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African Film Audience Segmentation Report

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Study Design and Audience Segmentation Approach

Study Coverage

- Audience survey conducted across **6 African countries: Kenya, Rwanda, Nigeria, South Africa, Egypt and Senegal**
- Sample includes **both urban and rural film audiences**
- Captures **diverse viewing environments, access levels, and consumption habits**

COUNTRY	URBAN	PERI-URBAN / SUBURBAN	RURAL	TOTAL
Kenya	170	85	49	304
Rwanda	57	92	16	165
Nigeria	147	93	64	304
South Africa	330	103	1	434
Egypt	213	0	0	213
Senegal	181	29	0	210
Total	1,098	402	130	1,630

Segmentation Methodology

Data-driven clustering based on viewing behavior, content preferences, motivations, attitudes, willingness to pay, economic factors, and film awareness

- **Selection of variables**: Chose variables reflecting content preferences, viewing motivations, device usage, and attitudes toward African and international films
- **Statistical analysis**: Applied clustering techniques to group respondents with similar behavior and preferences
- **Determine optimal segments**: Tested multiple solutions; selected the most stable and interpretable number of segments
- **Segment profiling**: Profiled each segment using demographics, platform usage, device ownership, and content preferences to describe characteristics and motivation

Alignment and Interpretation of Segment Insights

- Segments were interpreted by combining **statistical clustering results with descriptive audience profiles**
- Each segment was analyzed across **demographics, film preferences, viewing platforms, and motivations**.
- This analysis defined each segment by **who they are**, **what they watch**, **how they watch**, and **why they watch**

Kenya

Segmentation analysis on the three segments

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Kenya

A predominantly female, family-oriented segment that prioritizes local and African content. They rely heavily on smartphones and YouTube for streaming but are constrained by mobile data costs.

Segment 1: African - First Family Streamers

DIMENSION	KEY CHARACTERISTICS
Segment distribution	n = 138 (45%)
Gender	79% female skewed
Age distribution	Mixed age distribution with a strong representation of 25 – 44 years – 75%
Content preference	Watches both African and international films, but with the strong preference for local content – 83% and regional content – 76%.
Top genres	Highly drawn to drama (67%) and comedy – 65%
Primary device	Smartphone – 70% and smart TV – 42%
Main platforms	Mainly uses YouTube – 94% and Netflix – 25%
Fallback option	Free-to-air TV - 70%
Main motivations	Entertainment (86%) and Education – 46%
Key barriers to watching local films	Poor internet connectivity / High data costs- 47%
Median spend	~$7.80 per month on streaming (Average of 1 paid streaming platform); cinema Willingness To Pay ~$3.90
Net Promoter Score	The NPS for African local films is -37%, indicating a weak audience advocacy
Growth triggers	Higher-quality original African films – 59% and Lower subscription prices for streaming services – 36%

- The African-First Family Streamers, shows a strong commitment to African storytelling, with 47% watching exclusively African films and 48% combining African and international content, underscoring their deep cultural alignment with regional productions.
- Viewing behavior in this segment is distinctly mobile-first relying on smartphones, and platform engagement is dominated by.
- Film consumption is primarily for entertainment purposes and slightly, education.
- Audience satisfaction remains mixed, with a Net Promoter Score showing 59% detractors and 22% promoters, signaling room for improvement in quality and discoverability.
- When accessing new Kenyan releases, they typically opt to wait for availability on existing platforms or rent digitally with limited resort to piracy (7%).
- Looking forward, increased engagement from this segment would be driven by higher-quality original productions, lower subscription costs, pointing to clear opportunities for strengthening the local film ecosystem.

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Kenya

A culturally diverse, high-volume streaming audience watching across multiple devices. Prefers high-quality drama and comedy and will pay for premium local content when quality is strong.

Segment 2: Cross-Platform Cultural Explorers

DIMENSION	KEY CHARACTERISTICS
Segment distribution	n = 106 (35%)
Gender	Mixed gender,59% female and 41% male
Age distribution	Mixed age distribution with a strong representation of 25 – 44 years – 78%
Content preference	Only watches both African (local – 86% and regional – 79%) and international films – 100%
Top genres	Highly drawn to drama (68%) and comedy – 61%
Primary device	Smartphone/tablet – 70% and Smart TV – 56%
Main platforms	Mainly uses YouTube – 85% and Netflix – 47%
Fallback option	Free-to-air TV - 46%
Main motivations	Entertainment (93%) and High-Quality Storytelling - 64%
Key barriers to watching local films	Storylines that are not engaging - 41%
Median spend	~$9.40 per month on streaming (Average of 1 paid streaming platform); cinema Willingness To Pay ~$4.70
Net Promoter Score	The NPS for African local films is -39%, indicating a weak audience advocacy
Growth triggers	Higher-quality original African films – 77% and Better personalization and recommendations – 48%

- This segment is defined by a highly internationalized viewing orientation, with 100% of viewers consuming both African and international films, though international content dominates regular consumption (68%).
- Their genre preferences center on drama followed by comedy, suggesting a desire for emotionally rich, informative, and entertaining content.
- Technologically, this segment is both mobile-driven and device-diverse, making them among the most digitally equipped segments.
- Platform engagement reflects a hybrid streaming ecosystem, where YouTube remains dominant but paid platforms have far stronger uptake for premium content compared to other groups, Netflix (47%) and Showmax (17%) with low piracy reliance (7%), signaling both digital integration and willingness to access legitimate content.
- To strengthen engagement with local and African productions, audiences highlight the need for higher-quality originals, improved personalization and recommendation systems and country-based content filters (47%) to enhance discoverability.

