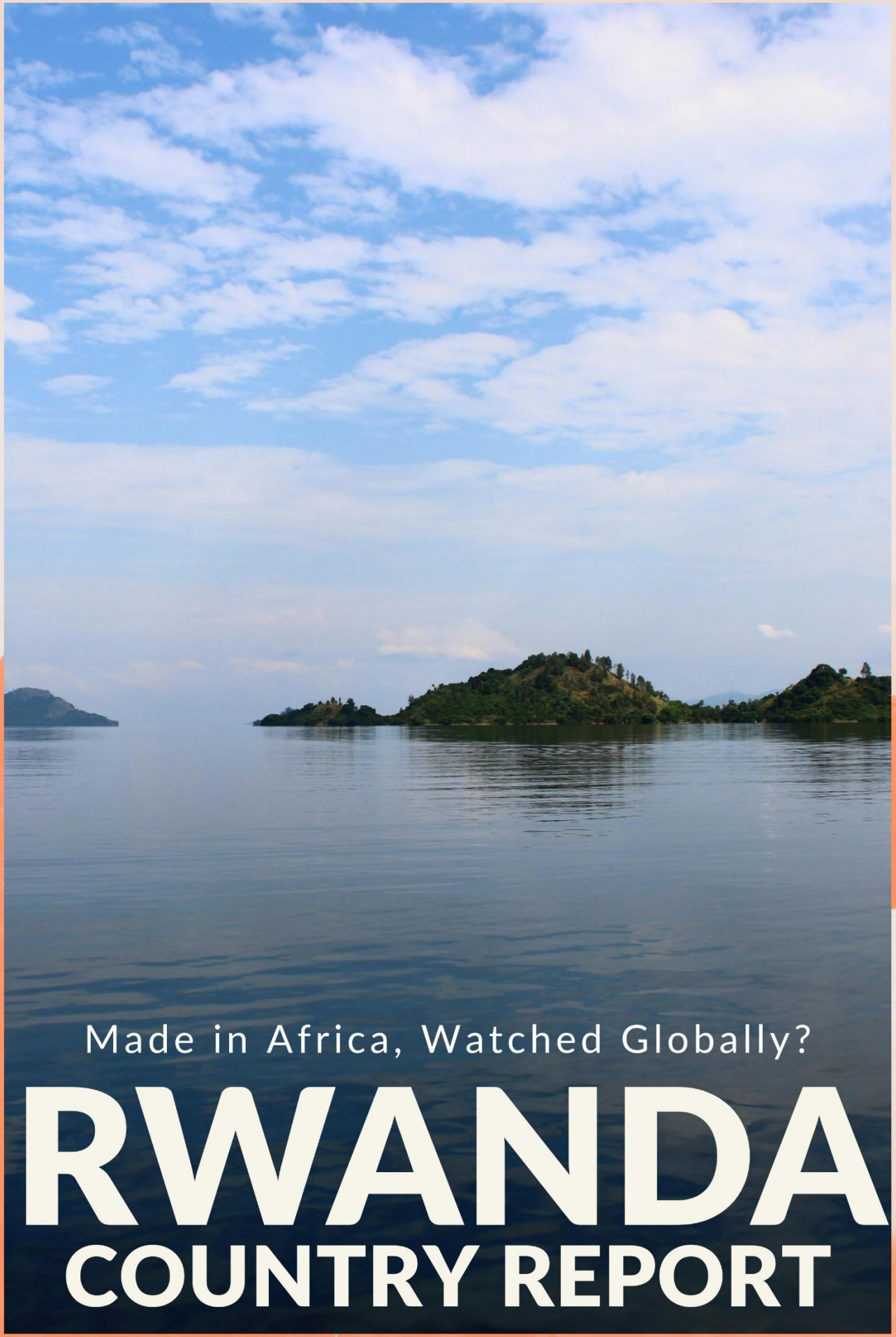


Made in Africa, Watched Globally?

RWANDA
COUNTRY REPORT

giz Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) GmbH

AFREXIMBANK

CANEX Creative Africa Nexus

Dalberg

Foreword

The Rwandan film industry stands at a pivotal moment in its development. As across much of Africa, the creative economy and the film industry in particular is increasingly recognized not only as a powerful vehicle for cultural expression, but also as a driver of economic growth, job creation, and international engagement. Rwanda, with its dynamic youth population and evolving creative landscape, is uniquely positioned to harness this potential.

Commissioned with the support of GIZ and the African Export–Import Bank (Afreximbank), and conducted by Dalberg Research, this report offers a comprehensive examination of the opportunities and constraints shaping Rwanda's film ecosystem. It reflects a rigorous and collaborative research process, engaging a wide range of stakeholders across the value chain, from filmmakers and financiers to policymakers.

What emerges is a nuanced portrait of an industry rich in talent and ambition yet still navigating structural challenges. Issues such as access to finance, distribution channels, technical capacity, and regulatory frameworks remain central to the sector's growth. At the same time, the report highlights significant opportunities for strategic investment, institutional support, and regional collaboration.

As a filmmaker and entertainment lawyer closely involved in this research, I am particularly encouraged by the growing recognition of the Rwandan film industry as both a cultural necessity and an economic asset. It is a privilege to contribute to a study that underscores the power of film to shape narratives, preserve memory, and connect Rwanda to global audiences. Realizing this potential, however, will require sustained commitment from both public and private stakeholders.

It is my hope that this report will serve not only as a reference document, but also as a catalyst for meaningful action. By aligning policy, investment, and creative vision, Rwanda has the opportunity to build a resilient and globally competitive film industry.

Yours sincerely,

Yuhi Amuli

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Executive Summary

Rwanda's film industry is undergoing a significant period of transformation, evolving from a relatively young post-genocide sector into an increasingly structured creative industry with growing institutional support and digital reach. The industry contributes an estimated 5% to national GDP and supports approximately 7,000 direct and indirect jobs. The establishment of the Rwanda Film Office (RFO) in 2019, alongside the creation of the Ministry of Youth and Arts and the introduction of stronger intellectual property protections in 2024, reflects increasing government recognition of the sector's economic and cultural potential.

Rwanda's film ecosystem remains smaller than those of regional peers such as Kenya or Nigeria, but it is experiencing a notable rise in local production activity, particularly in digital-first and Kinyarwanda-language content. The industry is characterized by a highly mobile and digitally connected audience, growing demand for culturally relevant storytelling, and a distribution environment increasingly shaped by online platforms rather than traditional cinema infrastructure. However, persistent structural challenges including limited exhibition infrastructure, fragmented monetization systems, weak audience measurement, and constrained financing continue to limit scalability and long-term sustainability.

Film Distribution

Rwanda's distribution landscape is increasingly dominated by digital and mobile-first consumption models. The decline of formal cinema infrastructure, including the closure of Canal Olympia Rebero in late 2025, has accelerated the shift toward streaming and television-based viewing. While community screening spaces and festivals continue to operate, theatrical exhibition remains highly limited and concentrated in Kigali.

Digital platforms now serve as the primary distribution channels for local content. YouTube, Canal+ Online, Zacu TV, and MTN Y'ello TV have emerged as critical access points for Rwandan audiences, particularly for Kinyarwanda-language productions. Zacu TV, which evolved from a VOD platform into a dedicated Kinyarwanda television channel through a Canal+ partnership, illustrates the growing importance of localized digital ecosystems. Local platforms significantly outperform global streaming services in hosting Rwandan content, with Zacu TV and MTN Y'ello TV libraries composed of over 87% local productions, compared to less than 1% local content on Netflix and Prime Video.

The Pay TV and OTT market is projected to grow steadily from USD 69.1 million in 2022 to USD 94.4 million by 2030. However, this growth is uneven. Pay TV remains dominant but slow growing, while OTT services, AVOD, FAST, and hybrid streaming models are expanding more rapidly. The market is heavily prepaid and price-sensitive, with audiences favoring low-commitment and flexible subscription models. This creates opportunities for lightweight, advertising-supported, and mobile-optimized distribution strategies.

At the same time, distribution remains constrained by limited audience data, weak box office reporting systems, and the absence of centralized revenue measurement mechanisms. Filmmakers often rely on proxy indicators such as YouTube analytics or broadcaster feedback rather than transparent commercial performance metrics.

Audience Development

Audience development in Rwanda is shaped by a young, digitally engaged population with strong interest in local storytelling. Audiences demonstrate a clear preference for culturally relevant narratives, with local films cited as the most widely watched category across platforms. Three primary audience segments emerge within the market: Local Loyalists, Value-Seeking Family Streamers, and Global Digital Enthusiasts. Each segment exhibits distinct viewing behaviors, device preferences, and motivations.

Local Loyalists and family-oriented audiences strongly engage with African and Rwandan content, particularly through YouTube and Canal+ Online, while younger digital audiences show greater preference for international content accessed primarily through Netflix and smartphones. Entertainment and relaxation remain the primary motivations for viewing films, followed closely by cultural connection and identity. Audiences also place extremely high importance on acting quality, technical production standards, genre clarity, and storytelling strength when selecting films.

Film discovery is highly community driven. Word-of-mouth recommendations from friends and family are the dominant discovery mechanism, followed by social media. Traditional advertising channels play a comparatively limited role. This suggests that audience growth in Rwanda depends heavily on peer networks, influencer engagement, and organic digital visibility rather than expensive conventional marketing campaigns.

Streaming has become central to audience engagement. YouTube is the most widely used platform, followed by Canal+ Online and Netflix. Smart TVs and Pay TV-connected devices dominate viewing behavior, indicating that home-based viewing environments are becoming increasingly important. Meanwhile, cinema attendance remains constrained primarily by limited access to venues and high-ticket costs rather than lack of audience interest.

Social Impact

Film in Rwanda continues to play an important role in cultural preservation, historical reflection, identity formation, and public dialogue. The sector's post-genocide origins have positioned storytelling as both a creative and nation-building tool. Stakeholders highlighted the importance of local narratives in strengthening cultural identity and creating social cohesion, particularly among younger audiences.

Festivals, cultural institutions, and community screenings also contribute to audience education and engagement by exposing viewers to socially relevant and culturally grounded films. Institutions such as Goethe-Institut, Kigali Cine Junction, and the Rwanda International Movie Festival continue to support film literacy and provide platforms for emerging filmmakers and community engagement. However, the reach of these initiatives remains largely urban and limited in scale.

At the same time, the growth of local-language content has strengthened audience relatability and emotional connection to film. Yet this same linguistic concentration can limit regional and international circulation if translation, dubbing, and subtitling are not prioritized.

Financing and Enabling Environment

Rwanda's financing ecosystem remains underdeveloped and heavily reliant on donor support, partnerships, and limited broadcaster acquisition models. While international productions may access selected tax incentives, smaller local filmmakers often struggle to benefit from these mechanisms due to scale and eligibility requirements.

The enabling environment has improved through institutional reforms, including the establishment of the Rwanda Film Office and stronger intellectual property protections. However, gaps remain in enforceable local content quotas, audience measurement systems, royalty collection structures, and long-term production financing mechanisms.

Revenue generation remains fragmented, with filmmakers increasingly required to adopt multi-window monetization strategies across Pay TV, YouTube, AVOD, and regional streaming platforms rather than relying on single-platform licensing deals. Rights retention, library ownership, and serialized content development are therefore becoming increasingly important for long-term sustainability.

Opportunities and Strategic Levers

Rwanda presents several strategic opportunities for long-term industry growth. One of the strongest opportunities lies in digital-first distribution models tailored to the country's economic realities. The high penetration of smartphones, increasing internet connectivity, and strong uptake of YouTube and Pay TV platforms create favorable conditions for AVOD, FAST, and hybrid streaming models focused on affordable access and local-language content.

The market also demonstrates strong latent demand for local storytelling, particularly among family audiences and culturally connected viewers. Expanding multilingual subtitling and dubbing into English and Swahili could significantly improve regional circulation across East Africa and strengthen export potential.

Community-based distribution models also represent an underutilized opportunity. Informal video shops, flash-drive circulation, and community screenings already function as agile last-mile distribution systems for underserved audiences. Formalizing and integrating these networks into legitimate distribution ecosystems could expand reach while reducing reliance on piracy.

Additionally, Rwanda's growing production capacity, improving policy attention, and rising digital engagement position the country as a potential regional hub for localized East African storytelling and digital content innovation.

The Path Forward

Rwanda's film industry stands at a pivotal moment. The country has developed a strong foundation of local storytelling talent, increasing digital connectivity, and growing audience demand for culturally relevant content. However, unlocking the sector's full potential will require coordinated investments across distribution infrastructure, audience measurement systems, local content financing, and regional market integration.

Future growth will depend less on replicating traditional cinema models and more on building scalable digital ecosystems aligned with Rwanda's mobile-first, price-sensitive audience realities. Strengthening local platforms, improving discoverability of African content, expanding multilingual accessibility, and supporting rights-based monetization strategies will be critical to ensuring long-term sustainability.

With continued institutional support, stronger regional partnerships, and targeted investments in local distribution and production ecosystems, Rwanda has the potential to emerge as a leading digital-first storytelling market within East Africa and a model for culturally grounded audience development across the continent.

1. Introduction

1.1 Background and context

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

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

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

The partnership leverages the unique strengths of the two institutions. Afreximbank provides the critical USD1 billion financial facility via CANEX to scale production and infrastructure. GIZ, on the other hand, acts as a catalyst for the ecosystem through investing in the generation of industry knowledge, strategic capacity development, and cross-sector partnerships to position African film for sustainable growth across the continent. Together, they bridge the gap between high-level capital and grassroots impact, transforming the industry's financial potential into improved livelihoods for creative professionals.

1.2 Objectives and research questions

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

Specifically, the study sought to:

1. Map the current landscape of film distribution across the six focus countries (Egypt, Kenya, Nigeria, Rwanda, Senegal, and South Africa) and at the global level, identifying key channels, emerging models, and bottlenecks.
2. Analyse how audience of African films are developed and sustained, including patterns of access, platform use, and engagement.

3. Assess the specifics around social impact films, including financing, marketing campaigns and audience preferences.
4. Map the film financing ecosystem and successful investment models.
5. Identify scalable practices, business models, and partnerships that can strengthen the ecosystem.

1.3 Methodology and scope

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

The study adopts a mixed-methods approach, combining:

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

Analysis

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

A central component of this phase was the Audience Segmentation Analysis. Rather than treating African viewers as a monolith, the study utilised cluster analysis to categorise audiences into four distinct segments based on their viewing habits, content preferences, motivations, platform and device usage and willingness to pay. Multiple segmentation

models were tested, with the final segments selected for statistical robustness and practical relevance. Each segment was then profiled across key dimensions such as demographics, viewing behaviour, and content preferences enabling a nuanced understanding of who audiences are, how they consume content, and what drives their choices. This segmentation allows the report to move beyond broad market averages and provide granular strategies for targeted audience development. Finally, thematic coding was used to synthesize stakeholder narratives, mapping them against the identified economic and distribution barriers to ensure that all recommendations are grounded in both market data and lived industry experience.

1.5 Limitations

This study provides a comprehensive synthesis of the African film ecosystem across six diverse markets. However, the following limitations should be considered when interpreting the findings:

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

2. Country Context

2.1. Country Context

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

2.1.1 Overview of national film ecosystem: Key milestones and institutional landscape

The history of Rwanda's film ecosystem is described as in its infancy, with formal production largely beginning after the 1994 genocide against the Tutsi. Stakeholders characterize the industry as a post-genocide development, noting that no formal local cinema existed in the country prior to 1994.

"So, for me, when I analyse the industry. I can say that we began making films on our own, right after the genocide. Our very first production was in 2000 when [name of person mentioned] produced as the main producer, a film A Hundred Days." Filmmaker, Rwanda

This was a major milestone that occurred and is often cited as the starting point for local cinema. Another critical development in Rwanda's film industry was the shift from physical media to digital distribution, accelerated by COVID-19, which expanded access and transformed consumption patterns.

"COVID… transformed into something positive… that's where streaming came into effect" Filmmaker, Rwanda

The launch of Zacu TV in 2017 as a VOD platform and its evolution into a 100% Kinyarwanda cable channel by 2022 marked a turning point for local distribution. Institutionally, the establishment of the Rwanda Film Office (RFO) in 2019 provided a dedicated structure to support industry growth, reflecting recognized opportunities in the sector.

More recently, the 2024 Intellectual Property law introduced protections for digital works, alongside ongoing efforts to formalize Collective Management Organizations for improved royalty systems. More recently, the establishment of the Ministry of Youth and Arts signalled a heightened government commitment to structuring the sector. The ecosystem also saw the growth of private entities and collectives aimed at professionalizing the chain from production to distribution.

3. Findings

3.1 Film Distribution

3.1.1 Distribution overview

The distribution landscape in Rwanda is defined by a notable transition from traditional theatrical exhibition to digital and mobile-first consumption. The theatrical sector has faced recent challenges, most notably the closure of the Canal Olympia Rebero multiplex in late 2025, which served as the country's primary screening venue. This contraction is largely attributed to high operating costs and the increasing dominance of streaming platforms. Other commercial venues, like Century Cinema, was closed down, while specialised community spaces such as Ciné Mayaka, L'Espace, and Cine Junction, as well as temporary festival screenings, continue to support theatrical exhibition. In contrast, digital distribution is thriving; platforms such as YouTube, and the local Zacu TV have become the primary channels for reaching audiences.

"I created Zacu TV as a VOD platform where users paid $5 to access content. Initially, I uploaded my own productions and acquired additional content from local producers who were distributing via CDs and street sales, in order to build a larger library. In 2022, I began discussions with Canal+, who were interested in launching a television channel airing 100% Kinyarwanda content. At the time, I had over 800 hours of content, which led to a partnership. That is how Zacu TV evolved into a television channel dedicated entirely to Kinyarwanda programming." Distributor, Rwanda

According to the stakeholder's insights the market structure was dominated by Zacu TV in 2022 (acquired by Canal+) which focused on broadcasting Kinyarwanda films and digital acquisition. RBA was noted to serves as a key institutional broadcaster, supporting popular series through contracts with local producers. The exhibition sector faced a major crisis following the closure of the Canal Olympia circuit in late 2025, leaving almost no operational commercial cinema halls.

"Recently the Canal, Olympia cinemas were closed in the whole African... I think Rwanda was the last place to close. Because it closed on 28th December,2025," Filmmaker, Rwanda

Global streaming platforms such as Netflix and Amazon Prime are accessible mainly to higher-income users and rarely commission original Rwandan content. International deals for high-end films, facilitated by entities like Orange Studio (later Studio Canal) and Sudu Connexion, sometimes resulted in creators losing ownership of their screening copies. Filmmakers have also explored niche and auxiliary channels to increase revenue, including in-flight content on Rwanda Air, university licensing, and screenings at youth centres. Promotional efforts rely heavily on social media influencers and radio "gameplay" to build audience awareness.

i. Digital platforms: Pay TV and OTT

Rwanda represents one of the smallest but most structurally instructive Pay TV and OTT markets in Sub-Saharan Africa. In value terms, the country accounts for a marginal share of regional Pay TV and OTT revenues, yet it exemplifies several continentwide dynamics: low absolute purchasing power, rapid mobile connectivity growth, high price sensitivity, and strong latent demand for video content outside traditional cinema infrastructure.

According to the *Sub-Saharan Africa Pay TV and OTT Market* report, Rwanda's video consumption market is overwhelmingly mobile-first, with Pay TV penetration constrained by household income levels and OTT adoption shaped by prepaid data economics rather than subscription depth. While Pay TV remains present, particularly through satellite offerings, growth momentum has shifted decisively toward OTT and online video—especially ad-supported and hybrid models.

