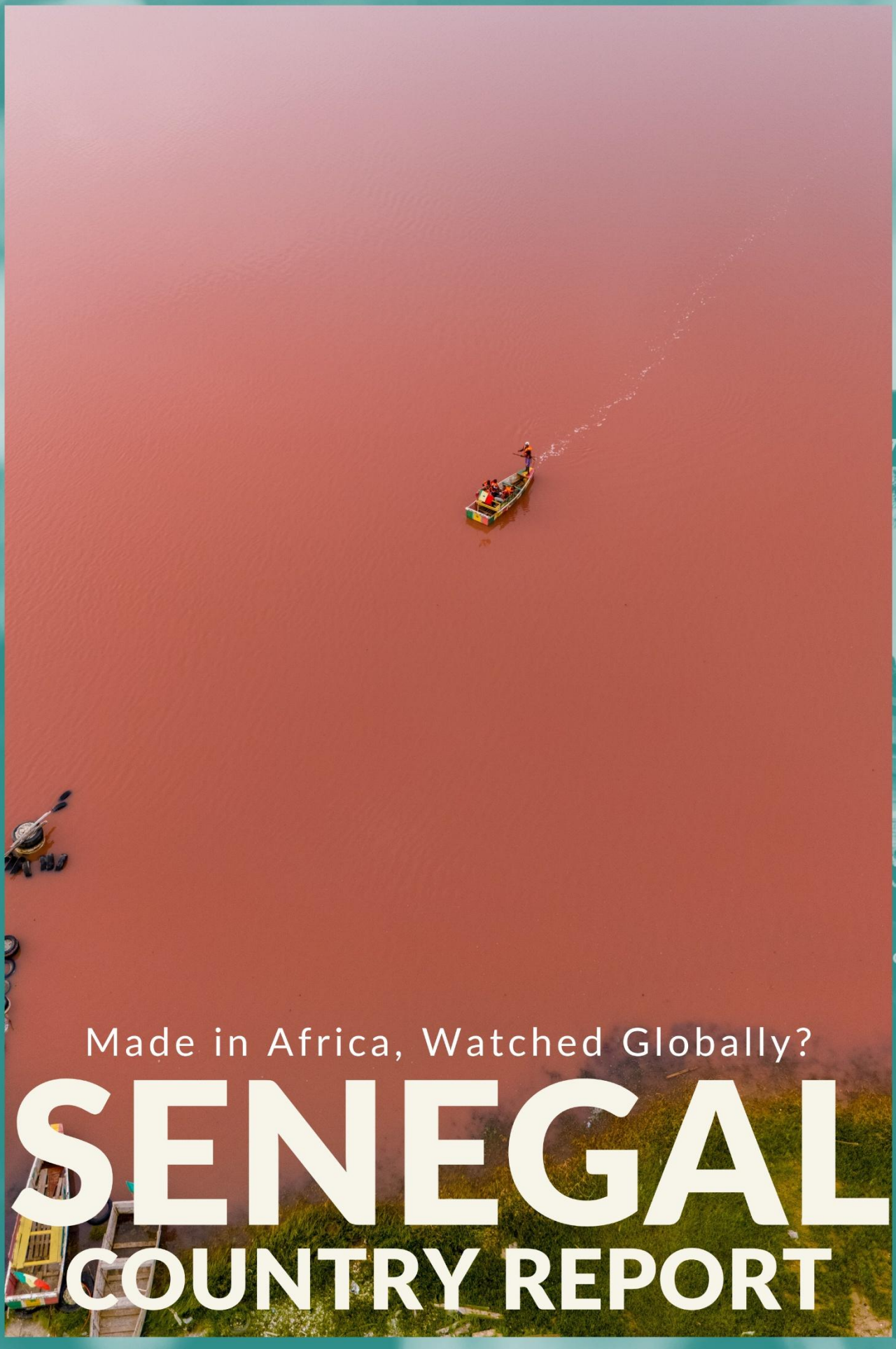


Made in Africa, Watched Globally?

SENEGAL
COUNTRY REPORT

giz Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) GmbH

AFREXIMBANK

CANEX Creative Africa Nexus

Dalberg

Foreword

There is a particular kind of excitement that comes not from promises, but from evidence. For too long, the narrative around African cinema has been one of potential deferred : "Africa is the future" has become a familiar refrain, repeated across panels and pitches for over a decade, rarely accompanied by the investment or structural commitment needed to make it real. Today, something has shifted. The conversation has changed register. And it is more than palpable in Senegal.

Senegal occupies a singular position in the history of African cinema. It is the land of Ousmane Sembène, often called the father of African cinema, of Djibril Diop Mambéty's visionary surrealism, of Safi Faye's pioneering voice, and more recently of Mati Diop and Ramata-Toulaye Sy : filmmakers who have not merely participated in world cinema, but redefined it. This auteur tradition is not nostalgia; it is a living foundation, a proof of concept that Senegalese storytelling carries universal resonance.

But what is new, and what makes this moment genuinely different, is the emergence of a commercial dimension that complements this heritage rather than contradicting it. The success of series like *Maîtresse d'un Homme Marié*, travelling across the sub-region and the diaspora on a Nollywood-inspired model, demonstrated something critical: the audience exists. It has always existed. It was simply waiting for content that spoke to it, in its own language, with its own references, its own humor, its own complexity.

The recent triumph of *Une Si Longue Lettre*, directed by Angèle Diabang, herself a member of the Un Certain Regard Cannes Festival jury in 2026, confirmed this appetite with striking clarity. The film, adapted from Mariama Bâ's beloved novel studied by virtually every Senegalese student, became a genuine popular success across Senegal and the sub-region. It demonstrated that when Senegalese audiences are offered high-quality content rooted in their own cultural patrimony, they show up enthusiastically, and in numbers.

On the ground, the ecosystem is visibly in motion. Creative hubs, film labs, and cinéclubs are multiplying. A new generation of filmmakers, producers, and cinephiles is organizing itself, building infrastructure where there was none, creating community where there was isolation. What we are witnessing is not yet a mature industry, but it is the anatomy of one forming in real time, and its growth potential is exponential.

The challenges are real and must be named. Distribution remains the most pressing structural gap: cinemas are few and entirely concentrated in Dakar, while the vast majority of the population consumes content on smartphones. High production value Senegalese content is nearly absent from major platforms. The screenwriting ecosystem needs urgent investment to produce the volume and quality of scripts that could unlock internationally competitive series and films. Financing mechanisms remain fragile, and the path from creative ambition to sustainable production is still too long and too uncertain for most practitioners.

And yet. The industry is growing, rapidly, organically, driven by practitioners who have decided not to wait for conditions to be perfect before building. This report, grounded in rigorous research and field interviews, offers something invaluable in that context: a clear-eyed mapping of where we are, what is working, and where the gaps remain that represent the greatest opportunities for those willing to act.

The question is no longer whether Senegal (and the continent) has stories worth telling or audiences hungry to receive them. It does, and they are. The question now is whether the investment, the distribution infrastructure, and the policy frameworks will catch up with the energy already at work on the ground. I hope this study contributes to making that case, and to turning, finally, potential into industry.

Yours sincerely,
Chloé Ortolé Diop
Tangerine productions
Yetu (Un)limited

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Executive Summary

Senegal's film industry is undergoing a gradual but important transformation, driven by a youthful population, expanding digital connectivity, and renewed institutional support. Rooted in a strong cinematic legacy shaped by pioneers such as Ousmane Sembène and Djibril Diop Mambéty, the sector remains internationally respected for auteur-driven storytelling and culturally grounded narratives. However, the industry continues to operate within a relatively small-scale ecosystem characterized by limited infrastructure, fragmented distribution systems, and constrained financing mechanisms.

The industry has experienced renewed momentum following the establishment of the Fund for the Promotion of Cinema and Audiovisual (FOPICA), which revitalized local production and enabled the emergence of younger filmmakers. At the same time, rapid internet penetration and mobile-first viewing habits have accelerated the growth of digital content consumption, particularly through platforms such as YouTube. Senegal's audiovisual ecosystem is increasingly shifting from a traditional theatrical model toward a digitally driven distribution economy, where serialized local content in Wolof and other local languages resonates strongly with audiences. Despite this progress, the sector continues to face structural challenges including weak cinema infrastructure outside Dakar, piracy, limited audience data, and insufficient monetization pathways.

1. Film Distribution

Senegal's film distribution ecosystem is defined by a sharp divide between a limited theatrical infrastructure and a rapidly expanding digital distribution environment. Cinema infrastructure remains highly centralized in Dakar, with only a small number of operational screens serving the country, significantly limiting access for audiences outside the capital. While cinemas continue to provide prestige and visibility for filmmakers, theatrical releases are no longer the primary pathway for audience reach or revenue generation.

Digital platforms have emerged as the dominant distribution channel, fundamentally reshaping how Senegalese audiences consume local content. Between 2020 and 2025, most locally produced films were distributed through digital platforms rather than cinemas, with YouTube becoming the primary platform for locally produced films and series. Production houses such as Marodi TV and EvenProd have demonstrated the viability of platform-first distribution models, attracting millions of viewers across Senegal and the diaspora through advertising-supported streaming and partnerships with regional and global platforms including Canal+ and Amazon Prime Video.

At the same time, satellite television and Pay TV operators such as Canal+ Afrique and StarTimes remain important regional circulation channels, particularly for Francophone African audiences. Senegal increasingly functions as a regional circulation node within West Africa's digital audiovisual economy rather than a large-scale production hub. However, piracy remains a major challenge, with stakeholders estimating that up to 75% of potential industry revenue is lost through unauthorized distribution networks and informal sharing systems.

2. Audience Development

Senegal's audience landscape is heavily shaped by its young, digitally connected population. Film consumption is increasingly mobile-first, with smartphones serving as the dominant viewing device and streaming platforms becoming the primary access point for content. YouTube, in particular, has become nearly universal among digital audiences, providing accessible and affordable pathways to local films and serialized productions.

Audience preferences demonstrate a strong attachment to local and African storytelling. Senegalese audiences place high value on culturally relevant narratives, local languages, and

films that reflect social realities and identity. Local films dominate overall viewing habits, while African productions also attract strong engagement alongside international content such as American films. Importantly, audiences do not consume films solely for entertainment; films are also viewed as vehicles for cultural connection, education, and social reflection.

The study identified distinct audience segments, including internationally oriented viewers attracted to high-budget action content, culturally loyal local-content viewers, and high-engagement family streamers seeking accessible and family-oriented storytelling. Across all segments, high-quality storytelling, strong production values, authentic cultural representation, and peer recommendations strongly influence viewing decisions. Social media and word-of-mouth remain the most influential discovery channels, reinforcing the importance of digital-first marketing strategies.

Despite strong audience engagement, several barriers continue to limit audience growth for local films. Many viewers perceive gaps in production quality and storytelling relevance, while limited discoverability and inconsistent access constrain wider engagement. This highlights the need for stronger investment in audience-centered storytelling, localized content development, and accessible distribution systems.

3. Social Impact

Film in Senegal continues to play an important cultural and social role, functioning as both a storytelling medium and a tool for education, dialogue, and identity formation. Audiences consistently value films that reflect Senegalese realities, address social issues, and reinforce cultural identity. This positions cinema and serialized digital content as influential platforms for shaping public discourse and preserving cultural heritage.

Community-based initiatives and grassroots film organizations have become especially important in expanding the social reach of film. Institutions such as Cine Banlieue, Centre Yennenga, and mobile cinema initiatives like MobiCiné have helped democratize access to film by reaching underserved communities and nurturing youth participation in the creative sector. Festivals, cine-clubs, and training programs also contribute to audience education, critical engagement, and the development of local creative talent.

At the same time, Senegal's digital film ecosystem has enabled local stories to travel beyond national borders, strengthening diaspora engagement and extending the social influence of Senegalese content across Francophone Africa and global African communities. However, the sector still lacks structured mechanisms for measuring social impact and translating cultural influence into sustainable financing and policy support.

4. Financing and Enabling Environment

Senegal's financing ecosystem remains relatively underdeveloped and fragmented despite recent progress through public support mechanisms such as FOPICA (Fund for the Promotion of Cinema and Audiovisual). While the fund has played a critical role in revitalising local production and supporting emerging talent, funding cycles remain inconsistent and insufficient to support large-scale industrial growth. Many filmmakers continue to rely heavily on international co-productions, donor support, festival funding, and partnerships with European distributors and producers to finance projects.

The rise of digital platforms has opened new monetization opportunities, particularly through advertising-supported streaming and licensing agreements. Platforms such as Marodi TV demonstrate the potential for alternative financing and revenue-generation models centered around audience scale, sponsorships, and platform partnerships. However, locally owned OTT platforms continue to face significant scalability challenges due to limited investment capital and infrastructure constraints.

The enabling environment is evolving but still constrained by weak infrastructure, limited formal box office systems, insufficient industry data, and widespread piracy. The lack of centralized ticketing systems and transparent audience measurement limits investor confidence and revenue tracking. At the same time, regulatory reforms aimed at strengthening local content promotion and digital platform oversight signal growing government recognition of the audiovisual sector's economic and cultural importance.

5. Opportunities and Strategic Levers

Senegal's strongest opportunity lies in leveraging its rapidly growing digital ecosystem to scale audience reach and strengthen monetization pathways for local content. Mobile-first consumption patterns, strong engagement with local storytelling, and the dominance of platforms such as YouTube create favorable conditions for expanding digital distribution and audience development. Supporting platform-first production models and improving monetization systems could significantly strengthen sustainability for filmmakers and distributors.

There is also significant opportunity in regional and diaspora distribution. Senegal's role within the Francophone African content corridor positions it well for cross-border partnerships, co-productions, and regional circulation strategies. Expanding collaborations with regional broadcasters, OTT platforms, and telecom operators could help scale local productions beyond the domestic market.

Audience development efforts can further be strengthened through localized storytelling, stronger marketing strategies, and improved accessibility. Investments in culturally grounded narratives, local-language productions, influencer-driven promotion, and affordable streaming solutions are likely to deepen engagement among younger audiences. Expanding decentralized viewing models such as community screenings and mobile cinemas also presents an important pathway for increasing geographic access beyond Dakar.

In addition, Senegal has an opportunity to strengthen institutional coordination within the audiovisual sector. The establishment of regulatory structures such as the National Media Regulation Council (CNRM) and continued support through FOPICA provide an important foundation for developing more structured content quotas, financing systems, and industry governance frameworks.

6. The Path Forward

Senegal's film industry stands at an important transition point, where digital transformation, youthful audiences, and strong cultural demand are creating new opportunities for growth despite persistent structural limitations. The future of the industry will depend less on replicating traditional theatrical models and more on building scalable, digitally enabled distribution ecosystems aligned with local consumption realities.

Strengthening the sector will require coordinated investments across production quality, audience development, infrastructure, financing, and regulatory reform. Expanding affordable legal access to local content, supporting mobile-first distribution strategies, improving storytelling relevance, and strengthening regional circulation networks will be critical to sustaining audience growth and monetization.

At the same time, Senegal's strong cultural identity, vibrant storytelling tradition, and growing digital audiences position the country to become an increasingly influential player within Francophone Africa's audiovisual economy. With stronger institutional support, improved financing mechanisms, and strategic investment in digital distribution and audience engagement, Senegal has the potential to build a more sustainable, inclusive, and globally competitive film ecosystem.

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

Senegal is a vibrant West African nation undergoing steady demographic expansion, with a population projected to reach 19.4 million people in 2026 and a youthful median age of 19.8 years. The national economy, which boasts a nominal GDP forecast of $36 billion for 2025, is increasingly diversified across services and agriculture as it shifts away from hydrocarbon-driven expansion. Approximately 53% of the population is urbanised, with the capital city of Dakar serving as the primary hub for economic and cultural activities. Digital connectivity is accelerating rapidly, with 11.5 million internet users as of late 2025 representing a 60.6% penetration rate supported by near-total 4G coverage and expanding 5G networks[1].

The national film ecosystem is rooted in a prestigious auteur tradition pioneered by figures such as Ousmane Sembène and Djibril Diop Mambety and continues to achieve international acclaim through contemporary filmmakers like Mati Diop and Alain Gomis. Historically, Senegal experienced a "Golden Age" from the 1960s to the early 1980s, during which it maintained the most robust cinema network in West Africa. However, the late 20th century saw a catastrophic collapse of the theatrical sector due to economic crises and the rise of digital piracy. Today, the industry is in a state of "industrial-creative" revival, though it remains characterised by a niche focus on quality over volume, producing an average of 15 to 20 total projects annually, including documentaries and series[2].

According to the stakeholder insights, the macro environment in Senegal reflected a nascent economy, with the audiovisual sector increasingly prioritised for job creation and revenue generation under the government's "Vision 2050" strategy. However, the COVID-19 pandemic had a significant negative impact, drastically reducing attendance and delaying major infrastructure projects such as the opening of the Pathe Dakar cinema. Mobile distribution units like MobiCine also faced heavy losses, cutting permanent staff from ten to two or three due to unsustainable fixed costs. During the recovery period, the industry experienced a digital boom, with online platforms and YouTube becoming central to content circulation.

The national film ecosystem was rooted in the legacy of its pioneers, but for a long period lacked formal institutional structures and training institutes. A key milestone was the establishment of the Fund for the Promotion of Cinema and Audiovisual (FOPICA) in 2014, which revitalised production and supported the emergence of young talent. Despite this progress, challenges persisted, including irregular funding cycles and the absence of a centralized film centre to oversee the value chain. Informal collectives such as Cine Banlieue helped bridge training gaps by mentoring youth in the suburbs as mentioned by a distributor:

"*Over the last five years, the creation of our fund, FOPICA (Fund for the Promotion of Cinema and Audiovisual), has also boosted everything. It has truly revitalized production. There are many productions in Senegal today... this fund has greatly helped to propel Senegalese cinema forward, truly." Film Distributor, Senegal*

[1] DataReportal. The "state of digital" in Senegal in 2026. Link
[2] A catalogue of Senegal films produced between 2020-2025 archived on IMDb

3. Findings

3.1 Film Distribution

3.1.1. Overview

The current distribution landscape in Senegal is defined by a sharp divide between a narrow theatrical pipeline and a booming digital sector. Cinema exhibition infrastructure is extremely limited compared to advanced markets such as Nigeria and South Africa. This infrastructure is heavily centralised, with most of the screens located in Dakar, making traditional theatrical releases inaccessible to the majority of the population. To address these gaps, alternative models such as MobiCiné utilise mobile projection units to bring African content to rural schools and public spaces, though these initiatives often generate insufficient revenue to finance large-scale production.

Digital disruption has fundamentally altered the market structure, with 58% of films from a catalogue of films produced between 2020 and 2025 distributed via digital platforms compared to just 21% in theatres. YouTube has emerged as the dominant force, with major production houses like Marodi TV and EvenProd attracting millions of subscribers and generating viable revenue through advertising and partnerships with global players like Canal+ and Amazon Prime. The regulatory environment is also evolving; in January 2026, the National Media Regulation Council (CNRM) was established to regulate digital streaming platforms and enforce local content quotas. Despite these advancements, piracy remains a critical barrier, with industry stakeholders reporting that up to 75% of potential revenue is lost to unauthorised circulation.

3.1.2. Distribution channels

i. Cinemas

Historical Evolution: The Rise and Fall

The trajectory of Senegal's cinema infrastructure is a compelling narrative of "rise, fall, and rebirth". Once the undisputed cinematic heartbeat of West Africa, the industry is currently navigating an aggressive revival to reclaim its status as a premier regional hub for film distribution and exhibition.

Following independence in 1960, President Léopold Sédar Senghor championed cinema as a crucial instrument for national identity and the "Negritude" movement. This era represented a "Golden Age" for the industry; by the mid-1970s, Senegal boasted approximately 80 thriving theatres, with 40 located in Dakar alone. The industry was a flourishing business supported by a distribution network that serviced neighbouring countries, with prominent filmmakers even financing their own venues, such as Cheikh Tidiane Aw's Cinéma Christa. However, the late 1980s ushered in a "Great Decline". Economic crises forced state disengagement, while the proliferation of television, DVDs, and digital piracy eroded the profitability of traditional venues. By the early 2000s, almost all historic cinemas had been shuttered or converted into shopping malls and religious centres, leaving Dakar, the historic capital of African film without a single commercial screen for nearly a decade.