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Kenya

Globally oriented viewers with high expectations for acting, storytelling, and production quality. Local films gain traction only when quality and discovery improve.

Segment 3:International Quality-Seekers

DIMENSION	KEY CHARACTERISTICS
Segment distribution	n = 60 (20%)
Gender	72% male skewed
Age distribution	Mixed age distribution with a strong representation of 25 – 44 years – 80%
Content preference	Watches both African (Local and regional both at 23%) and international films – 100%, but with the strong preference for international content.
Top genres	Highly drawn to action (80%), drama – 62% and science fiction – 60%
Primary device	Smartphone / Tablet – 62% and Smart TV – 60%
Main platforms	Mainly uses YouTube – 76%, pirated websites – 42% and Netflix – 40%
Fallback option	Making films available on affordable DVDs/USB sticks - 48%
Main motivations	Entertainment (90%), High-Quality Storytelling – 72% and Education – 67%
Key barriers to watching local films	Storylines are not engaging – 57%
Median spend	~$8.20 per month on streaming (Average of 1 paid streaming platform); cinema Willingness To Pay ~$4.70
Net Promoter Score	The NPS for African local films is -80%, indicating extremely poor audience advocacy
Growth triggers	Higher-quality original African films – 80% and Better personalization and recommendations – 52%

- This segment is characterized by a strongly global viewing orientation, with 63% watching international films exclusively and the remaining 37% blending international and African content. Their most-watched content comes overwhelmingly from American (60%) and European cinemas (30%), underscoring a preference for high production value global industries.
- Genre preferences reinforce this pattern, with dominant interest in action, drama and science fiction.
- Technologically, this segment is well-equipped, using a mix of screens: smartphones, smart TVs , and laptops.
- Platform usage is diverse but fragmented: while YouTube, Netflix , and Showmax remain important, the segment also shows high piracy engagement, likely due to cost, availability, limited access to global releases or lack of a catalogue of all the films.
- Overall, this segment represents a globally oriented, quality-driven audience that values cinematic excellence above all else, and whose engagement with local films hinges on significant improvements in production quality, storytelling strength, and visibility.

Rwanda

Segmentation analysis on the three segments

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Rwanda

Africa-first, community-driven viewers who rely on YouTube, Pay TV, and Smart TVs for viewing. Value culturally authentic, locally rooted storytelling, but engagement is often limited by cost barriers and weak content discovery.

Segment 1: Local Loyalists

DIMENSION	KEY CHARACTERISTICS
Segment distribution	n = 69 (42%)
Gender	62% male skewed
Age distribution	Mixed age distribution with a strong representation of 35 – 54 years – 56%
Content preference	Watches both African (Local – 99% and regional – 59%) and international films – 54%, but with the strong preference for local content.
Top genres	Highly drawn to drama (57%) and comedy – 49%
Primary device	Smart TV – 52% and Pay TV – 49%
Main platforms	Uses mainly YouTube – 93% and Canal+ online – 48%
Fallback option	Making films available on affordable DVDs/USB sticks - (41%)
Main motivations	Cultural Connection – 75% and Entertainment (64%)
Key barriers to watching local films	High cost of subscriptions or pay-per-view - (30%)
Average spend	~$6.90 per month on streaming (Average of 1 paid streaming platform);; cinema Willingness To Pay ~$4.80
Net Promoter Score	The NPS for African local films is 0%, indicating a mixed audience advocacy experience
Growth triggers	Lower subscription prices for streaming services – 29%

- This segment consists of Africa-first, community-oriented household viewers who strongly prefer locally produced content and culturally resonant storytelling. They over-index on watching African films (46% African-only, 52% mixed) and are the most frequent consumers of local films, gravitating toward drama and comedy, as well as high-drama and fast-paced narratives.
- Their viewing is anchored on YouTube, Pay TV, and Smart TVs, with high Smart TV ownership but substantial device sharing across households. This group values the authenticity of African stories, as locally produced content is very important citing cultural connection as their main driver.
- The ability to watch African film is constrained by cost, discovery challenges, and data/connectivity issues.
- Overall, this segment represents a highly engaged, authenticity-driven audience whose viewing choices are shaped by affordability, cultural relevance, and household media habits.

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Rwanda

Families anchored in Canal+ and Smart TV viewing who favor local, light-hearted content, engaging most when entertainment is affordable, easy to find, and clearly valuable.

