



**The internationalization of film industries  
through SVOD platforms: the case of  
Nollywood**

Tomás Watts Rodrigues Sarmiento Nunes

Dissertation written under the supervision of Professor Ricardo Reis

Dissertation submitted in partial fulfilment of requirements for the  
MSc in Business at Católica Lisbon School of Business and  
Economics,

30<sup>th</sup> of December 2020



## **Acknowledgments**

I begin by thanking my supervisor, Professor Ricardo Reis, for his interest and encouragement in the realization of this dissertation.

Moreover, I would also like to express my gratitude to all those who contributed to the technical and theoretical development of my thesis, namely: Deborah Marino, Nader Sobhan, Omoye Akhagba and the African communities who answered my questionnaires.

Lastly, I would like to thank my family for all the unconditional support. I can't help but mention my father, who supported me extensively in the development of this peculiar subject. I would also want to thank my grandfather, who encouraged me to pursue my career in management, and my grandmother for having aroused my interest in cinema.

## **Abstract**

Nollywood is the second largest film industry in the world in terms of films produced per year. This industry has been experiencing a huge growth in the last decade, becoming quite popular among African countries and the African diaspora. However, Nollywood still remains quite unfamiliar for global audiences.

In recent years SVOD platforms have been disseminating international content online. This trend resulted in the popularization and internationalization of emerging film industries. Thus, we have been witnessing the creating of global phenomena such as the Spanish language series Money Heist and Narcos by Netflix.

The aim of this research is to examine how SVOD platforms are influencing and shaping the internationalization process of Nollywood. The internationalization process in this study will be focused on the African continent and the African communities in diaspora. However, part of this research will study the possibility of Nollywood gaining a global reputation. In addition to SVOD platforms, other media channels will also be addressed.

**Key words:** Nollywood, internationalization, Africa, African diaspora, film industry, SVOD platforms, Netflix.

**Sustainable Development Goals Addressed:** SDG01, SDG08, SDG09 and SDG12.

## **Resumo**

Nollywood é a segunda maior indústria cinematográfica do mundo em termos de filmes produzidos por ano. Esta indústria tem vindo a registar um enorme crescimento na última década, tornando-se bastante popular entre os países africanos e a diáspora africana. Contudo, Nollywood continua a ser bastante desconhecido a um nível global.

Nos últimos anos, as plataformas SVOD têm vindo a divulgar conteúdos internacionais. Esta tendência resultou na popularização e internacionalização de indústrias cinematográficas emergentes. Deste modo, temos assistido à criação de fenómenos globais, tais como as séries em espanhol da Netflix: La Casa de Papel e Narcos.

O objetivo desta investigação é examinar como as plataformas SVOD estão a influenciar e a moldar o processo de internacionalização de Nollywood. O processo de internacionalização neste estudo será centrado no continente africano e nas comunidades africanas na diáspora. No entanto, parte desta investigação estudará a possibilidade de Nollywood ganhar uma reputação global. Para além das plataformas SVOD, serão também abordados outros canais de comunicação social.

**Palavras-chave:** Nollywood, internacionalização, África, diáspora africana, indústria cinematográfica, plataformas SVOD, Netflix.

**Objetivos de Desenvolvimento Sustentável:** ODS01, ODS08, ODS09 e ODS12.

# Table of Contents

<b>ACKNOWLEDGMENTS</b>	<b>2</b>
<b>ABSTRACT</b>	<b>3</b>
<b>RESUMO</b>	<b>4</b>
<b>TABLE OF CONTENTS</b>	<b>5</b>
<b>LIST OF ABBREVIATIONS</b>	<b>6</b>
<b>TABLE OF FIGURES</b>	<b>7</b>
<b>1 INTRODUCTION</b>	<b>8</b>
1.1 Problem Statement	9
1.2 Research Questions	9
<b>2 HISTORY OF AFRICAN CINEMA</b>	<b>11</b>
2.1 African Cinema: Origins and Colonial Era	11
2.2 African Cinema: Postcolonialism	11
2.3 African Cinema: Nollywood	12
2.4 African Cinema: Nigerian Video Revolution	13
2.5 African Cinema: Nollywood's Phenomenon of Internationalization	13
2.6 African Cinema: Theory of First, Second and Third Cinemas	14
2.7 African Cinema: Nollywood Crisis	15
2.8 African Cinema: New Nollywood	15
<b>3 LITERATURE REVIEW</b>	<b>17</b>
3.1 SVOD Platforms: Definition	17
3.2 SVOD Platforms: Internationalization Strategies	17
3.3 SVOD Platforms: African Context	18
3.4 SVOD Platforms: The Diaspora Market	19
3.5 SVOD Platforms: The Future in Africa	20
<b>4 HYPOTHESIS DEVELOPMENT</b>	<b>22</b>
4.1 The African Context	22
4.2 Relevance of Nollywood's Internationalization Case Study	22
4.3 Nollywood's Internationalization Model	23
<b>5 RESEARCH METHODOLOGY</b>	<b>25</b>
5.1 Data Collection	25
<b>6 DATA ANALYSIS</b>	<b>26</b>
6.1 Questionnaires	26
6.1.1 Rules and Terminology in the Presentation of Results	26
6.1.2 General Data	26
6.1.3 Personal Data	27
6.1.4 Data on Nollywood	29
6.1.5 Data on SVOD platforms	47
6.2 Interview	53
6.2.1 Interview with Nader Sobhan	53
<b>7 CONCLUSIONS</b>	<b>54</b>
<b>8 LIMITATIONS</b>	<b>55</b>
<b>9 REFERENCES</b>	<b>56</b>
<b>10 APPENDICES</b>	<b>59</b>

## **List of Abbreviations**

FAN – Filmmakers Association of Nigeria

FESPACO - Pan-African Film and Television Festival of Ouagadougou

FEPACI – Federation of African Filmmakers

GDP – Gross Domestic Product

HDI – Human Development Index

SVOD – Subscription Video on Demand

VOD – Video on Demand

## Table of Figures

Figure 1 – Sample distribution by origin (source: author)	27
Figure 2 – Map showing the source of answers (source: author)	28
Figure 3 – Source of answers (source: author)	28
Figure 4 – Age group of respondents (source: author)	29
Figure 5 - Nollywood consumption regions (source: author)	31
Figure 6 - Nollywood consumption by sample (source: author)	31
Figure 7 - Nollywood consumption channels in Africa (source: author)	33
Figure 8 - Nollywood consumption channels in the diaspora (source: author)	34
Figure 9 - Belief in Nollywood consumption by host country citizens (source: author)	35
Figure 10 - Knowledge of a non-African host country citizen that watches Nollywood (source: author)	35
Figure 11 - Belief in Nollywood consumption by non-African citizens (source: author)	36
Figure 12 - Features that make Nollywood appealing to African audiences (source: author)	37
Figure 13 - Features that make Nollywood appealing to respondents (source: author)	38
Figure 14 – Entertainment preferences of respondents by sample (source: author)	40
Figure 15 – Entertainment preferences of respondents by age group (source: author)	40
Figure 16 – Entertainment preferences of respondents by sample regarding complementarity (source: author)	41
Figure 17 – Entertainment preferences of other Africans by sample (source: author)	42
Figure 18 – Preference for language use in Nollywood (source: author)	43
Figure 19 – Belief that Africans are consuming more Nollywood content than ever before (source: author)	44
Figure 20 – Belief that Africans are consuming more Nollywood content than ever before by age group (source: author)	44
Figure 21 – Belief that Nollywood can become as popular as Hollywood in the future (source: author)	45
Figure 22 – Approval of the statement (source: author)	47
Figure 23 – Netflix usage by sample (source: author)	48
Figure 24 – Netflix usage in Africa by sample (source: author)	49
Figure 25 - Barriers for Netflix usage in Africa (source: author)	50
Figure 26 - iROKO TV usage by sample (source: author)	51
Figure 27 - Advantages of using iROKO TV compared to Netflix (source: author)	51
Figure 28 - Belief that SVOD platforms are helping Nollywood to internationalize (source: author)	52



# 1 Introduction

The internationalization of film industries refers to the export of entertainment content from a given country to an international audience through mass media. The export generally produces a growing effect of popularity and recognition of the industry at an international level. The internationalization of film industries is only possible due to the sustained consumption of international content observed in almost every country in the world. It is also important to stress that this consumption does not prove to be a threat to local entertainment, since both complement the consumption habits of global audiences.

The internationalization of film industries is not a new phenomenon. In addition to the existence of global entertainment giants such as Hollywood and Bollywood, other more limited phenomena of internationalization have been observed since the invention of cinema. Several examples can be mentioned, such as the Spaghetti Westerns, the Scandinavian thrillers and the Japanese anime. More recently, we have seen the popularization of crime series in Spanish, such as *Narcos* and *Money Heist*. This last phenomenon of entertainment internationalization has the peculiarity of having been promoted by SVOD platforms (subscription video on demand). These platforms stand out for their “global television” feature, where the content library available in different countries tends to be more or less uniform (Lobato 2019). Thus, the increasing popularity of SVOD platforms may accelerate the emergence of these phenomena on a global level.