The Current Landscape: A Narrow Pipeline

The contemporary "Renaissance" began around 2015 with the financial endowment of FOPICA, sparking a return of infrastructure through corporate expansions. Despite this growth, the exhibition landscape remains extremely limited and highly centralized. As of December 2025, Senegal operates only 18 operational screens across eight venues, a figure reflecting both a recovery and enduring structural constraints.

This infrastructure is overwhelmingly concentrated in the capital, where 15 screens, 83% of national capacity, are located. The market is dominated by the *Pathé Dakar*, which features 7

screens and accounts for nearly 40% of national capacity. Other Dakar venues include the 3-screen *Cinéma Ousmane Sembène*, the 3-screen *Seanema* at Sea Plaza, and single-screen venues at *Canal Olympia Dakar*, *and Cinema Medina*. This leaves a meager regional reach of only 3 screens: *Canal Olympia Saint-Louis*, *Alliance Française Thiès*, and *Alliance Française Ziguinchor*, each operating a single screen. This geographic imbalance creates a narrow pipeline that dictates market entry and limits the commercial potential for filmmakers and audiences outside the capital.

Local Content and Box Office Performance

The share of local versus international titles on Senegalese screens is gradually improving, though it remains a work in progress. Between 2020 and 2025, approximately 21% of total local productions (26 out of 124 catalogued films from IMDb) secured a theatrical release. Notably, 2025 saw a significant spike, with 38% of produced films reaching the big screen, signalling a strengthening bond between local producers and new exhibitors.

However, revenue data underscores the limitations of the domestic market. High-earning titles like *Father & Soldier* ($8.5 million) achieved success primarily through wide European distribution and major international partnerships (Gaumont). In contrast, films distributed purely through the local 18-screen circuit, such as *Take It or Bleed It* ($2,000), see significantly lower earnings.

Table 1: Gross Box Office for a sample of films from the catalogue | Source: IMDb pro, Box Office Mojo

Title	Release Date	Release Country	Box Office
Father & Soldier	4 January 2023	France	$8,500,000
Twist à Bamako	5 January 2022	France	$995,704
Dahomey	11 September 2024	France	$593,052
Banel & Adama	30 August 2023	France	$165,366
Lingui, The Sacred Bonds	14 April 2022	Germany	$37,685
Tukki	22 January 2023	Senegal	$23,446
Yoon	4 May 2023	Portugal	$5,952
Saloum	5 August 2022	Senegal	$5,078
Take It or Bleed It	31 October 2023	USA	$2,000
L'argent, la liberté, une histoire du Franc CFA	9 November 2022	Netherlands	$107
Sira	21 February 2023	Germany	$68

The Impact of Cinema as a Distribution Channel

For Senegalese filmmakers, the theatrical channel remains more of a prestige and validation platform rather than a reliable revenue driver. Because modern multiplexes carry high overhead costs, ticket prices often exceed the reach of the average citizen, concentrating the audience within the urban middle class.

The Senegalese audiovisual sector is sharply divided between auteur cinema and commercially oriented series. Feature films remain prestige-driven, aimed at festivals and theatrical recognition rather than profitability, but struggle to achieve sustainable economic viability or fully exploit digital distribution. In contrast, TV and web series, especially on YouTube to reach far larger local and diaspora audiences through low-cost, fast-paced production models. However, the dominance of free online access has entrenched audience expectations of free content, creating major obstacles for future monetization and subscription-based digital platforms.

As a result, the industry is seeing a strategic shift. While cinema serves as a launchpad for critical acclaim, filmmakers are increasingly bypassing the narrow theatrical pipeline in favour of streaming platforms and YouTube to reach the national population and the diaspora. To ensure

long-term sustainability, the industry is looking toward decentralized, low-cost models such as solar-powered mobile units (MobiCiné) and community-based digital hubs to align film access with the country's actual geography and purchasing power.

The qualitative results revealed that the current distribution in Senegal is fragmented between modern multiplexes in Dakar and informal or alternative networks in the regions. Pathe Dakar represented the largest commercial market but its reach was largely confined to the capital leaving the 14 regions underserved. Television series found massive success on YouTube due to free access, setting a low threshold for the public's willingness to pay for cinema tickets. Mobile and community venues operated by entities like MobiCine and Cinema Numerique Ambulant (CNA), attempted to reach rural areas through touring models, though these often-lacked consistent profitability.

"So, releasing a film and distributing it only within a 10-kilometer radius, for me that's not distribution when you know we have 14 regions. Because there are 2 cinema hubs that are less than 5 kilometers apart. So, if it's only there that we can see a Senegalese film, and even then, if it's programmed, for me the distribution, I can consider it to be non-existent, in fact, at least in Senegal." Filmmaker, Senegal

2.2.5. Cinema attendance and barriers

Cinema remains present but not central. Both mainstream cinemas (63%) and makeshift screening spaces (54%) are used, showing that audiences seek alternatives where formal infrastructure is limited. These informal or semi-formal spaces play a practical role in extending access.

Attendance is occasional. The median is three visits per year. Spending per visit 5,036 CFA (USD 9.00) suggests that cinema is out of reach financially, and it is not a routine activity.

Time (46%) and distance (35%) are the main barriers to watching films in cinemas. These reflect access challenges rather than lack of interest. A smaller group prefers to wait for films on other platforms (16%), reinforcing the shift toward digital viewing. Cost is a secondary concern (11%).

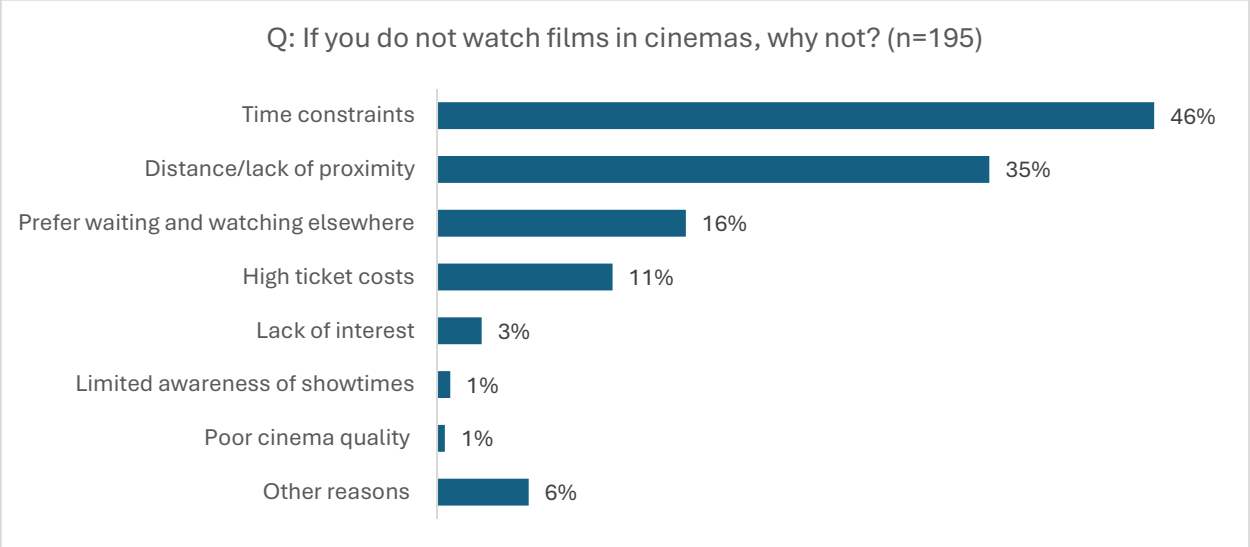


Figure 1: Reasons for not going to cinemas, Senegal | Source: Survey data

From the above, it can be deduced that while cinema demand exists, access limits frequency. Without broader geographic coverage, theatrical distribution will remain secondary to digital channels.

The market structure is dominated by a few key players, with Pathe as the main exhibitor and distributor for international blockbusters and local hits like *So Long a Letter* (2025) selling over 25,000 tickets - this was considered exception. Its performance was due to: the adaptation drew on a literary work embedded in the national school curriculum, giving it immediate cultural familiarity and an emotionally invested audience. Its themes, particularly polygamy, strongly echoed the narrative concerns of popular Senegalese TV series, while its humor and cultural references were deeply rooted in Senegalese everyday life. Local streaming platforms such as Wido also emerged as significant players, with 98% of viewership coming from Senegalese series. However, the regulatory environment offered limited support for distribution and release, with national television stations like RTS often unwilling to purchase local content at market rates. Transparency remained a key challenge due to the absence of a centralized ticketing system to track box office revenues. It was also noted that film release schedules being a barrier.

"We don't accurately assess the release dates... you have 'Avatar' playing, and next to 'Avatar,' you have 'Godzilla.' You're sure that cinemas will give 'Avatar' and 'Godzilla' more exposure than your film." Distributor, Senegal

"The Directorate of cinematography currently, which does not control ticketing, cannot tell you how many tickets were sold, because there is no ticketing system. Even these figures put forward by Pathé are not verifiable, because there is no system that verifies all of this." Filmmaker, Senegal

ii. Digital platforms - Pay TV and OTT

Market Size and Platform Structure

Senegal's Pay TV and OTT ecosystem represents a mid-sized but strategically important audiovisual market within Francophone West Africa. While smaller than continental production hubs such as Nigeria or South Africa, the country plays a significant role as a regional circulation territory linking domestic audiences with wider Francophone African and European screen markets.

Between 2022 and 2025, GMI estimates Senegal's combined Pay TV and OTT market grew from approximately USD 164.9 million to USD 183.7 million. Pay TV continues to dominate the sector, accounting for roughly USD 151.2 million in revenues in 2025 compared with USD 32.5 million generated by OTT services. Satellite broadcasting alone represented the majority of platform revenues, reflecting its continued accessibility across both urban and peri-urban areas where fixed broadband infrastructure remains uneven.

For film distribution, this structure means that satellite television—particularly through regional bouquet operators such as Canal+ Afrique and StarTimes—continues to function as the primary non-theatrical circulation channel for international and African films across Senegal. The table below shows the Pay TV and OTT market in Senegal.

Table 2: Senegal Pay TV and OTT Market 2022-2025 with projections from 2026-2030 (USD Million) | Source: GMI, 2025

Market Value	2022	2023	2024	2025	2026	2027	2028	2029	2030	CAGR
USD Million	**164.9**	**174.6**	**178.6**	**183.7**	**187.0**	**191.0**	**195.1**	**201.6**	**209.9**	**5.1%**
By Platform Type										
Pay TV platform	**138.3**	**146.5**	**149.0**	**151.2**	**151.8**	**152.8**	**154.2**	**156.1**	**158.5**	**2.2%**
Cable TV	17.6	18.5	18.7	18.9	18.8	18.8	18.9	19.0	19.2	1.5%
Satellite TV (DTH)	112.2	118.6	120.5	122.0	122.4	123.0	123.9	125.2	127.0	2.0%
IPTV	8.6	9.4	9.8	10.3	10.6	11.0	11.4	11.8	12.3	4.7%
OTT platform	**26.5**	**28.1**	**29.6**	**32.5**	**35.2**	**38.2**	**40.9**	**45.5**	**51.5**	**13.4%**
SVOD	21.4	22.6	23.8	26.1	28.2	30.6	32.7	36.3	41.0	13.3%

AVOD	3.3	3.6	3.8	4.2	4.5	4.9	5.3	5.9	6.7	13.9%
FAST	0.7	0.8	0.8	0.9	1.0	1.1	1.2	1.4	1.6	14.7%
TVOD	0.5	0.5	0.5	0.5	0.6	0.6	0.6	0.7	0.8	11.6%
Hybrid OTT Models	0.6	0.7	0.7	0.8	0.9	1.0	1.0	1.2	1.4	15.2%
By Subscription Model										
Postpaid	**47.7**	**50.6**	**51.9**	**53.5**	**54.7**	**56.0**	**57.4**	**59.4**	**62.1**	**5.4%**
Monthly contracts	38.2	40.6	41.6	43.0	43.9	45.0	46.1	47.8	49.9	5.5%
Annual contracts	9.5	10.0	10.3	10.6	10.8	11.0	11.2	11.6	12.1	5.2%
Prepaid	**117.2**	**124.0**	**126.7**	**130.1**	**132.3**	**135.0**	**137.8**	**142.2**	**147.9**	**5.0%**
Daily passes	9.1	9.7	9.9	10.1	10.3	10.5	10.7	11.0	11.5	4.9%
Weekly passes	13.5	14.2	14.5	14.9	15.1	15.3	15.6	16.1	16.7	4.7%
Monthly prepaid vouchers	94.6	100.1	102.3	105.1	107.0	109.2	111.5	115.1	119.7	5.0%
By Content Type										
Movies & entertainment	**40.6**	**43.1**	**44.2**	**45.6**	**46.6**	**47.8**	**49.0**	**50.8**	**53.0**	**5.5%**
Sports	53.6	56.8	58.0	59.7	60.7	62.0	63.3	65.4	68.1	5.1%
News & current affairs	12.7	13.3	13.5	13.8	14.0	14.2	14.4	14.7	15.2	4.2%
Cartoon/animation	**9.6**	**10.2**	**10.4**	**10.7**	**10.9**	**11.1**	**11.3**	**11.6**	**12.1**	**4.9%**
Music & lifestyle	35.2	37.3	38.2	39.4	40.2	41.1	42.0	43.5	45.3	5.3%
Others	**13.1**	**13.8**	**14.1**	**14.4**	**14.6**	**14.9**	**15.2**	**15.6**	**16.2**	**4.6%**
By Content Origin										
Regional content	91.8	97.5	99.9	102.9	105.0	107.5	110.1	113.9	118.9	5.4%
International content	73.0	77.1	78.7	80.7	82.0	83.5	85.1	87.6	91.0	4.8%
By End Users										
Residential	**142.6**	**151.1**	**154.6**	**159.0**	**162.0**	**165.5**	**169.1**	**174.8**	**182.1**	**5.2%**
Commercial	**22.3**	**23.5**	**24.0**	**24.6**	**25.0**	**25.5**	**26.0**	**26.8**	**27.9**	**4.9%**
Offices	1.3	1.3	1.3	1.4	1.4	1.4	1.4	1.4	1.5	3.8%
Hospitality (Hotels, Restaurants)	18.3	19.4	19.9	20.4	20.8	21.2	21.7	22.4	23.3	5.1%
Public transportation	0.5	0.5	0.5	0.5	0.5	0.5	0.5	0.6	0.6	2.4%
Others	2.1	2.2	2.3	2.3	2.3	2.4	2.4	2.5	2.5	4.1%

Digital Transition and the Rise of Platform-First Distribution

Despite Pay TV's continued dominance, Senegal's audiovisual sector is undergoing a rapid digital transition. Between 2020 and 2025, more than half of a sampled catalogue of 124 Senegalese films (58%) were released through digital platforms compared with only 21% that received theatrical distribution. This represents a major structural shift in the national distribution ecosystem and confirms that streaming platforms are increasingly functioning as the primary exhibition pathway for locally produced screen content.

Within this transition, YouTube has emerged as the most important platform for Senegalese film and series distribution. Of the 72 films released digitally in the sample, 60% premiered on YouTube channels such as Marodi TV, EvenProd and Pikini Production. Series including *Baabel*, *Debbo*, *Doomu Baay*, and *Marie & Momo* attracted millions of views both within Senegal and among diaspora audiences in Europe and elsewhere in Africa.

Unlike subscription streaming platforms, YouTube combines free access with advertising-based monetisation and immediate audience feedback mechanisms. This hybrid accessibility model makes it particularly well suited to Senegal's viewing environment, where affordability constraints continue to shape platform adoption patterns.

Table 3: Content Library Breakdown | Source: GMI, 2025

Platform Name	Total Hours	Local	Regional	International

		Titles	Hrs.	%	Titles	Hrs.	%	Titles	Hrs.	%
Canal Plus Senegal	173,980 20	-	4,380	5.9	-	61,380	83	-	8,220	11.1
MyCanal OTT	88,890 50	85	170	1.9	3,450	6,900	77.7	665	1,820	20.5
Showmax	15,480 68	12	24	0.4	285	570	10.4	4,103	4,886	89.2
SenTV Plus	18,190 21 .5	107	5,493	67.1	24	2,351	28.7	8	346	4.2
Netflix	115,200 12	6	12	0.1	220	440	2.9	7,374	14,748	97
Prime Video	212,000 80	4	8	0.1	185	370	3.1	5,811	11,622	96.8
YouTube Premium	1- 50	-	-	-	-	-	-	-	-	-
Marodi TV	8220 , 670	68	204	95.3	4	12	3.5	0	4	1.2
Wawaw	4537 20	165	495	92.2	12	36	6.7	3	6	1.1
Wassa	1123 50	38	114	95	4	8	4.2	0	1	0.8

Marodi TV and the Expansion of Digital Audience Reach

Among Senegal's digital distributors, Marodi TV represents the most significant example of platform-led transformation within the national audiovisual sector. As of 2025, the channel had accumulated more than three million YouTube subscribers, alongside 2.1 million Instagram followers and over 600,000 Facebook followers. Approximately 56% of its audience is female and 70% are aged between 18 and 34, highlighting the importance of mobile-first streaming among younger viewers. As of April 2026, the number of YouTube subscribers has risen to 8.67M subscribers, with 5,970 videos and over 4.6 billion views.

Importantly, Marodi TV's audience geography illustrates the transnational reach of Senegalese digital distribution. Around 60% of viewers are based in Senegal, while approximately 20% are

located elsewhere in Africa and 8% in France, demonstrating the continuing importance of diaspora audiences in sustaining platform engagement with Senegalese screen content.

Marodi's business model combines YouTube advertising revenue with licensing partnerships involving Canal+ and Amazon Prime Video, as well as direct sales to Senegalese television channels. Although advertising income per production remains modest by international standards, the scale of viewership achieved by popular series demonstrates that locally produced content can reach large audiences when distributed through accessible digital platforms. For film distributors, this model illustrates a viable alternative pathway to theatrical release, particularly for lower-budget productions targeting domestic and diaspora viewers simultaneously.

Film Content within the Platform Economy

Film and entertainment programming remain central components of Senegal's platform ecosystem. In 2025 alone, GMI estimates that these categories generated approximately USD 45.6 million in platform revenues, second only to sports broadcasting within the Pay TV sector.

Audience demand also strongly favours regionally relevant content. Regional programming accounted for approximately USD 102.9 million in consumption value compared with USD 80.7 million for international catalogue titles. This preference reinforces Senegal's role within a wider Francophone African distribution corridor linking markets such as Côte d'Ivoire, Mali and Cameroon through shared linguistic audiences and satellite broadcast infrastructure.

At the same time, Senegalese films increasingly circulate through multi-platform release strategies. Recent titles such as *Banel et Adama* (2023) have appeared across Canal+ Afrique, Apple TV and Amazon Prime Video, while productions including *Xalé (2022)* have reached global audiences through specialist streaming services such as MUBI. Other titles including *Baabel*, *Marie et Momo*, and *Doomu Baay*-have built audiences primarily through YouTube-first release strategies. Together, these examples illustrate the growing diversification of distribution pathways available to Senegalese filmmakers.

Local Platform Development and Structural Financing Constraints

Alongside international platforms, Senegal is also witnessing the emergence of locally developed streaming services. The Dakar-based platform Wawaw, launched in 2024 with government seed funding of approximately CFA 7 million (around USD 11,000), aims to become a dedicated streaming hub for African films.

However, Wawaw also illustrates the structural financing challenges facing domestic OTT development across much of West Africa. Limited capital investment and infrastructure constraints continue to restrict the scalability of locally owned streaming platforms, reinforcing the importance of partnerships with regional broadcasters and global digital distributors.