Segment 2: Value-Seeking Family Streamers

DIMENSION	KEY CHARACTERISTICS
Segment distribution	n = 60 (36%)
Gender	Mixed gender, 55% male, 45% female
Age distribution	Mixed age distribution with a strong representation of 25 – 44 years – 68%
Content preference	Dominant preference for local content (Local – 98% and regional – 85%).
Top genres	Highly drawn to romantic comedy (73%) and comedy – 65%
Primary device	Smart TV – 75% and Pay TV – 72%
Main platforms	Uses mainly Canal+ online – 90% and YouTube – 56%
Fallback option	Making films available on affordable DVDs/USB sticks - (63%)
Main motivations	Entertainment (77%) and Affordability / Accessibility (65%)
Key barriers to watching local films	High cost of subscriptions or pay-per-view - (68%)
Median spend	~$4.10 per month on streaming (Average of 2 paid streaming platform);; cinema Willingness To Pay ~$4.80
Net Promoter Score	The NPS for African local films is +42%, indicating a strong audience advocacy
Growth triggers	Lower subscription prices for streaming services – 55%

- This segment consists of budget-sensitive, family-oriented streamers who strongly favor local content. Their viewing is dominated by Canal+ Online supported by high Smart TV usage and Pay TV reflecting a home-based, shared-screen environment.
- Their genre preferences lean heavily toward rom-coms, comedies, and to a lesser extent action.
- Their motivations are driven by affordability and accessibility, general entertainment, family-friendliness, and educational value.
- When selecting a new local film, they overwhelmingly prefer to wait for it on their existing subscription with negligible interest in rentals. They would consider paying more only if monthly plans were more affordable or platforms offered higher quality and reliability.
- Overall, Segment 2 represents household-driven, Canal+-heavy family streamers who prioritize value, prefer African comedies and rom-coms, and respond strongly to affordability and improved on-platform guidance.

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Rwanda

Digital-native viewers on Netflix who favor high-quality, action-driven content and selective local films, engaging most with top-tier African originals with strong trailers and fast digital access.

Segment 3: Global Digital Enthusiasts

DIMENSION	KEY CHARACTERISTICS
Segment distribution	n = 36 (22%)
Gender	81% male skewed
Age distribution	25 – 34 years – 58%
Content preference	Dominant preference for international content – 100%.
Top genres	Highly drawn to action (86%)
Primary device	Smartphone / Tablet – 58% and laptop – 42%
Main platforms	Uses mainly Netflix – 78% and YouTube – 63%
Fallback option	Making films available on affordable DVDs/USB sticks - (64%)
Main motivations	Entertainment (78%)
Key barriers to watching local films	Difficulty in finding where to watch (28%)
Median spend	~$6.90 per month on streaming (Average of 2 paid streaming platform);; cinema Willingness To Pay ~$5.20
Net Promoter Score	The NPS for African local films is -67%, indicating extremely poor audience advocacy
Growth triggers	Higher-quality original African films – 42% and Better personalization and recommendations – 33%

- Segment 3 consists of international-leaning, quality-sensitive digital viewers who are heavily oriented toward Western entertainment. Nearly half watch international-only content, and American films dominate with an exceptionally strong preference for action and some interest in sci-fi.
- This audience is anchored on Netflix supplemented by YouTube and primarily watches on phones/tablets, laptops and smart TVs.
- They place the lowest importance on “locally produced” content and cite quality concerns, discovery challenges, and preference for international content as key barriers.
- What would increase their local consumption are higher-quality African originals and better personalization/discovery tools.
- Collectively, this group represents global-facing Netflix users who respond to premium production, strong genre execution, and easy digital access, and who will engage with local content only when it signals international-grade standards.

Nigeria

Segmentation analysis on the four segments



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Nigeria

Young, urban males who favor high-energy global action, horror, and drama, driven by fast-paced, emotionally intense storytelling

Segment 1: Global Action

DIMENSION	KEY CHARACTERISTICS
Segment distribution	n = 45 (15%)
Gender	78% male skewed
Age distribution	Mixed age distribution with a strong representation of 25 – 44 years – 76%
Content preference	Watches both African (Nigeria, South Africa & Ghana) and international films, but American titles dominate -73%
Top genres	Highly drawn to Action (76%) ,Drama(62%) and Horror(60%)
Primary device	Smartphone (81%) and Pay TV (66%)
Main platforms	Uses mainly YouTube – 82% and Netflix - 74%
Fallback option	Making films available on affordable DVDs/USB sticks and extremely low cost Pay Tv tiers - each (33%) ; Free-to-air TV broadcast of films (27%)
Main motivations	High quality narratives– 82% and Entertainment (73%)
Key barriers to watching local films	Storylines that are not engaging (47%) Storylines that are not original (42%)
Average spend	~$11.6 (Average 2 paid streaming services) per month on streaming; cinema cost per visit ~$9
Net Promoter Score	The NPS for African local films is -4%, indicating poor audience advocacy
Growth triggers	Better personalization and recommendations-54%

- This segment consists of young, male-skewed professionals who are mostly working-age adults (25–44), relatively urban, and among the highest spenders on streaming platforms. They engage with both African and international films but show a strong preference for global entertainment, particularly American titles, with only light engagement with local films.
- Their viewing is driven by high-energy genres, especially action, horror, and drama, reflecting a preference for fast-paced, emotionally intense storytelling. Viewing behavior is mobile-first, anchored on smartphones but supported by Smart TVs and Pay TV, with YouTube and Netflix serving as the primary platforms for content consumption.
- Their engagement is constrained by perceived weaknesses in scripts, originality, and production quality..
- Overall, this segment represents a globally oriented, mobile-first streaming audience that values exciting, high-quality storytelling and actively spends on digital entertainment platforms.

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Nigeria

Socially connected, female-led viewers who are loyal to Nollywood, favor relatable drama and rom-coms, and discover content through community and word-of-mouth.