Unlike larger markets such as Nigeria, South Africa, or Kenya, Rwanda does not exhibit platform stacking behaviour at scale. Instead, households and individuals tend to rotate between services or rely on free and semi-free access points. This has significant implications for content monetisation and sustainable local commissioning.

ii. Pay TV: Stable but Structurally Flat

Pay TV in Rwanda is characterised by low growth and gradual structural stagnation. Satellite Pay TV remains the dominant mode within the segment, reflecting both limited fixed broadband penetration and the historical availability of satellite infrastructure. However, the Pay TV market is primarily sustained by entry level packages, with limited uptake of premium tiers.

The main constraints include:

- **Affordability ceilings**: Monthly Pay TV subscriptions compete with essential household expenditure.
- **Limited localisation leverage**: While regional and international channels dominate packages, the incremental value of exclusive local content has not been sufficient to drive rapid subscriber expansion.
- **Urban concentration**: Pay TV penetration is disproportionately urban, with weak relevance for rural and peri-urban households.

As a result, Pay TV in Rwanda functions more as a defensive, cashflow oriented business than as a growth engine. For content producers, it remains useful for reach and branding but offers limited upside in terms of licence fees or commissioning budgets. As of June 2025, there were 543,293 registered Pay TV subscribers, of which 123,736 were active, representing 22.8%. Canal+ Rwanda Ltd held the largest market share among active Pay TV subscribers at 76%.

Table 1: Number of Pay TV subscribers as of June 2025 | Source: ICT Operator reports

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

By June 2025, the number of Pay TV active subscribers had decreased to 123,736 down from 141,154 subscribers in June 2024, representing a reduction of 12.3%. The reduction observed during this period is associated with off-season of major football leagues and champions, which generally serve as a key driver for subscribers to renew their Pay TV subscriptions.

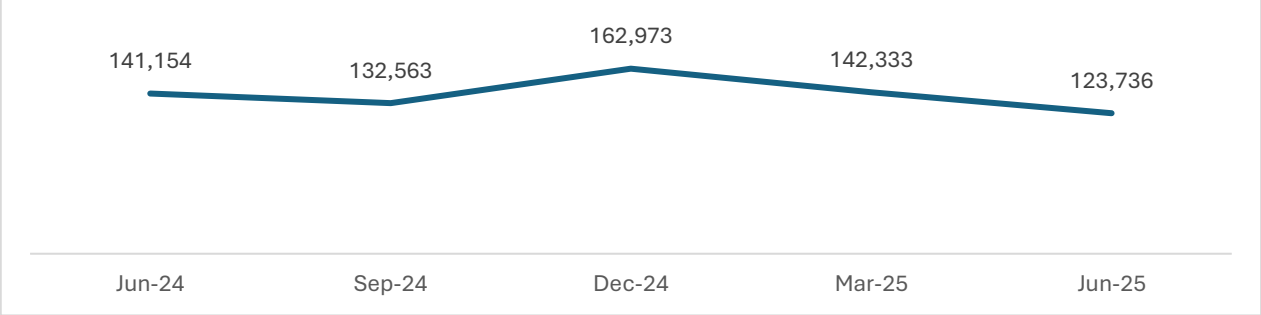


Figure 1: Trend of Pay TV active subscribers | Source: ICT Operator reports

iii. OTT and Online Video: Growth Without Monetisation Depth

OTT video consumption in Rwanda is expanding faster than Pay TV but from a low base. The GMI report highlights Rwanda as a price sensitive OTT environment, where subscriber growth is constrained less by availability than by willingness and ability to pay for recurring services.

Key characteristics of the OTT market include:

- Prepaid dominance: Consumers prefer platforms that can be accessed flexibly, without long-term commitments.
- Low ARPU: Average revenue per user (ARPU) remains among the lowest in the region, reflecting income levels and short subscription cycles.
- Mobile optimisation: Smartphone viewing far exceeds smart TV or desktop usage.
- High churn: Subscription rotation is common, driven by promotional pricing, limited exclusive must-see content, and data costs.

SVOD services operate primarily as supplementary entertainment, not core household services. By contrast, AVOD and free platforms align more closely with actual consumption behaviour.

Content library breakdown in 2025 reflects and reinforces these consumption dynamics. Global SVOD players such as Netflix and Prime Video operate almost entirely as international content distributors, with over 98% of their libraries comprising international titles and negligible local representation. Showmax, prior to its closure, played only a limited role in local development in Rwanda, with just 0.3% local content, functioning mainly as a regional and international aggregator.

In contrast, Rwanda's domestic platforms, particularly Zacu TV and MTN Y'ello TV, are the primary custodians of local film and television content, with over 87% of their libraries made up of Rwandan productions. Regional platforms such as MyMoviesAfrica complement this landscape by facilitating East and Pan-African content circulation.

Table 2: Content Library Breakdown - 2025 | Source: GMI

Platform Name	Active Subs (K)	Total Hours	Local			Regional			International		
			Titles	Hrs.	%	Titles	Hrs.	%	Titles	Hrs.	%
Showmax	45	5490	8	16	0.3	280	560	10.2	4012	4914	89.5
Netflix	28	15000	4	8	0.1	95	190	1.3	7401	14802	98.6
Y'ello TV MTN	85	254	62	186	87.3	18	54	10.1	5	14	2.6
Prime Video	6	12200	2	4	0.03	48	96	0.8	6050	12100	99.2
YouTube Premium	8	-	-	-	-	-	-	-	-	-	-
Zacu TV	65	281	82	246	91.1	10	30	7.4	3	5	1.5
MyMoviesAfrica	18	231	12	24	10.4	78	156	67.5	5	51	22.1

iv. FAST, AVOD, and the Importance of Economic Fit

One of the most salient insights from the Sub-Saharan Africa market analysis is the white space for FAST and AVOD models in markets like Rwanda. These models address the central constraint of affordability while enabling scale audience aggregation.

Rwanda's characteristics including high mobile penetration, growing social media usage, limited cinema access, and low tolerance for recurring payments make it structurally well-suited for:

- Free, ad supported streaming

- Local-language and regional content channels
- Lightweight applications optimised for low data usage

However, advertising yield remains low, which places pressure on production economics. Without aggregation at a regional or pan-African level, Rwanda-specific AVOD channels struggle to generate sufficient revenue to fully finance original long-form content.

This reinforces a broader continental pattern: the platforms that best match African consumer economics are those that currently capture the least value per viewer, while premium SVOD and Pay TV models capture more value but reach narrower audiences.

v. Pay TV and OTT Revenue

Table 3: Rwanda Pay TV and OTT Market 2022-2025 with projections from 2026-2030 (USD Million) | Source: GMI

Market Value	2022	2023	2024	2025	2026	2027	2028	2029	2030	CAGR
Total Revenue	**69.1**	**74.6**	**78.8**	**80.9**	**84.2**	**86.1**	**88.5**	**91**	**94.4**	**4.9%**
By Platform Type										
Pay TV platform	**57**	**61.4**	**64.2**	**66.1**	**68.4**	**69.5**	**70.8**	**71.9**	**73.8**	**3.2%**
Cable TV	6.7	7.1	7.2	7.4	7.5	7.5	7.5	7.4	7.5	1.3%
Satellite TV (DTH)	46.3	49.4	51.5	53.3	55.1	55.9	56.9	57.6	59	3.0%
IPTV	3.9	4.9	5.4	5.4	5.8	6.1	6.4	6.8	7.3	6.9%
OTT platform	**12.2**	**13.2**	**14.6**	**14.8**	**15.8**	**16.7**	**17.7**	**19.1**	**20.5**	**10.4%**
Subscription Video-on-Demand (SVOD)	9.8	10.6	11.8	11.9	12.7	13.4	14.2	15.2	16.4	10.2%
Advertising Video-on-Demand (AVOD)	1.5	1.7	1.9	1.9	2	2.1	2.3	2.5	2.7	11.4%
Free Ad-Supported Streaming Television (FAST)	0.3	0.3	0.3	0.3	0.4	0.4	0.4	0.4	0.4	9.3%
Transactional Video-on-Demand (TVOD)	0.2	0.2	0.2	0.2	0.2	0.3	0.3	0.3	0.3	8.7%
Hybrid OTT Models	0.4	0.4	0.4	0.4	0.5	0.5	0.6	0.7	0.7	12.7%
By Subscription Model										
Postpaid	**21.2**	**23**	**24.3**	**25.1**	**26.1**	**26.8**	**27.6**	**28.5**	**29.6**	**5.2%**
Monthly contracts	17.5	19	20.1	20.7	21.7	22.2	22.9	23.6	24.6	5.3%
Annual contracts	3.7	4	4.2	4.3	4.5	4.6	4.7	4.9	5	4.9%
Prepaid	**47.9**	**51.7**	**54.5**	**55.9**	**58.1**	**59.3**	**60.9**	**62.5**	**64.7**	**4.7%**
Daily passes	4.3	4.6	4.9	5	5.2	5.3	5.4	5.6	5.7	4.6%
Weekly passes	7.4	8	8.4	8.6	8.9	9.1	9.3	9.5	9.8	4.4%
Monthly prepaid vouchers	36.2	39.1	41.2	42.3	44	45	46.1	47.4	49.1	4.8%
By Content Type										
Movies & entertainment	**17.3**	**18.8**	**19.9**	**20.5**	**21.4**	**22**	**22.7**	**23.4**	**24.3**	**5.3%**
Sports	22.2	24	25.3	26	27	27.7	28.4	29.2	30.3	4.8%
News & current affairs	5.4	5.8	6.1	6.2	6.4	6.5	6.6	6.7	6.9	4.0%
Cartoon/animation	**3.8**	**4.1**	**4.3**	**4.4**	**4.6**	**4.7**	**4.8**	**4.9**	**5.1**	**4.7%**
Music & lifestyle	14.7	15.9	16.8	17.3	18.1	18.5	19	19.6	20.3	5.0%
Others (documentaries, education)	**5.6**	**6**	**6.3**	**6.5**	**6.7**	**6.8**	**7**	**7.2**	**7.4**	**4.4%**
By Content Origin										
Regional content	40.7	44	46.5	47.9	49.9	51.2	52.7	54.3	56.4	5.1%
International content	28.5	30.7	32.3	33	34.3	35	35.8	36.7	37.9	4.5%
By End User										

Residential	**61.3**	**66.1**	**69.8**	**71.7**	**74.7**	**76.4**	**78.5**	**80.8**	**83.8**	**4.9%**
Commercial	**7.9**	**8.5**	**8.9**	**9.2**	**9.5**	**9.7**	**9.9**	**10.2**	**10.5**	**4.6%**
Offices	0.5	0.5	0.5	0.5	0.5	0.5	0.6	0.6	0.6	3.5%
Hospitality (Hotels, Restaurants)	6.6	7.1	7.5	7.7	8	8.2	8.4	8.6	8.9	4.8%
Public transportation	0.2	0.2	0.2	0.2	0.2	0.2	0.2	0.2	0.2	2.1%
Others	0.7	0.7	0.7	0.8	0.8	0.8	0.8	0.8	0.8	3.7%

Rwanda's Pay TV and OTT market is growing steadily from USD 69.1 million in 2022 to a projected USD 94.4 million by 2030 (4.9% CAGR), but this growth trajectory is structurally uneven in its relevance to filmmakers. Pay TV continues to dominate in absolute terms, still representing nearly 78% of total market revenue by 2025, yet it is also the slowest growth segment (3.2% CAGR), driven primarily by satellite TV rather than cable or IPTV. For filmmakers, this implies that Pay TV remains a stable but low upside distribution window: it offers predictable licensing revenues and reach, but limited commissioning budgets and weak appetite for higher risk independent films. The market structure favours externally acquired, repeatable content rather than locally produced features, reinforcing Pay TV's role as a downstream monetisation layer rather than a growth engine for Rwandan film production.

By contrast, OTT is where incremental growth and future opportunity concentrate, even though it remains smaller in absolute value. OTT revenues are projected to grow from USD 12.2 million in 2022 to USD 20.5 million by 2030 (10.4% CAGR)—more than three times the growth rate of Pay TV. Importantly, this growth is not driven solely by subscription video on demand (SVOD), which itself faces affordability and churn constraints, but by a diversification of monetisation models. AVOD, FAST, TVOD, and hybrid models all grow at high single to low double-digit CAGRs, albeit from small bases. For filmmakers, this signals a structural shift: revenue opportunity is moving toward multiwindow, flexible distribution, where films can be monetised cumulatively across SVOD licensing, advertising supported views, and transactional or hybrid access—rather than relying on a single platform deal. However, this also means revenues are likely to be fragmented and backended, requiring stronger rights management and longer recoupment horizons.

Critically, the subscription and consumption economics reveal why local film monetisation remains challenging but not unviable. By 2025, prepaid models account for nearly 70% of total Pay TV and OTT revenue, driven by daily, weekly, and monthly prepaid vouchers, while postpaid contracts grow more slowly. This confirms that Rwandan audiences are willing to pay for video—but only with maximum flexibility and low commitment. At the content level, movies and entertainment grow faster than the overall market (5.3% CAGR) and outpace news and general programming, while regional content consistently outperforms international content in revenue growth (5.1% vs. 4.5%). These dynamics are already being operationalised through existing channels: telco-bundled Pay TV and OTT products (such as prepaid TV and mobile video offerings), advertising-supported platforms like YouTube and local AVOD services, and broadcaster-linked streaming platforms that monetise through advertising rather than subscriptions. While these channels do not yet offer large upfront licensing fees, they enable cumulative revenue generation through repeat viewing, regional circulation, and long-tail advertising. The strategic implication is that filmmakers seeking sustainability in Rwanda must design for these realities prioritising rights retention, library value, serialisation, and platform-agnostic distribution rather than relying exclusively on one-off Pay TV or SVOD sales that are structurally limited in scale.

3.1.2 Policy and regulatory environment impacting distribution

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

"*"there are also regulations preventing content that misleads or negatively influences society." Government, Rwanda*

3.1.3 Data on reach and revenues where available

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

By contrast, digital platforms, most notably YouTube, provide transparent, real-time dashboard data on views, audience geography, and demographic breakdowns, making them one of the few distribution channels where creators can directly observe reach and engagement. Audience research bodies such as the Rwanda Broadcasting Agency (RBA) conduct periodic surveys to assess programme popularity, with local series such as *City Maid* and *Indoto* consistently ranking among top-viewed titles. However, these rankings are not linked to publicly available revenue data, as Rwanda lacks a centralised system for tracking Pay TV viewership, advertising yield, or rural audience behaviour. Filmmakers similarly report difficulty accessing viewership or revenue data from international distributors such as Canal+, reinforcing that the challenge is not merely a data gap, but the absence of an integrated, transparent audience and revenue measurement infrastructure for film and television.

"There's definitely been a massive gap, and I've had this conversation with GIZ for the last two years. We also need to know what they're watching, but there's no real data; there's no quantitative data on these audiences, and no data on their viewing habits, tastes, or interests at all." Distributor, Rwanda

This structural opacity leaves policymakers, funders, and creators reliant on proxy indicators and qualitative assessments rather than verifiable performance data, constraining evidence-based decision-making and investment planning.

3.1.4 Gaps and opportunities (underserved regions, genres, languages)

Geographical concentration and underserved markets: The industry remains heavily concentrated in Kigali, resulting in significant access gaps for audiences in secondary cities and rural areas. A filmmaker noted that while demand for film content is high outside the capital, the lack of affordable and accessible screening infrastructure forces audiences to rely primarily on television and mobile internet. Interestingly, some audiences observed that rural audiences may consume even more content than urban populations, highlighting a large but underdeveloped market for physical exhibition.

Digital access as default rather than choice: In the absence of cinemas, digital platforms—particularly YouTube have become the primary mode of access due to convenience and affordability. This indicates that while digital distribution has expanded reach, it is often a substitute for, rather than a complement to, formal exhibition infrastructure.

"YouTube is widely used because it is convenient. For example, someone traveling from Kigali to Muhanga can watch episodes on YouTube. Netflix is also used, though mainly by higher-income individuals." Government entity, Rwanda

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

3.1.5. Film distribution through cinemas

Cinema access in Rwanda remains limited. Among audiences who reported attending cinemas, mainstream cinema venues were cited by 68% with stakeholders citing a total of 3 with 1 functioning cinema. Makeshift estate cinema rooms were mentioned by 44%. The presence of these informal screening spaces suggests that audiences may rely on alternative venues when formal cinema infrastructure is scarce. Audiences reported a median of two cinema visits in the past twelve months. Reported visits range from one to eight per year. Spending patterns, on the other hand, indicate moderate ticket costs relative to income levels. The median amount spent per cinema visit is RWF 10084 (USD 6.90), with values ranging from RWF 5042 (USD 3.45) to RWF 40337 (USD 27.60).

The most cited barrier for cinema attendance is the absence of nearby cinema venues, mentioned by 52% of audiences. This suggests that physical access to cinemas remains limited for many viewers. Ticket prices also emerge as a significant concern. Thirty-nine percent of audiences indicated that cinema tickets are expensive. Combined with limited infrastructure, this suggests that both availability and affordability shape decisions about whether to attend cinema screenings. Other barriers appear less frequently but still point to practical constraints. Nineteen percent of audiences reported that they do not have time to attend cinema screenings. A smaller share (13%) indicated that they prefer waiting and watching films on other platforms at their convenience. Very few audiences cited issues such as poor cinema quality, piracy, or lack of awareness of showtimes. These factors appear to play a minor role compared with the structural issues of access and cost.

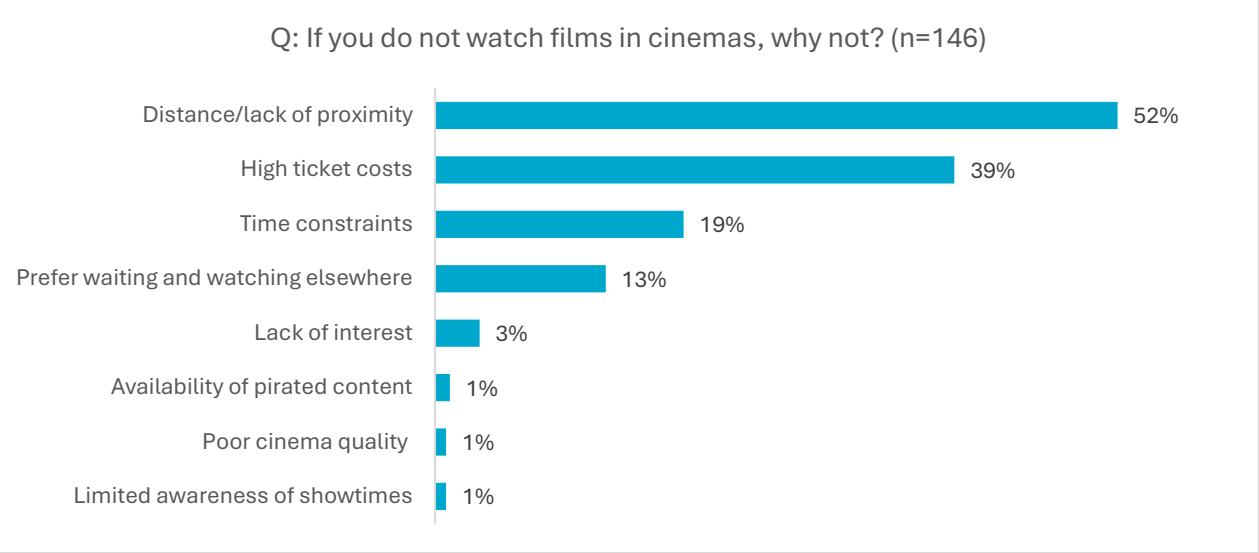


Figure 2: Reasons for not going to cinemas, Rwanda | Source: Survey data

Taken together, these responses suggest that cinema attendance occurs occasionally rather than frequently. Cinema attendance is influenced less by lack of interest and more by infrastructure and convenience. This shift toward home-based viewing also creates a vacuum filled by informal and decentralized distribution networks. When formal channels fail to meet the demand for specific titles or affordable price points, the market naturally pivots to local intermediaries.