Senegal as a Regional Circulation Node for Francophone Screen Content

Taken together, these platform dynamics position Senegal less as a large-scale production centre than as an increasingly important circulation node within Francophone Africa's digital screen economy. Satellite Pay TV operators continue to anchor regional catalogue distribution, while YouTube-based release strategies are expanding access to domestic productions among younger and diaspora audiences.

As OTT adoption continues to grow and mobile-first viewing becomes more widespread, digital platforms are likely to play an increasingly central role in determining how Senegalese films reach audiences both within the country and across the wider West African region.

2.2.6. Informal distribution and piracy

The audience survey suggests low piracy in Senegal, but the reality is a deeply rooted culture of normalized unauthorized sharing. Audiences no longer see these methods as illegal. Much of this consumption happens through informal fragmented channels. Unauthorized consumption is frequently masked by the widespread presence of informal neighbourhood networks that redistribute content through community-based cable systems or MMDS networks. Consumers in these models pay a subscription fee to a local informal provider, leading them to view the service as a legitimate commercial product. Canal+ Senegal has previously estimated that roughly 400,000 households pay for these pirated TV bundles, diverting billions in potential revenue away from the state and legitimate rights holders[3]. This creates a sharp contradiction: filmmakers lose up to 75% of their revenue, yet viewers believe they are acting legally because they are paying for a service.

Mobile-first consumption patterns have transformed piracy into a social activity rather than a clandestine one. The use of peer-to-peer applications like Xender or messaging platforms like Telegram to swap film files is predominantly viewed by the youth as "sharing with friends" rather than engaging in digital piracy. Survey data reinforces this fragmentation, with platforms like MovieBox (2%) and Telegram (2%) listed as distinct categories from "Digital Pirated Sites" (2%), confirming that audiences do not equate these tools with formal theft (see figure 104).

The challenge for the Senegalese film industry is less about strict legal enforcement and more about addressing the convenience and cost-effectiveness of these informal systems. Because audiences are already demonstrating a willingness to pay for content, albeit to unauthorized providers, the most viable pathway to reclaiming lost revenue is through expanding affordable legal access and integrating digital wallets to match the existing financial behaviours of the population.

3.2 Audience Development

3.2.1. Overview

Senegal's audience demographics are dominated by a digitally savvy youth population, with 70% of viewers for major digital platforms aged between 18 and 34. Audience consumption habits are increasingly moving toward localized, serialized content in languages like Wolof and Pulaar, as evidenced by the massive success of web series that garner millions of views per episode. This was supported by the qualitative results where the primary film audience comprised urban teenagers and young adults aged 18 to 40. Consumption was strongly shaped by digital access, with the "PlayStation generation" preferring high-budget, American-style aesthetics, while older urban viewers leaned toward social dramas and literary adaptations. In rural areas, audiences connected more with content dubbed in local languages like Wolof, highlighting language as a key driver of retention and emotional engagement as explained by a distributor: *"If it's a Senegalese film, people stay longer. If it's in their local language, if it's in Wolof, in a Wolof-speaking area, it encourages people to stay."*

Festivals and cultural institutes continue to play a vital role in audience building, though they often prioritize arthouse prestige over mass-market engagement. Education and training actors are also central to developing a sophisticated film culture. Institutions such as the Kourtrajmé film school and the Yennenga Center provide professional training in production and post-production, helping to formalize the sector and integrate young talent. However, marketing and promotion practices remain a significant weakness. Most Senegalese films lack an independent digital footprint, relying almost entirely on European festival infrastructure and international

[3] https://www.ecofinagency.com/comms/1610-32528-senegal-canal-notes-that-400-000-households-are-paying-for-pirated-channels

distributors for visibility. This prevents filmmakers from building direct relationships with their local audiences and limits their access to critical audience data.

The informant results also revealed festivals, campus circuits, and cultural institutes played a vital role in building cinephile communities. Events at Centre Yennenga and Cine Banlieue were seen crucial for networking and providing a space for post-screening discussions as a foundation for building audiences. Training programs, such as "Film Lab Africa" and schools like Kourtrajme and EIAD, acted as audience builders by involving young people in the production process and educating them about film language as stated by a distributor: *"Cine clubs have now become schools of cinema, a foundation for building audiences, just like image education in schools."* Marketing and promotion practices increasingly relied on digital strategies, using influencers and social media to boost ticket sales, though word-of-mouth remained highly effective in the African context.

3.2.2. Senegal film audience segments

Interviews with audience groups revealed three distinct viewer profiles within the Senegalese market. These segments provide a framework for understanding how different demographics navigate the film ecosystem and where the most significant barriers to engagement exist.

- International-leaning action viewers: This is a tech-forward, urban segment with a strong preference for international, high-energy content. Viewing spans multiple devices and platforms, with action and sci-fi leading. Engagement with African films is limited by concerns around production quality, though openness exists if quality improves.
- Local content cultural loyalists: This segment shows the strongest attachment to African storytelling. Viewing is mobile-first, centred on YouTube and free-to-air TV, reflecting cost sensitivity. Cultural relevance and relatability drive engagement, but discovery of new content remains a challenge.
- High-engagement family streamers: This group is family-oriented and consumes films frequently across shared devices. Preferences lean toward accessible, uplifting genres such as comedy and romance. Barriers are practical, data costs, content discovery, and inconsistent quality. Engagement improves with easier access and family-friendly content.

The distinct nature of these groups confirms that the Senegalese market is not a uniform block. Instead, it is a fragmented landscape where distribution success depends on matching specific technical and cultural standards to the economic realities of each segment.

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

Dimension	Segment 1: International Leaning Action Viewers	Segment 2: Local Content Cultural Loyalists	Segment 3: High Engagement Family Streamers
Segment distribution	n = 65 (31%)	n = 73 (35%)	n = 72 (34%)
Gender	74% male	52% female and 48% male	64% male
Age distribution	18 - 44 years	25 - 44 years	25 - 44 years
Content preference	Local (77%), regional (63%) and international films (99%)	Local (99%), regional (56%) and international films (47%)	Local content (100%)
Top genres	Action (88%) and drama (55%)	Action (88%) and romantic comedy - 47%	Comedy (89%) and drama - 47%

Primary device	Smartphone / Tablet (78%)	Smartphone / Tablet (86%)	Smartphone / Tablet (89%)
Main platforms	YouTube - 93% and Netflix - 59%	YouTube - 100%	YouTube - 100% and Netflix - 42%
Fallback option	Free-to-air TV (63%)	Free-to-air TV (82%)	Free-to-air TV (63%)
Main motivations	Entertainment (60%), High-Quality Storytelling (46%), Education (45%)	Cultural Connection (69%), Entertainment (62%), Education (45%)	Entertainment (68%), Cultural Connection (61%), Education (57%)
Key barriers to watching local films	Storylines that are not engaging (26%), Low production quality (25%), Storylines that are not original (25%)	Data/connectivity (33%), Difficulty in finding where to watch (32%)	Difficulty in finding where to watch (35%), Data/connectivity (28%)
Median monthly streaming spend	~$10.80	~$9.00	~$10.50
Avg. streaming platforms	1	1	1
Cinema willingness to pay	~$9.00	~$3.60	~$5.40
Net Promoter Score African films	21%	-1%	11%
Growth triggers	Better content recommendations and discovery, Higher-quality original African films, Reliable offline download features	Reliable offline download features, 'Free with ads' tiers on major platforms, Higher-quality original African films	Better content recommendations and discovery, Higher-quality original African films, Reliable offline download features

3.2.3. Film discovery and marketing channels

Film discovery among audiences in Senegal appears to be digitally driven, with social media emerging as the leading source of awareness at 67%. This indicates that online platforms play a central role in how audiences learn about films, likely through shared content, trailers, and discussions circulating on social networks. Friends and family remain an important secondary channel (57%), suggesting that interpersonal recommendations still reinforce what audiences see online. Other channels play a much smaller role: streaming platforms account for 20%, indicating some influence from platform recommendations, while out-of-home advertising such as billboards contributes 13% and traditional media advertising like radio or TV accounts for 10%. Influencers/bloggers represent only 3%.

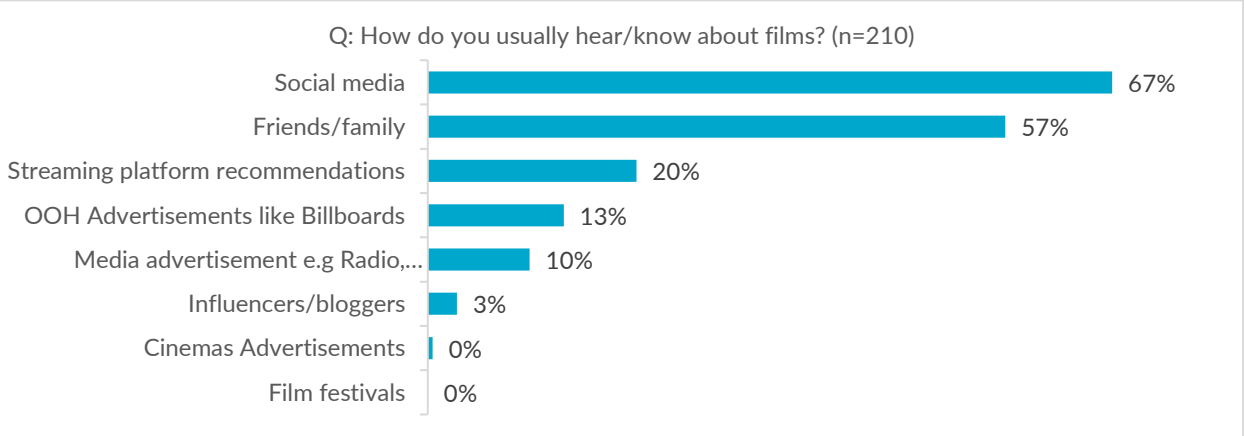


Figure 2: How audience in Senegal know/hear about new films | Source: Survey data

The key informants' findings were in support with the quantitative results where it was noted marketing and promotion in Senegal were increasingly defined by a "digital-first" strategy, as stakeholders recognized that the majority of the audience was connected via mobile devices 24/7. Social media platforms (Instagram, TikTok) and YouTube served as the primary engines for generating engagement through trailers, vertical clips, and "behind-the-scenes" content. Influencers played a pivotal role in this ecosystem; casting public figures with large followings was seen as a way to "cut marketing budgets in half" as a single post could drive substantial ticket sales and "crazy audiences". Beyond digital noise, controversy and gossip/rumours were frequently leveraged to spark public debate and compel attendance. However, in rural areas, traditional methods remained essential, including word-of-mouth and the recruitment of griots to beat drums and spread news of film screenings through neighbourhoods.

Overall, this suggests that film discovery in Senegal is largely shaped by digital engagement supported by social sharing, rather than traditional promotional channels. Consequently, film marketers should prioritize strong social media campaigns, shareable digital content, and online community engagement, while complementing these efforts with targeted outdoor advertising and selective platform promotion to broaden reach.

3.2.4. What drives audiences to watch films

In Senegal, audiences watch films primarily for entertainment and relaxation (63%), but the data reveals a distinct pattern in which cultural connection and identity (50%) and educational or social learning motivations (49%) are almost equally important drivers. This suggests that films are seen not only as entertainment but also as tools for cultural reflection and social awareness. High-quality storytelling (29%) and recommendations from friends or family (21%) also influence viewing decisions, while affordability (12%) and actors/directors (12%) play a smaller role. Recommendation: Filmmakers and cultural institutions should prioritize stories that reflect Senegalese identity, social realities, and educational themes, positioning film as both entertainment and a medium for social dialogue. Development partners and policymakers can support this by investing in films that address societal issues and promote cultural heritage, while distributors and broadcasters should ensure such content reaches audiences through accessible platforms and community screenings.

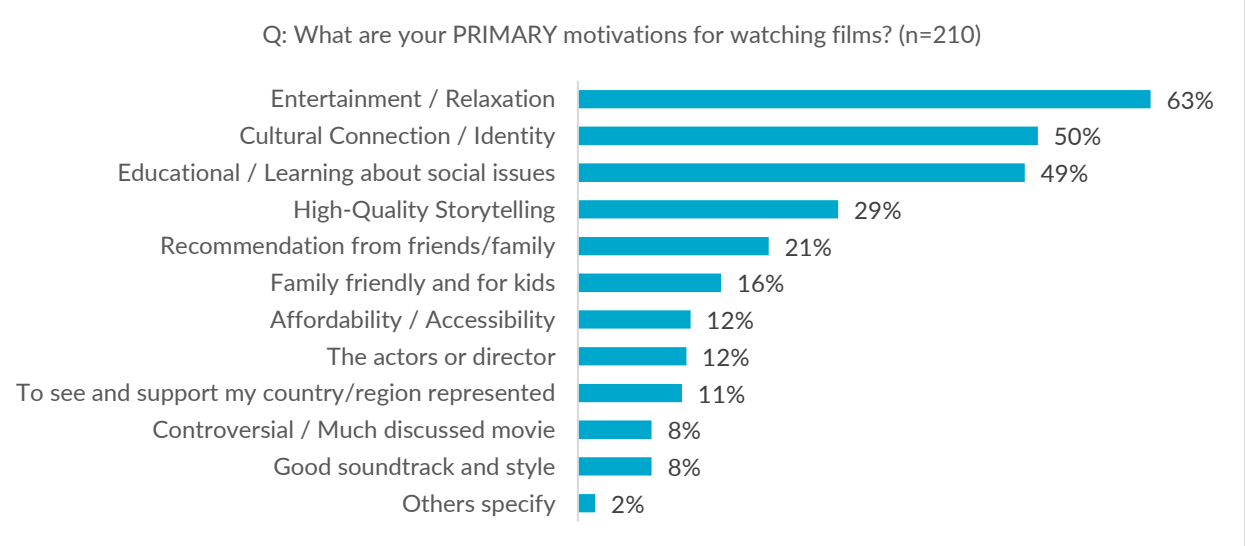


Figure 3: Primary motivations for watching films | Source: Survey data

Senegalese audiences prioritize story and production quality, with plot/theme (94%), acting quality (93%), technical quality (95%), and representation of African cultures (91%) ranking among the most important decision factors. Peer recommendation (92%) and marketing campaigns (88%) also play a strong role, indicating that both storytelling and community influence shape film choices. Actors (86%), language/subtitles (87%), and popularity or trending films (85%) further influence selection, while awards (65%) and reviews (65%) are comparatively less decisive. Stakeholders should focus on producing high-quality films with strong narratives that reflect African culture and identity, while distributors and marketers should leverage community engagement, social networks, and culturally relevant messaging to drive viewership. Policymakers and industry partners can further support the sector by encouraging local language accessibility and culturally grounded storytelling that resonates with Senegalese audiences.

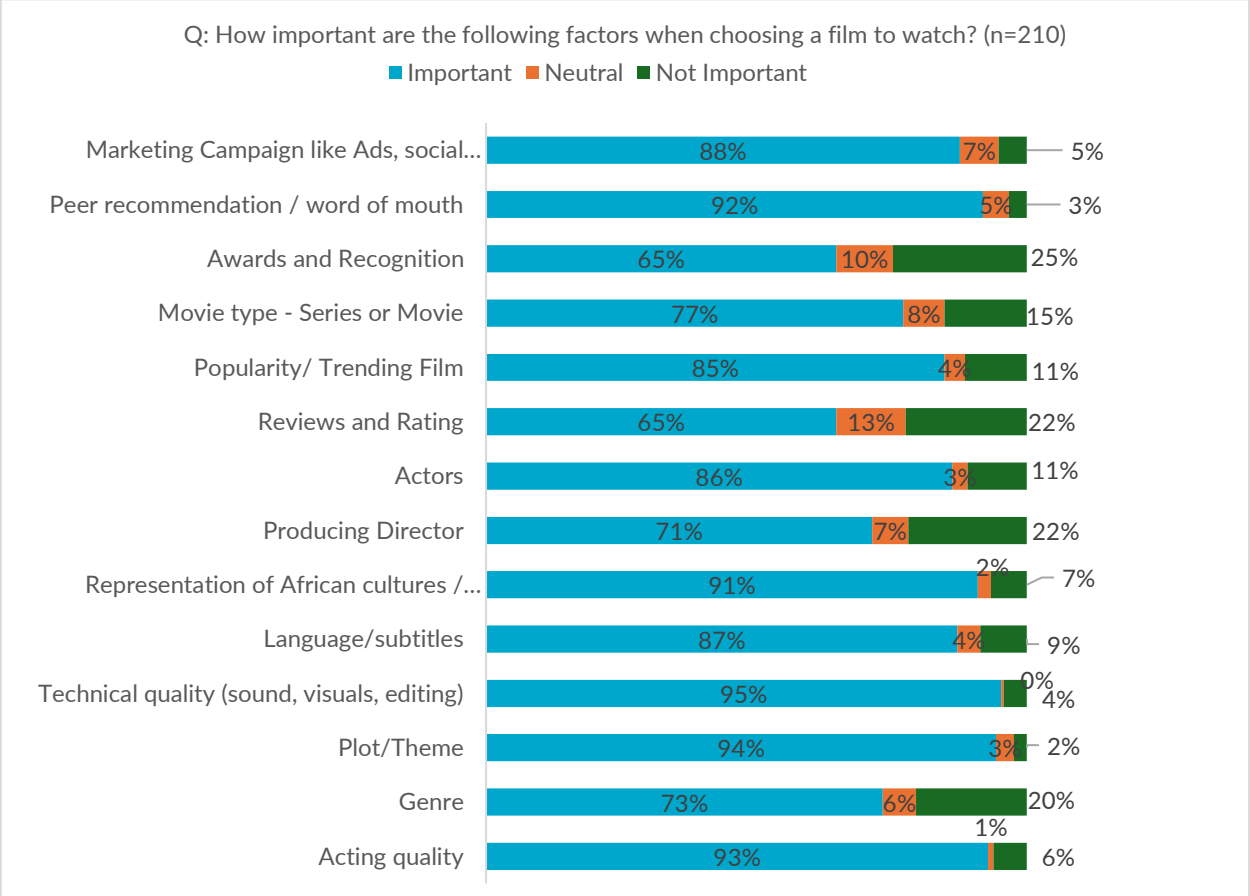


Figure 4: Important factors when choosing film to watch | Source: Survey data

Senegalese audiences engage with films as both a source of entertainment and a vehicle for cultural expression and social learning. While relaxation remains the primary driver, there is a strong and nearly equal emphasis on cultural identity and educational value, indicating that viewers seek content that reflects their realities and informs their perspectives. At the same time, film selection is highly quality-driven, audiences place overwhelming importance on strong storytelling, acting, technical production, and authentic representation of African cultures, reinforced by the influence of peer recommendations and marketing. This suggests that success in Senegal hinges on delivering culturally resonant, high-quality narratives, amplified through community-driven promotion. Stakeholders, including filmmakers, distributors, and policymakers, should therefore prioritize investment in locally grounded, socially relevant stories, ensure accessibility (including language and platforms), and leverage social networks and community engagement to deepen audience connection and drive sustained viewership.

3.2.5. Audience viewing platforms and access to films

The audience survey data suggests that film viewing in Senegal is overwhelmingly mobile, with smartphones dominating at 85%. This reliance on mobile devices sets Senegal apart from more TV-centric markets, though television remains a strong second at 78%. In contrast, laptops are used by a much smaller share of the audience, at 13%. These findings confirm a decisive shift toward personal, portable, and web-integrated screens as the primary way people engage with content.

When looking at platforms, streaming services leads at 85%, followed by broadcast (TV) at 74%. Cinema plays a minor role (8%). Social media (13%) and cinema (8%) remain limited as a primary viewing channel. This confirms that digital platforms are not just growing, they are already the main access point.