Nollywood stands for the Nigerian film industry and emerged as the first model of African popular culture in video format. This industry has been extremely successful in its internationalization process especially among African audiences and the African diaspora. Nollywood emerged from the Nigerian video revolution, which enabled the fast and cost-effective creation of entertainment content that was easily accessible to ordinary Africans. Consequently, it became the largest film industry on the continent and the second largest in the world in terms of films produced per year. With the recent popularization of SVOD platforms, Nollywood's international recognition may grow and reach new audiences. Therefore, this research will analyze how SVOD platforms are shaping Nollywood’s internationalization process.

## **1.1 Problem Statement**

The aim of this research is to examine how SVOD platforms are influencing and shaping the internationalization process of Nollywood. The internationalization process in this study will be focused on the African continent and the African communities in diaspora. However, part of this research will study the possibility of Nollywood gaining a global reputation. In addition to SVOD platforms, other media channels will also be addressed. However, it is important to note that the bibliography available on this subject is scarce. Furthermore, Nollywood's constant transformation and expansion make any bibliographic source easily outdated. Therefore, to ensure a more up-to-date approach, the development of this research will be mostly based on a methodology of data analysis. The data will be acquired through questionnaires and interviews to African communities and experts on SVOD platforms. Nevertheless, it is important to state that these data are subject to certain limitations and biases related to their acquisition. The main objective of this thesis is to open a field of study on the subject under discussion.

## **1.2 Research Questions**

**RQ1. How does the perception of Nollywood vary among African countries and between Africans and Africans in diaspora?**

The first research question aims to structure a map of Nollywood consumption regions in Africa. It also aims to study the different consumer habits among Nigerians, African citizens and Africans in the diaspora. This question should gather possible explanations on what elements are hindering Nollywood's internationalization in different African countries. Special attention will also be given to the diaspora market, as it is proving to be the main gateway to Nollywood's internationalization on a global level.

**RQ2. Are SVOD platforms contributing to the growth and internationalization of Nollywood?**

The second research question aims to study the effect of SVOD platforms on Nollywood's internationalization process. The main assumption is that an increasing consumption of Nollywood in non-African countries could result in a greater presence of Nigerian film content on local SVOD platforms. The greater spread of content in SVOD platforms would increase the consumption of Nollywood by African communities in the diaspora and could even attract the attention of local citizens. Therefore, this internationalization phenomenon through SVOD

platforms could help Nollywood expanding overseas and beyond African niche markets. However, we should also pay attention to SVOD platforms' presence in Africa. The lack of internet infrastructure as well as the low medium wages have made SVOD platforms' presence on the continent vaguely scarce and mostly concentrated on the elites. Thus, we should analyze which strategies should SVOD platforms pursue when trying to succeed in Africa.

**RQ3. Can Nollywood become a strong Hollywood competitor in the future or is it doomed to appeal only to the African market?**

The third research question is based on the possibility of Nollywood becoming a global entertainment hub in the future. This question seeks to ascertain whether there is a growing preference for Nollywood among African audiences (especially the younger ones) and whether it is taking media space away from other film industries like Hollywood and Bollywood. Another relevant issue is to understand whether Nollywood's cultural specificity is proving to be a barrier to non-African audiences. Thus, it is necessary to understand which aspects Africans find most attractive in Nollywood films and to assess whether these tend to be less appealing to international audiences.

## **2 History of African Cinema**

### **2.1 African Cinema: Origins and Colonial Era**

On November 5<sup>th</sup>, 1896, only a few months after their initial screenings in Europe, films by the Lumière brothers were shown in Alexandria (Leaman 2001). This event marked the first screening of a motion picture in Africa, placing Egypt as the pioneer of cinema in the continent<sup>1</sup>. Contrary to Egypt, which gained its independence in 1922, most African countries remained under European colonial rule for the first half of the twentieth century. This delayed the emergence of African Cinema, since former colonizers imposed strict laws on freedom of speech and filmmaking, forbidding Africans from creating their own productions. For example, under French rule, Africans were forbidden to make films without a license that, in practice, was never granted (Haynes 2011). Thus, film production became obscure in much of the continent, being exclusively produced by Western filmmakers as a means of propaganda. These films portrayed demeaning and caricatural representations of Africa and its peoples, reinforcing the Western vision of the “Dark Continent” (Murphy 2000). In short, film arrived in Africa as a colonial tool designed to highlight the colonizer’s position of supremacy and to solidify European hegemony.

### **2.2 African Cinema: Postcolonialism**

Although film production has been present in Africa since the beginning of the twentieth century, what is known as African cinema is a fairly recent phenomenon that emerged during the years of decolonization in the early 1960s. The end of colonial rule brought Africans the freedom to produce their own films, allowing a more authentic representation of the continent through an African point of view (Murphy 2000). However, the first African producers faced a number of setbacks, including lack of funding and technical equipment as well as inexperience in film production. European funding emerged as a response to the low budgets for film production. After the decolonization period, the French government reversed its position on African cinema and started funding it. This measure was aimed at maintaining a cultural relationship with its former colonies. French technical and financial aid enabled African cinema to develop in the same direction as European cinema, marked by independent celluloid art films

---

<sup>1</sup> <https://theculturetrip.com/africa/egypt/articles/10-things-you-didn-t-know-about-egyptian-cinema/>

(Haynes 2011). Another important event was the creation of the bi-annual Pan-African Film and Television Festival of Ouagadougou (FESPACO), held in French-Speaking Burkina Faso. Nevertheless, African cinema remained deeply influenced by French independent art films until the end of the twentieth century. These celluloid francophone films were characterized by their profound concerns with cinema aesthetics and extensive attention to ideological and humanist issues (Şaul and Austen 2010).

### **2.3 African Cinema: Nollywood**

Nollywood is generally defined as the Nigerian film industry. Today it is recognized as the largest film industry in Africa and the second largest in the world in terms of number of films produced per year. According to this criterion, Nollywood is only behind Bollywood but comfortably ahead of Hollywood. (Uzo and Mair 2014). However, if we consider the box office revenues the scenario is quite different as Nigeria does not even appear among the 21 world largest markets<sup>2</sup>. An important aspect to mention about Nollywood is the complexity of its term. Although widely defined as the Nigerian film industry, Nollywood may also refer to different spatial and temporal contexts of Nigerian cinema. First of all, Nollywood corresponds to a Nigerian film movement that started in the 1990s and became internationally popular due to the Nigerian "video boom". Thus, the commercial phenomenon of Nollywood tends to conceal the remaining periods and subdivisions of Nigerian cinema. Secondly, the term Nollywood refers mainly to English-language films produced in the Lagos region. Thus, it differs substantially from other film productions such as Kannywood in the northern part of the country (Haynes, 2007). Thirdly, Nollywood is a generic name for the whole Nigerian film industry and not a studio or concentration center of studios like "Cinecittà" (Rome), "Mosfilm" (Moscow), or Hollywood (Los Angeles). This is due to the low profitability of the industry, which is not profitable enough to cover the costs of building film studios. Consequently, Nollywood consists of several small businesses spread over Lagos which disappear and reappear due to economic conditions (Jedlowski 2013). As we can see, these particularities make Nollywood a unique case study. Thus, Nollywood cannot simply be compared to other industries of the same size, such as Hollywood and Bollywood. The same is true of its internationalization process, which differs greatly from others due to Africa's technological and financial context.

---

<sup>2</sup> <https://www.statista.com/statistics/243180/leading-box-office-markets-workdwide-by-revenue/>

## **2.4 African Cinema: Nigerian Video Revolution**

Despite many talented African cinematographers had developed a brilliant body of art cinema and documentaries, they had not succeeded in producing a cinema for Africa's mainstream audiences. Unless one was fortunate enough to attend a film event like FESPACO, opportunities to watch African films in Africa were very rare (McCall 2004). Nollywood embodied the video revolution on the African continent, with a cheap and easily-operated video technology that allowed films to be made with much lower budgets than the extremely expensive celluloid productions. In addition, the video format allowed the production of films at a faster pace, resulting in the Nigerian "video boom". From an economic perspective, the Nigerian "video boom" was the result of two determinant factors: the informality of the Nigerian economy and the adoption of digital technologies by Africans (Jedlowski 2013). Film production in Nigeria is a great example of the informality of the country's economy. Until the late 2000s, shooting typically took about two weeks and production budgets were extraordinarily low. For example, the film *Living in Bondage* (1992) was made for a few hundred dollars, while average budgets ranged from U.S.\$25,000 – \$70,000. Also, all shooting was done on location because, as noted earlier, Nollywood does not have the capital to construct its own spaces (Haynes 2007). In addition, formal prescriptions tended to be challenged, as oral agreements were more common than written contracts (Uzo and Mair 2014). The adoption of digital technologies in Africa will be discussed in detail later in the Literature Review. Another explanation for the emergence of the "video boom" phenomenon in Nigeria was the climate of political instability under the military dictatorship of Ibrahim Babangida. The political chaos and protests that occurred in the 1990s resulted in a considerable increase in crime and violence in the country. This made all cinemas to close down in Lagos, making the consumption of films in video format at home became a very appealing alternative (Haynes 2007; Onuzulike 2007).