3.1.6. Informal distribution and piracy

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

Physical rental/selling sources also appear as a film access platform, mentioned by 23% of film audiences. The leading channels of renting/selling films are the local video shops (91%), suggesting that offline circulation continues to exist alongside digital distribution. Other channels include through friends or informal sellers (18%), digital rentals (18%) and street vendors at 9% *(see figure 32)*.

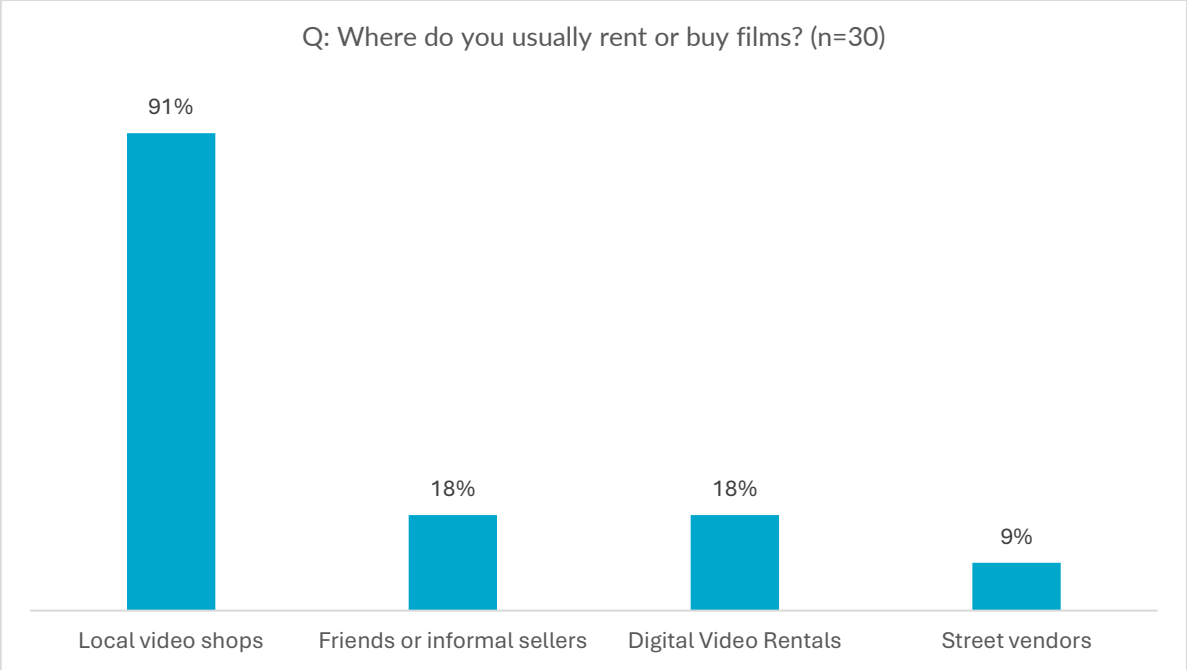


Figure 3: Video rental sources in Rwanda | Source: Survey data

These findings suggest that unlocking potential is not just about building more cinemas or launching new apps. It requires acknowledging that informal vendors are highly agile, demand-driven intermediaries. Instead of viewing them solely as a threat (piracy), there is an opportunity to explore how these local video shops and informal networks could be formalized or leveraged as legitimate last-mile touchpoints to reach the price-sensitive and underserved mass market.

3.1.7. Festivals and community screenings as alternative distribution channels

Festival and community screenings appear rarely in the survey responses. Only two audiences reported attending such events. While these screenings can play a role in cultural programming and industry networking, the survey suggests that they currently reach only a small portion of

the audience. Reported spending for these events is also limited, with audiences indicating a median cost of USD 3.45 per event. These figures suggest that festivals and community screenings operate as niche exhibition spaces rather than large-scale distribution channels for audiences.

Festivals such as Mashariki African film festival, Kigali Cine Junction and the Rwanda International Film Festival were instrumental in audience development by showcasing local work and creating a cinema-going culture. Cultural institutes like the Goethe-Institut provided essential screening spaces and facilitated "informal focus groups" to understand audience tastes. These events allowed filmmakers to interact directly with audiences, though their reach was often limited to urban groups

3.2 Audience Development

3.2.1. Overview

Audience development in Rwanda is currently shaped by a young, urban, and tech-savvy demographic that predominantly consumes content via mobile devices. While there is a documented demand for Rwandan stories, local content often struggles to compete with the availability and marketing of global Hollywood and Indian productions. Marketing practices are generally inconsistent and heavily reliant on international distribution partners or the festival circuit rather than sustained, production-owned engagement. Festivals like the Kigali Cine Junction play a vital role in building audience appreciation, yet online discourse indicates that film is often viewed more as a cultural reference or news item than a subject of deep critical debate. Furthermore, the lack of dedicated, production-managed social media channels represents a significant missed opportunity for fostering long-term audience loyalty and community building.

3.2.2. Demographic profile of Rwanda film viewers

The Rwanda audience survey identifies three distinct audience segments shaped by content preference, platform use, and viewing context.

- Local Loyalists (42%). This segment shows a profound commitment to African storytelling, with 99% preferring local content. This group is predominantly male (62%) and older, with 56% aged between 35 and 54. Viewing is centred on YouTube (93%) and Pay TV (49%), often through shared Smart TV screens. While cultural connection (75%) is their primary driver, their engagement is often constrained by high subscription costs.
- Value-Seeking Family Streamers (36%). This segment is defined by affordability and household viewing. Content choices are anchored on Canal+ Online (90%), with a heavy reliance on Smart TVs (75%). Preferences lean strongly toward Romantic Comedy (73%) and general Comedy (65%), chosen for family suitability and entertainment value. Notably, this group is highly price-sensitive, citing subscription costs (68%) as a major barrier, yet they hold the highest Net Promoter Score (+42%) for local film. Engagement is shaped by subscription value, with most viewers waiting for content within existing plans rather than paying for rentals.
- Global Digital Enthusiasts (22%). This younger, male-dominated segment (81% male, 58% aged 25–34) is almost exclusively oriented toward international content, particularly Action (86%). Viewing is anchored on Netflix (78%) and accessed primarily via smartphones and tablets (58%). Local content holds less importance for this group, with a significant Net Promoter Score of -67%. Growth in this segment is conditional on improved production quality and better platform discoverability. Engagement with African films appears conditional on improved production quality and easier access through platform recommendations.

Table 4: Rwanda film consumer segments | Source: Survey data

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

The diversity of these segments highlights why a standardized approach to reaching the Rwandan audience is ineffective. While local content has a strong base among household and value-driven viewers, broader engagement with digital enthusiasts depends on improving perceived production quality and platform visibility.

Insights from stakeholder interviews reinforce these findings, noting a sharp age-based skew in consumption habits. Youth are the primary consumers of digital content on YouTube and social media while the older demographics, including retirees and household workers, consistently followed television series. Consumption patterns reflected a preference for relatable local stories. In support with the audience survey, the urban audiences benefitted from better internet and Pay TV access, while rural audiences were seen relying on community viewing or low-cost data bundles.

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

These distinct profiles suggest that the pathways through which audiences first encounter new content are deeply rooted in their specific social and digital environments. Success in the Rwandan market therefore depends on aligning distribution channels with the specific device availability and connectivity levels of each target segment.

3.2.3. Film discovery and marketing channels

Reflecting these segmented behaviours, film discovery in Rwanda is largely driven by social networks and informal recommendations rather than centralized marketing. A significant 72% of audiences report hearing about films through friends and family, making word-of-mouth the dominant awareness channel across all demographic groups. Social media follows at 36%, suggesting that digital platforms support film discovery but mainly reinforce conversations happening within personal networks. Other channels play a much smaller role, with streaming platforms accounting for 19%, influencers/bloggers 8%, media advertisements such as radio or TV 6%, and out-of-home advertising like billboards only 3% *(Figure 34)*. This pattern shows that film awareness in Rwanda is primarily community-driven rather than marketing-driven, meaning audiences rely more on trusted personal recommendations than on formal promotional channels.

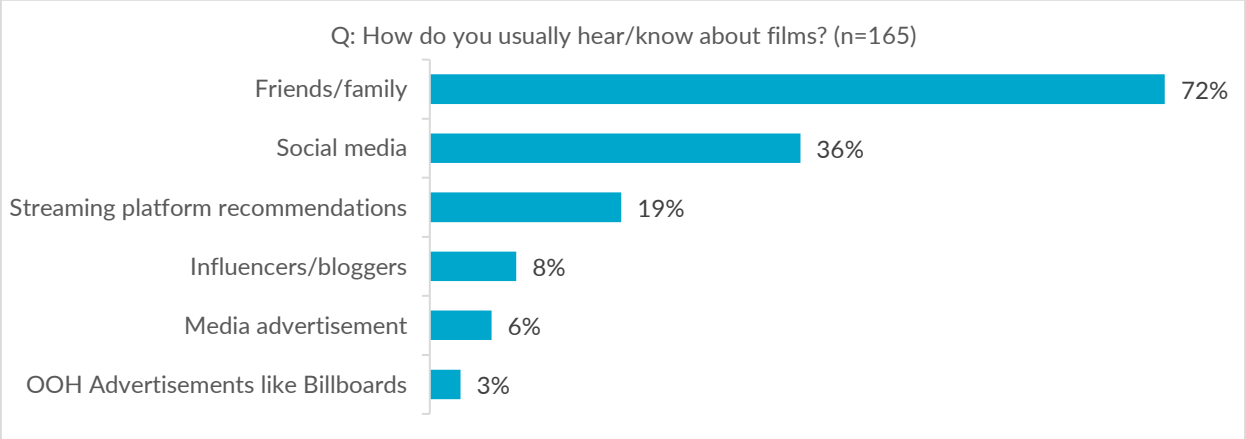


Figure 4:How audience in Rwanda know/hear about new films | Source: Survey data

Distributors and filmmakers should focus on strategies that stimulate word-of-mouth, such as community screenings, social media campaigns that encourage sharing and discussion, and peer-led promotion, while using traditional advertising mainly as a supporting tool rather than the core awareness strategy.

In addition, qualitative interviews revealed that marketing leaned heavily on social media platforms such as TikTok, Facebook and Instagram and radio to reach audience cheaply and effectively. Influencers were utilized to create viral momentum for new releases. International festival recognitions and awards also served as powerful marketing tools, generating local pride and press coverage. However, most local film productions lacked dedicated marketing budgets, often relying on organic word of mouth and television trailers.

"For us, the most effective is online. We had to push ads through meta-Facebook, Instagram, Google advert as well as using influencers through the word of mouth, where people talk about the content they are going to release. We also engage the media, where they review the content we are about to release." Distributor, Rwanda

This reliance on organic, community-driven discovery is reinforced by the industry's grassroots approach to professional development. In a market where formal marketing budgets are rare, the individuals trained within the ecosystem often become the primary engines of both production and promotion.

3.2.4. Education and training actors

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

The growth of this professional capacity is ultimately tested by its ability to meet the specific expectations of the Rwandan audience. Understanding what drives viewers to choose a film, and the quality standards they demand, is essential for these self-taught and donor-trained creators to achieve commercial viability.

3.2.5. What drives audiences to watch films

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

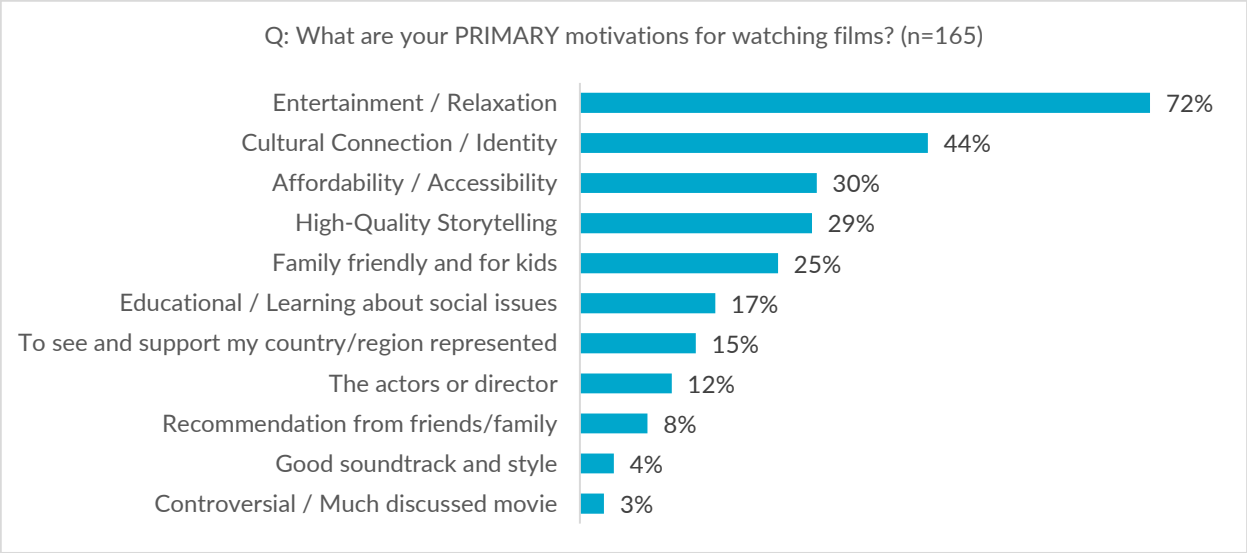


Figure 5: Primary motivations for watching films in Rwanda | Source: Survey data

Audience in Rwanda place the strongest emphasis on acting quality (96%), technical quality such as sound and visuals (93%), genre (92%), and both plot/theme (91%) and popularity or trending films (91%), these shows that viewers prioritize well-produced films with compelling stories and clear genre positioning. Language/subtitles (88%), actors (85%), and representation of African cultures (85%) also rank highly, suggesting audiences value both accessibility and cultural relevance. While marketing campaigns and peer recommendations (both 78%) remain influential, they are secondary to the film's intrinsic quality and storytelling elements. Filmmakers and producers targeting Rwanda should prioritize strong scripts, high acting standards, and technical production quality, while distributors and platforms should ensure language accessibility through subtitles or local languages. Cultural institutions and policymakers can support the industry by investing in capacity building for technical production and acting talent, while marketing teams should emphasize story, genre, and cultural relevance when promoting films.

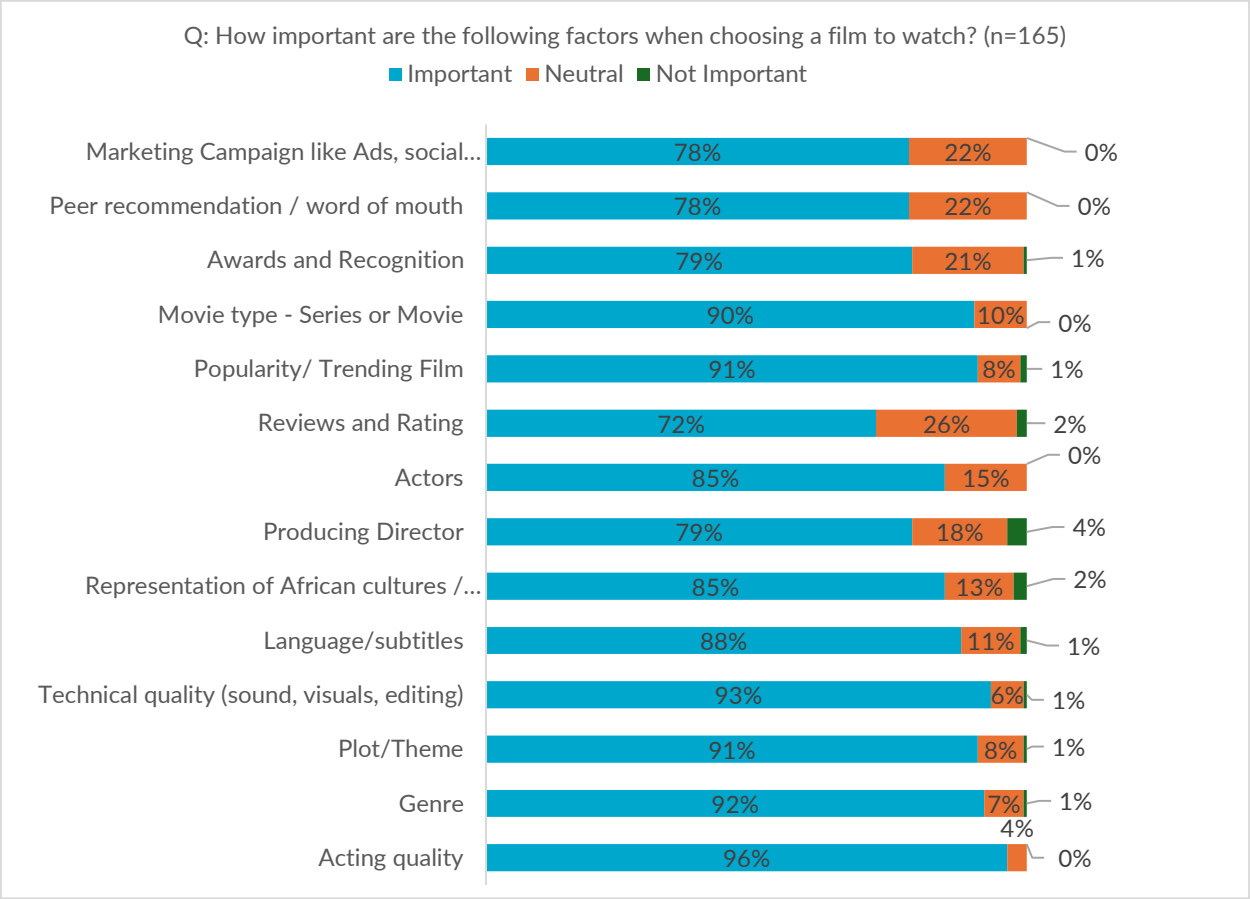


Figure 6: Important factors when choosing film to watch in Rwanda | Source: Survey data

Overall, this suggests that successful films in Rwanda will likely be those that combine engaging storytelling with high production standards and authentic cultural representation. Filmmakers and producers should therefore prioritize strong scripts, skilled acting, and technical quality while embedding culturally resonant narratives, while distributors and platforms should ensure content is accessible through affordable channels and language options. Policymakers and ecosystem partners can further strengthen the industry by supporting capacity building in film production and expanding distribution infrastructure.

High production standards and compelling storytelling only translate into viewership if the content is accessible through the audience's preferred channels. The choice of viewing platform in Rwanda is a strategic intersection of these qualitative demands and the practicalities of hardware availability.