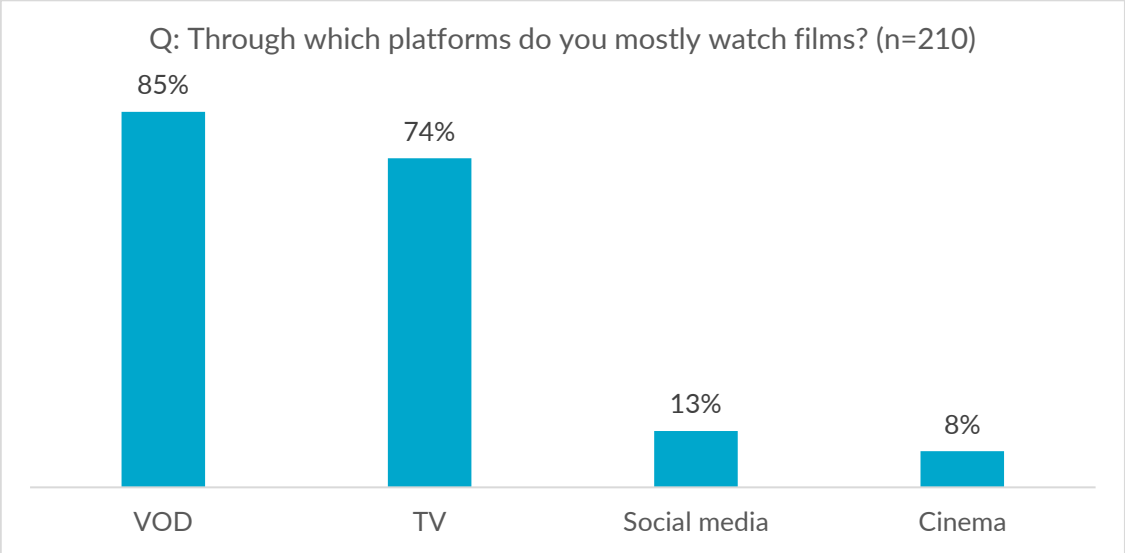


Figure 5: Primary viewing platforms in Senegal | Source: Survey data

Within streaming, YouTube is near-universal (98%). No other platform comes close. Netflix reaches 43%, while Canal+ Online and others remain niche. Television still holds relevance. Free-to-air TV (70%) and Pay TV (55%) continue to provide access, particularly where streaming is constrained.

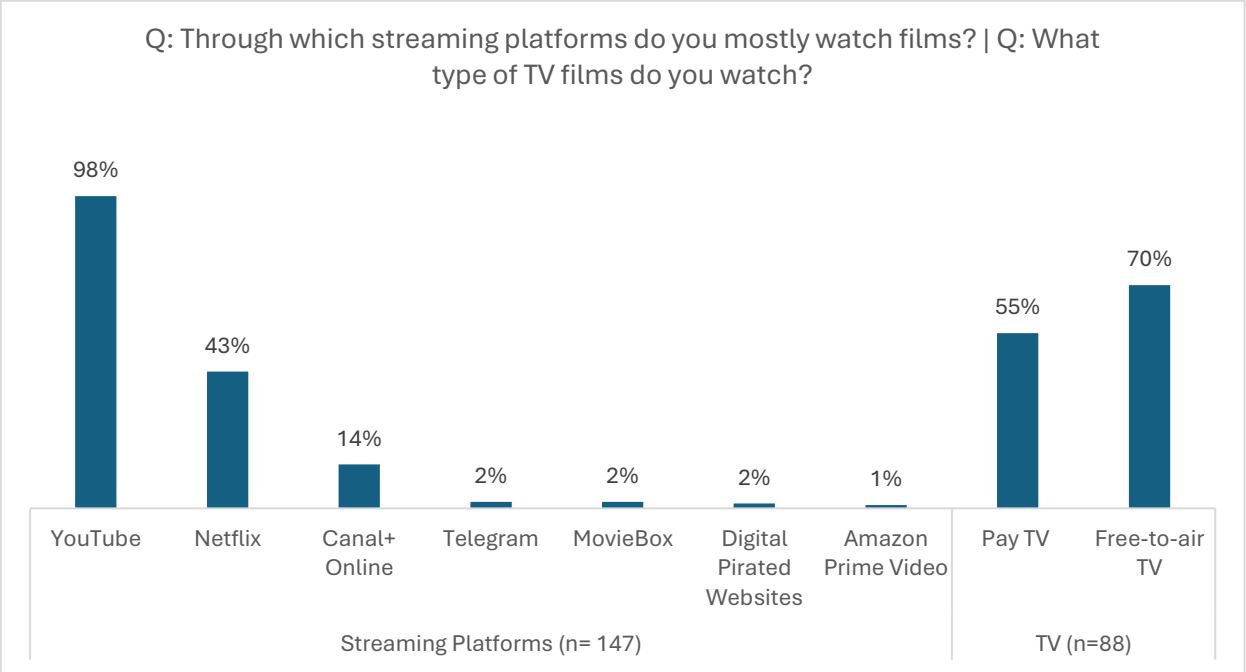


Figure 6: TV & streaming platforms used in Senegal | Source: Survey data

TV viewing itself is increasingly hybrid. Smartphones are the most used device for TV content (64%), followed by Pay TV connections (48%). Traditional screen-based viewing is less dominant. This suggests that broadcast content is often accessed through digital or mobile interfaces.

The above findings infer that in Senegal, access is defined by flexibility. Viewers move between TV and streaming, but mobile remains the anchor. Platforms that optimise for mobile delivery are, therefore, better positioned to scale.

3.2.6. Streaming behaviour and platform preferences

Content consumption is balanced between local and global. Senegalese films lead (63%), followed by other African content (41%). American films are close behind (39%), indicating strong exposure to international content. No single category dominates completely. Instead, audiences navigate across content types depending on availability and platform.

Platform behaviour creates a clearer divide. On YouTube, local films dominate (91%), making it the primary channel for African content. On Netflix, the pattern reverses: American films lead (68%), while locally produced Senegalese content remains minimal, limited to a small number of auteur films, with no popular or commercial local productions currently available. It is therefore difficult to interpret this gap as a straightforward reflection of audience preferences, as the comparison is complicated by a significant asymmetry in content availability across platforms. This suggests that platform segmentation may be driven as much by catalogue composition as by audience demand.

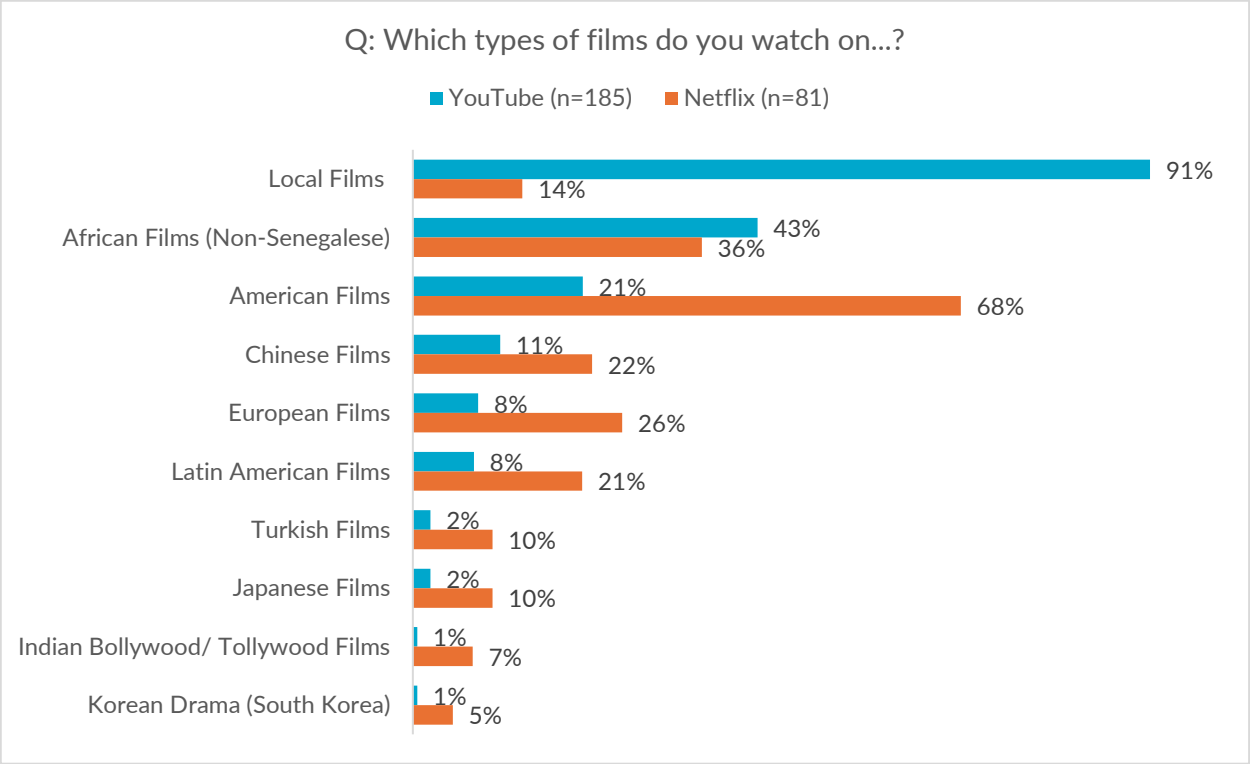


Figure 7: Films streamed on YouTube & Netflix in Senegal | Source: Survey data

Streaming frequency is high across the board. Nearly half of audiences watch local films daily (48%), with strong weekly engagement across other categories. Even niche content types maintain consistent weekly viewership. This indicates that streaming is embedded in everyday routines rather than occasional use.

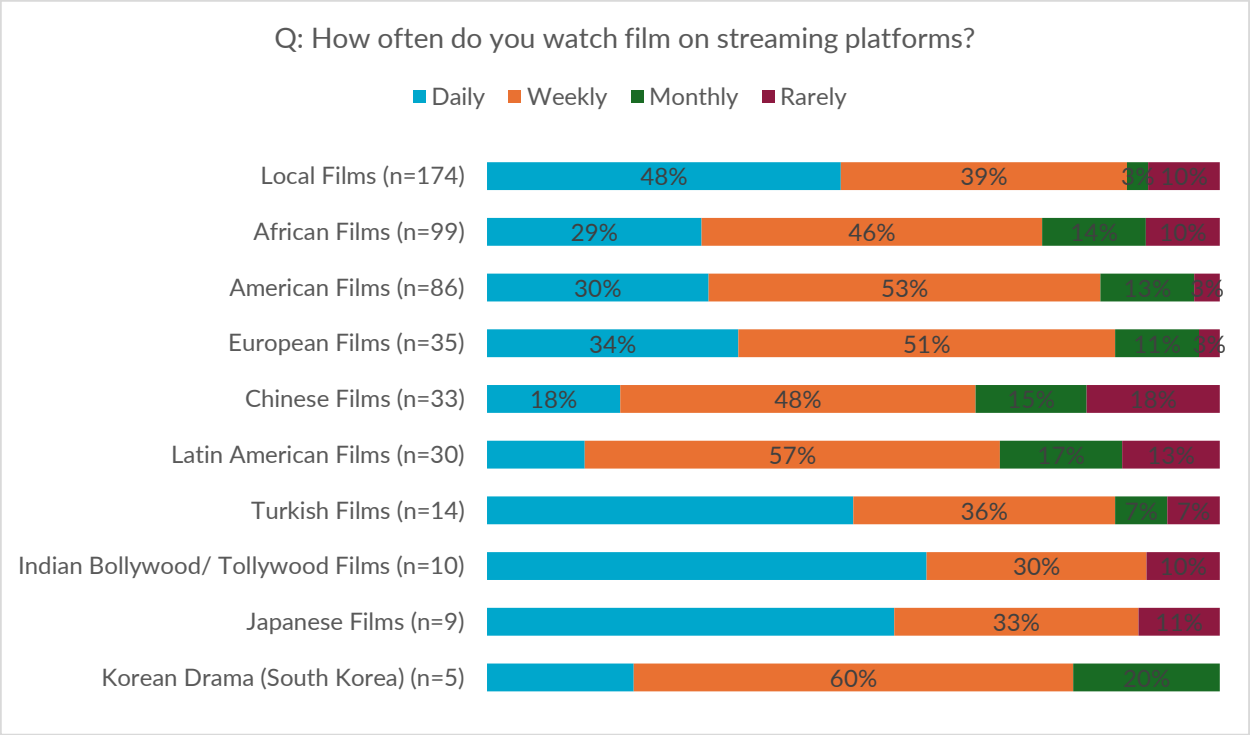


Figure 8: Frequency of streaming in Senegal | Source: Survey data

Device use, for streaming films, mirrors earlier patterns. Smartphones dominate (85%), followed by Pay TV (42%) and Smart TVs (20%). Streaming is largely personal and mobile, even when content originates from traditional channels.

Subscription to paid streaming services, on the other hand, remains limited. Most users rely on one service or none. At the same time, spending varies widely, with some users paying significantly more than the median C5338 CFA (USD 9.54). This points to uneven purchasing power within the audience.

Taken together, these findings suggest that while engagement is high, monetisation is uneven. Audiences watch frequently but rely on a mix of free and paid access. Growth depends less on increasing usage and more on converting that usage into sustainable revenue streams.

3.2.7. Demand for local and African content

Senegalese audiences show very strong engagement with local films (92%), complemented by high consumption of African films (62%) and American films (50%), indicating both regional solidarity and openness to global content. There is also moderate exposure to European, Chinese, and Latin American films, suggesting a relatively diverse viewing environment. Stakeholders should focus on strengthening regional African distribution networks and co-productions, while streaming platforms and broadcasters can capitalize on this openness by curating a mix of local, African, and global content that reflects Senegal's culturally diverse audience tastes.

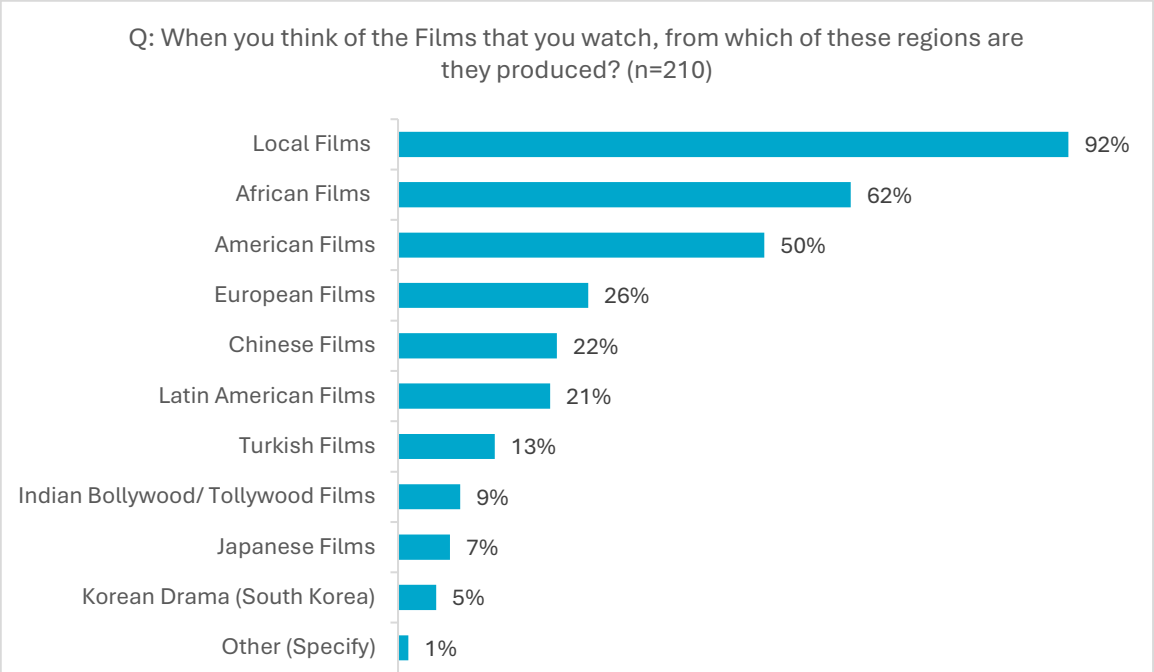


Figure 9: Regions of films watched | Source: Survey data

In Senegal, local films dominate viewing habits, with 69% of audiences most often watching locally produced content, followed by 18% watching films from other African countries. However, small but notable shares also engage with American (5%) and other international content. Audience attitudes strongly support local production, with 91% stating that it is important that films are locally made (67% very important; 24% somewhat important). Stakeholders should focus on strengthening Senegal's local production and distribution ecosystem while also promoting regional African collaborations. Expanding access to local films across cinemas, television, and streaming platforms could further capitalize on the strong audience preference for domestic storytelling.

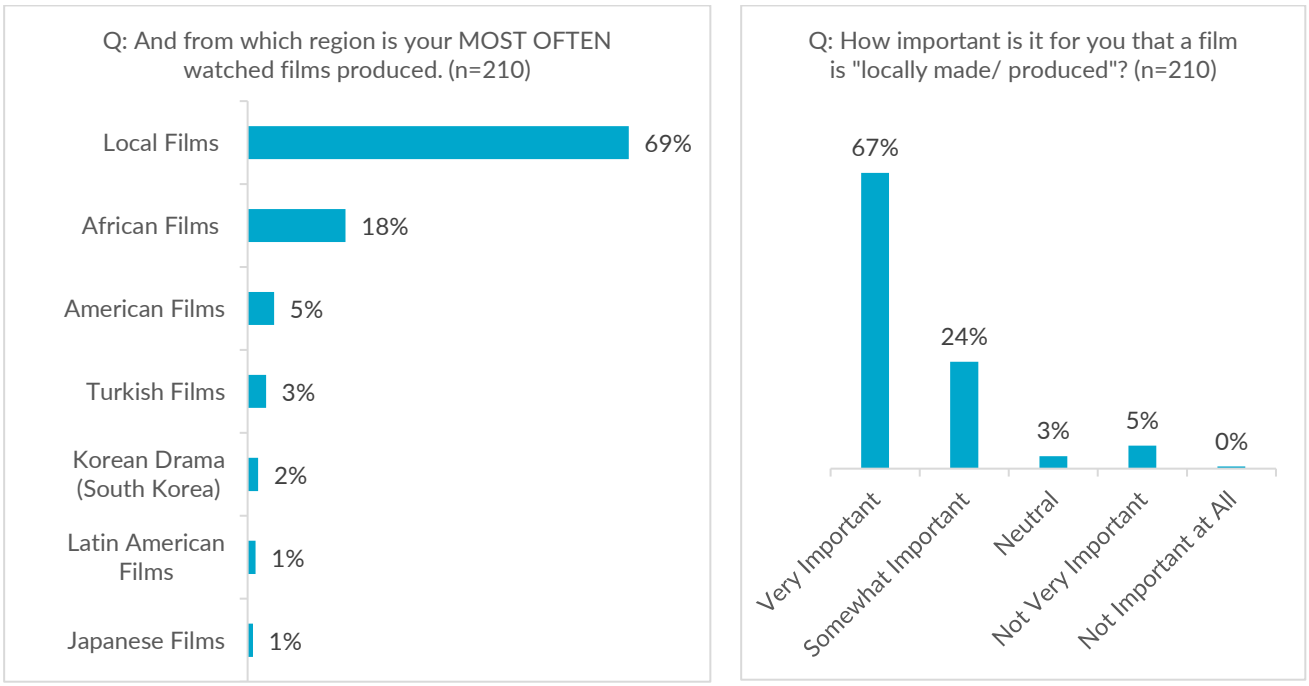


Figure 10: Most frequently watched region and Importance of films being locally produced | Source: Survey data

Overall, Senegalese audiences demonstrate a strong preference for local content, with local films clearly dominating both overall consumption and most-watched patterns, alongside high appreciation for films produced within Africa. This reflects a deeply rooted cultural affinity and a strong sense of value placed on locally made storytelling. At the same time, audiences remain open to global content, particularly American films, indicating a balanced consumption pattern that combines cultural loyalty with international exposure. The high importance placed on locally produced films further reinforces the central role of domestic content in shaping viewing habits. For stakeholders, this presents a clear opportunity to strengthen Senegal's local production and distribution ecosystem while scaling regional African collaborations and co-productions. Distributors, broadcasters, and streaming platforms should prioritize accessibility and visibility of local films across channels, while curating a complementary mix of African and global content to match audience openness and sustain engagement.