## **2.5 African Cinema: Nollywood's Phenomenon of Internationalization**

The factors discussed above have also provided a fast and remarkable internationalization of Nollywood in Africa. Due to the informality of Nollywood's distribution networks, pirated copies of Nigerian videos have circulated throughout the world since the mid-1990s (Jedlowski 2013). This has made Nollywood a pan-African affair with a notable presence in most sub-Saharan African countries and in the African diaspora around the world. The success of Nollywood's internationalization also seems to have led to an increase in Nigerian cultural

imperialism in sub-Saharan Africa. Some phenomena observed on the continent demonstrate this trend, such as the idolization of Nollywood celebrities, the "Nigerianization" of African films, the imitation of Nigerian accents, and a greater presence of Nollywood films in the television programming of other African countries (Endong 2017). Nollywood has also been serving as a model of inspiration for most African film industries, with the emergence of similar models such as Ghollywood (in Ghana), Collywood (in Cameroon) and Kollywood (in Kenya). In addition, Floribert Endong notes that Nollywood has also achieved remarkable worldwide recognition, since "They are on sale on the streets of Kenya. In New York, foreign publics such as Chinese and Caribbean nationals avidly consume them. In Holland, Nollywood stars are recognized on the street by people from surname and in London, they are hailed by Jamaicans" (Endong 2017).

## **2.6 African Cinema: Theory of First, Second and Third Cinemas**

Nollywood's emergence in the 1990s resulted in the duality of today's African cinema, marked by the coexistence of two radically different cinemas: the old francophone celluloid art cinema identified with the FESPACO, and the new anglophone more commercial video film industry identified with Nollywood (Russell 1998). Thus, Nollywood films are more influenced by the commercial Hollywood filmmaking model often called First Cinema. First Cinema is defined by its devotion to capitalism. Thus, Hollywood-style filmmaking is dependent on massive amounts of money to finance the stars and special effects. In order for these films to make money, they must reproduce the bourgeois ideology of their intended audiences. In contrast, FESPACO films are more influenced by the European experimental art cinema often called Second Cinema. Many of these films express a concern with artistic expression and cinematic experimentation, which challenges the traditional patterns for the use of time and space and editing. These films may also voice anti-bourgeois sentiments that are connected to their stylistic explorations (Russell 1998). However, both FESPACO and Nollywood films have generally been characterized as Third Cinema. They differ from the other models, since they reflect an authentic African cinema that is based on connections between culture and social change while tending to reject the Hollywood model. This reflects the desire of Africans to produce an authentic perspective of Africa that contrasted the Western demeaning vision of the "Dark Continent" portrayed in films such as the Tarzan of the Apes (1918) and King Solomon's mines (1950). This was made explicit at the second meeting of the Federation of African Filmmakers (FEPACI), which was formed with the purpose of rejecting the foreign-dominated

systems just described: “not only should African films represent Africa from an African point of view, but they should also reject commercial, Western film codes” (Murphy 2000).

## **2.7 African Cinema: Nollywood Crisis**

After a first decade of prosperity, Nollywood's immense popularity began to decline. The market became saturated, generating a negative spiral, which led the industry to a critical impasse. In short, the factors that enabled the Nigerian video boom were also the main drivers of the production crisis that hit the industry in the 2000s. The lack of regulation, the inefficient copyright regime and the low barriers to entry exposed the industry to a high degree of imitation. In addition, the small number of original copies available in the video market opened up unexpected opportunities for piracy. In a context where legitimate distribution could not reach the majority of the population, piracy and other illegitimate distributors filled the gap. Paradoxically, Nollywood's international recognition coincided with the worst crisis the industry had ever experienced. This happened since media piracy and transnational informal circulation made Nigerian videos travel all over the world, transforming them into a pan-African and global form of popular culture (Jedlowski 2013; Haynes 2007). Another problem was that Nollywood films were not positively appraised by most critics and international film communities. The prevalence of issues such as bad computer-generated imagery, bad sound quality, unprofessionalism, bad acting, predictable plots and the thematic obsession with the occult world had legitimized the negative reviews of several film critics. The main argument stated was that the Nollywood seemed to be more concerned with the quantity and profits of its films, than with their quality and artistic relevance (Haynes 2007).

## **2.8 African Cinema: New Nollywood**

Around 2010 the phrase "New Nollywood" started buzzing in Lagos. This new term described an attempt by independent producers and directors to "take Nollywood to the next level" (Haynes 2014). Thus, several strategies were taken to adopt the reforms imposed by New Nollywood. With the support of American antipiracy institutions, the Filmmakers Association of Nigerian (FAN) started suing Internet pirates that sold Nollywood films. In the United Kingdom, the introduction of scheduled movies premieres at Odeon cinemas was intended to progressively create a demand for the theatrical release of Nollywood films with a view to moving them into the mainstream distribution network (Jedlowski 2013). In Nigeria, several new multiplexes have opened in recent years. However, ticket prices remained quite



inaccessible to the average Nigerian. The new wave shifted its focus from a local-popular to a transnational-elitist audience, whose economic support proved vital for the industry's survival (Haynes 2014). Nollywood's films have also been increasingly screened at international film festivals in Europe and the United States. This measure aimed at a substantial change in the target market, focusing mainly on diaspora communities. Also, new popular films started to be partially set abroad (Haynes 2007; Haynes 2014). In addition, the budgets for Nollywood productions grew considerably: from U.S.\$100,000 to \$400,000, or nearly ten times what mainstream producers allot for production costs. The increase in budgets has resulted in an extension of the production period of films. This has contributed greatly to Nollywood films' quality and originality. With larger budgets available, some producers have also begun to build sets and shoot at sound stages around Lagos (Ryan 2015). Furthermore, the additional profit acquired through weakened piracy was directed at promoting the quality of films and scripts (Haynes 2014). This set of reforms in the industry has transformed the Nollywood characteristic of the "video boom" era into what is now described as New Nollywood.

### **3 Literature Review**

#### **3.1 SVOD Platforms: Definition**

As explained above, Nollywood's international success seems to be intrinsically linked to the Nigerian video revolution. However, the last decades have seen the emergence of new digital players that have accelerated the process of internationalization of film industries. These refer to digital streaming systems such as VOD (video on demand), SVOD, social media and online piracy. This research will give special attention to SVOD platforms as a means of internationalization. SVOD stands for subscription video-on-demand and refers to media distribution systems that use a subscription business model. These platforms offer a curated library of content for a regular fee. The most famous examples of SVOD services are Netflix, Hulu, Disney+, Amazon Prime Video and HBO Now. Netflix is presently the largest SVOD platform, with over 193 million paid subscriptions online. It can be understood as a global television as it operates on all countries except for China, Syria and North Korea (Lobato 2019). Netflix was also recently entitled as the first draft of a global television service, as its CEO Reed Hastings put in 2016, "Right now, you are witnessing the birth of a global TV network" (Aguiar and Waldfogel 2017). Due to its huge popularity and extensive international range, this platform shows enormous potential for the popularization and internationalization of film industries.

#### **3.2 SVOD Platforms: Internationalization Strategies**

Luis Aguiar and Joel Waldfogel note that there are two contradictory effects associated with the arrival of giant streaming services' companies. The first effect concerns the predominance of a West-to-rest cultural imperialism. This happens since most of the content present in the giant streaming services tends to be Hollywood-centric. Therefore, the increase in US-made material available worldwide could result in greater competition on foreign markets, threatening the consumption of local entertainment productions. The second effect is based on a totally opposite view. It proposes an acceleration of the internationalization process of film industries through a predicted growth in the demand for local content on these streaming platforms. Since localization matters in television, it is expected that different audiences have different tastes, preferences and expectations (Aguiar and Waldfogel 2018). Ramon Lobato presents the example of the MTV channel's internationalization process, which began with a one-channel-for-all approach that proved extremely ineffective. The main causes for the failure

of this approach were the extremely complex divergence of tastes in the different markets and the absence of local content in television programming. Thus, MTV executives decided to change their approach by diversifying the content available in the different markets and adapting it to local tastes. This new strategy was a success and highlighted the argument that the global cannot simply displace the local, since “audiences don’t choose between the local and the global but combine both in their everyday lives; they move between these scales of identification, at different times and for different purposes” (Lobato 2019). Netflix is currently following the same approach as MTV, having invested in the differentiation of its content in order to become more attractive to foreign markets. The creation of original content is a smart practice as Netflix will become the direct owner of the distribution rights of its new productions, reducing part of its fixed costs while making more attractive products available to the different markets where it competes. Nevertheless, as Netflix continues to reach a wider international audience the service becomes more geographically differentiated, making it to lose its initial appeal of a global (homogeneous) TV network. Briefly, we can see that Netflix has been structurally transformed by its internationalization process, aiming to combine the local and the global within one platform in the most efficient way (Lobato 2019).