Segment 2: Nollywood Loyalist

DIMENSION	KEY CHARACTERISTICS
Segment distribution	n = 130 (43%)
Gender	72% female skewed
Age distribution	Mixed age distribution with a strong representation of 25 – 44 years – 76%
Content preference	Watches both African and international films, but local films dominate-89%
Top genres	Highly drawn to Drama (80%) ,Comedy (62%) and Romcom(54%)
Primary device	Smartphone (82%) and Pay TV (56%)
Main platforms	Uses mainly YouTube – 89% and Netflix 36%
Fallback option	Extremely low cost Pay Tv tiers - (39%) and Free-to-air TV broadcast of films (33%)
Main motivations	Entertainment (77%) and recommendations (63%)
Key barriers	Poor connectivity (32%), High-cost subscription (28%) and story lines not engaging (21%)
Average spend	~$7 (Average 1 paid streaming services) per month on streaming; cinema per visit ~$11
Net Promoter Score	The NPS for African local films is +78%, indicating extremely positive audience advocacy
Growth triggers	Better personalization and recommendations-38%

- This segment consists of a strongly female-led audience, mostly working-age adults (25–44), with many self-employed and living in urban areas. They represent a socially connected group whose media habits are closely tied to everyday community interactions and digital social spaces.
- Their viewing centers on drama, comedy, and rom-coms, with a strong preference for very real, relatable, and uplifting stories. What they watch is heavily influenced by word-of-mouth and social media, making discovery highly community-driven.
- Streaming is mainly through smartphones, with lower overall spending on platforms. Despite this, they remain highly supportive of local films, reflected in the highest promoter score for Nollywood, indicating strong loyalty to local storytelling.
- Price sensitivity and reliance on word-of-mouth limit discovery of new films.
- Overall, this is female-led, mobile-first Nollywood loyalist audience that is emotionally connected to local storytelling and highly supportive of Nigerian films.

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Nigeria

Story-driven viewers who value culturally grounded African narratives, enjoying drama, comedy, action, and documentaries that feel real and socially meaningful.

Segment 3: African Story Seekers

DIMENSION	KEY CHARACTERISTICS
Segment distribution	n = 72 (24%)
Gender	53% female and 47% males
Age distribution	Mixed age distribution with a strong representation of 25 – 44 years – 75%
Content preference	Watches both African and international films, but Local (98.6%) and African films (81%) dominate
Top genres	Highly drawn to Drama(96%), Comedy(86%), Action (75%), Romcom(67%)
Primary device	Pay TV (88%) Smartphones/tablets (81%) and Smart TVs (58%)
Main platforms	Uses mainly YouTube – 80% and Netflix 75%
Fallback option	Extremely low-cost Pay TV tiers (53%)
Main motivations	High-quality storytelling (88%), Cultural connection(85%) and Entertainment (60%)
Key barriers to watching local films	High subscription cost (40%), lack of awareness (35%) and low production quality (33%)
Average spend	~$8 (Average 2 paid streaming services) per month on streaming; cinema cost per visit ~$5.76
Net Promoter Score	The NPS for African local films is +38%, indicating a positive audience advocacy
Growth triggers	High-quality originals (61%) and Better personalization and recommendations (58%)

- This segment is balanced in gender and strongly represented by working young adults (25–44) with high educational attainment and steady employment.
- African storytelling anchors their viewing habits. They watch both international and African films but show strong loyalty to local and regional African content.
- Content preferences are broad but story-driven. Drama, comedy, action, and documentaries perform strongly, especially when stories feel real, culturally grounded, and socially meaningful.
- Streaming is cross-device and platform diversified, with strong use of YouTube, Netflix, Showmax, and Pay TV
- They value storytelling quality and cultural relevance. However, subscription costs, low awareness of local releases, and production quality concerns can limit engagement.
- Overall, Segment 3 is a story-driven audience that values African cultural narratives and high-quality storytelling across multiple streaming platforms

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Nigeria

Young, male viewers who prioritize high-intensity international action and horror, seeking fast-paced, cinematic storytelling over local content.

Hollywood- First Streamers

DIMENSION	KEY CHARACTERISTICS
Segment distribution	n = 57 (19%)
Gender	70% male skewed
Age distribution	Mixed age distribution with a strong representation of 25 – 44 years – 74%
Content preference	Watches mostly international films 74% with American films taking 81%
Top genres	Highly drawn to Romcom (83%) ,Horror (49%) and Drama (32%)
Primary device	Smartphone/Tablet (87%), Smart TV (25%) and Pay TV (33%)
Main platforms	Uses mainly Netflix 69%,YouTube 44% and Showmax 46%
Fallback option	Extremely low-cost Pay TV tiers (30%)
Main motivations	Entertainment (66%), High-quality storytelling (61%) and Educational / Learning about social issues (28%)
Key barriers to watching local films	Stories not engaging(38%),Prefer international content (30%) and Low production quality (28%)
Average spend	~$6 (Average 1 paid streaming services) per month on streaming ; cinema cost per visit ~$6.30
Net Promoter Score	The NPS for African local films is -65%, indicating extremely poor audience advocacy
Growth triggers	High-quality originals (53%)

- This segment is male-skewed young adults (25–44) with lower streaming spend and a strong preference for global entertainment
- International content dominates their viewing. American films are overwhelmingly preferred, while engagement with local or African titles is very limited.
- High-intensity entertainment drives viewing. Action and horror dominate their preferences, with audiences seeking fast-paced, high-impact storytelling.
- Streaming is primarily mobile-first, with Netflix leading platform use and relatively higher engagement with pirated content compared to other segments.
- This audience is also the most critical of local films, citing weak storytelling and low production quality as major barriers.
- Overall, Segment 4 represents a global-content-first audience that prioritizes cinematic quality and international entertainment over local films.