3.2.8. Barriers to audience growth for local films

Among Senegalese audiences, the dominant barrier is a strong disconnect with local content, with 75% reporting lack of interest in the stories or themes, by far the highest across all markets, indicating a critical relevance gap. Production quality is also a significant concern (33%), reinforcing the need for stronger technical and narrative execution. Preference for international content is comparatively lower (25%), suggesting that the issue is less about competition from global films and more about shortcomings within local offerings. Awareness is a moderate barrier (25%), pointing to gaps in visibility and promotion, while language and subtitles (17%) are a notable constraint, likely reflecting linguistic diversity and accessibility challenges. Overall, the data suggests that Senegal requires a dual focus on improving storytelling relevance and production quality, alongside strengthening discovery and localization efforts to better connect with audiences.

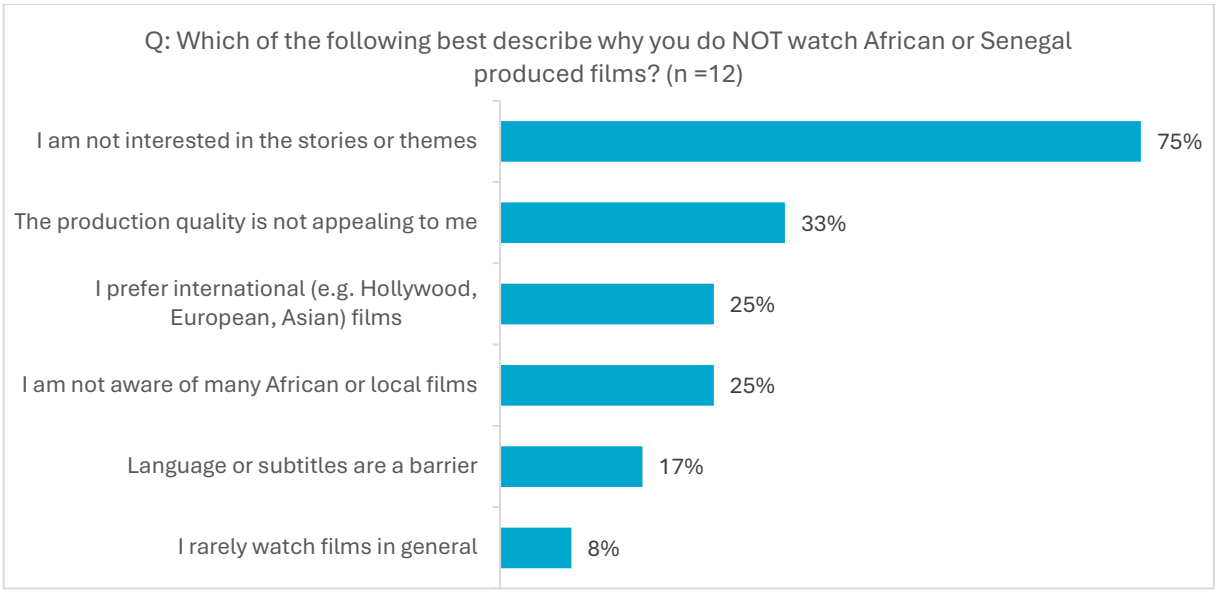


Figure 11: Why audience do NOT watch Local or African films | Source: Survey data

In Senegal, the key barriers are difficulty finding where to watch African films (28%) and poor internet connectivity or high data costs (26%), followed by lack of awareness about new releases (23%), although 25% report no major barriers. Secondary concerns include production quality (17%) and story originality or engagement (13–12%). This suggests that access, infrastructure, and discoverability, rather than audience resistance, limit consumption. There is therefore prioritize expanding distribution channels, improving digital access through telecom partnerships, and strengthening marketing efforts to increase awareness of African film releases.

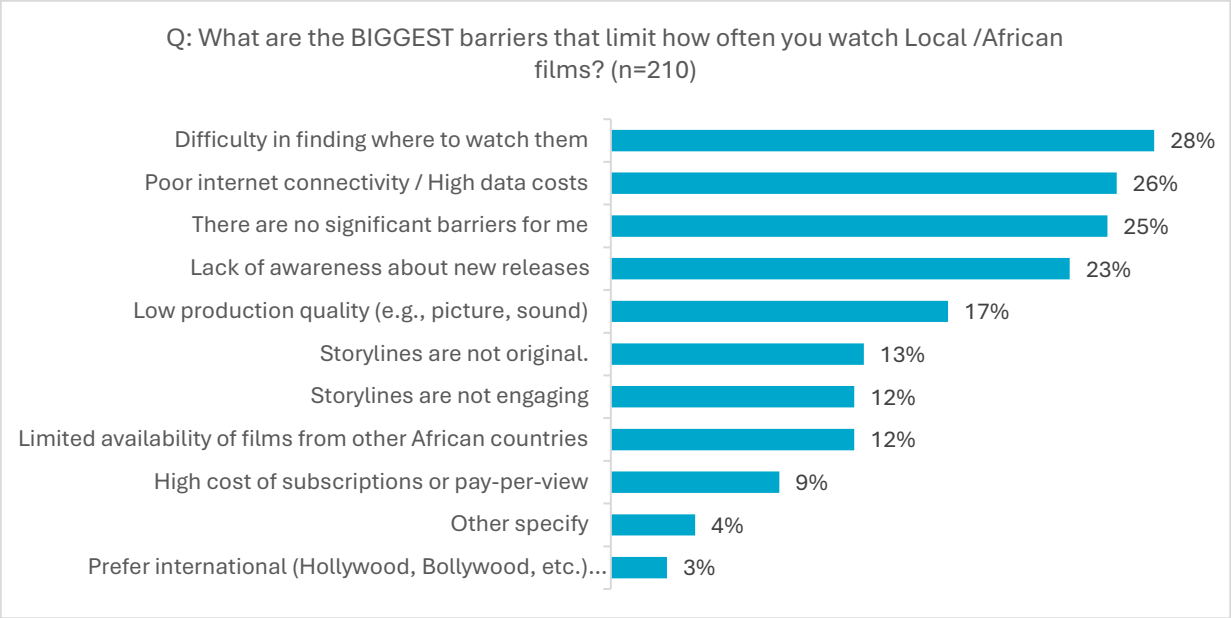


Figure 12:Barriers to watching Local or African films | Source: Survey data

Senegalese audiences show strong recognition of the quality and authenticity of local films, with about 67% agreeing that production quality has improved and roughly 69% agreeing that local films tell authentic and relatable stories. There is also moderate willingness to pay for high-quality local content (59%), suggesting an emerging market opportunity. However, the main challenges are visibility and accessibility where 38% report difficulty finding local films on mainstream platforms and a large majority (76%) believe local films are poorly promoted or marketed. This highlights the need to prioritize marketing investment, strengthen distribution channels, and increase the presence of Senegalese films on mainstream streaming platforms to better connect high audience interest with actual consumption.

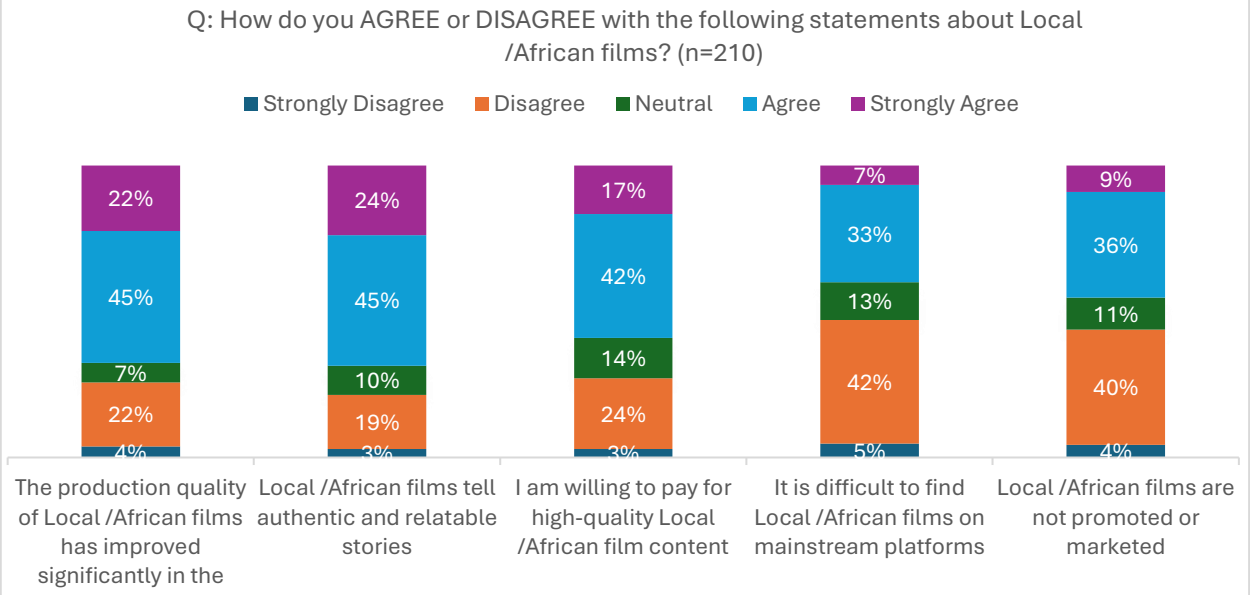


Figure 13: Perceptions on local/African films | Source: Survey data

For Senegal, barriers to film consumption reflect a combination of relevance, access, and visibility challenges rather than outright rejection of local content. While a significant share of audiences cites a lack of interest in local stories and concerns around production quality, pointing to a need for stronger, more relatable storytelling and improved technical execution,

this is not the full picture. Structural constraints are equally critical: audiences face difficulties in discovering where to watch films, limited awareness of new releases, and persistent connectivity and cost barriers, all of which restrict access. At the same time, there is clear underlying demand, many audiences recognize improvements in production quality, find local stories authentic, and show willingness to pay for high-quality content. This indicates that the primary gap lies in converting interest into actual consumption. For stakeholders, the priority should be a dual strategy: strengthening the relevance and quality of content, while significantly improving distribution, platform availability, and marketing. Partnerships with telecom providers, better placement on mainstream streaming platforms, and stronger promotional campaigns will be essential to bridge the gap between audience interest and engagement.

As of the stakeholder insights the primary barriers to audience engagement were the high cost of entry with cinema tickets (often 5,000 CFA) and transportation making a family outing cost between 25,000 and 30,000 CFA- an abysmal amount for the average household. Distribution was severely restricted geographically, with modern theatres concentrated within a 10-kilometer radius in Dakar, leaving the rest of the 14 regions as a shortage zone. Technological access for streaming was hindered by high data costs and a reliance on traditional banking for subscriptions, which excluded the majority of the population who used digital wallets. Proposed solutions included decentralizing theatres to ensure at least one complex per region, implementing tax exemptions to encourage infrastructure investment, and integrating mobile money (Wave/Orange Money) into streaming payment interfaces to improve accessibility.

"The average Senegalese person who doesn't have access to a bank card... won't be able to pay for Netflix with their Wave. That's why... they need to integrate digital wallets to allow people to purchase content." Filmmaker, Senegal

3.2.9. Audience engagement and word-of-mouth

In Senegal, audience behaviour reflects a mix of word-of-mouth influence and moderate digital engagement. 36% recommend films to others, while 28% look for more films from the same country, indicating that personal recommendations and national film discovery are key drivers of continued viewing. At the same time, 28% do nothing specific, suggesting that a substantial portion of viewers remain passive after watching. Some audiences also engage socially, with 18% sharing films on social media and 13% researching the social issues discussed in films. Stakeholders should capitalize on word-of-mouth momentum by encouraging community screenings, influencer partnerships, and social media conversations, which can help convert passive viewers into more active promoters of films.

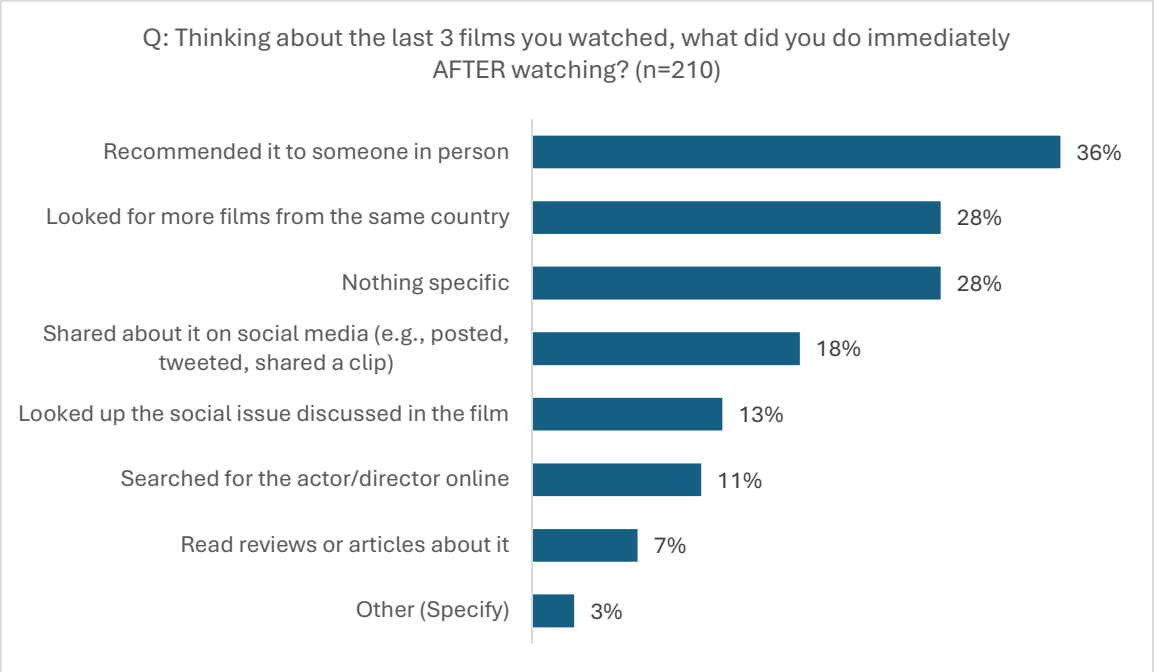


Figure 14: Actions after watching a film | Source: Survey data

Senegalese audiences demonstrate relatively high proactive discovery of films, with 45% actively searching for and downloading films. However, 34% still report none of the listed activities, indicating a mixed engagement landscape. Social media engagement with film talent is moderate (17%), but participation in cinemas (5%), digital payments (5%), community screenings (8%), and online film groups (3%) remains limited. Stakeholders should leverage audiences' strong discovery behaviour by improving legal digital access points and strengthening online promotion, while also expanding community screenings and local film events to build stronger audience participation beyond search and discovery.

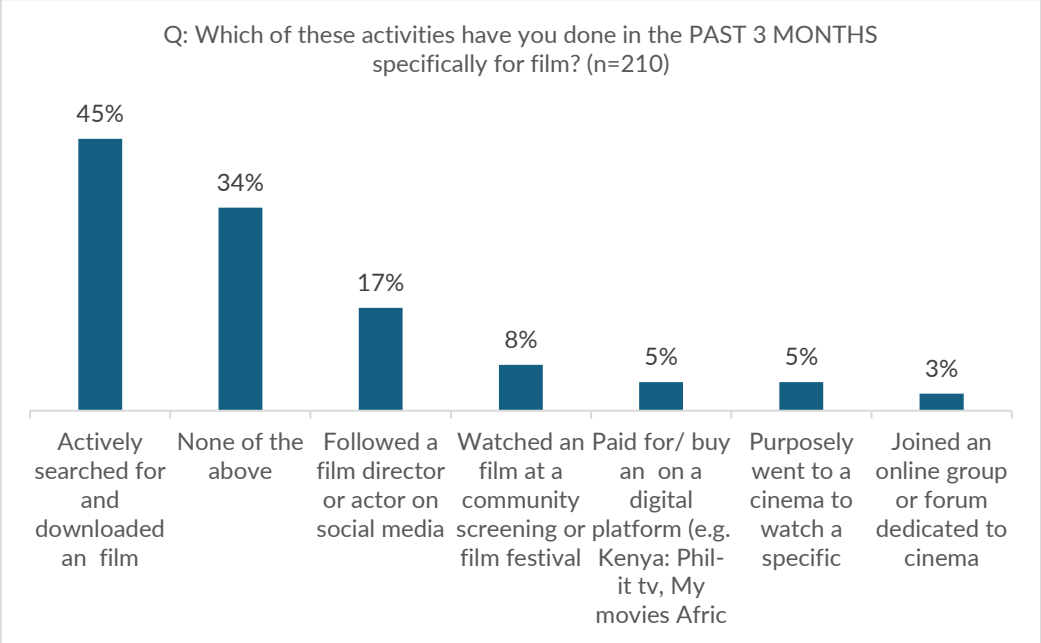


Figure 15: Engagement in past 3 months | Source: Survey data

Senegal shows a slightly negative audience sentiment toward recommending African films, with promoters (29%) lower than detractors (32%), leading to an NPS of -3. The high share of passives

(40%) indicates that many viewers are indifferent rather than strongly opposed, suggesting that improvements in content relevance, visibility, and viewing experiences could shift perceptions positively. Filmmakers should focus on storytelling that reflects contemporary Senegalese and regional realities while maintaining high production standards to strengthen audience pride and engagement. Distributors, cinema operators, and streaming platforms need to address accessibility barriers by expanding distribution channels and promoting African films more effectively through marketing and community screenings. Government agencies and film institutions can stimulate the market through policy support, funding schemes, and local content quotas that encourage the circulation of African films. Funders and ecosystem partners should invest in audience development initiatives, such as film education programs, festivals, and grassroots screenings, to rebuild trust and convert passive viewers into promoters of African cinema.

The Senegal audience engagement reflects a hybrid pattern of strong word-of-mouth influence, active discovery, and a sizeable passive segment. Viewers frequently recommend films and seek out additional content from the same country, indicating that peer influence and national content affinity are key drivers of continued engagement. At the same time, a notable share remains passive after viewing, and deeper ecosystem participation, such as cinema attendance, paid digital consumption, and community involvement, remains limited. While proactive behaviours like searching and downloading films are relatively high, weak participation across formal channels points to gaps in accessibility and structured engagement opportunities. This is further reflected in a slightly negative NPS, driven by a large proportion of indifferent viewers rather than strong opposition, suggesting untapped potential to shift sentiment. For stakeholders, the priority is to convert passive and indifferent audiences into active promoters by strengthening storytelling relevance and quality, while expanding access through digital platforms, community screenings, and improved distribution. Leveraging social media, influencer partnerships, and grassroots activation, alongside policy support, funding, and audience development initiatives, will be critical to deepen engagement, improve perception, and drive sustained growth of Senegal's film ecosystem.

Audience data systems and evidence gaps

While sophisticated real-time data tracking is standard for global giants and larger local services like Wido, this information is typically kept proprietary for internal strategic use rather than being shared with the industry at large, leaving most creators with a significant evidence gap regarding their content's true reach. To address these gaps, some platforms began exploring AI-driven recommendation systems and data collection tools to track real-time user interaction, while distributors advocated for the creation of a dedicated "Senegalese Box Office" to provide a scientific barometer for the industry. Establishing this scientific barometer is currently hindered by the absence of a centralized, state-controlled ticketing system managed by the Directorate of Cinematography, which makes current box office figures an unverifiable "puzzle". However, the industry could start by replicating the monthly reporting model successfully implemented in Ivory Coast

3.3 Social Impact

3.3.1. Overview

Film in Senegal is a powerful medium for social reflection and debate, with the strongest perceived impacts found in themes of cultural identity, feminism, and environmental resilience. Cinematic works frequently explore national history and the struggle for dignity, as seen in the public engagement with biopics and adaptations of classic Senegalese literature. Emerging genres, such as ecological thrillers, have begun to address the impact of climate change on coastal communities, sparking conversations about adaptation and social cohesion.

