 0-3. MultiChoice's 31% price hike eliminated 1.2 million linear subscribers in a single year. Conversely, Viusasa's USD 0.08 daily micro-subscription converts at scale. The imperative: adopt Kadogo micropayment models, integrate mobile money billing, and bundle data with content. Any distribution strategy that ignores this arithmetic will remain a prestige niche.

03 Fund Distribution - Not Only Production

Nigeria produces 1,000+ films annually. The gap is not content volume; it is the near-total absence of dedicated distribution financing. Without support for marketing, subtitling, festival access, dubbing, and multi-territory release coordination, high-quality content dies in production. National and Regional Distribution Funds, ringfenced from production budgets ,are the single most underinvested lever available to public institutions and development banks.

04 Rebuild The Missing Middle - Showmax Left A USD 1b Gap

Showmax’s April 2026 closure removed not a streaming platform but an entire financing and distribution stratum: mid-budget, culturally specific, non-export-driven commissioning. It produced 6,500 hours of local content annually across 22 languages from a library of 84,871 hours. No single entity replaces it. What can replace it is a coordinated ecosystem of regional streaming platforms, telecom-integrated distribution, and AfCFTA-aligned licensing exchanges, built with African capital for African audiences.

05 Measure Social Value - Or Lose The Institutional Capital

The sector's impact is documented: STI rate declines under MTV Shuga; a Head of State issuing redress instructions after a Senegalese documentary screening; an 11-year-old French legal case reopened by a Rwandan film. But these are anecdotes, not data systems. In an evidence-conditional global funding landscape, the inability to quantify behavioural change excludes impact film from institutional capital it has demonstrably earned. Longitudinal measurement frameworks must be funded as a production cost.

Thank you!

Read the report

Made in Africa, Watched Globally? Market Intelligence on Distribution, Audience and Social Impact Themes across Egypt, Kenya, Nigeria, Rwanda, Senegal and South Africa