South Africa

Segmentation analysis on the three segments

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Female-led urban audience that prioritize African stories centered on relatable drama and family-oriented content.

Urban African Story Loyalist

DIMENSION	KEY CHARACTERISTICS
Segment distribution	n = 153 (35%)
Gender	69% female skewed
Age distribution	The age distribution has a strong representation of 25 – 54 years – 77%
Content preference	Watches both African and international films (88%), but local titles dominate (66%)
Top genres	Highly drawn to Drama (75%), Action (69%), and Comedy (54%)
Primary device	Smart TV (58%) and Smartphone / Tablet(55%)
Main platforms	Uses mainly YouTube – 82% , Netflix 78%, Showmax (72%) and DStv Stream (33%)
Fallback option	Free-to-air TV broadcast of films (37%)
Main motivations	Entertainment (60%) and cultural connection (41%)
Key barriers to watching local films	High subscription cost (37) and Lack of awareness of new releases (29%);
Average spend	~$30 per month (Average 2 paid streaming services) on streaming; cinema per visit ~$12
Net Promoter Score	The NPS for African local films is +57%, indicating extremely positive audience advocacy
Growth triggers	Lower subscription prices for streaming services and More high-quality original African films - 40%

- This is and urban, female-led family viewers. Mostly working women aged 25–44 in urban households, often with children, shaping family-centered and shared viewing habits
- They watch both global and African films, but local and African titles especially Nigerian films dominate, and they watch the most local films per month.
- They spend the most on streaming and hold multiple subscriptions yet still cite subscription cost and difficulty discovering new local releases as key barriers. watch the most local films per month.
- Streaming is shared and TV-centered, with the highest Smart TV and Pay TV usage and strong engagement across YouTube, Netflix, Showmax, and DStv Stream.
- Drama and action lead their viewing, with a preference for very real, relatable narratives.
- Overall, this is an urban, female-led family audience whose viewing is communal, African-focused, and spread across multiple legal streaming platforms.

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South Africa

Social-media influenced audiences who favor global, high-energy entertainment and discover content through online trends.

Trend Driven Global streamers

DIMENSION	KEY CHARACTERISTICS
Segment distribution	n = 152 (35%)
Gender	56% Male skewed
Age distribution	Mixed age distribution with a strong representation of 25 – 44 years – 68%
Content preference	Watches both African and international films (72%), however American films dominate-86%
Top genres	Highly drawn to Action (78%) , Horror (43%) and Sci-Fi (22% highest)
Primary device	Smartphone (57%), Smart TV (57%) and Laptop (31%)
Main platforms	Uses mainly Netflix 66% ,You Tube (55%) , Showmax (47%) and DStv Stream (31%)
Fallback option	Making films available on affordable DVDs/USB sticks (32%)
Main motivations	High-quality storytelling (66%), Entertainment (57%) and Actors/director (49%)
Key barriers to watching local films	Low production quality (36%), lack of awareness (28%) and poor connectivity (24%).
Average spend	~$19 per month on streaming (Average 2 paid streaming services) ; cinema per visit ~$16
Net Promoter Score	The NPS for African local films is +26%, indicating a positive audience advocacy
Growth triggers	More high-quality original African films (44%)

- This segment is male-skewed and younger, urban-leaning, and digitally connected, with fewer caregiving responsibilities and a lifestyle centered on personal device use and online platforms presence.
- Most discovery-driven audience. Film choices are strongly influenced by social media trends, online buzz, and peer recommendations, making them the most trend-responsive segment.
- They are the most international and trend-driven segment, strongly favoring global entertainment content, especially action, horror, sci-fi, and fast-paced storytelling that provides escapism and high emotional intensity.
- Economically, the segment sits in the mid-income range, with a mix of self-employment and full-time employment, providing a moderate purchasing power .
- Viewing behavior is more individualized and mobility-based.
- Overall, Segment two represents a trend-sensitive, globally oriented urban audience that prioritizes high-quality entertainment, social buzz, and convenience-driven access to content.

Dalberg Research South Africa

Culturally loyal, quality-conscious viewers who favor African-only stories with strong regional narratives and emotionally engaging, well-crafted content.

Culturally African Story Loyalist

DIMENSION	KEY CHARACTERISTICS
Segment distribution	n = 129 (30%)
Gender	77% female -most female skewed
Age distribution	Mixed age distribution with a strong representation of 25 – 44 years – 75%
Content preference	Local films dominate their viewership (74%)
Top genres	Highly drawn to Drama (74%), Comedy (30%) and Romcom (30%)
Primary device	Smart TV (47%) and Smartphone/Tablet (27%),
Main platforms	Uses mainly Netflix & DStv Stream 53%, Showmax (46%) and YouTube 40%
Fallback option	Adopt Free-to-air TV broadcast of films (42%)
Main motivations	Entertainment (53%), high-quality storytelling (43%) and affordability (35%)
Key barriers to watching local films	High subscription cost (33%), lack of awareness (27%) and low production quality (18%)
Average spend	~$20 per month on streaming (Average 2 paid streaming services) ; cinema per visit ~$11 spend the lowest
Net Promoter Score	The NPS for African local films is +36%, indicating a positive audience advocacy
Growth triggers	More high-quality original African films (48%)