Examples of socially impactful films include *The Waste Commons* (2025), which implemented a structured campaign with NGO partnerships to advocate for the livelihoods of waste pickers in

Dakar. While documentaries and fiction films addressing youth protection and gender equality are common, the broader ecosystem lacks institutional support for sustained advocacy programming. Public broadcasters and international donors, such as the AFD and the Goethe-Institut, play a significant role in supporting impact-oriented content, yet there remains a gap in translating thematic relevance into organized social mobilization.

The stakeholder insights revealed that social impact was defined by the industry's ability to change behaviours and spark debate on sensitive cultural issues. Respondents observed that film had the strongest perceived impact in thematic areas such as migration (*Io Capitano* (2022), *La Pirogue* (2012), women's rights (*Mistress of a Married Man* (2019)), and public health (Yaay 2.0). The series "*Yaay 2.0*", which addressed infertility, reportedly prompted men to seek sperm analyses, a procedure many had previously refused. Policy influence was explicitly demonstrated by the documentary *L'utilité et l'attachement*, which prompted the Head of State to issue formal instructions regarding unpaid compensation for the Regional Express Train project after a screening.

Priority themes for sector growth included mental health, pre-colonial African history, and addressing rising societal violence. However, several genres remained under-explored, particularly children's programming, animation, and thrillers that move beyond "miserabilist" narratives. Social impact initiatives were often driven through partnerships with international organizations such as GIZ, UNFPA, and UNESCO, as well as public institutions, with films frequently utilized in educational settings, community screenings, and focus group discussions. Despite these efforts, evidence of impact remained largely qualitative, relying on testimonials and social media engagement metrics rather than robust, structured systems for measuring behavioural change.

3.3.2. Audience interest in socially relevant storytelling

The audience survey data indicates that audience interests are strongly concentrated around issues that reflect everyday realities and future aspirations. Stories about young people pursuing opportunities lead by a wide margin (61%), followed by women overcoming challenges (54%) and themes around power, politics, and corruption (42%). These points to a clear demand for narratives that engage with structural and societal change. Audiences are responding to stories that mirror lived experiences and broader national conversations.

A second tier of themes, coexistence (40%), livelihoods (36%), and relationships (30%), adds another layer. These themes are more personal and community-driven, focusing on how individuals navigate social and economic pressures in daily life.

Lower-ranked themes such as identity beyond norms (23%) and mental health (23%) still attract meaningful interest, suggesting emerging spaces for storytelling that may not yet be fully explored in mainstream content. Environmental themes (28%) also show moderate traction, indicating awareness but slightly less urgency compared to economic and social mobility issues.

Only 7% of audiences prefer films purely for entertainment without social themes. This is a small minority and stands in clear contrast to other markets.

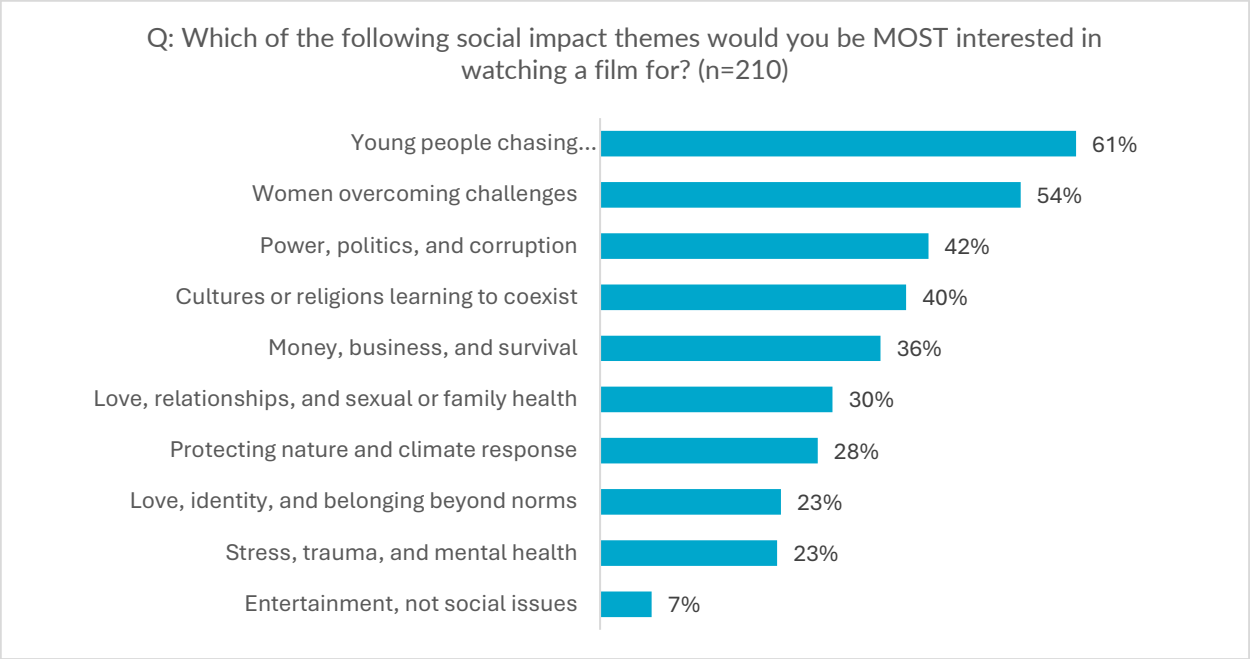


Figure 16: Social impact themes Senegalese audiences want to watch | Source: Survey data

Taken together, the data shows a consistent pattern. Audiences are not passively open to socially relevant content; they actively prioritise it. At the same time, engagement is selective. Themes tied to opportunity, gender, and governance resonate more strongly than those perceived as abstract or less immediate. Social impact is, therefore, not an added layer in Senegalese film consumption. It is part of the core value proposition. The strongest opportunity lies in stories that combine entertainment with clear social relevance, especially those grounded in youth aspirations, gender dynamics, and everyday economic realities.

3.4 Financing and Enabling Environment

The financing landscape in Senegal is a hybrid of public support, international co-productions, and emerging private investment. The primary domestic source is the Fund for the Promotion of Cinematographic and Audiovisual Industry (FOPICA) (83%), which allocated approximately USD 2.1 million across 49 projects in 2023[4]. While FOPICA is a crucial catalyst, its resources are often insufficient to cover the full costs of commercial features, leading to a continued dependence on European co-production facilities. The 2016 agreement with France remains one of the most active bilateral film treaties in Africa, allowing Senegalese films to access French funds and international distribution networks. It has recently supported major international successes like Ramata-Toulaye Sy's *Banel & Adama* (2023) and Mati Diop's *Dahomey* (2024), which won the Golden Bear at the Berlinale. Additional treaties exist with Belgian (Wallonia-Brussels), Canada and Morocco.

The private sector is increasingly active, notably through the Canal+ Group, which has acquired stakes in local production houses and commissioned numerous original series. However, the commercial ecosystem remains constrained by high levels of informality across the creative sector. Industry stakeholders estimate that a substantial (about 80%) share of creative enterprises particularly smaller production companies and independent studios operate without fully formalised corporate structures, audited financial systems, or long-term contractual frameworks. In practice, this limits access to commercial financing, insurance products, tax incentives, and institutional investment, while also complicating rights management and revenue tracking across distribution windows. However the business model

[4] Tambay Obenson. News Brief: Senegal's State Film Fund Publishes Long-Awaited 2023 Results. Link.

remains strained by informality caused by lack of large scale studio infrastructure and weak intellectual property enforcement which deter risk capital and limit the industry's ability to scale.

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

Financing for film and audiovisual content in Senegal was a fragmented landscape where public funds, international grants, and private sponsorships played distinct roles. FOPICA served as the primary local public funding mechanism, aimed at helping filmmakers secure local legitimacy, though it often only covered 30-40% of feature film budgets. International financing was dominated by the OIF (International Organization of La Francophonie) and other European funds, but a major shift occurred as Gulf-based capital from the Red Sea Film Fund and Doha Film Institute began to outpace combined African government investments. Private financing through the traditional banking sector was described as virtually non-existent; banks did not fully comprehend the industry's cash-flow cycles and often refused to provide advances even against signed contracts.

"I think few people know that the Gulf countries invest more in African cinema than all African governments combined... the Red Sea Film Fund and the Doha Film Institute, which together weigh... we're not far from 10 million [EUR]" Funder, Senegal.

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

Senegal lacked a robust system of tax credits or fiscal incentives, a gap widely perceived by industry stakeholders as a major constraint to investment, especially in comparison to markets such as South Africa. Public funding mechanisms, primarily channelled through FOPICA, were largely project-based but faced notable operational challenges, including infrequent calls for proposals only three over the past decade.

"There is this FOPICA mechanism, which is there, which is to be commended, but unfortunately 1 billion is not nearly enough. And not only is that not nearly enough, FOPICA has a real organizational problem. This is a fund that was created, I think, in 2014, here we are in 2026, and normally there should have been at least one call for projects per year. So, from 2014 to 2026, almost 10 years, but in 10 years, we have only had 3 official calls for projects. I'd even say 2. The 3rd it is true that it was published, but the call for projects was not as clear. So actually 3 out of 10. And yet, the fund has existed for 10 years. So even if this fund exists, it poses a huge problem" Filmmaker, Senegal.

Co-production arrangements remained critical for financing feature films; however, they frequently introduced power imbalances. International partners often contributed up to 80% of project budgets, positioning local producers as minority stakeholders and, in many cases, necessitating the inclusion of Global North talent to meet external funding requirements.

Business models and revenue mixes across distribution channels

Business models for content in Senegal varied widely between television series and feature films. The successful Marodi model for TV series relied on securing private sector sponsorships from industries like real estate and telecommunications, effectively bypassing TV channels that were unwilling to pay market rates. For theatrical distribution, the standard model was a 50/50 revenue split between exhibitors and distributors, which many stakeholders found *"unfair"* as it failed to account for the distributor's marketing costs, often leaving producers with zero profit. Streaming platforms like Wido utilized a mix of subscription and pay-per-view models (charging as little as 100 CFA per day) and experimented with revenue sharing, though they struggled with high rates of piracy that leaked potential earnings as explained by a filmmaker.

"If Wido distributes your product today, tomorrow you wake up and your product is everywhere, pirates are using it, and that's lost revenue that Wido doesn't pay you for." Filmmaker, Senegal

Key constraints and promising innovations

According to the key informant insights, key constraints to a thriving audiovisual ecosystem included high technical production costs and the concentration of infrastructure in Dakar, which left regional areas significantly underserved. Industry stakeholders also noted that the influx of foreign productions and large-scale co-productions had driven up technician fees, making it increasingly difficult for low-budget local films to remain viable. At the same time, several promising innovations were emerging. These included the use of AI tools to support due diligence, analyse market trends, and strengthen business planning processes to better attract investors. In distribution, hybrid models were gaining traction, combining VOD services with live event streaming such as concerts and fashion shows. Additionally, digital wallet solutions like Wave were being leveraged to address low credit card penetration and facilitate more accessible streaming payments.

3.5 Children's Consumption Landscape

This section examines children's film and media consumption behaviours within the Senegal 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 Senegal are significantly more engaged in film consumption than children and display much broader exposure to international content. Local films are the most watched among both groups, particularly among teenagers (79%) compared to children (49%), highlighting the strong appeal of culturally relevant storytelling. Teenagers also report higher viewership of American, African, Chinese, and other international films, indicating more diversified viewing habits as audiences grow older. European films attract similar levels of interest across both groups. Meanwhile, children are far more likely not to watch films at all (16% compared to 2%).

The young audience survey shows that film consumption in Senegal evolves substantially with age, shifting from more limited and locally focused viewing among children toward broader, more internationally diverse consumption among teenagers, while local films remain the dominant preference across both groups.

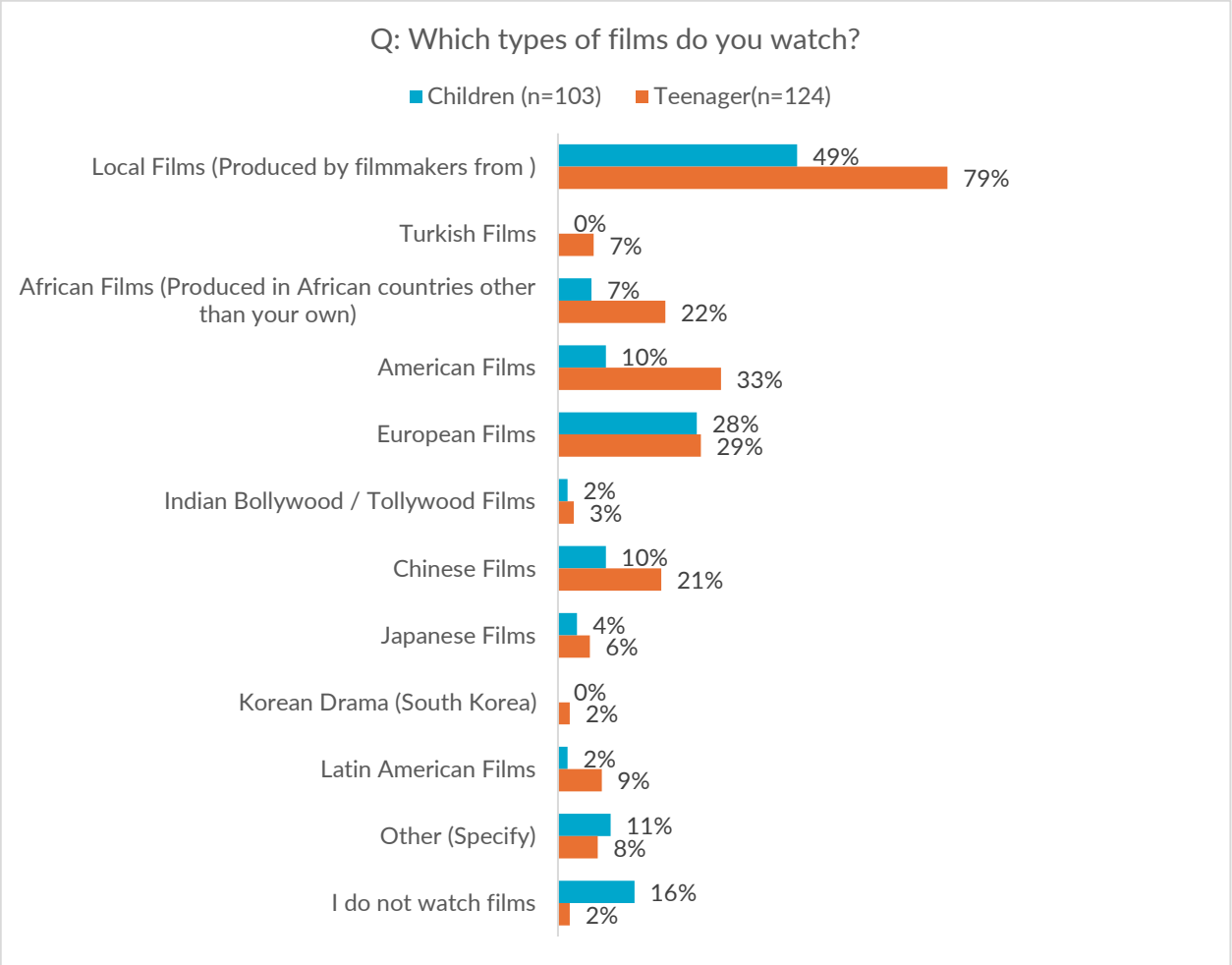


Figure 17: Type of films watched by teenagers and children in Senegal | Source: Survey data

3.5.2. Genre preferences among young audiences

Film genre preferences in Senegal differ significantly between children and teenagers. Children overwhelmingly prefer Animation/Cartoons (80%), making it their dominant genre, while teenagers demonstrate much broader and more diverse viewing habits. Teenagers show particularly high interest in Comedy (57%), Animation/Cartoons (54%), Action (38.0%), and Documentary content (36%). Older audiences are also more likely to engage with mature genres such as Drama, Sci-Fi, Horror, Romantic Comedy, and Fantasy, which attract very limited interest among children. Overall, the findings suggest that children's film consumption is heavily entertainment-focused, while teenagers increasingly diversify toward more complex, action-oriented, and informative storytelling genres.

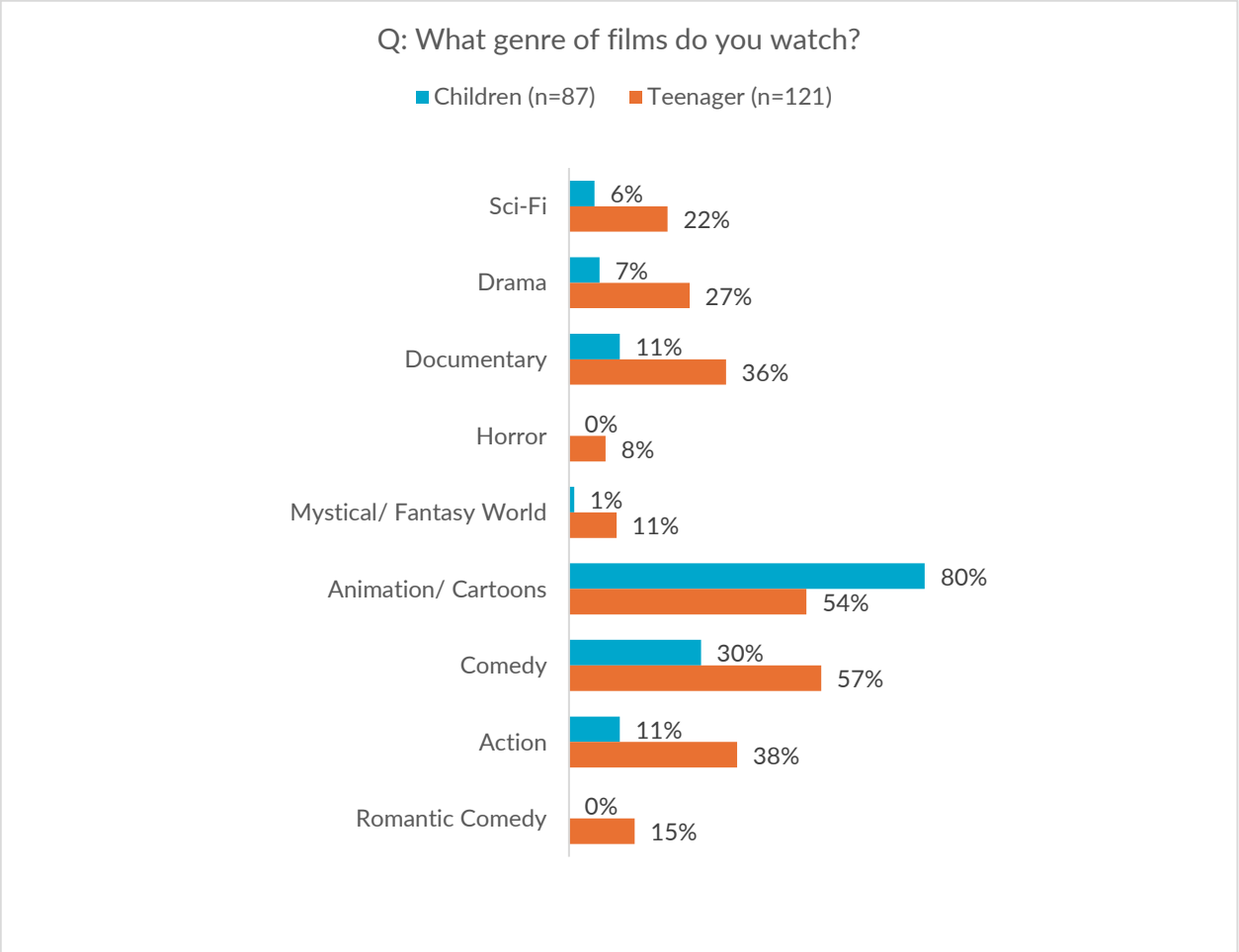


Figure 18: Genre of films watched by children and teenagers in Senegal | Source: Survey data

3.5.3. Digital platforms dominate film access

YouTube/YouTube Kids is by far the dominant film-viewing platform among both children (71%) and teenagers (73%) in Senegal, highlighting the central role of free digital video platforms in youth film consumption. Traditional television also remains important, with roughly one-third of both children and teenagers watching films through Free-to-air TV (33%) and Pay TV services such as DStv and Canal+ (29% among children and 35% among teenagers).