### **3.3 SVOD Platforms: African Context**

Despite being available on a global scale, the use of Netflix is still virtually impracticable in some countries. Issues such as slow and unaffordable internet, lack of online payment options, lack of understanding of the internet and unaffordability of subscription fees make Netflix a luxury service reserved for the elites in developing countries. We will briefly go through these factors in order to allow a better understanding of the context of using the internet and SVOD platforms in Sub-Saharan Africa. In 2017, the number of Internet users in Sub-Saharan Africa was of 18.71%, well below the world average of 49%<sup>3</sup>. However, this region has seen great improvements in connectivity infrastructure and affordability over the past decade. In 2008, only three fiber-optic submarine cables connected the entire continent to the global internet. Today this number has risen to 26, directly connecting 37 of the 38 countries that have a seashore<sup>4</sup>. Nevertheless, since cable television has never been particularly popular in sub-Saharan Africa, Internet use has been largely driven by cell phones connected via wireless

---

<sup>3</sup> <https://data.worldbank.org/indicator/IT.NET.USER.ZS?locations=ZG-1W>

<sup>4</sup> <https://www.empowerafrica.com/internet-infrastructure-in-africa/>

networks. This growth of internet use through mobile phones is essentially an urban phenomenon, since it is estimated that as many as 100 million Africans live in rural areas out of reach of traditional cellular networks<sup>5</sup>. However, fiber networks infrastructure still remains precarious in this region. Most cell towers are placed too far from fiber cable networks, making users to rely on satellites and microwaves instead for their reception. Overall, this poor and under construction infrastructure makes Internet quite slow as well as extremely difficult and expensive to access. However, according to Promoting Content in Africa, “the top reasons [that justify people not using the internet] relate to a lack of interest and understanding about the internet”. The main factors that can explain this lack of interest are the absence of local content in native languages and a “weak word-of-mouth”, meaning that people are not interested in the internet because their relatives do not know and do not talk about it (Kende and Quast 2016). In addition, the absence of a high-speed internet and the unaffordable SVOD’s subscription fees makes this service practically inaccessible for the average African. Also, much of local entertainment can be easily found on traditional media and piracy platforms. Thus, there is little need for Africans to pay to access this content. Payment is also a relevant issue, since the majority of Africans do not own credit cards and lack online payment options. There also seems to be a common rejection of online payment options related to fear of online fraud (Dovey 2018). In addition, most transactions in Africa are still made in cash, which is not compatible with the online payment requirements of SVOD platforms.

### **3.4 SVOD Platforms: The Diaspora Market**

African diaspora communities are the largest source of income for African SVOD platforms (Dovey 2018). This happens since most of these communities live in developed countries, where access to high-speed internet is common and people have a greater purchasing power. Although the African market is much larger in terms of population, the percentage of Africans with internet access is very small. Therefore, most African SVOD platforms seem to have adapted their services to target the diaspora market instead. As stated in *Entertaining Africans: Creative Innovation in the (Internet) Television Space*, “The African diaspora in Europe was the biggest market for us. I’d say around 80% were in Europe (...) What is happening in Africa is the internet and its priorities. So, it’s not like you launch this luxury product with movies and series, it’s not like people will stop eating to watch this service!”. Another important aspect is

---

<sup>5</sup> <https://www.empowerafrica.com/internet-infrastructure-in-africa/>

that diaspora communities are usually deprived of African content, since it is difficult to access it outside of traditional African media. This reveals a huge opportunity for SVOD platforms to distribute African content (mostly unavailable in foreign media) to diaspora communities. From a cultural perspective, African-focused SVOD platforms help to bridge the distance from the continent in terms of bringing Africa-based content closer to these communities. Myria Georgiou gives special attention to the notion of cultural proximity in the context of diasporic communities. Despite not having a clear definition, the concept of cultural proximity can be described as a feeling of belonging to an imagined community, based on a self-identification with certain national, ethnic, religious and cultural expressions. This concept is very important among diasporic communities due to the need to respond to a prevailing feeling of nostalgia caused by the distance to one's homeland. Therefore, sharing media provides diasporic groups with opportunities to develop common cultural practices (Georgiou 2012). In addition, Nollywood is often described as the media representation of African popular culture, thus presenting enormous significance in terms of cultural proximity for African communities in diaspora (Dovey 2018).

### **3.5 SVOD Platforms: The Future in Africa**

Currently, the largest entertainment channels in Africa exclude SVOD and consist mainly of traditional media (Dovey 2018). This raises the question of how will SVOD platforms survive in Africa in the long run? Lindiwe Dovey describes two determinant strategies that SVOD platforms have been following to guarantee their survival on the African continent. The first strategy is to remodel the service in a way that meets African standards, particularly with regard to internet speed, affordability and alternatives to online payment methods. A relevant issue to address is that the concept of leisure and entertainment consumption is quite different in Africa. Most Africans do not possess digital devices common to the Western world, such as smart TVs, computers, laptops and tablets. In fact, the vast majority of Africans who have access to the internet can only access it through the use of mobile phones. Therefore, the viewing of films through “super-small” screens of mobile phones is a common practice in Africa. This has made several African SVOD companies to adapt their services to the African market, replacing streaming features with downloading ones. For example, iROKO TV decided to switch off its streaming platform in Africa and develop an Android app for mobile phones which allowed a direct download of the content (Dovey 2018). Regarding online payments, some mobile application such as Afrinolly have been integrating with several telecommunications

companies in order to offer the alternative of paying for films with the airtime of the user's mobile phone. Another notable example of service adaptation for the African market was iROKO's move from being a digital-only platform to both digital and linear with the launch of a new satellite on Sky in 2016. This innovative approach aimed to distribute iROKO's original Nollywood content to a large part of the population that was not yet connected to the Internet. Therefore, this service adaptation comes as fundamentally necessary since SVOD platforms alone cannot succeed in Africa without a multifaceted approach that also focuses on more traditional forms of television (Dovey 2018).

The second strategy is based on the creation of new business through partnerships and regional alliances. The most curious case presented by Lindiwe Dovey is about a partnership created between iROKO TV and Canal + (a French cable television channel). This partnership was really important because it helped eroding the historical divides between Anglophone and Francophone Africa through a "common thirst" for Nollywood films and series across the continent. The partnership consisted on a multimillion euro deal to bring popular Nollywood films to French-speaking African markets through a mobile Android app. This partnership was seen both as an incredible strategy for the internationalization of Nollywood cinema to new African audiences and as a symbolic peace act that challenged old colonial-era rivalries between the two great blocs on the continent.

## **4 Hypothesis Development**

### **4.1 The African Context**

Nigeria is the largest African economy in terms of Nominal GDP (Gross Domestic Product), with about \$444,916 billion in 2019. It is also the most populous country in Africa with a population of 206 million in 2020, which is almost double the population of the second most populous country in Africa. It is also in Nigeria where Lagos, the largest city and metropolitan area in Africa, is located. In terms of Human Development Index (HDI), Nigeria (R=0.534) is considered a low-development country and is ranked as average for African standards. However, it is very developed when compared to other countries in West Africa. It is important to mention that it was in Nigeria where the African video revolution took place in the 1990s. Therefore, Nollywood emerged as the first mainstream entertainment industry on the continent and the first model of African popular culture in video format. Consequently, Nollywood became the largest film industry in Africa. All these factors have contributed to the emergence of a Nigerian cultural imperialism in sub-Saharan Africa. In addition, several film industries on the continent have copied and became visibly influenced by Nollywood.