3.2.6. Audience viewing platforms and access to films

High expectations for technical and acting quality require robust access points that can deliver a high-definition experience. Device usage patterns provide insight into how these films reach audiences, showing televisions are the most reported viewing device, cited by 75% of audiences. The proportion is higher (63%) when watching African films. Smartphones and tablets are used by 28% of audiences, with the proportion of those using them to watch international movies being higher (46%). Laptops account for a smaller share (13%) of viewing, with a skew to watching international films (33%).

These figures indicate that film viewing in Rwanda often takes place through home-based digital screens rather than mobile devices alone. Smart TVs and Pay TV services appear to form a central part of the viewing environment captured in the survey.

Reinforcing this digital consumption pattern, Video-on-demand (VOD) services are the most common access point, cited by 89% of audiences. Television follows at 57% as a channel through which audiences encounter films. Other distribution channels appear far less prominent. Video rentals were mentioned by 23% of audiences, suggesting that physical or informal circulation of films still exists but on a smaller scale. Cinema viewing is relatively limited, with only 11% of audiences citing cinemas as a primary viewing platform. Social media platforms were mentioned by 7%, while film festivals account for just 1% (Figure 7).

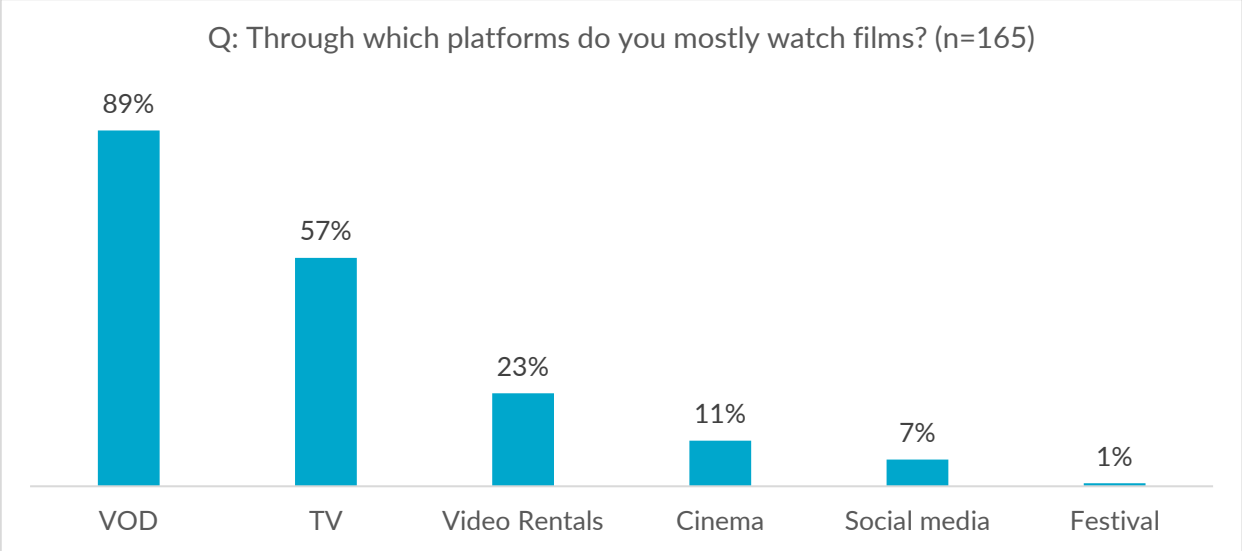


Figure 7: Primary viewing platforms in Rwanda | Source: Survey data

These patterns highlight the central role of digital distribution in Rwanda's film ecosystem. Most audiences access films through on-demand platforms or television rather than through theatrical venues. For distributors and producers, this suggests that reaching audiences increasingly depends on digital platforms rather than traditional cinema circuits.

Within the streaming ecosystem, YouTube emerges as the most widely used platform among audiences, cited by 73%. Canal+ Online follows at 53%, while Netflix is used by 36% of viewers. Only a small share reported using digital pirated websites (4%), while Amazon Prime Video and other platforms account for just 1% each. The platform mix suggests that audiences rely on a combination of global and regionally accessible services. Free or lower-cost platforms such as YouTube appear widely used, while subscription-based services such as Canal+ Online and Netflix also play a significant role in how viewers access films (Figure 8).

Television continues to serve as an additional access point for films. Among audiences who watch films through television, Pay TV services dominate, cited by 94%. Free-to-air television was mentioned by only 10% of audiences *(Figure 38)*. This difference highlights the central role of subscription television in Rwanda's film viewing environment. For many viewers, Pay TV packages appeared to function as a gateway to film content, often alongside streaming platforms. As terrestrial and cable television, specifically Zacu TV and Rwanda Broadcasting Agency (RBA), were noted to remain the primary avenues for mass audiences. Mobile consumption was noted to be high, with people watching content on their phones while in markets or traveling. In the absence of formal cinema infrastructure, some alternative distribution occurred through flash drives and community screenings where streets were closed, and screens displayed for the public.

"There is, of course, we know, the local kind of market, that's more like on the…not the DVD, but on the flash; people redistribute their film." Ecosystem partner, Rwanda

"We went and asked the community there…we closed the street, put the screens there, and we watched." Ecosystem partner, Rwanda

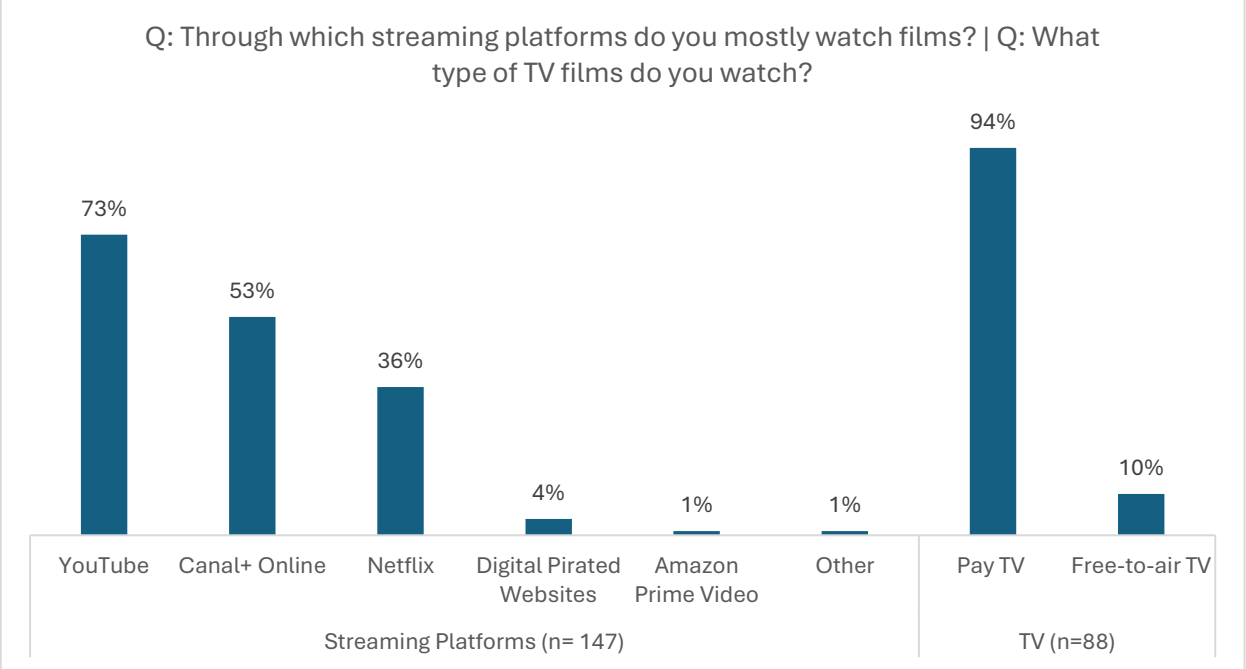


Figure 8: TV & streaming platforms used in Rwanda | Source: Survey data

Moreover, qualitative results affirm that distribution channels are currently dominated by television and digital platforms. YouTube emerged as a vital tool for the free circulation of web series and sketches, allowing creators to reach audiences despite limited theatrical infrastructure,

"YouTube is preferred because it's affordable and you can watch it anywhere. Pay TV you have to watch it at home on the screen," Filmmaker, Rwanda

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

3.2.7. Streaming behaviour and platform preferences

This preference for household-based streaming is further reflected in the specific origins of the content hosted on these platforms. Local Rwandan films are the most widely watched category, cited by 70% of audiences. Films from other African countries follow at 45%, while American productions are mentioned by 34%. Other regions appear less frequently in viewing habits. Korean dramas account for 16% of responses, while films from India, China, Europe, and Turkey appear in smaller shares.

Interviews with the audience also show that they engage strongly with locally produced stories while also maintaining interest in regional and international content. This combination suggests that both local and cross-border distribution remain important in reaching Rwandan viewers *(Figure 39)*. However, viewing patterns differ noticeably by platform. On YouTube and Canal+ Online, locally produced films dominate. A large majority of audiences reported watching Rwandan films on these platforms, with 90% citing YouTube and 92% Canal+ Online. Films from other African countries also appear regularly, particularly on Canal+ Online where they were cited by 59% of viewers. Netflix, on the other hand, shows a very different pattern. American films dominate viewing on the platform, cited by 68% of audiences. Only a small share reported watching local Rwandan films on Netflix. Korean dramas and other international genres also appear more frequently on Netflix compared with the other platforms.

These differences suggest that audiences use platforms for different types of content. YouTube and Canal+ Online appear to serve as key access points for local and African productions, while Netflix is used primarily for international titles.

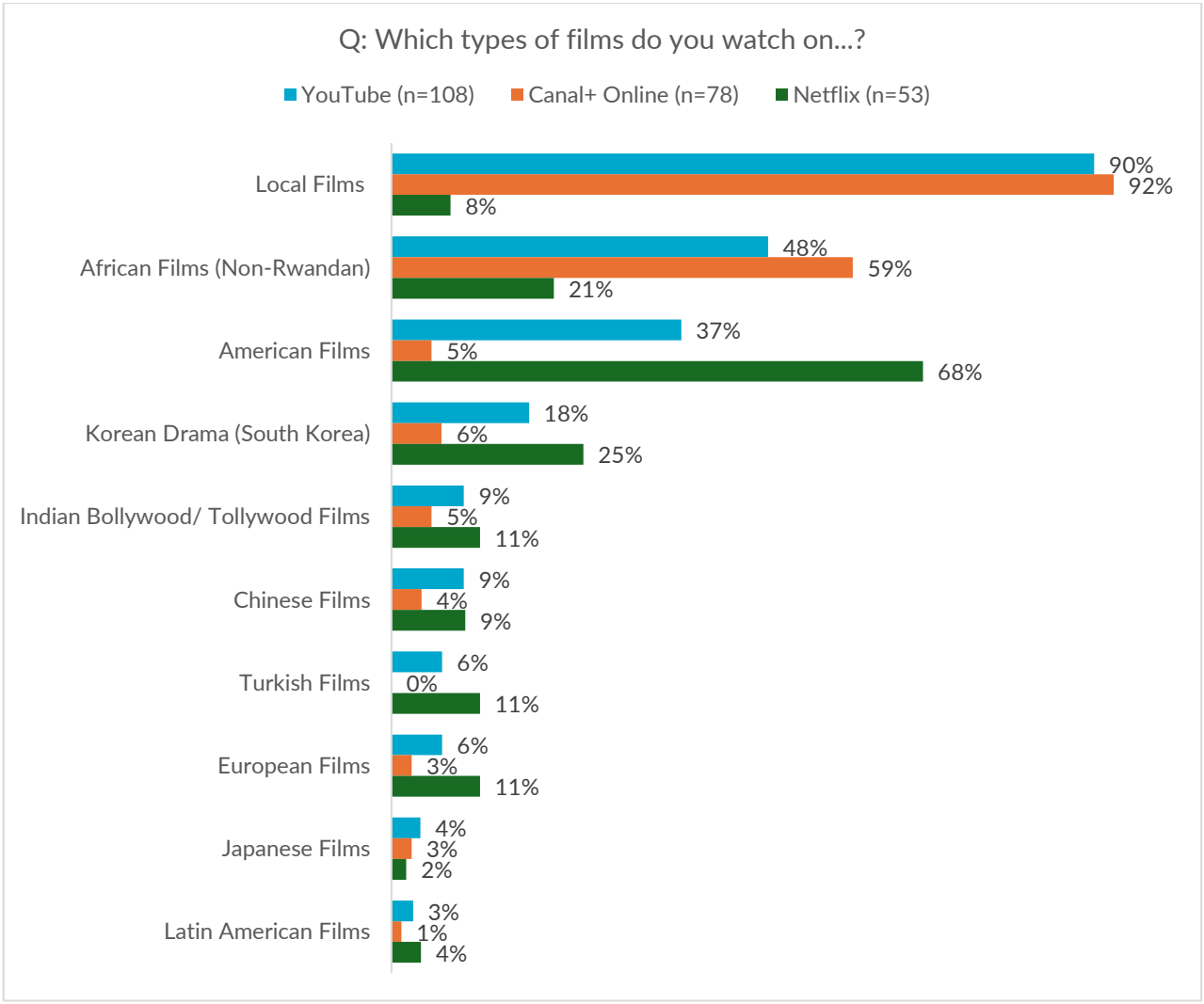


Figure 9: Films streamed on YouTube, Canal+ Online & Netflix in Rwanda | Source: Survey data

Streaming also appears to be a regular activity for many audiences. Frequency data shows that films are consumed across multiple categories on a consistent basis (mainly on a weekly basis)

rather than occasionally *(Figure 40)*. This indicates that streaming platforms have become a routine channel for film access among audiences.

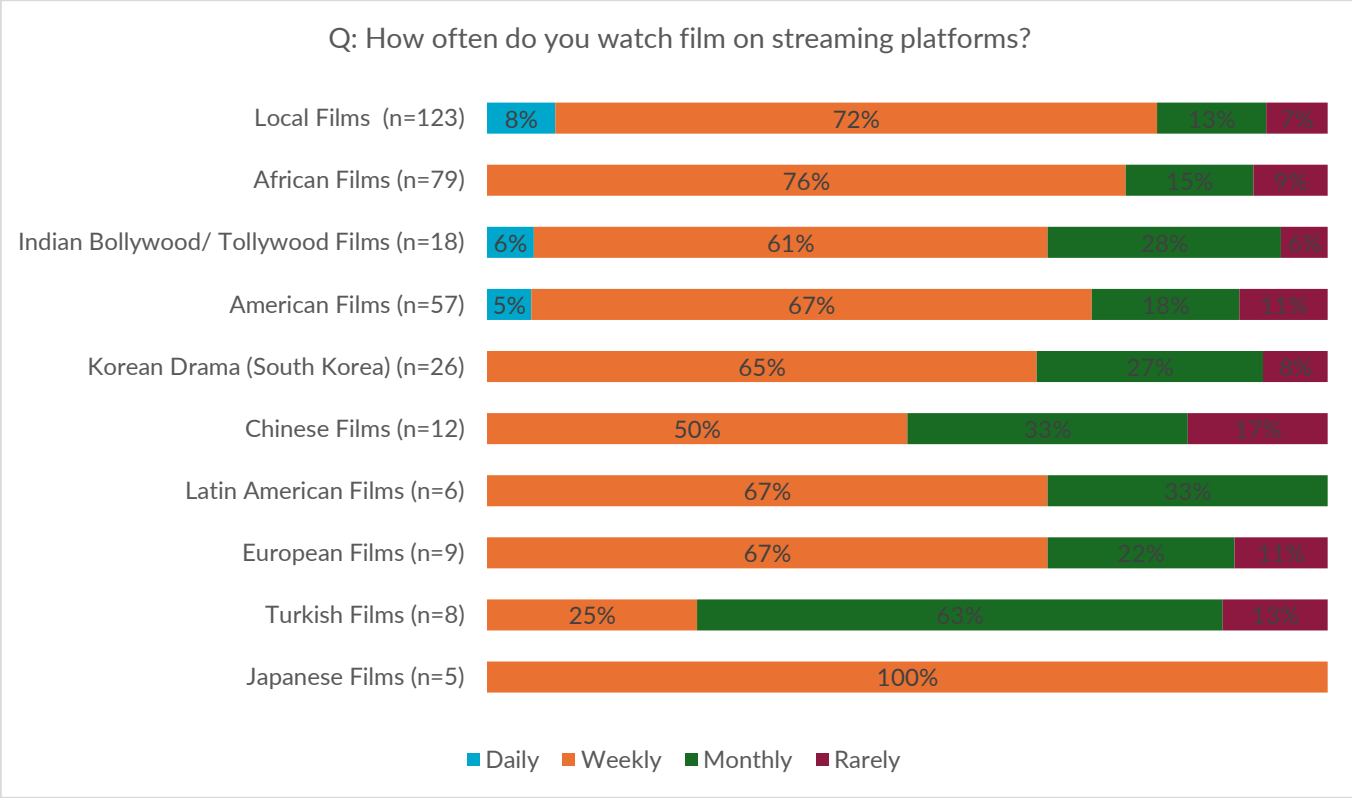


Figure 10: Frequency of streaming in Rwanda | Source: Survey data

Device preferences further illustrate how streaming takes place. Smart TVs are the most used devices for streaming films, cited by 58% of audiences. Pay TV-connected devices follow at 48%, while smartphones and tablets account for 33%. Laptops appear less frequently, used by 16% of viewers. The distribution of devices indicates that streaming in Rwanda often occurs on larger household screens rather than exclusively on mobile devices. Smart TVs and Pay TV systems appear to play an important role in enabling access to streaming platforms within the home.

Subscription patterns also provide further insights into platform usage. Audiences reported a median of one paid streaming subscription, while the average number of subscriptions is two. Some audiences reported using up to eleven services, though this represents a small share of the sample. Monthly spending on streaming platforms remains moderate. The median monthly expenditure is RWF 10084 (USD 6.90), with responses ranging from RWF 2016 (USD 1.38) to RWF 30253 (USD 20.70).

These subscription and device patterns are a direct reflection of how Rwandan viewers prioritize their spending to access specific types of stories. The limited number of paid subscriptions suggests that audiences are highly selective, choosing platforms that best align with their cultural interests. This selectivity provides a clear window into the underlying demand for content that resonates on a personal and regional level.

3.2.8. Demand for local and African content

This selective platform usage, as evidenced by the high engagement on YouTube and Canal+ Online, is a direct manifestation of a film consumption habit that is strongly centred on local productions (88%), with a substantial interest in films from other African countries (62%), suggesting a strong appetite for culturally relevant and regionally relatable storytelling.