- This segment is female-skewed and slightly older (35–44) compared to other clusters. Most households have fewer or no children, making viewing behavior more individually motivated. The segment is strongly urban-based
- Cultural loyalty drives consumption more than global trends. With African-only content dominating viewing, this segment shows the strongest attachment to regional narratives
- The viewership is split across Pay TV and mainstream streaming platforms, Traditional streaming ecosystems shape viewing. Consumption is split across Netflix, DStv Stream, Showmax, and YouTube, with stronger reliance on Pay TV and established platforms than more digitally experimental audiences.
- This segment is very critical of production quality, especially acting, sound, and overall cinematic execution
- Overall segment three represents the culturally rooted, quality-conscious African content audience, combining traditional viewing preferences with selective digital streaming adoption.

Egypt

Segmentation analysis on the three segments

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Senegal

Family-oriented viewers with a strong cultural affinity for local stories. Engagement grows when locally produced films are higher quality, more visible, and easily accessible on TV and affordable digital platforms.

Segment 1: Heavy Local-TV Traditionalists

DIMENSION	KEY CHARACTERISTICS
Segment distribution	n = 126 (59%)
Gender	Mixed gender split – 54% male and 46% female
Age distribution	Mixed age distribution with a strong representation of 25 – 44 years – 73%
Content preference	Watch Local – 99% + International films – 56%, but lean strongly toward local content
Top genres	Highly drawn to drama (87%) and comedy – 79%
Primary device	Smart TV – 95%
Main platforms	Uses mainly YouTube – 70% and Watch iT – 48%
Fallback option	Free-to-air TV - 87%
Main motivations	Entertainment - 81%, Family friendly and for kids – 35% and High-Quality Storytelling – 34%
Key barriers to watching local films	Storylines that are not engaging (27%) and Storylines that are not original (23%)
Net Promoter Score	The Net Promoter Score (NPS) for African local films is +69%, indicating exceptionally strong audience advocacy
Growth triggers	Better personalization and recommendations and higher-quality original African films

- This segment represent the largest audience segment and are characterized by a highly traditional approach to film consumption. Their viewing habits are strongly centered on television, with films typically watched at home on shared screens rather than through modern streaming platforms. Films are frequently watched as a family activity, reflecting the household-oriented nature of their media consumption.
- While viewers consume both African and international films, there is a clear preference for locally produced content, which resonates more strongly with their cultural experiences. Streaming platform use is relatively low and mostly limited to YouTube and Watch iT, while cinema attendance is almost nonexistent.
- The most popular genres among this group are drama, comedy, romantic comedy, and action
- To increase viewing, this segment would respond well to better personalization and recommendations to help discover relevant films, higher-quality African original productions and lower subscription costs or free-with-ads viewing options.

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Senegal

Digitally savvy viewers influenced by social buzz and cinema culture, engaging most when quality films have strong visibility and promotion.

Segment 2: Cinema-Oriented Streamers

DIMENSION	KEY CHARACTERISTICS
Segment distribution	n = 44 (21%)
Gender	Mixed gender, 52% female and 48% male
Age distribution	Mixed age distribution with a strong representation of 25 – 44 years – 73%
Content preference	Dominant preference for local content – 100%
Top genres	Highly drawn to comedy – 66% and romantic comedy – 50%
Primary device	Free satellite TV – 93%
Main platforms	Uses mainly YouTube – 40% and Watch iT – 55%
Fallback option	Free-to-air TV - 82%
Main motivations	Affordability / Accessibility – 61% and Recommendation from friends/family – 48%
Key barriers to watching local films	High cost of subscriptions – 21% and Data/connectivity – 21%
Net Promoter Score	The Net Promoter Score (NPS) for African local films is +43%, indicating a generally positive level of audience advocacy
Growth triggers	Lower subscription prices and higher-quality original African films

- The segment represent a younger, digitally engaged audience that combines cinema-going with active use of streaming platforms. They are more comfortable navigating multiple digital platforms and are more likely to pay for streaming services, although they remain highly selective and price-sensitive.
- A notable characteristic of this segment is the extremely high use of free satellite TV (97%), suggesting they still rely on free broadcast options for regular viewing.
- This segment stands out for having the highest cinema attendance among all groups, indicating that theatrical viewing remains an important entertainment experience.
- Their viewing decisions are strongly influenced by recommendations from friends and family, as well as reviews and word-of-mouth. Accessibility and affordability also play an important role in determining whether they watch a film.
- Despite their digital engagement, several barriers limit film consumption; subscription costs, poor internet quality, and platform access challenges.
- To increase engagement with this segment, platforms and filmmakers could focus on: more affordable subscription plans, free-with-ads streaming options, and stronger promotion and marketing of African films

Dalberg Research

Senegal

Digitally connected, family-oriented viewers who engage when African films match international quality and offer diverse storytelling.