### **4.2 Relevance of Nollywood's Internationalization Case Study**

All these factors lead us to the question why is Nollywood's case study so culturally and economically relevant for the topic of internationalization of businesses? The response is complex and seems to have been reinvigorated by cultural and economic events that occurred in 2020. However, to understand this issue we have to look at the context of the entertainment industries in Africa. The entertainment landscape in Africa has been invaded and influenced by other film industries since the arrival of cinema on the continent. African cinema was developed on the standards of European art cinema and was systematically influenced by Hollywood in the West and Bollywood in the East. In short, African cinema was marked by a systematic lack of funding in production, as well as by a precarious infrastructure that made the dissemination of its films scarce. Unlike other continents, Sub-Saharan Africa never had an influential film industry until the emergence of Nollywood in the 1990s. Moreover, Nollywood is characterized by being the first model of African popular culture in video format. This holds great promise for success, as black representation has proved virtually non-existent in global

film industries. For example, African-American representation in Hollywood cinema proved to be scarce until the early 2000s. Thus, Nollywood's internationalization may come to cover the market gap of the representation of global Afro-descendant communities. In addition, today's social and technological context is proving ideal for Nollywood's international popularization due to three main factors. First, recent anti-racism movements in the Western world and the cultural pressure of racial inclusion in Hollywood seem to be creating a unique market opportunity for black cinema. In addition, Africa's growing ability to export actors to Hollywood, such as Barkhad Abdi, is a very interesting aspect. The growing influence of African-American communities in the United States means that there is a growing market opportunity for black actors in Hollywood. This opportunity has often been filled by African actors, highlighting a clear aptitude of Africans for the entertainment industry. This has previously been seen in the music industry, with the emergence of musical genres among black communities such as Jazz, Blues, and Funk. Second, the growing industrialization of Sub-Saharan African countries is providing much of the continent with the necessary infrastructure for media and film diffusion. This is critical to Nollywood's popularization in Africa, since this industry already has a competitive advantage (being the largest on the continent) over other African entertainment industries. Third, the recent popularization of SVOD platforms on a global level represents an extraordinary opportunity for Nollywood's internationalization. This happens since these platforms stand out for creating viral phenomena of international content. Also, with the closure of several film complexes due to the current pandemic, these platforms are becoming even more popular worldwide. In conclusion, Nollywood's case study is proving to be critical for the topic of internationalization of businesses not only on an economic level, but also on a cultural one.

### **4.3 Nollywood's Internationalization Model**

Nollywood's internationalization model is quite peculiar, since it was sustained by Africa's extraordinary process of technological development in the last decades. Unlike other major film industries, Nollywood emerged from the video revolution and became internationally popular through new media. With the absence of a popular African media culture on the continent, Nollywood came to fill a gap in the African entertainment landscape. Therefore, this industry emerged in a totally revolutionary context that "inaugurated" a new entertainment panorama in Sub-Saharan Africa. Nollywood's internationalization model has been characterized by three fundamental phases, based on their level of international popularity. These are:



- **Popularization in Nigeria and neighboring countries (1992 – 2000):** Emergence of the industry through the Nigerian Video Revolution. Nollywood filled an empty market, as African cinema at the time excluded the African mass audiences. Even Nigerian universities could rarely get hold of famous African films, which were only available from American and European distributors, and which had to be paid for in foreign currencies (McCall 2004). Nollywood developed the first demonstration of mainstream African popular culture on video. The industry became popular in Nigeria and in neighboring English-speaking countries, namely Ghana and Cameroon.
- **Popularization in Sub-Saharan Africa and the African Diaspora (2000-2010):** Nollywood's fast and inexpensive film production (low cost model) resulted in a growing popularization of the industry in Africa. However, this model resulted in a crisis of overproduction in the mid-2000s. The industry was also affected by the informality of Nollywood's distribution networks, where content was essentially disseminated by illegitimate distributors who did not revert profits to producers. Paradoxically, these illegitimate distributors made Nigerian videos travel all over the world, transforming them into a pan-African and global form of popular culture (Jedlowski 2013; Haynes 2007).
- **Reform and focus on the Diaspora market (2010-2020):** General industry reforms led to the emergence of New Nollywood. These reforms aimed at the production of higher quality content, as well as the implementation of various strategies to target the remarkably more profitable diaspora market. These included Nollywood's participation in international film festivals and the production of films partially shot in the diaspora. This period was also characterized by the emergence of Nollywood blockbusters on international SVOD platforms, such as Netflix. This effect promoted greater visibility and accessibility of Nollywood's content to the diaspora communities. Nollywood also began to appeal to elites in Africa, marked by the inauguration of several film complexes in Nigeria (Haynes 2014).

## **5 Research Methodology**

### **5.1 Data Collection**

Data was gathered from two main sources: questionnaires and an interview. Questionnaires were the main source of data collection, with 521 responses from all African countries (52) except Equatorial Guinea and the Seychelles. These questionnaires were directed to both Africans living in Africa and the African diaspora. The questions varied slightly between these two groups. However, questionnaires for the diaspora group also included questions about their consumption habits in their home countries. This allowed the data to be sorted by African country and region. Most questionnaires for Africans in the diaspora were shared in online groups of African communities residing in developed countries. Thus, a ranking by host country was not justified. In addition, questionnaires were available in the official business language of most African countries, namely: English, French and Portuguese. Specific questionnaires were also conducted for Nigerian citizens in Africa and in the diaspora. These questionnaires were identical to the previous ones, presenting an additional question for Nigerians in Africa.

The interview was the secondary method of data collection. It was conducted to Nader Sobhan, co-founder of iflix, on the topic of internationalization of SVOD platforms in emerging markets.

## **6 Data Analysis**

### **6.1 Questionnaires**

#### **6.1.1 Rules and Terminology in the Presentation of Results**

Questionnaires were addressed to two main groups: Africans in Africa and Africans in the diaspora. However, there is a high probability that respondents to the questionnaire of Africans in Africa will actually reside in the diaspora. This is due to the factors mentioned above regarding the low internet penetration in Africa. Therefore, all personal questions in the African questionnaire are directed only to consumption habits in Africa. Even if the location of respondents does not correspond to the target of the questionnaire, the questions always specify the region to which consumer habits should be associated. In order to obtain more reliable results, all responses to questions that do not return to the consumer's location will never be structured according to the group of Africans in Africa. Whenever necessary, responses will be structured to highlight the contrast between the total sample and the diaspora sample. The same will be done with Nigerian samples.

The term "All Combined" reverts to the total sample of the questionnaires, that is, the 521 answers received.

Most questions are mandatory and identical to all questionnaires. Any exception to this rule will be mentioned.

#### **6.1.2 General Data**

Questionnaires were directed both to Africans in Africa and Africans in the diaspora.

##### **Results:**

As we can see in Figure 1, 54.51% (N=284) of respondents answered the questionnaires for Africans in Africa, and 45.49% (N=237) answered the questionnaires for Africans in the diaspora.

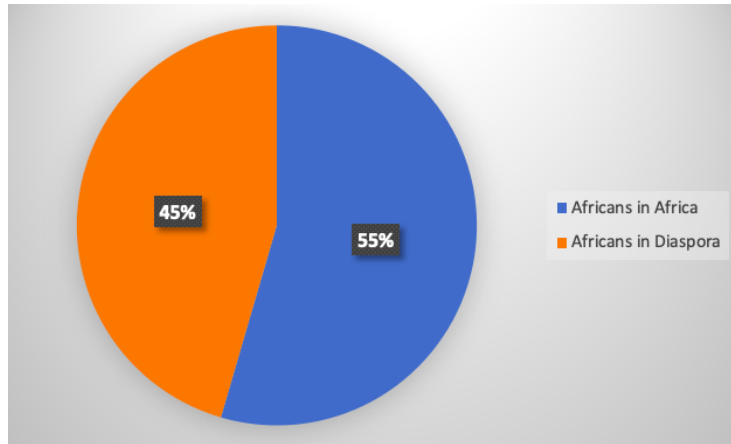


Figure 1 – Sample distribution by origin (source: author)

### 6.1.3 Personal Data

#### 6.1.3.1 Country of origin

Respondents were asked about their country of origin. Each language version of the questionnaire included the countries using the corresponding official/co-official language. In the case a country did not have an official/co-official business language, it was included in the English version. In the questionnaires for Nigerians, this question was replaced by "Where are you from in Nigeria?". This ensured that respondents were effectively Nigerian.

#### Results:

As can be seen in the following figures, the vast majority of respondents come from either English-speaking countries (59.7%) or North African countries (14.19%). Nigeria (13.05%) stands out with almost twice the number of responses of the second most receptive country to the questionnaire, South Africa (6.91%). This can be justified due to the relevance of data collection from Nollywood's country of origin. The 10 most populous countries in Africa also show a higher representation of answers (43.56%). In contrast, the countries that have less adhered to the questionnaire are mostly French speaking or have a very small population.

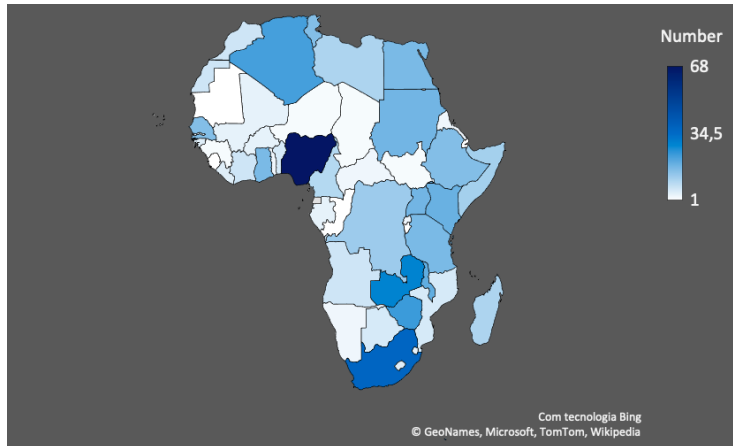


Figure 2 – Map showing the source of answers (source: author)



Figure 3 – Source of answers (source: author)

### 6.1.3.2 Age and Gender

Respondents were asked about their age group and gender. These questions were not mandatory. The main objective of these questions was to assess whether there was an effect between the age group/gender of respondents and certain consumption habits. This effect will be assessed when interpreting the data for the selected questions. Looking only at the valid responses to the gender question, we obtain a male group of 56.46% and a female group of 43.46% and the following age distribution.