American films (36%) still maintain moderate visibility, while other international industries such as Korean, Indian, and Chinese films remain niche. For stakeholders, this is a strong opportunity to invest in strengthening the Rwandan film industry and regional African co-productions, while distributors and streaming platforms should prioritize local and African catalogues to align with audience preferences

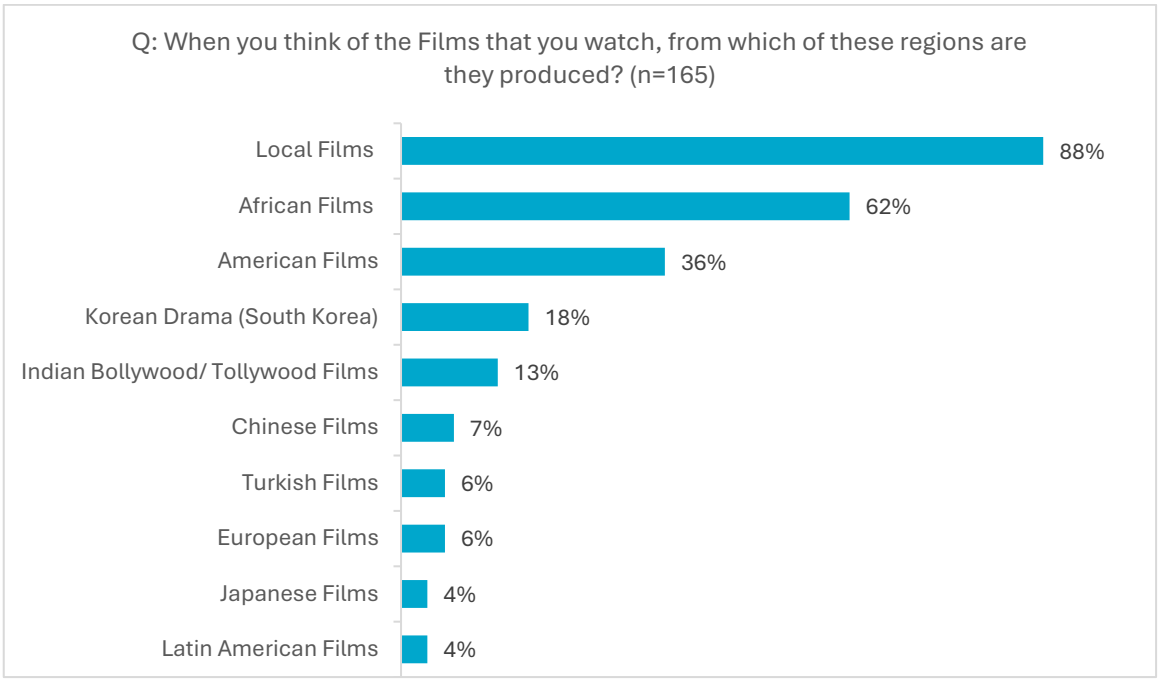


Figure 11:Regions of films watched by Rwandan Audience | Source: Survey data

Rwandan audiences show a strong preference for locally produced films, with 60% reporting that the films they watch most often are local productions, followed by 19% watching films from other African countries. Interest in other global industries remains minimal (each under 7%). This preference is reinforced by audience attitudes, with 89% considering it important that a film is locally made (62% very important, 27% somewhat important). This suggests a strong alignment between national cultural identity and viewing habits. Local filmmakers and producers should continue prioritizing authentic Rwandan stories and culturally relevant narratives, while policymakers and industry bodies should invest in strengthening production capacity, distribution channels, and funding mechanisms to sustain the growth of the local industry and expand its regional reach.

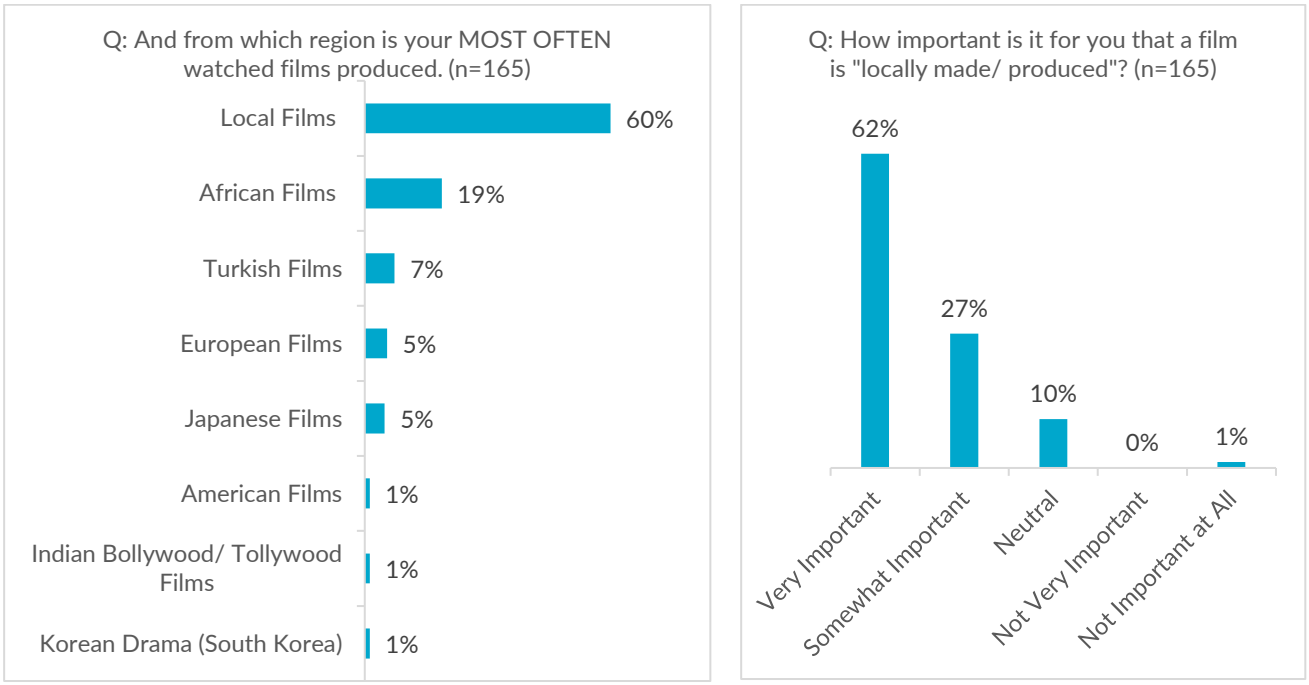


Figure 12: Most frequently watched region and Importance of films being locally produced (Rwanda) | Source: Survey data

Film consumption in Rwanda is strongly oriented toward local productions, with audiences demonstrating a clear preference for films made within the country and a notable openness to content from other African markets. There is a strong demand for culturally relevant storytelling that reflects local realities and regional experiences, while international industries maintain only moderate to niche visibility. Audience attitudes further reinforce this trend, with viewers expressing strong importance for films to be locally produced, highlighting the close link between national identity and viewing habits. For industry stakeholders, this presents a clear opportunity to strengthen investment in the Rwandan film sector and expand regional African collaborations and co-productions. Filmmakers should continue prioritizing authentic local narratives, while distributors and streaming platforms should expand their catalogues of Rwandan and African films. At the same time, policymakers and ecosystem partners can support industry growth by investing in production capacity, financing mechanisms, and stronger distribution infrastructure to scale local content and increase its regional reach.

While this high demand for local content creates a significant market opportunity, it also highlights a critical friction point. The gap between the audience's strong desire for Rwandan stories and their actual viewing frequency is shaped by a complex interplay of content relevance and the economic realities of the digital marketplace.

3.2.9. Barriers to audience growth for local films

Among Rwandan audiences, the primary barrier to watching local or African films is clearly content relevance rather than access or quality. A majority (56%) report a lack of interest in the stories or themes, indicating a disconnect between local content and audience preferences. While a preference for international films is present (33%), this suggests less dominance of foreign content and more opportunity for local films if relevance improves (Figure 13).

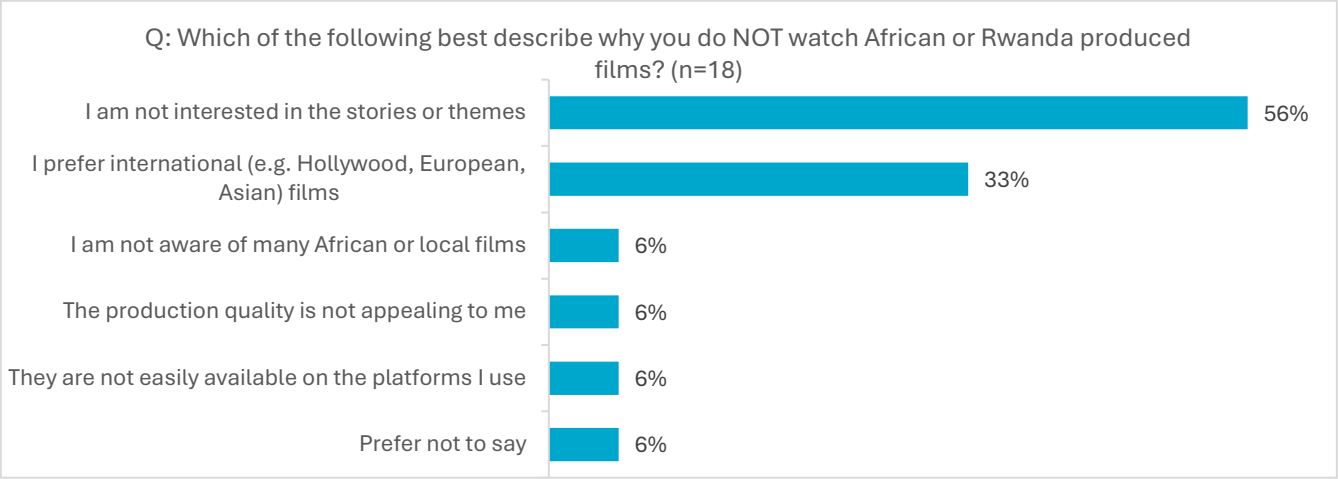


Figure 13:Why audience in Rwanda do NOT watch Local or African films | Source: Survey data

This disconnect in storytelling exists alongside a significant layer of structural and economic obstacles. Beyond the themes of the films themselves, the practicalities of hitting play remain a challenge for the average viewer. Interviews with the audience highlights the high cost of subscriptions or pay-per-view (41%) as a key barrier, indicating that affordability remains a primary constraint *(Figure 44)*. Secondary obstacles include the difficulty of finding where to watch films (18%), poor internet connectivity or high data costs (13%), and a lack of awareness regarding new releases (12%), even though 22% of respondents report no significant barriers. These results suggest that structural access issues, specifically cost, discoverability, and connectivity, limit consumption more than content quality or storytelling alone. Stakeholders should therefore focus on improving affordability through lower-cost streaming models, partnerships with telecom providers, and heightened promotion to increase the visibility of new local releases.

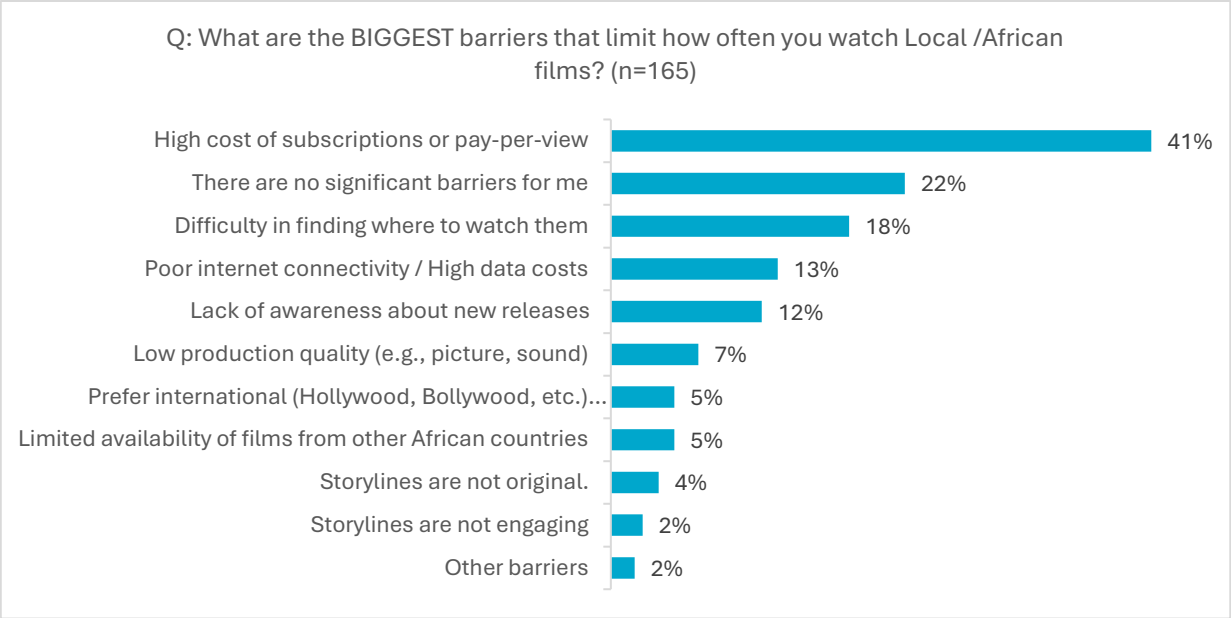


Figure 14:Barriers to watching Rwandan or African films | Source: Survey data

Rwandan audiences generally hold positive perceptions of local and African films, particularly around storytelling and improving production quality. A majority agree that local films tell authentic and relatable stories (61% agree/strongly agree) and that production quality has improved significantly (58%). There is also moderate willingness to pay for high-quality local

content (47%), indicating growing value recognition. However, audiences also highlight structural barriers: nearly half (49%) say it is difficult to find local films on mainstream platforms and 51% believe local films are not well promoted or marketed. For stakeholders, this suggests that while audience perception of content quality is improving, distributors, streaming platforms, and marketers should focus on increasing visibility and discoverability of Rwandan and African films through stronger marketing campaigns and better placement on mainstream platforms.

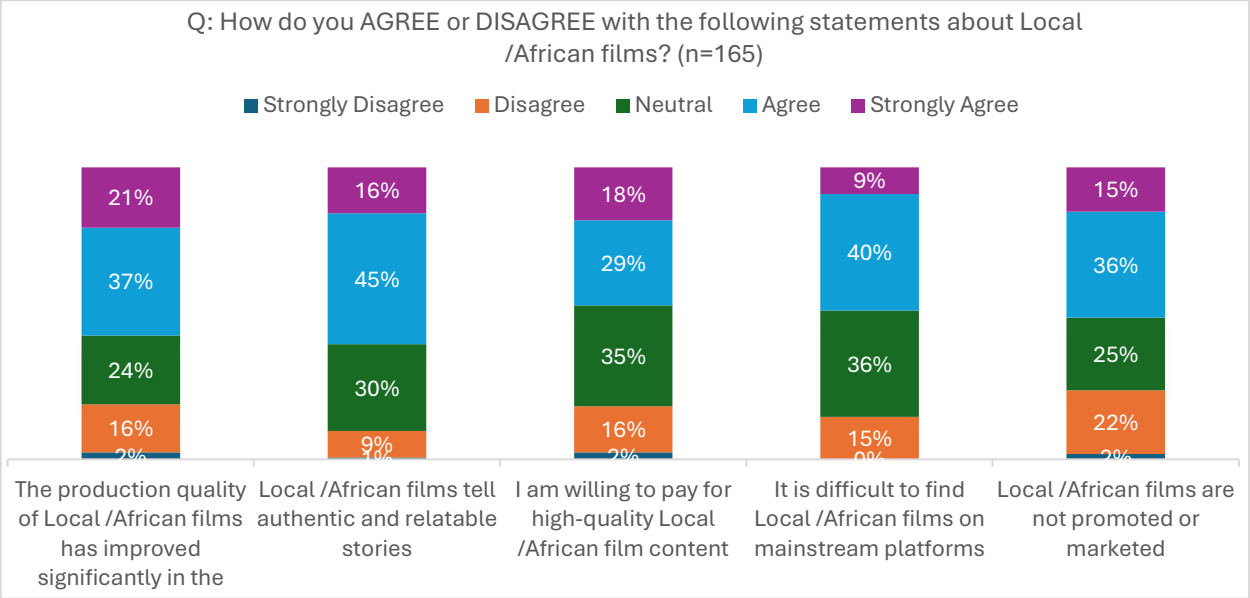


Figure 15:Perceptions on local/African films in Rwanda| Source: Survey data

Audience growth for local and African films in Rwanda is constrained less by negative perceptions of the content and more by engagement, visibility, and structural access barriers. While audiences generally acknowledge improvements in storytelling authenticity and production quality, many still report limited interest in some local story themes and low awareness of available titles. Structural barriers further limit consumption, particularly the high cost of subscriptions or pay-per-view models, difficulty discovering where to watch films, and connectivity or data cost challenges. At the same time, audiences indicate that local films are not sufficiently promoted or visible on mainstream platforms. For stakeholders, this suggests that expanding audience growth will require a combined approach: developing more compelling and audience-driven narratives, improving marketing and discoverability of local films, and addressing affordability and access through lower-cost distribution models and partnerships with telecom providers or accessible platforms.

Despite these structural hurdles, the Rwandan audience remains inherently proactive once they successfully access a film. This transition from *'passive viewer'* to *'active advocate'* suggests that the community itself is the most underutilized tool in the distribution chain.

3.2.10. Audience engagement and word-of-mouth

This proactive behaviour is clearly reflected in the way Rwandan audiences demonstrate strong post-viewing engagement driven by discovery and word-of-mouth. After watching films, 44% look for more films from the same country, while 28% recommend the film to someone in person, indicating that positive viewing experiences stimulate further exploration of similar content and peer sharing. However, 20% report doing nothing specific, and relatively smaller shares engage in deeper exploration such as searching for actors/directors (14%) or sharing on social media (8%). This suggests that discovery pathways and recommendations play a stronger role than digital amplification. Stakeholders should therefore strengthen recommendation

algorithms, curated collections, and cross-promotion of similar films, while also encouraging social sharing campaigns that can amplify audience engagement online.