Teenagers demonstrate greater engagement with subscription-based streaming platforms (18% vs. 6%) and social media platforms (7% compared to 5%) compared to children, indicating increasing digital diversification and independent content discovery with age.

Cinema-going, film festivals, community screenings, and video rentals record almost no engagement among both groups, suggesting that film access for young audiences in Senegal is overwhelmingly home- and mobile-based rather than theatre-based. Overall, we see that a highly digital-first viewing ecosystem, with YouTube serving as the primary gateway to film consumption for both children and teenagers.

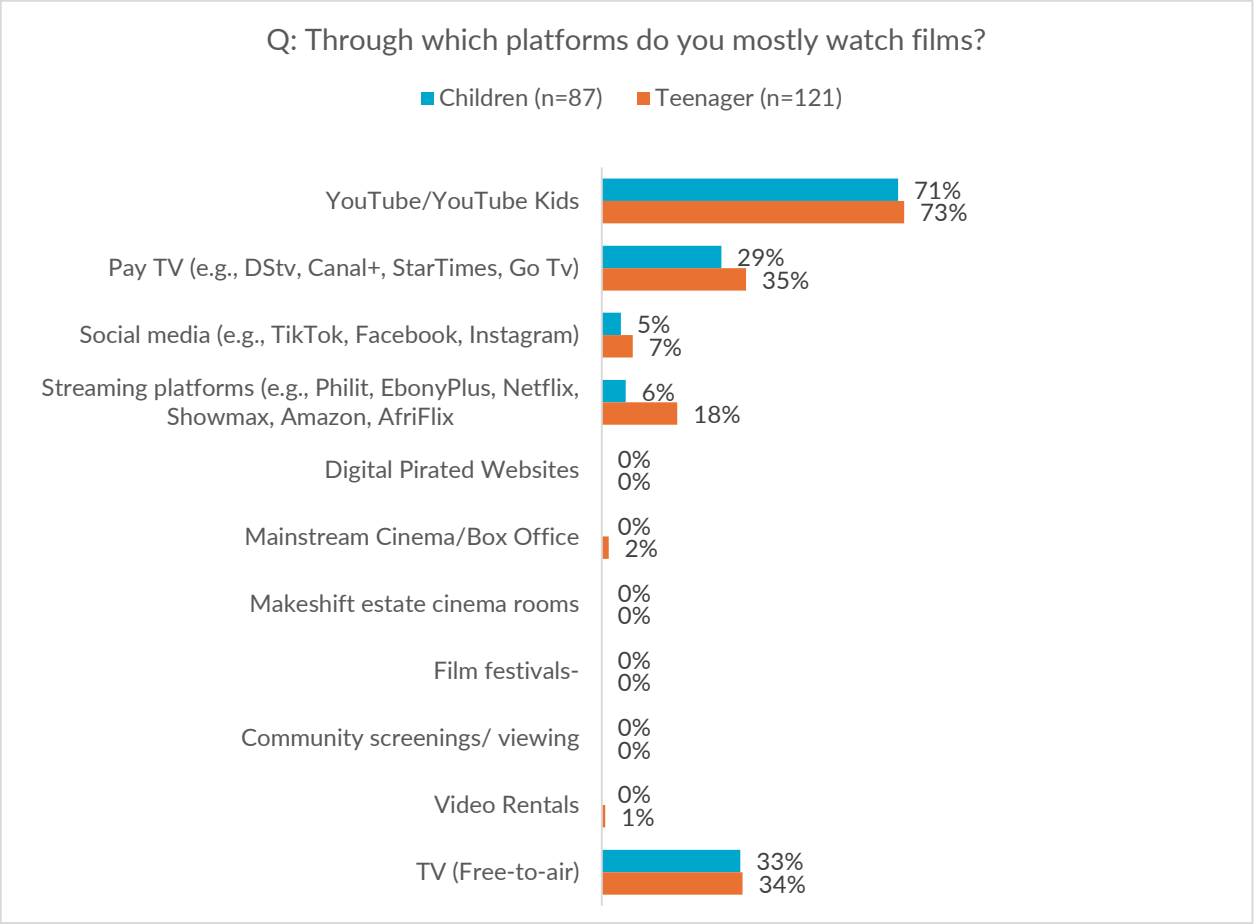


Figure 19: Platforms used mostly by children and teenagers to watch films in Senegal | Source: Survey data

3.5.4. Film consumption frequency among young audience

Film watching is highly frequent among both children and teenagers in Senegal, with the vast majority watching films either daily or at least once a week. Over half of children (53%) and teenagers (51%) watch films at least once a week, while daily film consumption is also very high among both groups, particularly teenagers (48%) compared to children (44%). Very few audiences watch films only a few times a month, and virtually none report watching films monthly or less frequently. Overall, film consumption is a regular and deeply integrated part of entertainment habits for young audiences in Senegal.

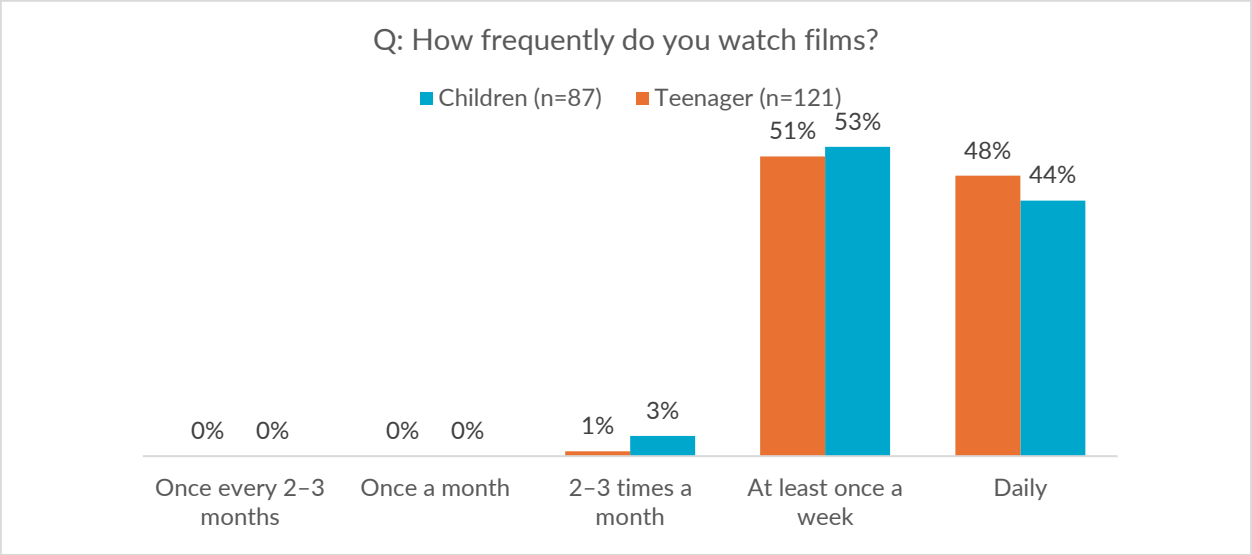


Figure 20: Frequency of children and teenagers watching films in Senegal | Source: Survey data

3.5.5. Family-Centered Viewing Behaviors

Film viewing among young audiences in Senegal is largely a social and family-centered activity. Parents are the most common viewing companions for both children (62%) and teenagers (64%), followed closely by siblings and relatives, particularly among children (59%) and teenagers (54%).

Teenagers are significantly more likely to watch films alone (51%) compared to children (28%), suggesting increasing independence in viewing habits as audiences grow older. Watching with friends is relatively limited overall but remains more common among teenagers (17%) than children (8%). Very few audiences report watching films with classmates or schoolmates. Overall, the findings highlight the strong role of family environments in shaping film consumption among children and teenagers in Senegal, while teenagers gradually transition toward more individual viewing behaviours.

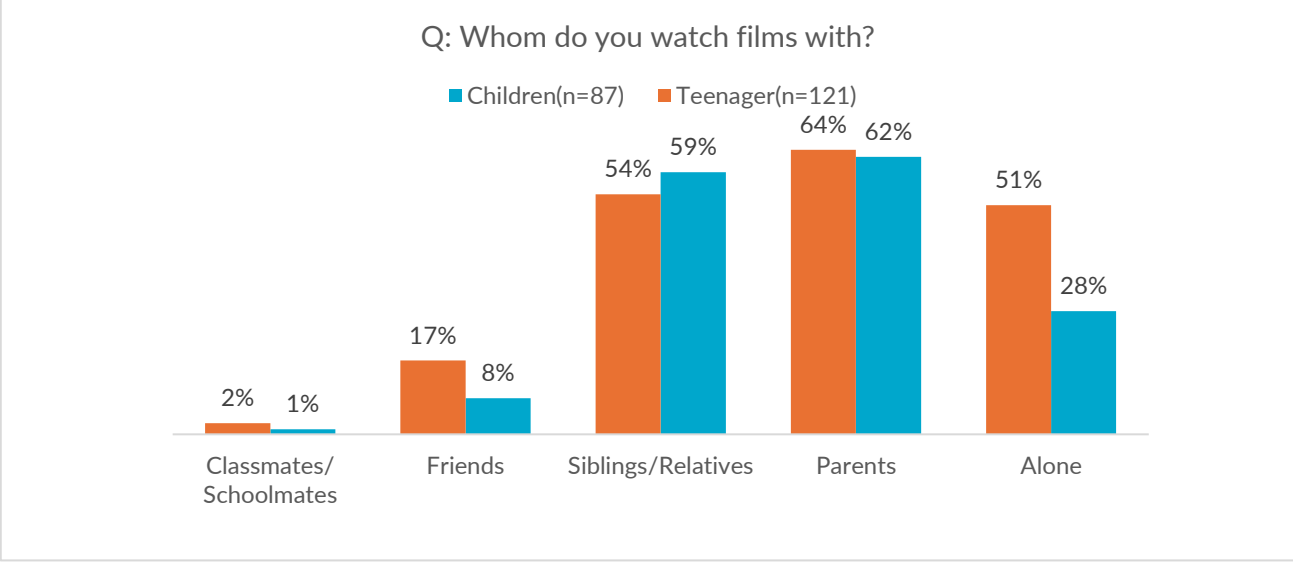


Figure 21: Whom do children and teenagers in Senegal watch films with | Source: Survey data

3.5.6. Film discovery pathways among young audiences

Friends and family are the dominant source through which both children (79%) and teenagers (80%) in Senegal discover new films, highlighting the strong influence of close social networks and word-of-mouth recommendations in shaping viewing choices.

Teenagers are significantly more likely to discover films through social media (46%) compared to children (17%), indicating that digital and platform-driven discovery becomes more important with age.

Traditional media channels such as radio, newspapers, magazines, blogs, and outdoor advertising play only a minor role for both groups, while streaming platform recommendations have limited influence overall. Influencers, bloggers, and film festivals contribute almost no meaningful role in film discovery among young audiences.

Overall, the findings suggest that film awareness among young audiences in Senegal is driven primarily by personal networks and increasingly by social media among teenagers, rather than through formal marketing or institutional channels.

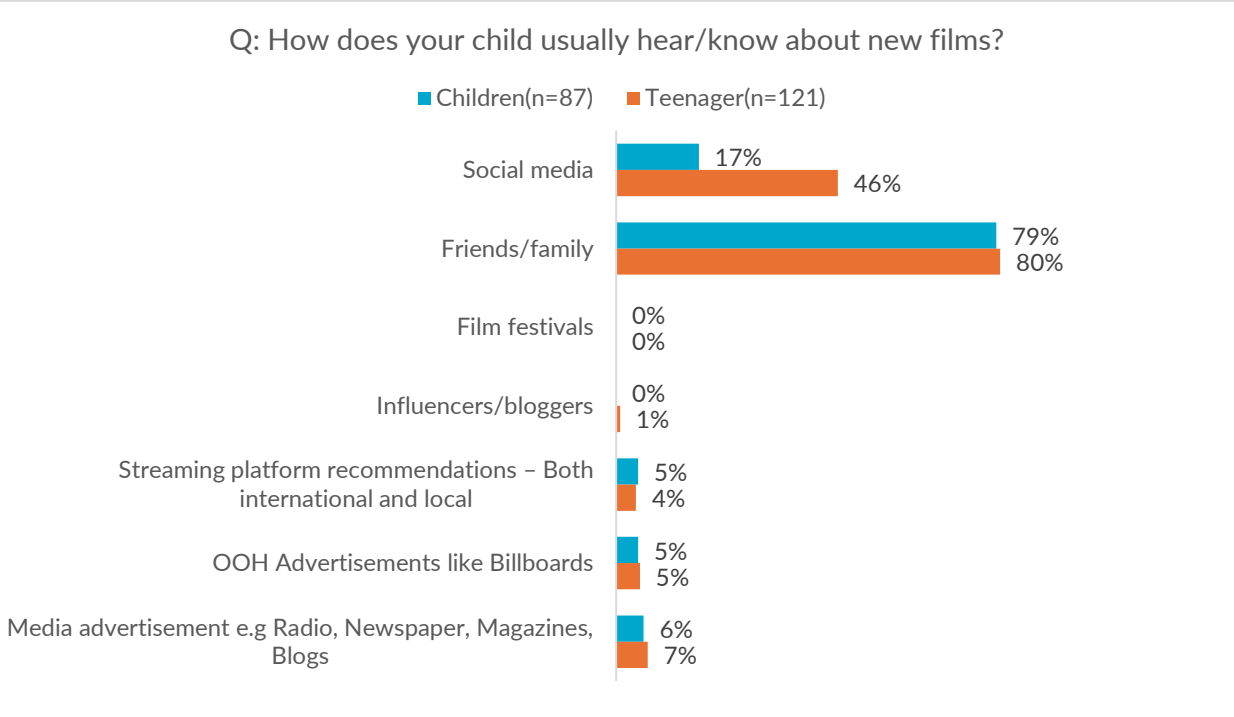


Figure 22: How children and teenagers hear about new films in Senegal | Source: Survey data

3.5.7. Motivations driving film consumption

Fun, entertainment, and relaxation are the strongest motivations for watching films among both children (63%) and teenagers (83%) in Senegal, with teenagers showing particularly high entertainment-driven engagement. Learning and educational value is also a major driver, especially among teenagers (65%) compared to children (52%), indicating that films are viewed not only as entertainment but also as a source of knowledge and awareness.

Children place greater importance on family-friendly and safe content (63%) than teenagers (51%), reflecting stronger parental influence and age-appropriate viewing considerations among younger audiences. Teenagers are also more motivated by interesting stories (11%), popularity among friends and family (17%), and accessibility of films (8%) compared to children.

Meanwhile, factors such as favourite actors, visual style, cultural familiarity, and music play a relatively limited role in motivating film consumption among both groups. Overall, the findings suggest that young audiences in Senegal primarily engage with films for entertainment,

learning, and family-oriented viewing experiences, with teenagers demonstrating broader and more socially influenced motivations.

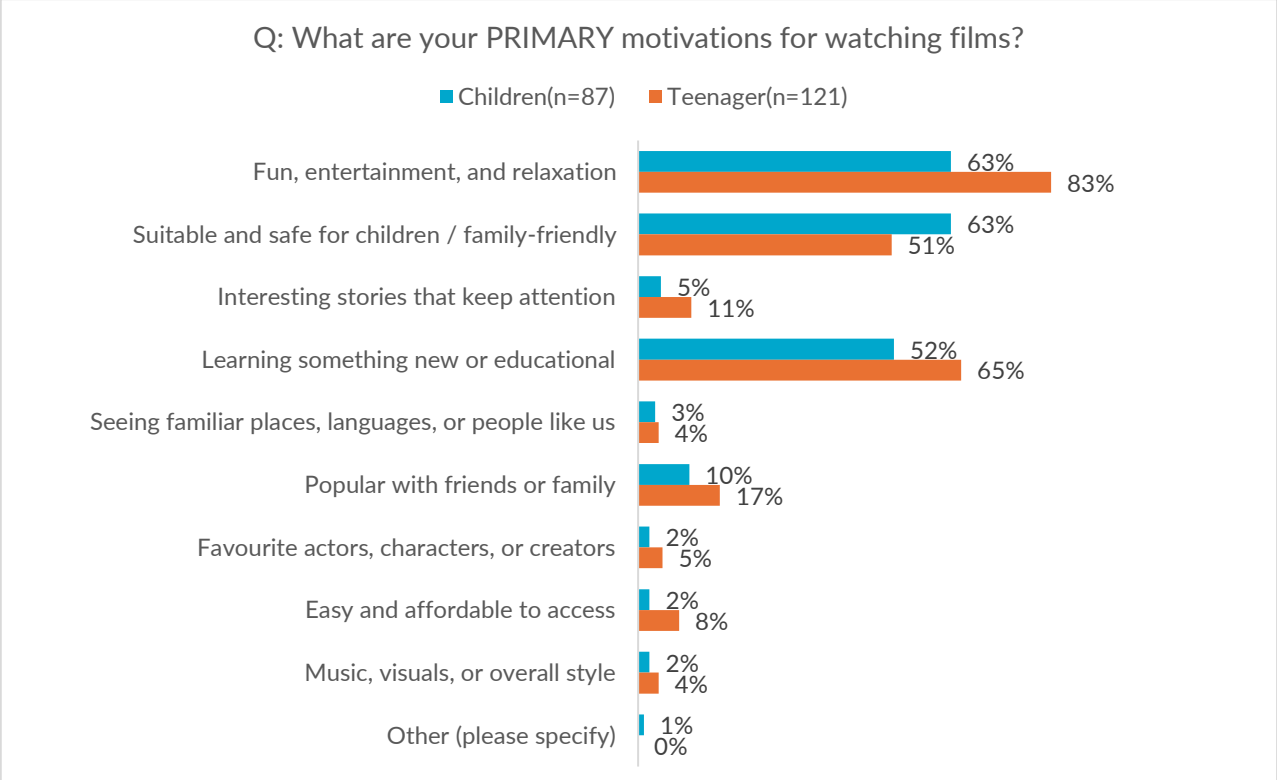


Figure 23: Primary motivation for children and teenagers to watching films in Senegal | Source: Survey data

Conclusion

Young audiences in Senegal are highly engaged with film content, with viewing habits becoming more diverse, independent, and digitally driven as audiences grow older. Local films remain strongly preferred across both children and teenagers, underscoring the continued importance of culturally relevant storytelling and local representation. However, teenagers demonstrate significantly broader exposure to international content, wider genre preferences, and greater use of digital and streaming platforms, reflecting evolving consumption behaviours and increasing global media exposure.

The study also highlights the dominance of digital-first and home-based viewing ecosystems, particularly through YouTube and television, while cinemas, festivals, and community screenings play a minimal role in youth film engagement. Family environments remain central in shaping viewing habits, discovery pathways, and content choices, especially among younger children, although teenagers increasingly transition toward independent and socially influenced viewing behaviours.

Importantly, film consumption among young audiences is driven not only by entertainment but also by learning, relaxation, and social connection. These findings suggest strong opportunities for Senegal's film industry to invest in youth-oriented, culturally resonant, digitally accessible, and educationally meaningful content that can nurture long-term audience development and strengthen future demand for local film production.

4. Recommendation

4.1 Country-Specific Priorities and Opportunities

To unlock Senegal's full economic potential, the industry must prioritize the production of commercially appealing, genre-oriented content, such as action, comedy, and romance, that resonates with mainstream domestic and regional audiences. There is a significant opportunity to scale through decentralized and low-cost distribution models, including solar-powered exhibition units and community-based digital hubs that align with the country's population geography. The scale of intellectual property infringement in Senegal is currently described as a "disaster," with creators facing a rampant piracy environment where films are frequently hacked and circulated on unauthorized websites or through external hard drives almost immediately after release. Strengthening the enforcement of intellectual property rights through SODAV is also essential to professionalizing the ecosystem as it would move the industry away from "informal" operations and provide the "traceability of resources" and objective "accounting values" that private banks and institutional investors require to view film as a guaranteed, low-risk sector for capital commitment.