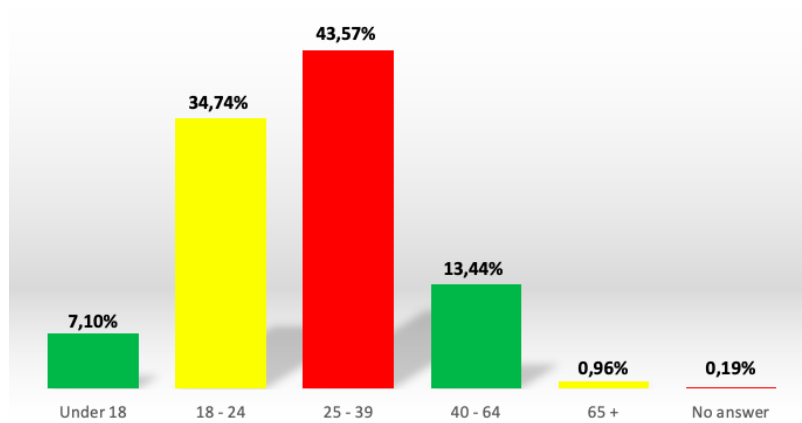


Figure 4 – Age group of respondents (source: author)

## 6.1.4 Data on Nollywood

### 6.1.4.1 Nollywood Consumption

Respondents were asked if they had ever watched a Nollywood film. This was one of the most relevant questions, as it allowed to structure a map of Nollywood consumption regions in Africa. Nollywood consumption was also analyzed according to the age and gender of the respondents. The same was done with the sample of origin.

#### Results: Consumption Regions

As we can see in Figure 5, seven key regions of Nollywood consumption were identified. These were structured according to their geography and their Nollywood consumption rates. The regions will be listed according to their Nollywood consumption rate in ascending order:

- North Africa (N=74; R=24.32%). It is composed of the Mediterranean countries. Most respondents from these countries revealed to be unaware of Nollywood's existence, namely Egypt (N=17; 5.9%) and Libya (N=11; R=18.2%) where the consumption rates were inferior to 20%. Answers to following questions reveal a preference for Arabic content, namely Egyptian novels;
- Horn of Africa (N=52; R=46.15%). It consists of the countries located in the Horn of Africa region. Answers to following questions reveal a partial knowledge, but a very weak consumption of Nollywood. Some still revert to a certain tribalism and a preference for national content in the case of Ethiopia, and for Arabic and Bollywood content in the case of Sudan;

- Southern Africa (N=54; R=51.85%). This region is composed of the countries located in the far south of the African continent. The situation is quite similar to that of the Horn of Africa region. However, as described in some answers of the following questions, the fact that South Africa is a media hotspot contributes to enormous entertainment competition in this region;
- Central Africa (N=42; R=76.19%). This region is composed of French-speaking and Portuguese-speaking countries in the central region of the continent. Nollywood consumption rate is much higher in Central Africa than in the regions described above. However, it is slightly lower than West and East Africa. The determining factor of this lower adherence to Nollywood might be the language barrier. I recall what was described before in the Literature Review about the existence of a greater influence of French artistic cinema in French speaking Africa;
- West Africa (N=78; R=82.05%). This region is composed of the countries in the Western part of the African continent, excluding Nigeria. There is a large consumption of Nollywood in this region, which was expected as it is the geographical region of Nigeria. However, the consumption rate is lower than in East Africa. This can again be explained by the language barrier factor, with most West African countries speaking French. In addition, there is competition from FESPACO taking place in the West African country of Burkina Faso;
- East Africa (N=153; R=86.93%). This region is composed of the countries located in the Eastern part of the continent, with the exception of the Horn of Africa. It is the region with the highest consumption of Nollywood, if we exclude Nigeria. This can be explained by the fact that most countries in this region have English as their official (or co-official) language, representing the absence of a language barrier. Thus, most of the countries listed here showed Nollywood consumption rates close to 100%, such as: Kenya (N=19; R=100%), Tanzania (N=17; R=100%), Zambia (N=29; R=96.6%) and Malawi (N=20; R=95%). However, in the island countries of the Indian Ocean the situation is quite different. The consumption rate is much lower (N=16; R=37.5%) than the region's average. This can be explained by the answers of following questions, which reveal a greater influence of Bollywood cinema as well as the existence of a language barrier.
- Nigeria (N=68, R=98.53%). As expected, Nigeria stands out with a Nollywood consumption rate close to 100%. Only one respondent answered that he had never

watched a Nollywood film, but surprisingly he was able to indicate his favorite film. This indicates that Nollywood is a very influential means of entertainment in its home country.

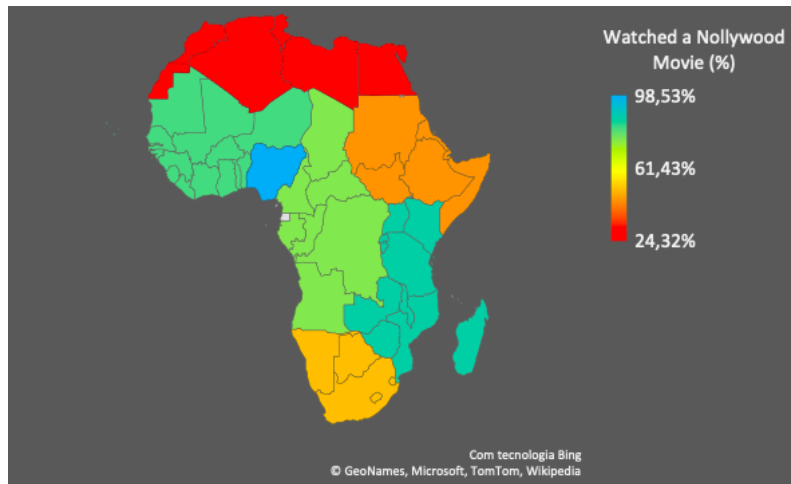


Figure 5 - Nollywood consumption regions (source: author)

### Results: Samples

Data analysis presented in Figure 6 reveals that Nollywood tends to be more popular among Africans in the diaspora (R=75.11%) than the total sample (R=70.25%). Nigerians are among the largest consumers of Nollywood (R=98.53%). Also, if we take Nigerian data from the total sample, the consumption rate drops to 66%.

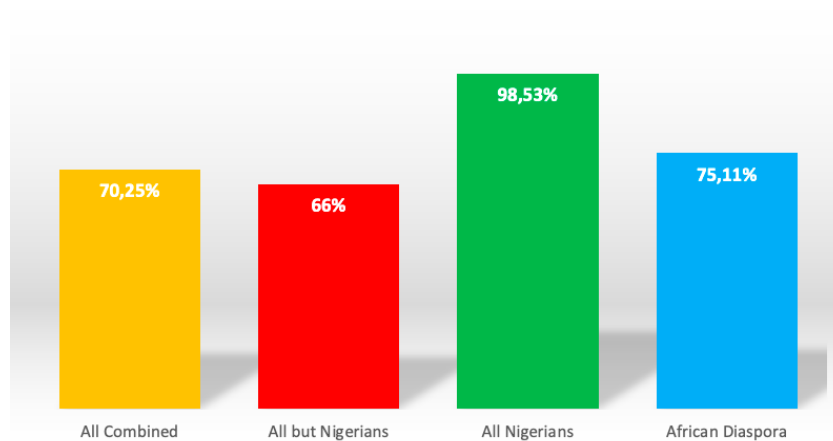


Figure 6 - Nollywood consumption by sample (source: author)

### Results: Age Group

The analysis of data regarding the age group of respondents indicates that Nollywood consumption is more prevalent among individuals aged 25-39 (79.74%) and 40-64 (77.14%). In contrast, the age group that reveals the lowest consumption is that of under-18s with only



48.65%. This is the only age group with a consumption rate below 50%. These figures are alarming, as younger generations do not consume as much Nollywood as older ones.

### **Results: Gender**

The analysis of data regarding the gender of respondents reveals that Nollywood consumption is more prevalent among women (78.07%) than men (64.77%). However, both genders show positive figures with rates never lower than 60%.