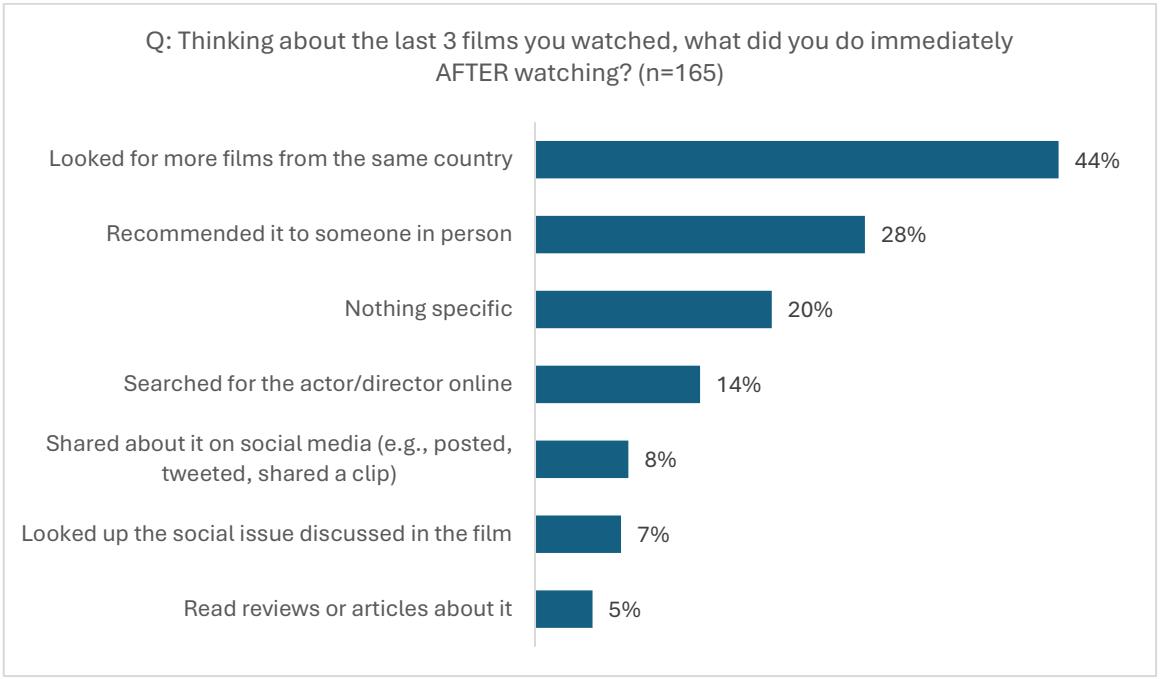


Figure 16: Actions after watching a film (Rwanda) | Source: Survey data

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

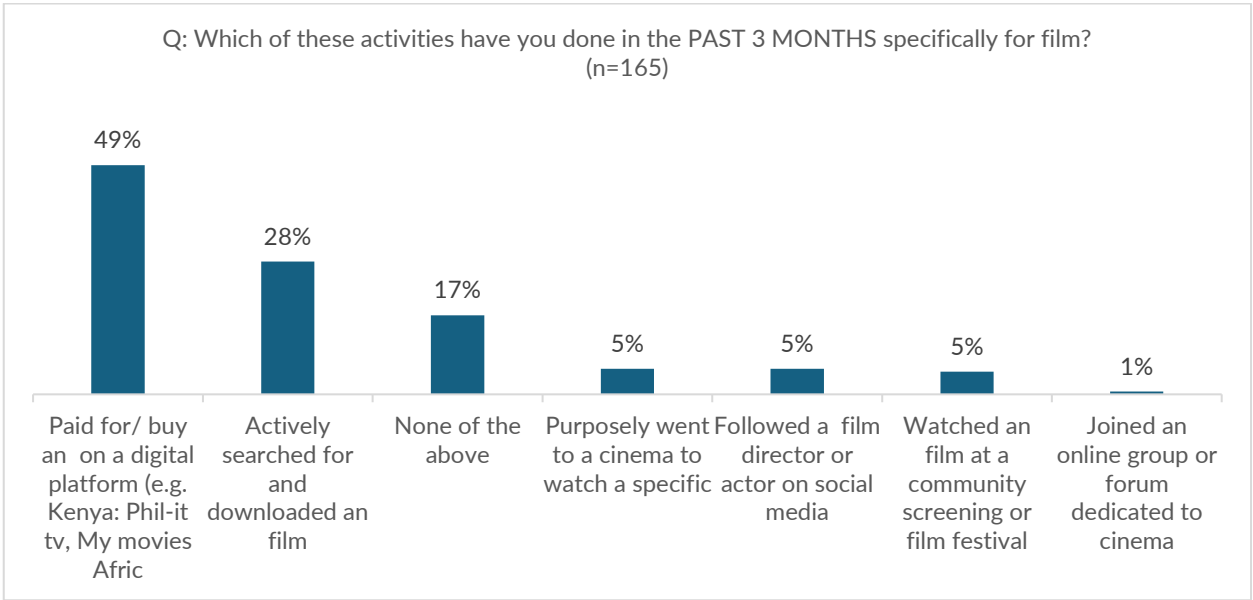


Figure 17:Engagement in past 3 months for Rwandan Audience | Source: Survey data

Audience sentiment toward recommending African films in Rwanda is relatively neutral, with promoters (33%) and detractors (32%) almost evenly balanced, resulting in a marginally positive NPS of 1. This indicates that while a segment of viewers appreciates African films, many remain unconvinced about actively recommending them, suggesting gaps in perceived quality, accessibility, or audience engagement. For filmmakers, the focus should be on strengthening storytelling quality, production value, and culturally resonant narratives that build stronger emotional connections with viewers. Distributors and streaming platforms should prioritize wider accessibility and targeted marketing campaigns that highlight compelling African titles to convert passive viewers into advocates. Government agencies and film commissions can support this shift through incentives for local productions and audience development programs such as festivals, school screenings, and public broadcasting partnerships. Funders and ecosystem partners should invest in talent development, script labs, and marketing capacity to ensure films not only get produced but also build stronger audience loyalty.

Audience engagement around films in Rwanda is largely driven by discovery and interpersonal recommendations, with many viewers exploring more films from the same country or sharing recommendations with friends after watching. This indicates that positive viewing experiences can stimulate further interest in similar content and support organic word-of-mouth circulation. At the same time, deeper engagement with the film ecosystem remains limited, with relatively few audiences participating in cinemas, festivals, online fan communities, or social media conversations around films. Audience willingness to pay for digital access suggests that viewers are open to investing in content, but recommendation behaviour remains relatively neutral, indicating that not enough films generate strong advocacy. For stakeholders, this suggests the need to strengthen audience engagement strategies beyond viewing, including improved digital discovery tools, curated collections, social media campaigns, community screenings, and fan-building initiatives that encourage audiences to actively share, discuss, and champion local and African films.

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

i. Pricing and economic constraints

The "Hollywood premium" pricing model for cinema tickets was described as a failure for the local market, as charging citizens high fees distracted rather than attracted viewers. A significant portion of the audience preferred "freemium" content on YouTube, but even this was limited by the high cost of internet data; a single episode could consume a user's entire daily 200 RWF bundle. Furthermore, the theatrical distribution process itself was reported as extremely expensive, with producers often facing costs in the millions to secure a release, alongside a minimum marketing budget of 1,000 EUR just for a premiere.

"A*ccessibility is zero... if someone buys the 200 RWF data a day, they can only watch one episode, and the internet will be depleted" Ecosystem partner, Rwanda*

ii. Limited distribution channels

The exhibition sector faced a crisis following the closure of major venues like Century Cinema and the Canal Olympia circuit, leaving the country with a massive gap in physical screening infrastructure. Outside of Kigali, infrastructure was virtually non-existent, leaving 80% of the population in rural areas underserved. Additionally, filmmakers were noted for "gatekeeping" their own work by prioritizing international festival runs, which meant local audiences often could not find access to films they had read about in the press.

"Infrastructure is also a serious problem, especially cinema screens. In many cases, there is only one screen available, which limits access." Filmmaker, Rwanda

iii. Technological access and knowledge gaps

Rwanda suffered from a severe lack of specialized film equipment, forcing producers to rent tools like steady cams from Nairobi at costs as high as $3,000 for two days. Technological requirements from international streamers also acted as a barrier, as they demanded film content shot on specific high-end cameras that were often unavailable locally. On the digital side, monetization of YouTube remained a challenge because creators in Rwanda often had to claim their accounts were based in the United States or other regions to receive payments.

"*In Rwanda, the monetization is still an issue. You have to say that your account is from America or something like that for it to make good money and receive payments." Ecosystem partner, Rwanda*

3.2.12. Solutions to the barriers

Infrastructure and accessibility fixes: Key informants recommended the establishment of affordable screening rooms in the 30 existing youth centres across Rwanda to bring cinema to the district level. Using alternative venues, such as community streets, interior parking lots, or drive-ins, was identified as a way to bypass the lack of formal cinema halls. To address the rural-urban divide, it was suggested that policy makers focus on bringing infrastructure and promotions into villages where the majority of the population resides.

Pricing and market sustainability: To move away from the free content mindset and build a sustainable industry, stakeholders suggested implementing small, symbolic e.g. 100 to 500 RWF for community screenings. This approach aimed to build a paying habit among audiences who were already willing to pay for foreign work. Filmmakers were also encouraged to produce content in cheaper, viral formats to remain economically viable while the local market matured

Technological and collaborative innovations: The adoption of AI tools was proposed as a solution to reduce production costs and assist in multilingual translation for example into Swahili, English, or French to help Kinyarwanda content reach regional and international markets. Formalizing a "pool" of African distributors and creating regional distribution highways across East Africa were seen as vital steps to increase collective bargaining power against global streamers. Additionally, integrating technical film skills such as sound, lighting, colour correction into existing technical vocational education and training (TVET) centres were identified as a long-term solution to the technical capacity gap.

"The whole world is catching up with AI now including Africa, Ecosystem partner, Rwanda

3.2.13. Audience data systems and evidence gaps

The industry suffered from a massive gap in reliable, quantitative audience data. A distributor remarked that there has been a massive gap in research, noting that creators were often left to speculate on tastes.

Government and institutional data were described as "unavailable", the insights revealed lack of specific data to track social impact or long-term behavioural changes.

Filmmakers typically relied on platform-specific dashboards for data, with one audience noting that *"YouTube is transparent and they give you the back end"* to see age and location data. However, for traditional theatrical or international runs, data was nearly non-existent; one filmmaker mentioned they *"never had access on those numbers"* when their film screened across Africa through a major distributor. The audiences emphasized that the industry needed better research on *"how much people would be willing to pay to watch a film"* to inform future distribution models.

3.3 Social Impact

3.3.1. Overview

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

3.3.2. Defining and measuring social impact through behaviour

Audiences characterized social impact in the Rwandan film industry as the capacity for a film to serve as a tool for education, community empowerment and the promotion of social change. One distributor noted that social impact occurred when a film activated a community during its inception, empowering them with the skills to tell their own stories. A distributor also defined social impact films as content that addressed specific social trends or agendas, such as behaviour change projects designed to educate youth on avoiding drugs and prostitution. Measuring this impact was described as a non-technical, often emotional process where the healing of participants or the reopening of legal cases served as primary indicators of success. However, official tracking frameworks remained absent, as current audience surveys primarily focused on general preferences rather than behavioural shifts.

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

This strategic view of film as a tool for social transformation relies heavily on how audiences prioritize their viewing choices. For social impact to move from a distributor's agenda to a community's reality, it must compete with the fundamental drivers of audience demand.

3.3.3. Audience interest in socially relevant storytelling

Participants of the audience survey showed more interest in stories about young people pursuing opportunities, education, or a better future ranked highest, cited by 38% of audiences. Economic themes also feature prominently, with 27% expressing interest in stories about money, business, and survival. Governance and social justice also attract attention. Stories dealing with power, politics, or corruption were cited by 24% of audiences, while 23% indicated interest in stories about women overcoming challenges. Themes around relationships, family health, and identity were mentioned by roughly one in five audiences. Issues related to social cohesion also appear in the responses. 16% expressed interest in stories about different cultures or religions learning to coexist, while the same share cited interest in stories about stress, trauma, or mental health. Environmental themes such as protecting nature or responding to climate change were mentioned by 14% of audiences. Only a small share of audiences (6%) indicated that they prefer films purely for entertainment without social themes (Figure 18).

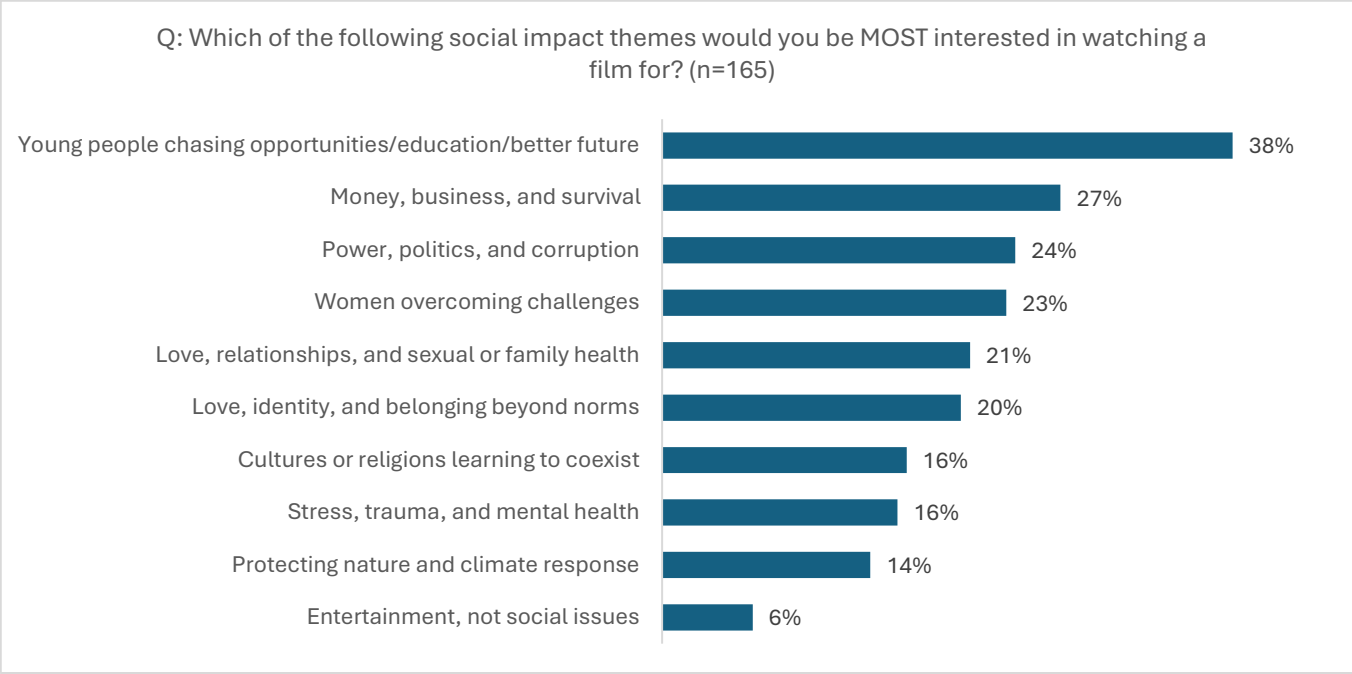


Figure 18: Social impact themes Rwandese audiences want to watch | Source: Survey data

Taken together, the findings suggest that audiences are open to films that engage with social realities, particularly when they focus on everyday aspirations such as education, economic opportunity, and personal resilience. These themes appear to resonate more strongly than abstract or policy-focused issues, indicating that socially relevant storytelling may gain greater traction when grounded in personal and community experiences.

This audience preference for grounded, relatable narratives aligns closely with the thematic areas where the industry observes its deepest social influence. When films move from abstract social concepts to the mirrored realities of Rwandan life, such as history, unity, and family, they transition from simple entertainment to powerful tools for national discourse.

3.3.4. Thematic areas where film has strongest perceived/observed impact

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

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

"Gender-based violence, I think you will almost always have a scene like that in a lot of the dramas we see on YouTube. Rural development, yeah, I think those two." Filmmaker, Rwanda

3.3.5. Priority and underexplored film themes/genres and their potential for growth and impact

Key informants identified several priority areas for future growth, particularly climate justice, land rights, and mental health. While historical dramas were established, there was a noted lack of diverse genres such as action, thrillers, and horror rooted in the Rwandan context. A filmmaker emphasized that underexplored themes like morality, spiritual conflict within a deeply religious society, and the subtle, lingering impacts of colonialism on modern identity deserved deeper cinematic exploration as stated *"Rwanda is deeply religious, and yet we rarely explore faith, doubt, spiritual conflict, or the intersection between religion and modern life in complex ways. Colonialism is another theme that can be explored more deeply. Its impact is not only historical it still influences culture, identity, language, and systems today. Sometimes this influence is subtle, but it shapes how we see ourselves and the world."* Additionally, the cultural clash between Gen Z and older generations regarding traditional taboos was cited as a theme with high potential for engagement on digital platforms.

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

3.3.6. Examples of socially impactful films and campaigns

Several films were cited for their specific social impact. *The 600: The Soldiers' Story* (2019) was recognized for its patriotic and historical significance, which successfully drew large local audiences to cinemas and encouraged national unity. *Le silence des mots (*2021) was credited with the tangible achievement of prompting the reopening of a closed legal case in France concerning survivors of the genocide.

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

Local TV series like *Seburikoko* and *City Maid* were noted for their broad appeal and their ability to convey consistent social messages regarding family values and community behaviour to a nationwide audience.

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

Public and non-profit institutions were central to both the funding and dissemination of impact-oriented content. The Rwanda Broadcasting Agency was highlighted for purchasing and airing films that promoted social values. Similarly, organizations such as the Imbuto Foundation supported youth-targeted series addressing issues like sexual health, drug abuse, and social responsibility.

NGOs also emerged as key distribution partners, often financing social impact tours and worKesops, and providing essential funding for films aligned with development priorities such as climate action and financial literacy. However, some filmmakers raised concerns that heavy reliance on donor funding could compromise artistic vision, as projects were sometimes required to incorporate explicit approval messaging to secure support.

3.4 Financing and Enabling Environment

Rwanda's film financing is moving away from a traditional "NGO grant" model toward a more commercial and institutionalized framework. The 2024 Creative Grants Initiative, which provided €360,000 in domestic production funding, represents a seismic shift in how local projects are supported. While international co-financing from partners like GIZ and OIF remains a cornerstone of the industry, the availability of local "anchor budgets" is increasingly seen as

essential for attracting foreign investment. However, critical gaps remain, particularly the lack of development capital for pre-production, the absence of domestic private equity, and a shortage of specialized film-grade equipment and studios. The regulatory environment is supported by competitive tax incentives and a modern intellectual property law enacted in 2024, though the operational enforcement of these protections and the transparency of content classification through the Censorship and Viewership Board are still in early stages of development.

3.4.1. Overview of public, private, and international financing for film

Financing in the Rwandan film industry was characterized by a heavy reliance on international sources, limited public funding, and a cautious private sector. Key informants estimated that approximately 80% of film financing originated from Europe and the United States, raising concerns about neocolonialism and the influence of external narratives on local storytelling.

" Once you look to the side of funds, I exactly confirm that we are still colonized because you find that 80% is from Europe and America, so once our country gets into conflict with one of them, it distracts the entire industry" Filmmaker, Rwanda.

At the national level, institutions such as the Rwanda Film Office and the Ministry of Youth and Arts provided some support through production and travel grants, although these were described as limited and inconsistent. The Rwanda Broadcasting Agency also played an indirect financing role by purchasing locally produced content, enabling select producers to recover part of their investment. Private investment remained minimal, as financial institutions and high-net-worth individuals often lacked confidence in film as a viable commercial sector. It was widely perceived as high-risk, with underdeveloped and unproven distribution channels limiting its attractiveness as an investment opportunity.

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

3.4.2. Incentives, grants, tax credits, funds, and coproduction schemes

The enabling environment in Rwanda is noted to be characterized by emerging, yet largely untested, fiscal incentives and highly competitive grant structures. The government introduced tax incentives for international co-productions exceeding USD500,000, including exemptions on VAT and other production-related costs. However, many local filmmakers remained unaware of these provisions or had not yet seen successful cases of projects navigating the requirements to benefit from them.

Public funding mechanisms, particularly through the Rwanda Film Office, were described as extremely competitive, with demand far exceeding the available resources.

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

As a result, co-production became a critical pathway for accessing financing, equipment, and post-production facilities. However, these partnerships were seen to come with restrictive conditions, including requirements to hire foreign technical teams or cede distribution rights to international particularly European partners.

3.4.3. Business models and revenue mixes across distribution channels

Key informants revealed revenue generation being primarily split between digital platforms, national television, and specialized licensing. YouTube served as the dominant business model for "underground" filmmakers, allowing them to monetize content through views, although local monetization in Rwanda remained a challenge that forced some to register accounts

abroad. Zacu TV and RBA were the most effective local channels for content acquisition, with Zacu TV evolving from a VOD platform into a major Canal+ owned cable channel airing 100% Kinyarwanda content. Beyond traditional media, some filmmakers found success through niche licensing, such as selling content for in-flight entertainment on airlines like RwandAir or producing films used in university studies, which generated higher returns than traditional theatrical releases. Theatrical models were described as failing due to high costs and the lack of operational cinema screens.