Furthermore, investing in independent digital marketing infrastructure including proprietary data dashboards to track real-time viewing metrics, AI-driven recommendation systems and personalization algorithms, vertical marketing funnels on platforms like TikTok and Instagram and integrated digital wallets such as Wave and Orange Money for direct monetization; will allow Senegalese filmmakers to reclaim control over their audience data and visibility. The planned reforms to merge FOPICA's funding with other state bodies aim to improve transparency and efficiency, potentially creating blended finance vehicles that are more attractive to private capital.

4.2. Priority opportunities in distribution

The primary priority for distribution in Senegal was the decentralization of cinema infrastructure, as modern screens remained concentrated in Dakar while most of the country's 14 regions lacked access to theaters. Stakeholders emphasized the need for simple community screening spaces in rural areas and stronger mobile cinema networks that could provide regular weekly screenings rather than occasional visits. Expanding exhibition beyond Dakar was viewed as essential for improving the commercial viability of local films and increasing admissions.

"Dakar wasn't all of Senegal. Major films could only be seen in Dakar, so cinemas in rural areas were very important. Even simple halls with a large screen, chairs, or mats could work." Ecosystem Partner, Senegal

Another major priority was the professionalization of digital and hybrid streaming platforms adapted to local payment realities. Stakeholders stressed the need for platforms to integrate mobile money services such as Wave and Orange Money and adopt micro payment or pay per view systems. Hybrid models that combined VOD with live streaming of concerts, festivals, slams, and fashion events were also identified as promising opportunities to diversify revenue streams.

"The average Senegalese person without a bank card could not pay for Netflix with Wave, so platforms needed to integrate digital wallets." Filmmaker, Senegal

"The goal was to create a hybrid platform combining films, festivals, concerts, slams, and fashion events to serve a wider creative ecosystem." Streaming platform, Senegal

"We also wanted a platform that provided performance data so creators could better adapt future films and stories." Streaming platform, Senegal

Institutional and regulatory reforms were also prioritized to improve transparency and financial sustainability. Stakeholders called for a centralized national ticketing system to verify box office

figures, which were widely described as unreliable. They also advocated for dedicated distribution subsidies through FOPICA and stronger obligations for national television channels to pre purchase local productions.

"The Directorate of Cinematography could not verify ticket sales because there was no ticketing system." Filmmaker, Senegal

"Television channels needed to be involved from the earliest stages of production to reduce financial pressure on producers." Distributor, Senegal

Regional integration and export strategies were viewed as critical for scaling Senegalese cinema beyond national borders. Stakeholders highlighted the importance of building a unified West African market where films could circulate across countries such as Mali, Côte d'Ivoire, and Burkina Faso. They also identified dubbing films into multiple languages and licensing successful story formats internationally as underused opportunities for global revenue generation. v Finally, stakeholders emphasized the importance of integrating distributors early in the filmmaking process instead of treating distribution as a final step. Distributors were expected to contribute market knowledge, audience insights, and commercial planning from the scriptwriting stage onward.

"We needed a West African market where films released in Dakar could also circulate in Bamako and other countries." Filmmaker, Senegal

"Even a Senegalese film should be planned from the beginning to be dubbed into several languages." Distributor, Senegal

4.3.Priority opportunities in audience development

A major opportunity for audience development lay in building a genuine cinephile culture through film education, cine clubs, and youth engagement initiatives. Stakeholders argued that cinema needed to evolve from being perceived as a luxury activity into a regular cultural practice. Integrating film into the school curriculum, supported by annual screening and discussion budgets, was viewed as essential for cultivating future audiences. Initiatives such as Ciné Banlieue and Film Lab Africa also played an important role in media literacy, professionalization, and exposing young audiences to cinematic language and standards.

"What we needed in Senegal was a community of real film enthusiasts who went to the cinema out of culture, not luxury. People were beginning to recognize filmmakers and cinematic styles, making cinema a cultural practice Distributor, Senegal

"Schools needed annual film education budgets so students could regularly watch films followed by discussions and awareness sessions." Distributor, Senegal

Another significant opportunity emerged through the use of narrative identity and the "mirror effect" to strengthen patriotism, cultural identity, and audience engagement. Stakeholders emphasized the importance of producing stories rooted in Senegalese history, local heroes, and African cultural heritage. Films and series produced in local languages such as Wolof enabled audiences to see themselves reflected on screen, which was identified as a key driver behind the popularity of local productions. Cinema was therefore viewed as a tool for reclaiming cultural identity and historical narratives.

"African audiences also needed their own heroes and stories that reflected their histories and cultural identities." Ecosystem Partner, Senegal

Modernizing marketing and promotional strategies through digital platforms represented another major growth opportunity. Stakeholders highlighted the importance of TikTok, Instagram, blogs, and influencer marketing in reaching youth audiences who spent most of their time online. YouTube was also used strategically as a promotional funnel, with free pilot

episodes designed to create suspense and redirect audiences to paid VOD platforms. Controversy and social debates surrounding film themes were also recognized as strong drivers of audience engagement and cinema attendance.

"Casting influencers in films could significantly reduce marketing costs because their followers already created audience reach." Distributor, Senegal

Finally, stakeholders prioritized expanding both physical and digital access to cinema across underserved regions. Establishing cinema spaces in all 14 regions was considered necessary to reduce Dakar centric access to films. On the digital side, integrating mobile money systems such as Wave and Orange Money into streaming platforms was identified as essential for audiences without bank cards. Stakeholders also recommended differentiated pricing models where Senegalese films would be cheaper than international blockbusters in order to encourage local consumption and increase admissions.

"The average Senegalese consumer without a bank card needed digital wallets integrated into streaming platforms." Filmmaker, Senegal

"Senegalese films should not be sold at the same price as international blockbusters; lower pricing could encourage local audiences to attend." Distributor, Senegal

4.4 Priority opportunities in social impact

Integration into the Educational System

A key priority for social impact distribution was integrating film into the national education system. Stakeholders argued that awareness and educational films should not rely solely on commercial cinema models where audiences paid individual ticket prices. Instead, schools were encouraged to allocate annual film education budgets that would support regular screenings, classroom discussions, and awareness sessions facilitated by teachers. This approach aimed to shift the financial burden away from families while creating a sustainable distribution channel that reached young people across the country.

"Social impact films were not films that should only be shown in cinemas where audiences paid for tickets. Schools needed annual film education budgets so students could regularly watch films followed by discussions and awareness sessions." Distributor, Senegal

Decentralization through community touring and mobile units

Stakeholders emphasized that impactful films needed to reach communities directly rather than remain limited to Dakar based multiplexes. Community touring models, mobile cinema units, cine clubs, and cultural centers were seen as effective ways of bringing films to underserved regions such as Tambacounda, Kédougou, and Matam. These screenings often created spaces for discussion and encouraged audiences to openly share personal experiences connected to the film themes.

"The most effective approach was touring. Mobile units in every department would allow regular weekly screenings rather than occasional visits every few years" Distributor, Senegal

Leveraging institutional partnerships and NGO support

Partnerships with NGOs, international donors, and government institutions were considered essential for distributing social impact content. Since these films often lacked strong commercial profitability, organizations such as GIZ, UNFPA, and UNESCO funded screenings linked to themes like health, agriculture, citizenship, and environmental protection. Distributors provided the technical infrastructure and local access while institutional partners financed outreach and awareness activities.

"UNESCO supported screenings of 'Banel and Adama' because of its environmental themes, and this generated strong visibility and social media engagement." Distributor, Senegal

Embedding social messages in popular entertainment

Stakeholders increasingly prioritized embedding social messages within mainstream entertainment formats rather than relying on overt awareness campaigns. Producers believed audiences were more receptive to social themes when they appeared naturally within popular dramas and family series. Topics such as infertility, maternal health, and women's empowerment reached larger audiences through relatable storytelling on television and YouTube.

"People did not want to feel forced into awareness campaigns; they went to the cinema for entertainment first." Distributor, Senegal

Measuring impact for future distribution

Stakeholders also prioritized developing systems to measure the behavioral and social impact of films. At the time, impact was mainly tracked through anecdotal evidence and social media engagement. Producers and distributors therefore sought to create dedicated platforms capable of monitoring audience reactions, behavioral changes, and real world outcomes in order to strengthen advocacy efforts and attract future investment.

"The goal was to create a platform that could track impact and provide evidence for advocacy after each project." Filmmaker, Senegal

4.5. Scaling potential recommendations

Stakeholders argued that achieving industrial scale required moving beyond the limitations of the Senegalese market and building a unified West African distribution space. By connecting exhibition and distribution networks across countries such as Côte d'Ivoire, Mali, and Burkina Faso, local films could circulate to much larger audiences and become more commercially viable. This regional integration required coordinated advocacy, harmonized regulations, and co financing agreements between governments so that films released in Dakar could also screen simultaneously in Bamako, Abidjan, and other regional markets.

"If we focused only on Senegal, with 18 million people, we could not build an industry. We were forced to look for audiences elsewhere, and at the sub regional level there needed to be advocacy to unify systems because the audience was much more global." Filmmaker, Senegal

Institutional reforms and economic sovereignty

A major recommendation for scaling the industry involved strengthening economic sovereignty by ensuring that a larger share of film financing came from local sources. Stakeholders argued that dependence on external funding weakened long term sustainability and limited narrative control. Tax exemptions and fiscal incentives were also identified as critical tools for attracting investors, encouraging cinema construction, and stimulating production. In addition, stakeholders called for stronger enforcement of local content obligations, including requiring national television channels to co finance and pre purchase local productions from the earliest stages.

"At least 75% of cinema financing should come from local funds; otherwise, we would never be sovereign and would always depend on others." Ecosystem Partner, Senegal

"Tax exemptions and state support would stimulate investors, encourage the development of theaters, and bring audiences back to cinemas." Filmmaker, Senegal

Production volume and genre diversification

Stakeholders emphasized that industry growth depended on moving away from isolated auteur productions toward a volume-based production model. Producing a larger number of films each

year would create a stronger content library where commercially successful titles could offset less profitable ones. Scaling also required diversification into more commercially accessible genres such as romantic comedies, thrillers, and children's programming, which were viewed as more capable of attracting mass audiences than traditional festival cinema.

"If Senegal or sub-Saharan Africa could produce even 10 films per year, it would completely transform the industry." Filmmaker, Senegal

Professional unity and collaborative models

Stakeholders stressed the importance of collaboration and collective bargaining to strengthen the industry's negotiating power with governments and global streaming platforms. Producers, technicians, and distributors were encouraged to work together on larger projects, pool resources, and agree on fair pricing structures. Collaboration also included integrating distributors into projects from the scriptwriting stage so films could be developed with stronger market knowledge and commercial strategies.

"People needed to learn to work together in a constructive way. Producers, technicians, and stakeholders needed to unite and collaborate on projects Filmmaker, Senegal

"The more distributors were involved from the beginning, the more governments could integrate distribution support and commercial planning into projects." Distributor, Senegal

Export strategies in dubbing and format licensing

To expand Senegalese content internationally, stakeholders recommended investing in dubbing and format licensing. Films needed to be planned from the outset for translation into multiple languages such as English, Arabic, Spanish, and Portuguese to reach audiences in Asia, Latin America, and beyond. Format licensing was also highlighted as an underused opportunity, allowing successful Senegalese series and programs to be adapted for foreign markets while generating additional revenue streams.

"Even if I was making a Senegalese film, I needed to plan from the beginning to dub it into at least five languages." Distributor, Senegal

"Successful Senegalese programs could be formatted and licensed to other countries as ready made production models." Distributor, Senegal

5. Case Study: Audience Building

5.1 Starting in a screenless city to a continental network

Background

Background

In 2015, the founder of Goree Cinema launched a film festival in a country with no functioning cinema screen. The choice of location Goree Island, historically recognised as a point of embarkation in the transatlantic slave trade was strategic and symbolic. This was not meant to be a glamorous industry event. It was an attempt to create a genuine, accessible encounter between Senegalese people and African cinema: cinema embedded in cultural identity rather than imported from outside it.

For five years the festival ran open-air, free of charge, drawing between 300 and 1,000 people per screening. Those numbers, in a market with no theatrical infrastructure, were exceptional. The festival built real audience relationships, real visibility for African cinema and an institutional reputation that the company continues to benefit from. But it also created a problem: having been trained to experience cinema at no cost, the audience had no framework for paying.

Goree by Night: The pivot to sustainability

The company's answer was Goree by Night, a curated premium weekend experience that kept cinema at its centre but surrounded it with accommodation on the island, a restaurant experience and a live music showcase. Hotels and restaurants were integrated as commercial partners, creating a circular local economy. The package generated revenue and demonstrated that the willingness to pay existed among Senegalese audiences but only for something genuinely and categorically different from what they had previously received for free. The lesson was hard-won: free access builds community; it does not automatically become a paying audience without a new value proposition.

Distribution as a practitioner network

When the company moved into production, its approach to distribution stayed grounded in the same relationship-first logic. For the circulation of a documentary about a German Senegalese contemporary dancer, West Africa was handled directly through the company's own distribution contacts; East Africa was co-ordinated through LBx Africa (under its distribution arm Bigger Motion), a Kenyan impact-distribution company. The goal was circulation across 15 to 20 countries achievable only because the trust, shared purpose and working relationships among those practitioners had been deliberately built over years.

A think tank event in Brazil in 2025 bringing together film practitioners from Africa and Latin America, formalized this network into a structured knowledge exchange that continues to generate market intelligence the company uses. The core argument to emerge from all of this: the best platform for African cinema is not a technology or a streaming service. It is the network of people who know their local markets and can be trusted to activate a film within them. African audiences, moreover, always include their diasporas and treating the diaspora as an activation point rather than a secondary market opens a categorically different set of strategic possibilities.

Key lessons

- Free festivals are effective at building audiences and generating interest, but they do not automatically convert those audiences into paying customers.
- The shift to financially sustainable exhibition requires a fundamentally different value proposition not simply the same content with a ticket price, but a clearly differentiated, higher-value experience that audiences are willing to pay for.

- Distribution models built on practitioner relationships across territories are often more durable and better suited to the African context than those reliant on one-off international licensing deals.
- Diaspora communities should be treated as primary distribution targets, not secondary markets, given their strong role in driving visibility, demand, and revenue.
- As entrepreneurial cultural enterprises grow and gain traction, they require stronger institutional and legal protection to manage the stakeholder friction that often emerges with success.

Recommendations

- For institutions and funders: Support the development of paid exhibition and hybrid access models that allow African filmmakers and festival organizers to transition audiences from free to paying without losing them. This means funding the infrastructure of experience, venue development, island or destination event logistics, community partnerships not just content production. Investment in companies like LBx Africa as continental distribution infrastructure is urgent and underfunded.
- For policymakers: Provide legal and institutional frameworks that protect entrepreneurial cultural enterprises from predatory stakeholder behaviour as they scale. Develop in-country incentives for film exhibitions, not just production including support for open-air screening infrastructure, community cinema development and festival organizers working outside established urban venues. Recognise the diaspora as a strategic cultural and commercial priority in national film policies.
- For the broader ecosystem: Invest in formalizing practitioner networks through think tanks, co-distribution coalitions and structured knowledge platforms. The market intelligence that flows through these networks of who is distributing what, where, on what terms, with what results is the most valuable and least-funded resource in African film distribution. It cannot be replaced by external market research reports.

5.2 Creating a genre where none existed

Background

Background

The founder of Kalista Production created *Maîtresse d'un homme marié* (Mistress of a married man) in 2019 after identifying an absence so fundamental it was almost invisible: Senegalese audiences were consuming Nollywood drama, Ivorian comedy, Burkinabè entertainment and Latin American telenovelas but almost nothing that reflected their own contemporary lives and social realities. The series was modern, frank and distinctly Senegalese. It accumulated more than six million digital views and helped establish Senegal as a significant producing country in Francophone African content. The YouTube channel grew from zero to 600,000 subscribers. Across the wider ecosystem that grew alongside Kalista's work, Marodi reached more than seven million subscribers and Even Prod five million placing Senegalese French-language series among the most-watched African digital content in the world.

A financing model built on brand partnerships

Each production is financed with 70% to 80% from brand partnerships with Senegalese and regional companies contributing their communication budgets in exchange for product integration aligned with their campaign calendars. The remaining 20% comes from YouTube revenue and VOD sales through the platform Wido, where content is sometimes dubbed from Wolof into French to enable regional resale across Francophone Africa. Television broadcast is structured through arrangements in which the producer contributes 20 to 40% of production costs in exchange for airtime counterintuitive by conventional standards, but a realistic reflection of the current market maturity.

Content that moves people to act

What distinguishes Kalista Production is the social purpose embedded in every project. *Yaay 2.0* centering an infertile man, a framing entirely absent from Senegalese content before its release won 11 awards at the Gayne Festival and generated national advocacy for the operationalization of Senegal's Medically Assisted Procreation centre. Viewers called for state subsidies and awareness campaigns encouraging men to get fertility testing. The forthcoming series *Kalista* addresses body-shaming; *Ladies Boss* focuses on financial literacy for women entrepreneurs. These topics are chosen because they speak directly to realities the audience is already living and that connection is what converts viewers into advocates.

The limits of YouTube and the road ahead

The practitioner is clear-eyed about the model's structural vulnerabilities. YouTube monetizes diaspora views at dramatically higher rates than continental African views the most commercially valuable audience is the one furthest from the communities the content serves. YouTube is not monetized at all in some African markets, including Ivory Coast, where producers earn nothing from potentially hundreds of thousands of views. Platform policy changes can restructure the economics without warning. And inadequate content security on VOD platforms has allowed piracy to divert revenue that paid-access distribution was supposed to protect.

The long-term answer she advocates is African-owned paid VOD infrastructure that routes payment directly to creators, developed alongside sustained cultural work to help audiences understand why local content is worth paying for. A coordinated cross-continental marketing strategy launching series simultaneously across Francophone Africa would activate audiences that already exist but are currently unreached because no one has invested in finding them.

Key lessons

- YouTube has played a critical role in building and aggregating audiences, but on its own, it cannot sustain the long-term growth and stability of the industry.
- Brand partnerships currently offer a viable financing pathway for Francophone African content at scale, but this model depends on addressing platform monetization inequalities and developing paid distribution infrastructure alongside it.
- Platform-driven revenue remains uneven and unreliable, reinforcing the need for diversified income streams beyond digital advertising.
- Content that is rooted in genuine audience resonance rather than shaped to meet funder compliance consistently drives deeper engagement, stronger loyalty, and more meaningful social impact.
- In contrast, commissioned content built primarily around grant criteria often struggles to connect with audiences at the same depth or scale.

Recommendation

- For financing institutions and funders: Fund audience education initiatives alongside content production helping Senegalese and Francophone African audiences understand the cultural and economic value of paying for locally produced content is part of the infrastructure investment the sector needs. Support brand partnership models as a legitimate and effective financing mechanism, and develop complementary instruments such as equity, soft loans, development grants that reduce dependence on a single revenue pillar.
- For production companies and co-producers: Invest in the development of African-owned VOD platforms with robust content security infrastructure. Treat content protection, watermarking, access controls, rights management as a production cost, not a technical afterthought. Build coordinated cross-continental marketing campaigns as a standard component of every major digital release: the audience exists across Francophone Africa; it needs to be told the content is there.

- For platforms (YouTube / Google): Extend full monetization access to all African markets currently excluded including Ivory Coast as a matter of policy equity. The absence of monetization in key Francophone African markets removes the primary financial incentive for local content creation in those territories and disproportionately punishes the creators building the continent's largest digital communities. This is a platform policy decision with ecosystem-level consequences.

6. Annex

6.1 Links

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

To read the full desk research report for Senegal, see this link (Placeholder)

To see full dataset, see the link (Placeholder)

To see full KII discussion guides, see the link (Placeholder)

To see full case studies discussion guides, see the link (Placeholder)

6.2 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**[5]

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)

[5] 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.