#### **6.1.4.2 Nollywood Favorite Films**

All respondents were asked to name their favorite Nollywood film. Nollywood TV Series as well as films from other African countries were not considered in the responses. However, information about these films is often scarce and unreliable. Many of them are only found on YouTube websites, without any other source of information about the film's directors, release date and film genre. Therefore, the results of this question should be considered as merely indicative.

### **Results:**

Only 27.06% of the respondents managed to name a film. Many reported remembering the film but not knowing its name. This seems to be a fairly common factor about Nollywood consumption, where quantity tends to be more valued than quality. Thus, audiences consume a large amount of films but rarely manage to remember a specific one that stands out from the rest. Of the 72 films listed, 9.72% are from the 1990s, 20.83% are from the 2000s and 48.61% are from the 2010s. The remaining 15 films do not present any reliable source of their release date. About 29.16% of the films listed are or were available on Netflix <sup>6</sup>(according to several sources not specific to the Netflix service of a specific country), corresponding to 38.30% of respondents' favorite films. The most mentioned film was "The Wedding Party" (2016) with 16 votes. This film is also stated to be the highest-grossed Nigerian film of all time according to Wikipedia<sup>7</sup>. The second most voted film was "Osuofia in London" (2003) with 10 votes. However, only 22 films were mentioned by more than one respondent and only 5 of them surpassed the 5 mentions. As for the films genres, the most common was Drama (54.17%), followed by Comedy (22.22%), Thriller (8.33%), Crime (6.94%) and Romantic Comedy

---

<sup>6</sup> <https://www.nollywoodreinvented.com/2019/10/list-of-nollywood-movies-on-netflix-october-2019.html>

<sup>7</sup> [https://en.wikipedia.org/wiki/List\\_of\\_highest-grossing\\_Nigerian\\_films](https://en.wikipedia.org/wiki/List_of_highest-grossing_Nigerian_films)

(6.94%). The remaining genres were present in less than 5 films. No information was available about the genres of 9 of the films listed.

**6.1.4.3 Nollywood Consumption Channels: Africa**

All respondents were asked about where they usually watched Nollywood films in Africa. A list of several options was presented in which respondents could select as many as they wanted. Respondents were allowed to mention other relevant issues in the following question. This second question was optional and only served this purpose.

**Results:**

Figure 7 shows Nollywood's main means of consumption in Africa. As we can see, most respondents use African television channels (R=26.30%), Netflix (R=23.03%) and Nigerian film channels on YouTube (R=16.70%). Piracy is also quite prevalent, as if we combine online piracy (R=13.05%) with DVD piracy (R=12.28%), we get a strong (R=25.33%) piracy representation. If we look at the Nigerian sample we can identify a higher prevalence of Nigerian television channels (R=30.88%) and iROKO TV (R=26.47%). Nollywood's consumption in cinemas is also much more prevalent in Nigeria (R=22.06%) than on the African continent (R=6.14%). In summary, Nollywood's consumption on Africa is mostly conducted through African television channels, SVOD platforms and piracy practices.

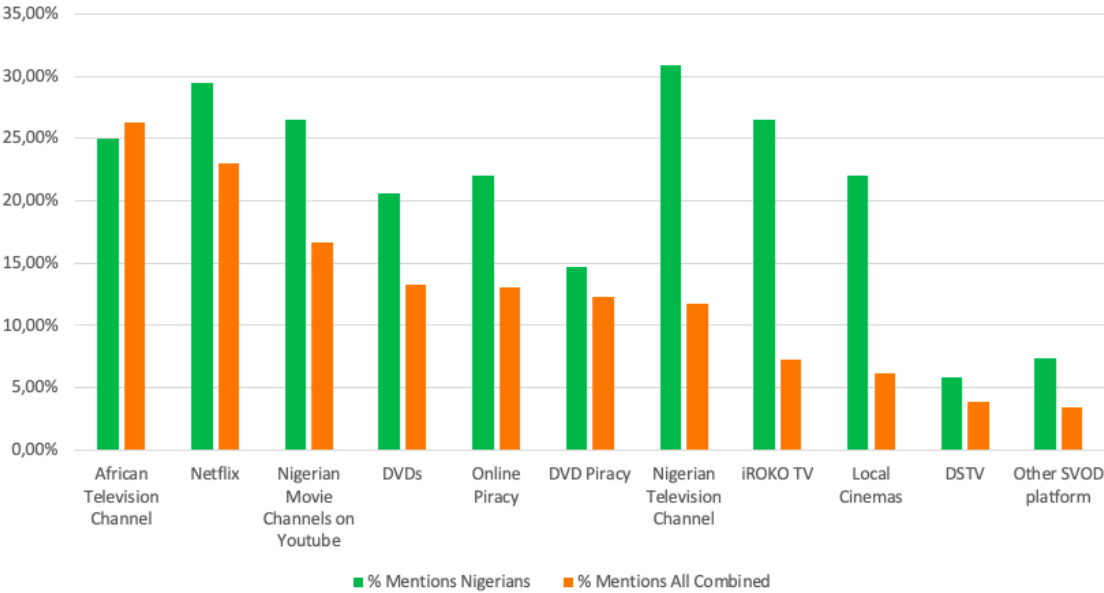


Figure 7 - Nollywood consumption channels in Africa (source: author)

**6.1.4.4 Nollywood Consumption Channels: Diaspora**

Respondents from the diaspora were asked about where they usually watch Nollywood films in their host countries. A list of several options was presented in which respondents could select as many as they wanted. Respondents were also allowed to mention other relevant issues in the following question. This second question was optional and only served this purpose.

**Results:**

Figure 8 shows Nollywood's main means of consumption in the diaspora. As we can see, most respondents use Netflix (R=52.74%), Nigerian film channels on YouTube (R=18.57%), iROKO TV (R=15.19%) and African television channels (R=15.19%). Piracy is much less prevalent, with a total representation of 17.03%. The pattern in the Nigerian sample is quite similar, with a stronger representation of Netflix (R=82.14%), iROKO TV (R=42.86%) and Nigerian film channels on YouTube (R=39.29%). In summary, Nollywood’s consumption in the diaspora is mostly conducted through SVOD platforms and YouTube.

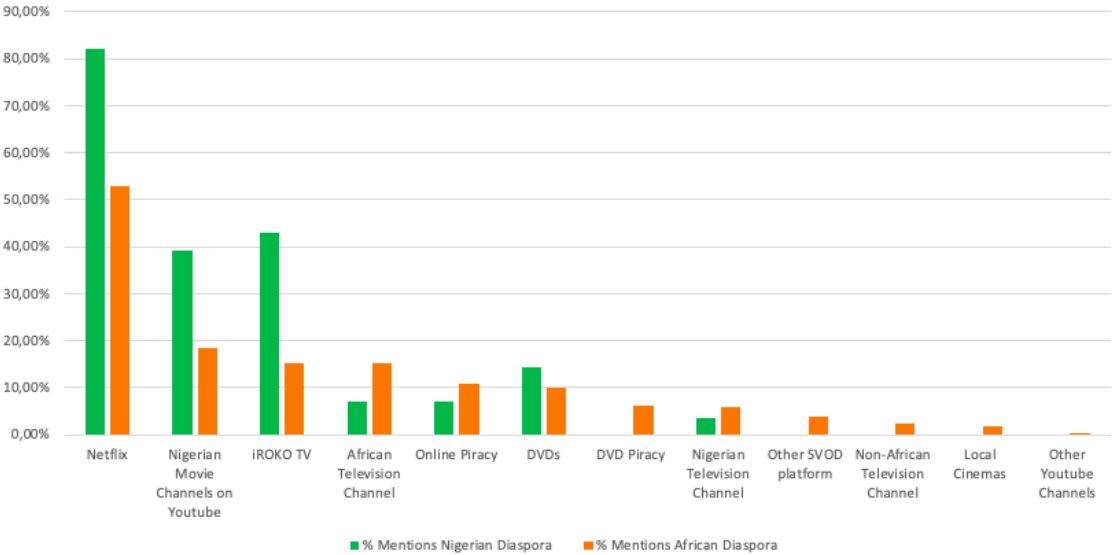


Figure 8 - Nollywood consumption channels in the diaspora (source: author)

**6.1.4.5 Nollywood International Range: Diaspora Sample**

Respondents from the diaspora were asked if they thought citizens of their host countries knew about Nollywood. They were then asked if they actually knew any non-African citizen from their host countries who watched Nollywood.

**Results:**

As Figure 9 shows, answers were quite positive with 59.49% of Africans in diaspora and 64.29% of Nigerians in diaspora answering yes. However, when asked if they actually knew

any non-African citizen from their host country who watched Nollywood, the results were quite different. Note that knowing about Nollywood is different from watching Nollywood, but the assumption is identical. As Figure 10 shows, only 35.02% of the total group and 60.70% of Nigerians sample answered yes. This factor reveals a huge discrepancy between the entertainment consumption preferences of the diaspora communities and the citizens of their host countries. The high consumption of African content by diaspora communities leads them to believe that other citizens of their host country must have similar entertainment preferences. Also, this phenomenon seems to be even more prominent in the groups that consume Nollywood the most (Nigerians). However, the only clear conclusion we can draw from these questions is that Nollywood consumption among diaspora communities is remarkable enough to make these communities consider the consumption of this content as universal.