Segment 3: Global-Explorer Digital Families

DIMENSION	KEY CHARACTERISTICS
Segment distribution	n = 43 (20%)
Gender	Mixed gender 56% male and 44% female
Age distribution	Mixed age distribution with a strong representation of 35 – 54 years – 65%
Content preference	Watch Local – 100% + International films – 88%, but lean strongly toward local content
Top genres	Highly drawn to drama – 98%, comedy – 95 and action – 77%
Primary device	Free satellite TV – 100%
Main platforms	Uses mainly YouTube – 100%
Fallback option	Free-to-air TV - 56%
Main motivations	Entertainment – 86%, Cultural Connection - 44%, High-Quality Storytelling - 44%
Key barriers to watching local films	High cost of subscriptions – 35% and Lack of awareness about new releases - 33%
Net Promoter Score	The Net Promoter Score (NPS) for African local films is +21%, indicating moderate audience advocacy
Growth triggers	'Free with ads' tiers on major platforms and Better personalization and recommendations

- The segment represents a digitally comfortable audience that consumes a predominately local and international film content. Their viewing habits reflect a balance between cultural connection and global exploration, as they actively seek stories from both local and international markets. Their film consumption is largely centered around shared household viewing, often influenced by the preferences of children in the home. As a result, family-friendly and engaging content tends to receive greater attention.
- Despite their enthusiasm for films, several barriers limit engagement with African content. Subscription costs, limited awareness of local film releases, and lower production quality are among the most cited challenges. In addition, they reported that African films can be difficult to find across platforms, which reduces discovery and viewing opportunities.
- For a greater engagement, this segment would respond well to lower subscription prices or free-with-ads viewing options, improved video and audio production quality, bundled subscription offers across platforms and more films designed for children and family viewing.

Senegal

Segmentation analysis on the three segments



Dalberg Research

Senegal

Globally oriented, male viewers who favor high-volume international content, drawn to drama and strong production. Engagement increases with better personalization, higher-quality productions, and improved content discovery.

Segment 1: International-Leaning Action Viewers

DIMENSION	KEY CHARACTERISTICS
Segment distribution	n = 65 (31%)
Gender	74% male skewed
Age distribution	Mixed age distribution with a strong representation of 18 – 44 years
Content preference	Watches both African (Local – 77% and regional – 63%) and international films – 99%, but with the strongest preference for international content.
Top genres	Highly drawn to action (88%) and drama – 55%
Primary device	Smartphone / Tablet – 78%
Main platforms	Uses mainly YouTube – 93% and Netflix – 59%
Fallback option	Free-to-air TV (63%)
Main motivations	Entertainment (60%), High-Quality Storytelling (46%), Education (45%)
Key barriers to watching local films	Storylines that are not engaging (26%),Low production quality (25%),Storylines that are not original (25%)
Median spend	~$10.80 per month on streaming (Average of 1 paid streaming platform); cinema Willingness To Pay ~$9.00
Net Promoter Score	The NPS for African local films is +21%, indicating moderate audience advocacy
Growth triggers	Better content recommendations and discovery, Higher-quality original African films productions, More reliable offline download features

- This segment represents a tech-forward, mostly male urban audience with a strong appetite for international high-energy cinema. Their viewing behavior is defined by heavy consumption across multiple devices and platforms, with a notable preference for action, sci-fi, and documentary genres. Although they do watch African films, their trust and affinity remain anchored in international production quality, storytelling sophistication, and genre diversity.
- This group is the most critical of African film production standards. They perceive gaps in creativity, originality, and technical quality barriers that reduce their engagement with local content. However, they also acknowledge significant improvement over the past five years and express willingness to watch more African films if production continues to rise to global standards.
- For this cluster, quality is king. Investments in production value, original narratives, and better recommendation algorithms can meaningfully increase local film consumption.

Dalberg Research

Senegal

Culturally rooted, low-income viewers who mostly watch local films via YouTube and free-to-air TV, engaging more when content is easier to discover, affordable, and well promoted.

Segment 2: Local-Content Cultural Loyalists

DIMENSION	KEY CHARACTERISTICS
Segment distribution	n = 73 (35%)
Gender	Mixed gender, 52% female and 48% male
Age distribution	Mixed age distribution with a strong representation of 25 – 44 years
Content preference	Watches both African (Local – 99% and regional – 56%) and international films – 47%, but with the strongest preference for local content.
Top genres	Highly drawn to action (88%) and romantic comedy – 47%
Primary device	Smartphone / Tablet – 86%
Main platforms	Uses mainly YouTube – 100%
Fallback option	Free-to-air TV (82%)
Main motivations	Cultural Connection (69%), Entertainment (62%), Education (45%)
Key barriers to watching local films	Data/connectivity (33%), Difficulty in finding where to watch (32%)
Median spend	~$9.00 per month on streaming (Average of 1 paid streaming platform); cinema Willingness To Pay ~$3.60
Net Promoter Score	The NPS for African local films is -1%, indicating an evenly split audience advocacy
Growth triggers	More reliable offline download features, 'Free with ads' tiers on major platforms, Higher-quality original African films productions

- Segment 2 is made up of mixed gender in urban, lower-income households who maintain the strongest connection to local and African storytelling. They are the most culturally rooted segment, with African films forming the bulk of what they watch. Their media habits rely heavily on mobile phones, YouTube, and free-to-air TV, reflecting cost sensitivity and a practical approach to entertainment access.
- This segment values cultural authenticity, family-friendliness, relatable themes, and educational content. They believe African films have improved significantly and place a high importance on local productions. However, they struggle with discovering new releases due to poor visibility, inconsistent platform recommendations, and limited marketing.
- Segment 2 requires better visibility, increased affordability, and stronger promotional efforts to deepen engagement. This group represents a loyal audience base for African cinema one that rewards storytelling rooted in identity and shared experience.