3.4.4. Key constraints and promising innovations

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

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

Professional collaboration was predominantly informal, rooted in peer networks and “collectives,” where practitioners leveraged each other’s expertise in areas such as sales, marketing, and legal affairs. Mentorship typically followed a “learning by doing” model, reflecting the limited availability of formal film education, with many practitioners relying on online resources and short-term worKesops.

Emerging opportunities, including internships at Zacu TV, were also noted as important pathways to gain full-time industry experience and contribute to quality control processes.

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

3.5 Children’s Consumption Landscape

This section examines children’s film and media consumption behaviours within the Rwandan 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

Teenagers in Rwanda show significantly stronger engagement with local films (81%) compared to children (51%), highlighting the growing relevance of local storytelling among older audiences.

Teenagers also consume a more diverse range of international content, particularly African films from other countries (40%), Bollywood/Tollywood films (13%), and Korean dramas (10%), compared to children.

American films are popular across both groups, with teenagers (40%) slightly more likely to watch them than children (33%).

Children demonstrate narrower and less defined viewing habits, with a high proportion selecting "Other films (23%), suggesting greater consumption of mixed or unclassified content such as cartoons or online videos.

Overall, film consumption in Rwanda becomes more diversified with age, shifting from generalized viewing among children toward stronger local film engagement and broader international exposure among teenagers

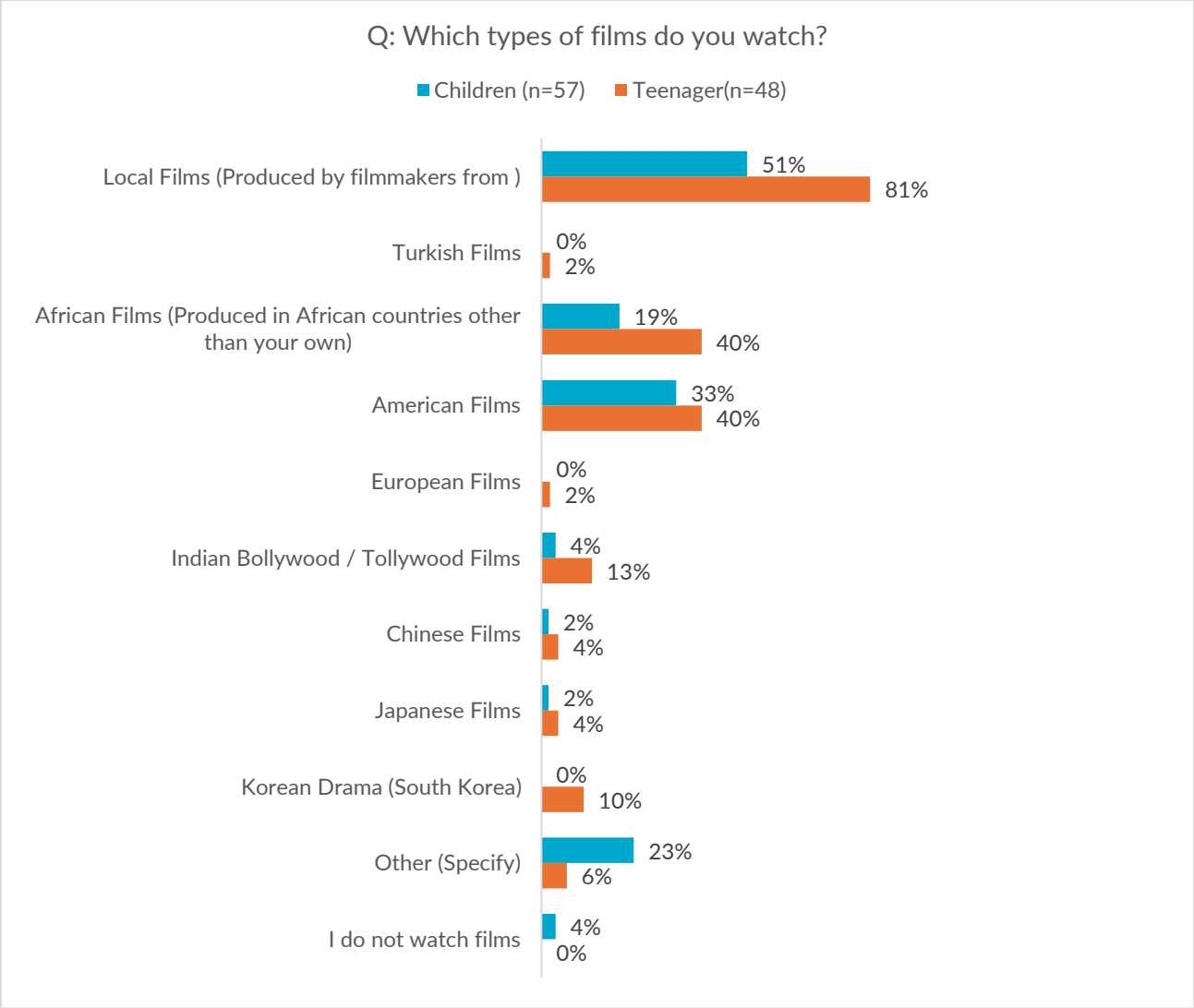


Figure 19: Type of films watched by teenagers and children in Rwanda | Source: Survey data

3.5.2. Genre preferences among young audiences

Animation and cartoons overwhelmingly dominate children's viewing preferences in Rwanda, with 85% of children watching this genre compared to 46% of teenagers, confirming that animated content remains the primary genre for younger audiences.

Teenagers exhibit more diverse and mature genre preferences, particularly toward comedy (56%), action (42%), documentaries (29%), and romantic comedies (29%), compared to children at 42%, 7%, 0%, and 9% respectively.

Documentary viewing is almost exclusively driven by teenagers, with 29% engagement compared to no reported documentary consumption among children, suggesting increased interest in educational and real-world storytelling among older audiences.

Action films show one of the largest generational differences, attracting 42% of teenagers but only 7% of children, indicating that teenagers are significantly more drawn to fast-paced and high-intensity content.

Comedy appeals strongly across both groups, though teenagers remain more engaged (56%) than children (42%), making it one of the few genres with broad cross-age appeal.

Drama and sci-fi remain relatively niche genres overall, though teenagers still show slightly higher interest than children, reinforcing the broader diversification of genre preferences with age.

Overall, this indicate that film preferences in Rwanda evolve from animation-centered viewing among children toward broader engagement with action, comedy, documentaries, and relationship-driven storytelling among teenagers.

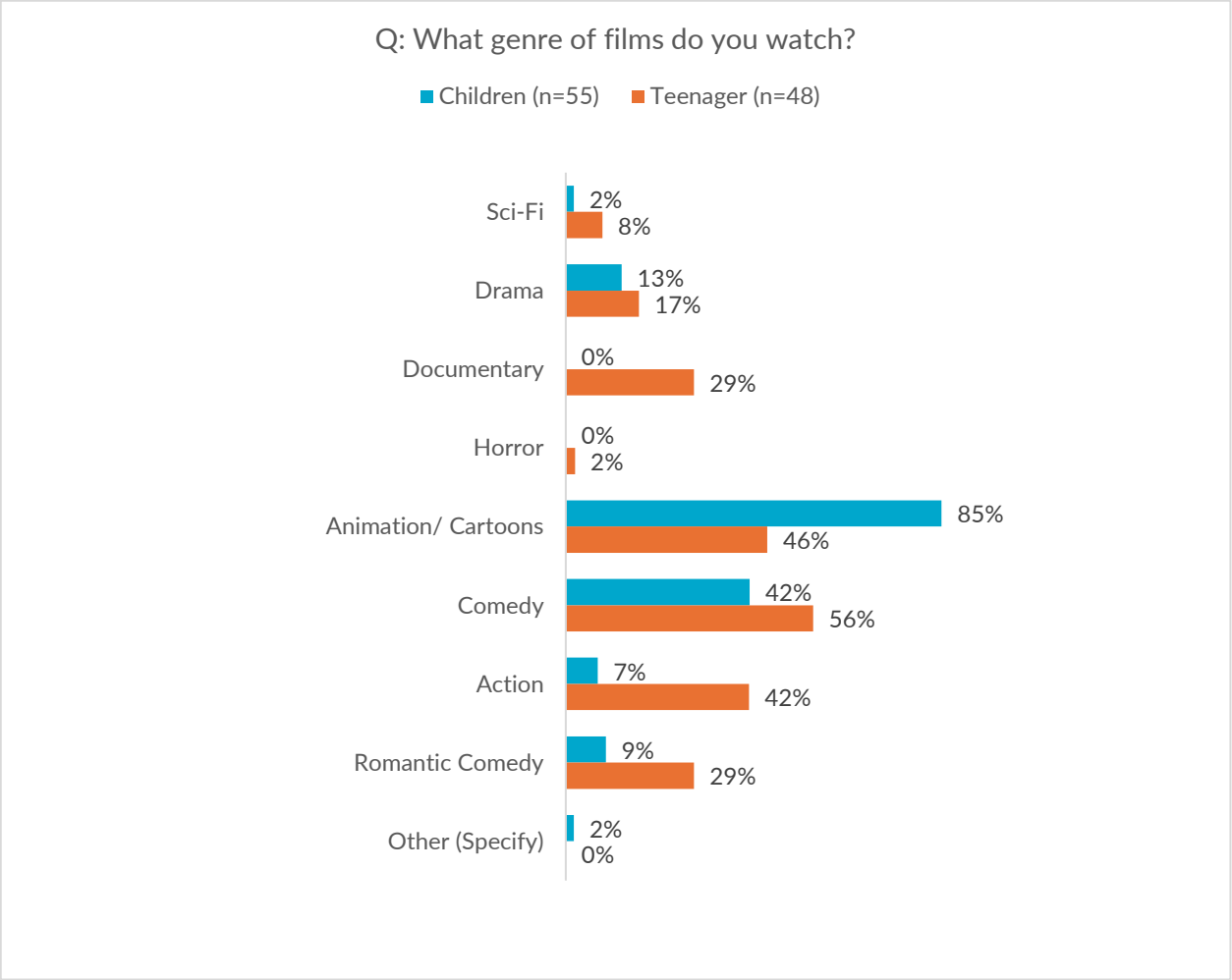


Figure 20:Genre of films watched by children and teenagers in Rwanda | Source: Survey data

3.5.3. Digital platforms dominate film access

YouTube/YouTube Kids and Pay TV are the dominant film viewing platforms among both children and teenagers in Rwanda, with teenagers showing particularly high engagement on YouTube (67%) and Pay TV (65%).

Teenagers are significantly more likely to use streaming platforms such as Netflix and Showmax (31%) compared to children (16%), indicating stronger adoption of digital and on-demand viewing habits among older audiences.

Formal cinema ecosystems, including mainstream cinemas, film festivals, and community screenings, record almost no engagement among either group, highlighting limited theatrical film consumption among young audiences in Rwanda.

Video rentals continue to play a modest role for both children (13%) and teenagers (13%), suggesting that informal or offline distribution channels remain relevant despite increasing digital access.

Overall, film consumption among young audiences in Rwanda is heavily centered around home-based digital and television platforms, with teenagers showing a clear shift toward more online and streaming-oriented viewing behaviors.

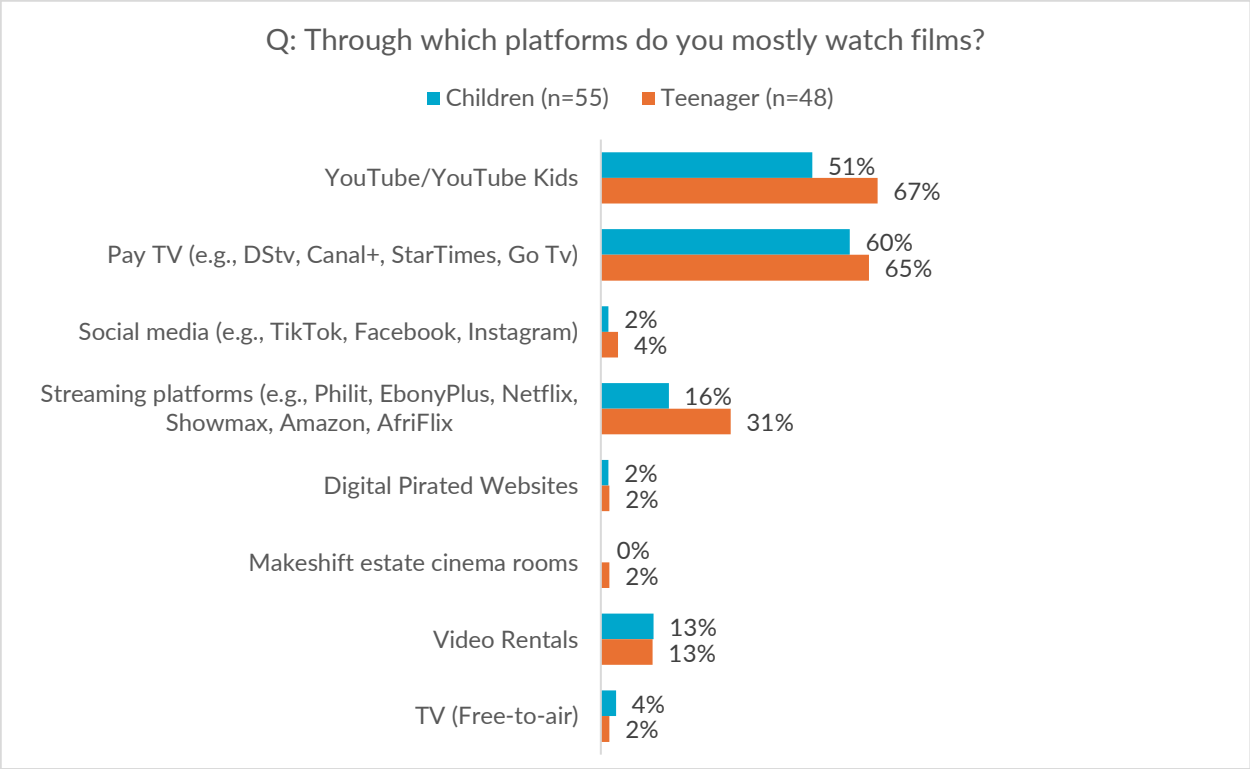


Figure 21: Platforms used mostly by children and teenagers to watch films in Rwanda | Source: Survey data

3.5.4. Film consumption frequency among young audience

Film watching is a regular activity among both children and teenagers in Rwanda, with the majority consuming films either at least once a week or 2–3 times a month.

Children are more likely to watch films at least once a week (60%) compared to teenagers (38%), suggesting more routine or family-oriented viewing habits among younger audiences.

Teenagers, however, are more likely to watch films 2–3 times a month (52%) than children (31%), indicating slightly less frequent but still consistent engagement with film content.

Daily film consumption remains relatively low but similar across both groups, reported by 7.3% of children and 8% of teenagers, showing that intensive daily viewing is not yet widespread among young audiences in Rwanda.

Very few respondents watch films only occasionally, with almost no children or teenagers reporting viewing once every few months or once a month, highlighting the strong integration of film consumption into regular entertainment habits.

Overall, film consumption is highly embedded in the routines of young audiences in Rwanda, with children tending toward more frequent weekly viewing while teenagers engage in slightly more moderate but still regular consumption patterns.

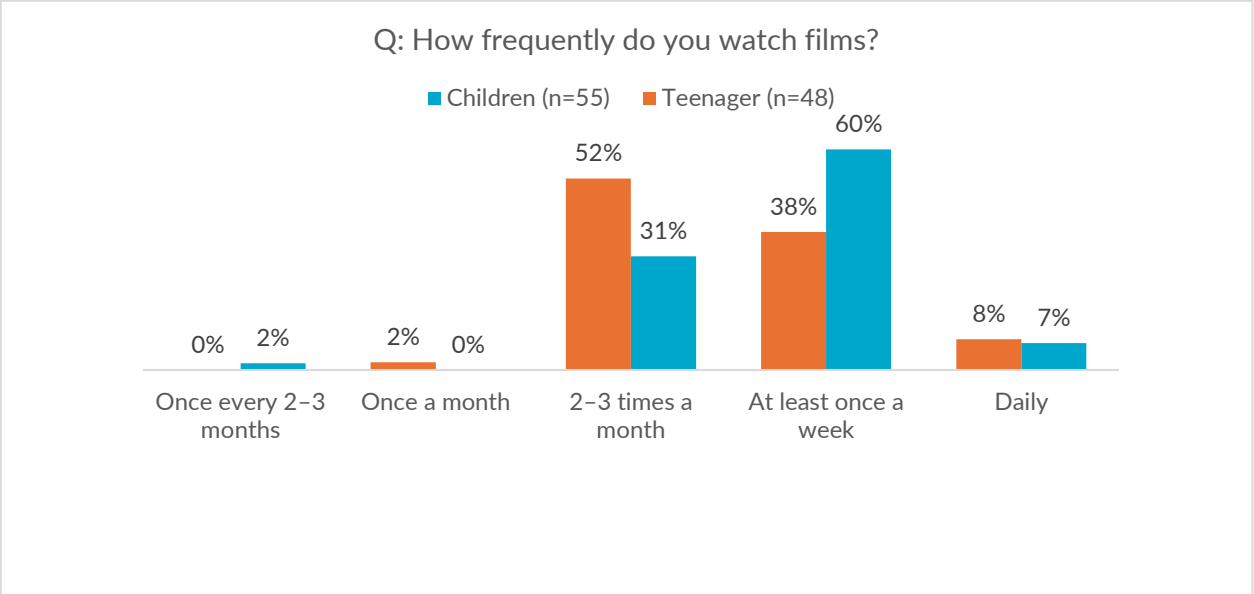


Figure 22: Frequency of children and teenagers watching films in Rwanda | Source: Survey data

3.5.5. Family-Centered Viewing Behaviors

Film watching among young audiences in Rwanda is largely a social and family-oriented activity, with parents and siblings/relatives emerging as the most common viewing companions for both children and teenagers.

Children are more likely to watch films with parents (62%) compared to teenagers (54%), reflecting stronger parental involvement and supervision in younger audiences' viewing habits.

Teenagers show higher levels of peer-oriented viewing, particularly with friends (41.7% compared to 18% among children) and classmates/schoolmates (13% compared to 2%), suggesting that film consumption becomes increasingly socialized outside the family environment with age.

Watching films with siblings or relatives is common across both groups, though slightly higher among teenagers (60%) than children (51%), indicating the continued importance of household and extended family viewing experiences.

Teenagers are also more likely to watch films alone (38%) compared to children (22%), pointing toward greater independence and personalized media consumption habits among older audiences.

Overall, the findings suggest that children's film consumption in Rwanda remains strongly family-centered, while teenagers balance family viewing with growing peer interaction and independent viewing behaviors.