Dalberg Research

Senegal

High-volume family viewers on YouTube and Smart TVs who enjoy African and local content, especially comedy, engaging most when content discovery, offline access, and original African stories improve.

Segment 3: High-Engagement Family Streamers

DIMENSION	KEY CHARACTERISTICS
Segment distribution	n = 72 (34%)
Gender	64% male skewed
Age distribution	Mixed age distribution with a strong representation of 25 – 44 years
Content preference	Dominant preference for local content – 100%.
Top genres	Highly drawn to Comedy (89%) and drama – 47%
Primary device	Smartphone / Tablet – 89%
Main platforms	Uses mainly YouTube – 100% and Netflix – 42%
Fallback option	Free-to-air TV (63%)
Main motivations	Entertainment (68%), Cultural Connection (61%), Education (57%)
Key barriers to watching local films	Difficulty in finding where to watch (35%), Data/connectivity (28%)
Median spend	~$10.50 per month on streaming (Average of 1 paid streaming platform); cinema Willingness To Pay ~$5.40
Net Promoter Score	The NPS for African local films is +11%, indicating a moderate audience advocacy
Growth triggers	Better content recommendations and discovery, Higher-quality original African films productions, More reliable offline download features

- Segment 3 consists largely of family-centric female viewers who consume films frequently particularly local films and watch across shared household devices. Films play an important social role in this group's lifestyle; they are used for bonding, entertainment, and children's learning. Comedy, romance, drama, and light, uplifting storytelling dominate their preference landscape.
- While they are positive about the evolution of African films, they face pragmatic barriers: finding the right content, dealing with data limits, and occasionally encountering uneven production quality. This segment values accessibility whether through offline viewing options, intuitive discovery tools, or curated recommendations.
- For segment, the opportunity lies in family-friendly African cinema, improved content accessibility, and stronger visibility on streaming platforms.

Overall

Segmentation analysis on the four segments



Dalberg Research

Senegal

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

Segment 1: Premium Hybrid Viewers

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

- This segment represents digitally connected audience who are among the most engaged film consumers in the market. They are slightly male-skewed (53%), concentrated in the 25–44 age group, and most commonly found in South Africa, Nigeria, Kenya, and Senegal.
- Despite their global viewing habits, local content is highly valued. Over half (56%) say local films are very important, and 47% strongly value representation on screen. Encouragingly, 56% believe the quality of local films has improved significantly, suggesting growing confidence in the industry.
- However, several barriers still affect their viewing. Cost (31%), awareness of available films (29%), data/internet limitations (26%), and perceived production quality gaps (25%) remain the main constraints.

Dalberg Research

Overall

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

Segment 2: Afro-Loyal Mainstreamers (TV-First)

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

- This segment is a predominantly female audience with a strong and consistent preference for local and African content. They are defined by their TV-first behavior. Unlike more digitally driven segments, they rely heavily on traditional viewing channels such as Smart TVs, free satellite TV, and Pay TV, with comparatively low engagement on mobile devices and streaming platforms.
- Behaviorally, they are more passive than other segments. A significant portion does not actively search for new content, instead relying on scheduled programming or familiar sources. While they are likely to recommend content they enjoy, they are also the most likely to take no further action after viewing, reflecting a habitual rather than exploratory consumption style.
- Overall, they are the core audience for local content, engaged, and highly receptive to culturally resonant storytelling. Winning with this segment requires prioritizing accessible distribution channels (especially TV), maintaining a strong pipeline of relatable, feel-good local content, and reinforcing cultural authenticity over technical sophistication.

Dalberg Research

Overall

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

Segment 3: Family Sharing, Mobile-First

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

- This segment represents family-oriented viewers who consume content in shared household environments, with a strong reliance on mobile devices. Smartphones dominate as the primary viewing device, while Smart TV ownership and usage are comparatively lower. Their content preferences are broad and inclusive, with a strong inclination toward both international and local films.
- Cost and discoverability are less of a concern, though data usage and occasional production quality issues still play a role. Despite favorable perceptions, their Net Promoter Score for local content is mixed, indicating that while expectations are being met in some areas, there is still room to strengthen loyalty and advocacy.
- Overall, they are high-volume, multi-user consumers who value accessible, relatable, and family-friendly content. Winning with this segment requires optimizing for mobile experiences, supporting shared viewing, and investing in language accessibility, while continuing to deliver culturally relevant and educational storytelling that appeals across age groups.

Dalberg Research

Overall

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

Segment 4: Action-First Quality Chasers

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

- This segment is a digitally savvy audience that prioritizes high-quality, fast-paced storytelling particularly in action and drama genres. They are heavy mobile-first consumers, with near-universal smartphone ownership and strong adoption of Smart TVs and laptops. Their viewing behavior is platform-agnostic and convenience-driven, with high usage of mainstream platforms like YouTube and Netflix, alongside the highest engagement with pirated sites.
- While they consume both local and international films, they show the strongest tilt toward international-only content, alongside a balanced appreciation for both American and local productions. European content also holds relatively higher appeal within this segment.
- Overall, they represent a high value but demanding audience. To capture and retain them, content providers must deliver cinematic-quality productions, compelling narratives, and strong talent, supported by effective discovery and distribution strategies.