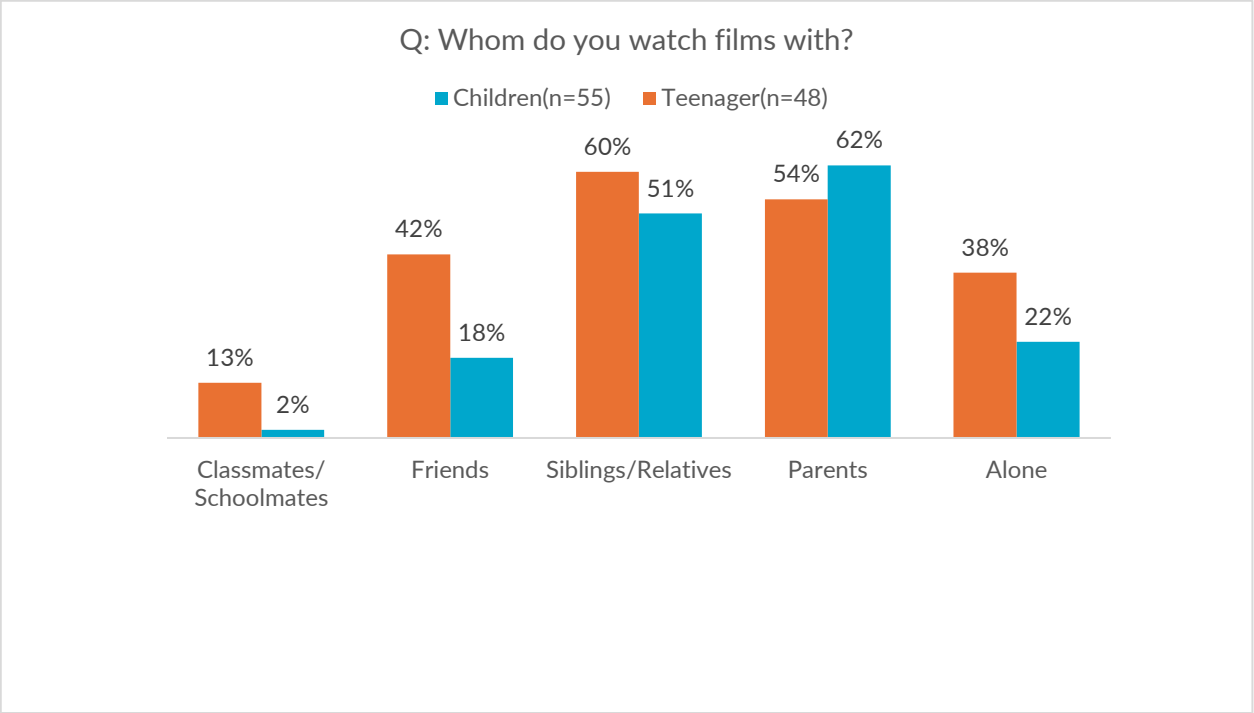


Figure 23: Whom do children and teenagers in Rwanda watch films with | Source: Survey data

3.5.6. Film discovery pathways among young audiences

Friends and family are by far the dominant source of film discovery among both children and teenagers in Rwanda, cited by 93% of children and 90% of teenagers. This highlights the central role of interpersonal networks and word-of-mouth recommendations in shaping viewing choices among young audiences.

Teenagers are significantly more influenced by digital discovery channels compared to children, particularly social media (19% vs. 4%) and streaming platform recommendations (21% vs. 11%), reflecting greater exposure to online and algorithm-driven content discovery.

Influencers/bloggers and traditional media advertisements play only a minor role overall and are relevant almost exclusively among teenagers, each cited by 6% of respondents, while children report virtually no engagement with these channels.

Film festivals and outdoor advertising such as billboards have no reported influence on film discovery among either children or teenagers, suggesting limited exposure of young audiences to formal film promotion ecosystems in Rwanda.

This indicate that film awareness among young audiences in Rwanda is driven primarily by close social networks, while teenagers increasingly supplement this with digital and platform-based discovery channels.

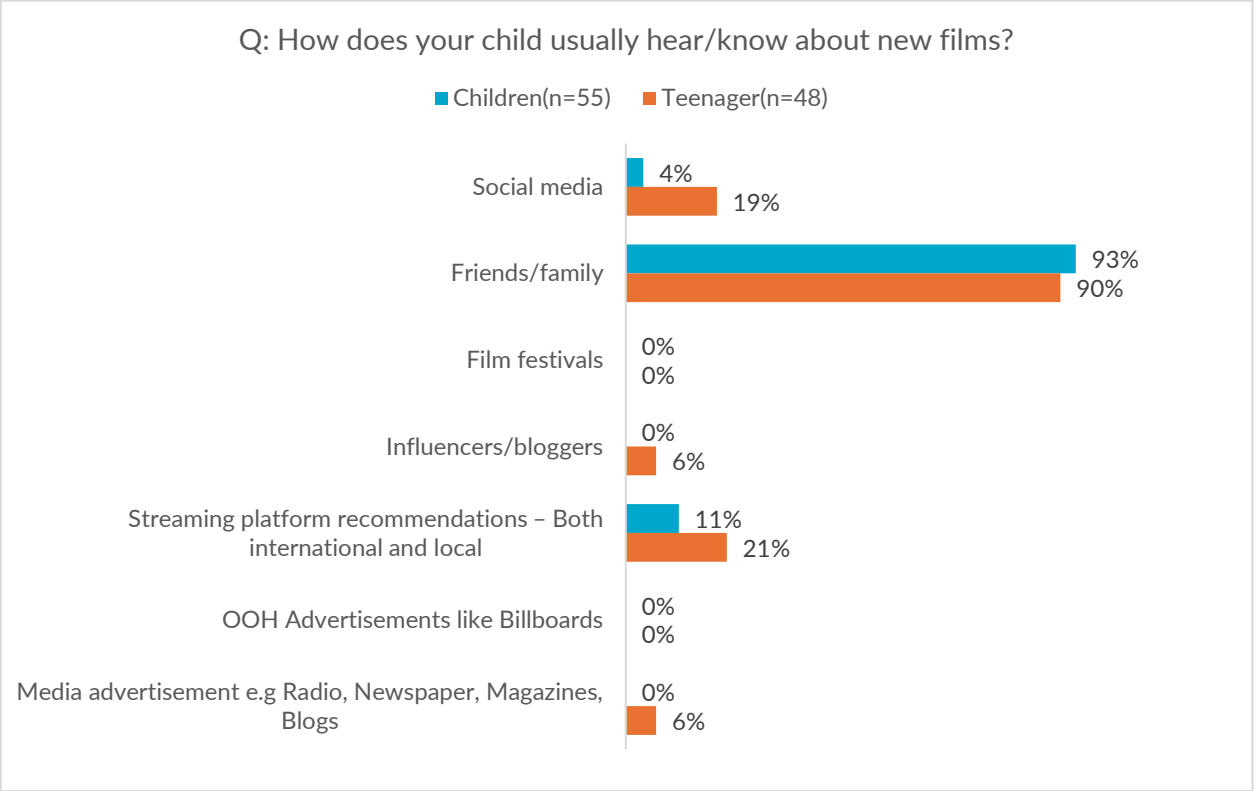


Figure 24: How children and teenagers hear about new films in Rwanda | Source: Survey data

3.5.7. Motivations driving film consumption

Entertainment and relaxation are the primary motivations for watching films among both children (85%) and teenagers (92%) in Rwanda, making enjoyment the dominant driver of film consumption.

Family-friendly and engaging storytelling are also important motivations across both groups, with around one-third valuing safe content and interesting stories that maintain attention.

Teenagers are more influenced by accessibility, peer trends, and entertainment culture, including affordability of access (31%), popularity among friends/family (17%), and music, visuals, or style (19%).

Children place slightly greater emphasis on educational value (22%) and safe viewing environments, suggesting stronger parental and developmental influence in their viewing motivations.

Overall, film consumption among young audiences in Rwanda is primarily entertainment-driven, while teenagers increasingly engage with films as part of broader social and cultural experiences.

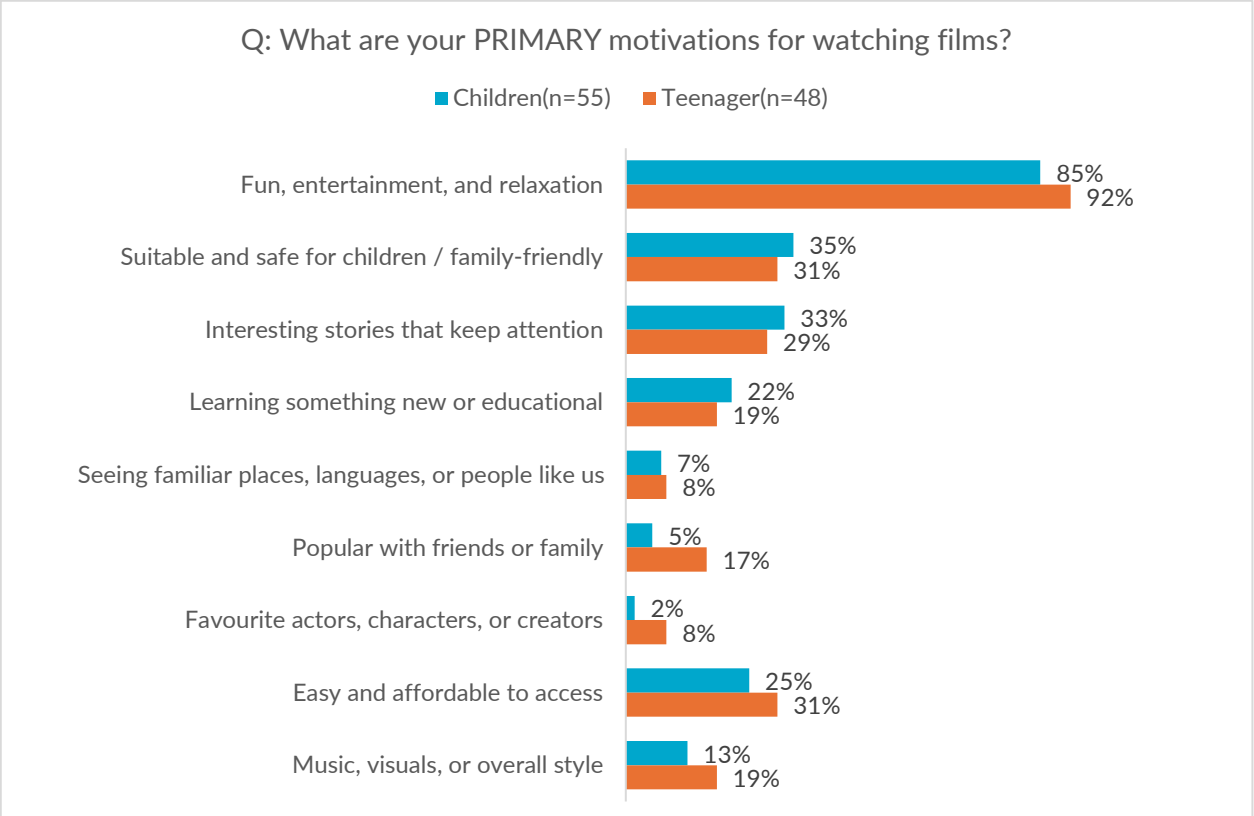


Figure 25: Primary motivation for children and teenagers to watching films in Rwanda | Source: Survey data

Conclusion

The young audience survey shows that film consumption among children and teenagers in Rwanda is highly embedded in everyday entertainment and social life, with clear differences emerging across age groups. Younger children remain strongly oriented toward animation, family-centered viewing, and guided content discovery through parents and relatives, reflecting the important role of household influence in shaping early viewing habits. In contrast, teenagers display broader and more independent consumption patterns, characterized by stronger engagement with local films, greater exposure to international content, diversified genre preferences, and increased reliance on digital platforms and social media for discovery.

The insights also point to a rapidly evolving youth media ecosystem in Rwanda, where home-based digital viewing through YouTube, Pay TV, and streaming platforms increasingly dominates, while formal cinema-going and public screening spaces remain largely absent from young audiences' experiences. At the same time, the strong preference for local storytelling among teenagers highlights an important opportunity for the Rwandan film industry to cultivate long-term audience loyalty through culturally relevant, youth-oriented content. As younger audiences grow older and become more digitally connected, there is significant potential to expand engagement through accessible streaming ecosystems, peer-driven marketing, and diverse storytelling that reflects both local realities and global entertainment trends.

4. Recommendation

4.1 Country-Specific Priorities and Opportunities

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

4.1.1. Priority opportunities in distribution

The qualitative findings indicated that audiences viewed pan-African collectives and regional distribution networks as the most critical priority for expanding the reach of Rwandan film. Establishing regional distribution frameworks and partnerships that enable films to circulate across East African markets particularly between Rwanda, Uganda, Kenya, and Tanzania was seen as a strategic approach to sharing the high costs associated with marketing and distribution.

Emerging self-distribution models, such as filmmaker-owned websites, were also highlighted as viable alternatives for bypassing unfavourable agreements with global streaming platforms as mentioned by a distributor,

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

In addition, auxiliary markets including in-flight entertainment on national airlines and content licensing for inter-city bus systems were identified as underutilized revenue streams with strong growth potential.

At the policy level, key priorities included the establishment of grants to support digital channel promotion and the introduction of tax exemptions for local streaming platforms, enabling them to reinvest in content development and scale their operations sustainably. As stated by an ecosystem partner, *“If there were any kind of loans, not maybe loans are too difficult for filmmakers but if there was some grants that could be given to filmmakers for them to use funds to promote their channels."*

4.1.2. Priority opportunities in audience development

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

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

I had an idea that I always talk about, and I hope I will be able to do it: to do screenings in youth centres. We have like 30 youth centres, that's a lot. If each centre can show a film, even if they pay 100 or 200 RWF, it's a lot of money. " Ecosystem partner, Rwanda

4.1.3. Priority opportunities in social impact

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

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

4.1.4. Scaling potential recommendations

Integration of technical film trainings into national TVET systems: Stakeholders recommended embedding specialized film skills such as sound engineering, editing and lighting into Rwanda's national TVET system to create a sustainable talent pipeline.

"The limitation is that we are not doing long-term things…there's something already with the ministry. We have TVET, the vocational training centres… you can add sound, you can add light, you can even add filmmaking." Ecosystem partner, Rwanda

The results revealed that while existing centres train in areas like electricity and carpentry, there is a missed opportunity to expand these programs into intensive three-year film-related technical training, ensuring young professionals gain in-depth, practical skills.

Rwandan owned infrastructure and film mandates: Scaling industry reach requires breaking the dominance of foreign-owned cinema chains by investing in locally owned exhibition spaces that can mandate screenings for Rwandan content. Local ownership would allow self-regulated programming to protect domestic productions while gradually expanding the market for Rwandan stories.

Inclusion of working filmmakers in funding design: It was strongly recommended that the government involve active filmmakers in shaping funding criteria to reflect the realities of Rwandan production. Stakeholders noted that only those familiar with local challenges such as limited equipment access and informal production models can create effective policies, rather than simply replicating Western frameworks.

"I think it is very important that the people designing and managing the film industry should include actual working filmmakers, people who understand the reality of filmmaking in Rwanda." Filmmaker, Rwanda

Formalization of collective management organizations (CMOs): Policy-level recommendations emphasized establishing CMOs to ensure filmmakers receive consistent royalties from digital and broadcast exploitation. This framework would provide a legal basis for creators to recoup investments every time their work is viewed across multiple platforms.

5. Annex

5.1 Links

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

To read the full desk research report for Rwanda, 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)

5.2 Quantitative 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**[1]

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

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

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

What is your name (open end)

[1] SA-Single Response

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

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

A4. What is your age? SA

1. 18 - 24
2. 25 - 34
3. 35 - 44
4. 45 – 54
5. 55 – 64
6. 65 – 74
7. 75 – 84
8. 85 and above

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

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

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

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

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

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

A8. Approximate Household Monthly Income in your local currency:

Type in_____

A9. Which devices do you own?

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

10. Free satellite TV
11. Free to air digital TV
12. Other (Specify)
13. None

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

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

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

	0-5 years	6-9 years	10-13 years	14-17 years
Child 1	1	2	3	4
Child 2	1	2	3	4
Child 3	1	2	3	4

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

1. Yes
2. No

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

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

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

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

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

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

SECTION B: GENERAL FILM CONSUMPTION HABITS

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

1. **Local Films (Produced by filmmakers from [Insert Country])**

2. **African Films (Produced in African countries other than your own)**
3. American Films
4. European Films
5. Indian Bollywood/Indian Tollywood Films
6. Chinese Films
7. Japanese Films
8. Korean Drama (South Korea)
9. Latin American Films
10. Turkish Films
11. Other (Specify)
12. I do not watch films- Terminate

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

(Select options mentioned from B1)

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

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

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

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

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

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

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

(ASK IF B1 = 1 and/or 2)

1. I am not interested in the stories or themes
2. I prefer international (e.g. Hollywood, European, Asian) films

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

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

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

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

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

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

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

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

SECTION C: PLATFORM SPECIFIC MODULES

C1. VOD / STREAMING PLATFORMS

(ASK IF B2 = 1)

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

ONLY SHOW COUNTRY OPTIONS AS CODED IN A.1

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

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

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

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

1. Daily
2. Weekly

3. Monthly
4. Rarely

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

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

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

Type in_____

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

Type in_____

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

Type in _____

Piracy Frequency (If selected pirated websites in C1

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

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

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

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

C2. CINEMA (MAINSTREAM & MAKESHIFT)

(ASK IF B2 = 2)

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

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

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

Type in_____

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

Type in_____

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

1. Alone

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

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

Type in_____

C3. FILM FESTIVALS & COMMUNITY SCREENINGS

(ASK IF B2 = 3)

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

1. Film festivals
2. Community screenings/ viewing

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

1. Type in _____

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

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

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

Type in_____

C4. VIDEO RENTALS

(ASK IF B2 = 4)

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

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

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

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

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

Type in_____

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

Type in_____

C5. TV/Broadcasting Stations

(ASK IF B2 = 5)

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

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

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

1. Daily
2. Weekly
3. Monthly

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

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

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

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

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

(Ask only if coded 2 in C5.1)

Type in_____

C6. SOCIAL MEDIA

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

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

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

1. Daily
2. Weekly
3. Monthly

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

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

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

Type in_____

Preferred Alternative

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

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

SECTION D : CONTENT PREFERENCES & PERCEPTIONS

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

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

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

D3. What type of storytelling do you prefer? MA

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

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

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

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

Use D4 options	Not Important				Very Important
Acting quality	1	2	3	4	5
Genre	1	2	3	4	5

Plot/Theme	1	2	3	4	5
Technical quality (sound, visuals, editing)	1	2	3	4	5
Language/subtitles	1	2	3	4	5
Representation of African cultures / Cultural Relevance	1	2	3	4	5
Producing Director	1	2	3	4	5
Actors	1	2	3	4	5
Reviews and Rating	1	2	3	4	5
Popularity/ Trending Film	1	2	3	4	5
Movie type - Series or Movie	1	2	3	4	5
Awards and Recognition	1	2	3	4	5
Peer recommendation / word of mouth	1	2	3	4	5
Marketing Campaign like Ads, social media posts, influencer promotions	1	2	3	4	5

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

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

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

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

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

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

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

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

SECTION E: DRIVERS & BARRIERS

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

Note to scripting: Please randomize

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

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

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

SECTION F: BEHAVIOURAL ENGAGEMENT WITH FILMS

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

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

8. Other (Specify)

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

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

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

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

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

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

SECTION G: CINEMA vs. HOME VIEWERING & SPENDING

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

(Ask if 2 in B2)

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

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

(Ask If G1 = 2 is not coded)

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

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

(Type in local currency) _____

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

(Type in local currency) _____

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

Type in_____

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

Type in_____

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

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

SECTION H: RECOMMENDATIONS FOR THE AFRICAN FILM INDUSTRY

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

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

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

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

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

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

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

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

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

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

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

SECTION CC: CHILDREN'S VIEWING BEHAVIOUR

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

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

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

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

Type in_____

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

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

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

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

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

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

CC5 How frequently do you/your child watch films:

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

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

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

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

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

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

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

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

Closing Remarks

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