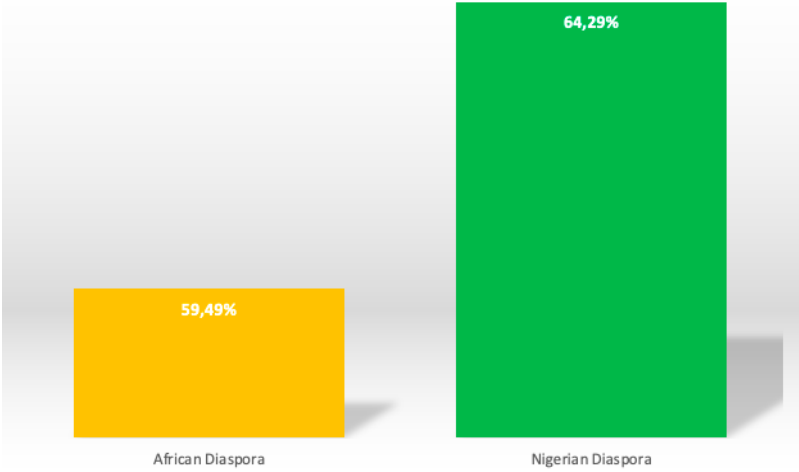


Figure 9 - Belief in Nollywood consumption by host country citizens (source: author)

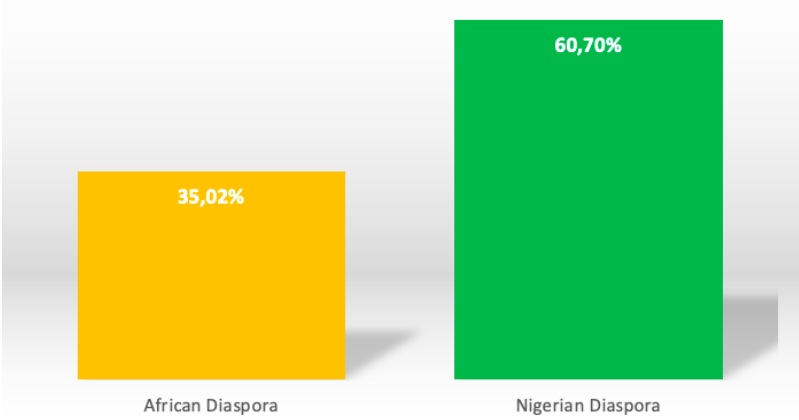


Figure 10 - Knowledge of a non-African host country citizen that watches Nollywood (source: author)

#### 6.1.4.6 Nollywood International Range: African Sample

A similar question was put to Africans living in Africa. They were asked if they thought citizens from other continents also watched Nollywood.

##### Results:

As we can see in Figure 11, the results in the African and Nigerian samples are quite different. Only 39.08% of Africans believe in a sustained universal consumption of Nollywood. In contrast, about 67.50% of Nigerians believe in the international consumption of their film industry. Therefore, we can conclude that Nollywood's consumption in Nigeria is remarkable enough to make Nigerians believe in an international success of their national film industry. Despite the lower figure, African responses also show a very positive determination towards Nollywood's international success.

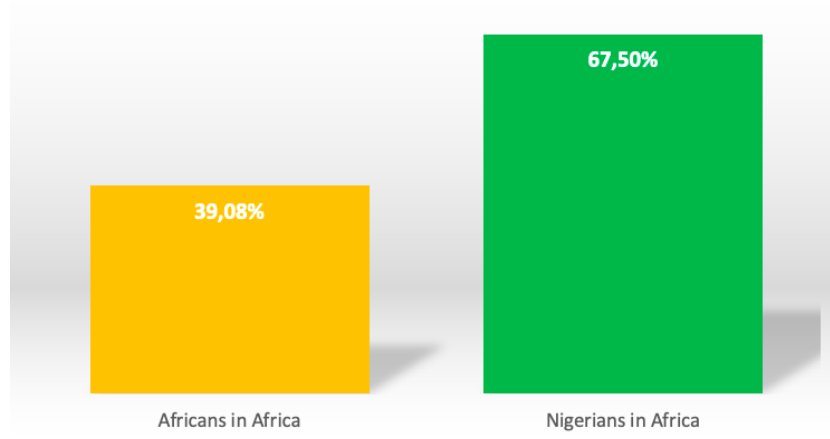


Figure 11 - Belief in Nollywood consumption by non-African citizens (source: author)

#### 6.1.4.7 Nollywood Appeal: African Audiences

All respondents were asked which aspects of Nollywood films they thought African audiences found most appealing. This question was open-ended. Therefore, I conducted a general analysis of the responses in order to select the most recurring ones. The topics were evaluated according to the percentage of mention in total number of responses.

##### Results:

As we can see in Figure 12, only 5 topics were mentioned in more than 10% of the responses. “Relatability” stood out, being mentioned in 31.48% of the responses. “Relatability” is understood as a set of identity representations (through cultural, linguistic and racial factors) that result in greater identification by a specific audience. Thus, the presence of “Relatability”

in Nollywood films is considered a key factor in attracting African audiences. The remaining topics that exceeded 10% of mentions were "African Made" (12.67%), "Educational: Culture and History" (12.28%), "Portrays the Real Africa" (11.32%) and "African Stories, Storylines" (10.36%). The vast majority of the topics mentioned were related to the presence of African cultural elements in Nollywood films. Factors related to the technical aspect of the films, such as "Film Quality" (1.15%), "Creativity" (0.58%) and "Variety of Content" (0.38%), represented a minority of mentions in the total answers.

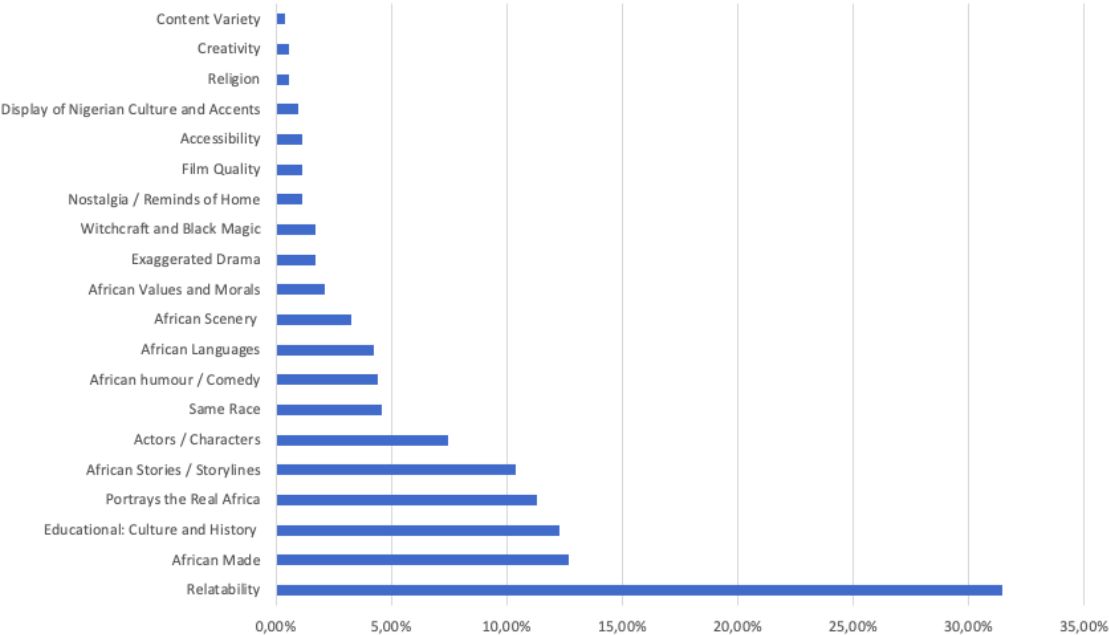


Figure 12 - Features that make Nollywood appealing to African audiences (source: author)

**6.1.4.8 Nollywood Appeal: Individual**

All respondents were then asked which aspects of Nollywood films they found most appealing. This question was also open-ended and followed the same evaluation method as the previous one.

**Results:**

As we can see in Figure 13, the topics selected varied widely from the ones in the previous question. This fact is quite interesting, as both questions were answered by Africans about African consumption habits. This reveals that a large part of the respondents considered themselves an exception to the majority of Africans. Responses were also more divergent, with only 5 topics being mentioned in more than 5% of the responses. "African Humor/Comedy" stood out, being mentioned in 12.67% of the responses. Most respondents stated that this topic was fundamental because it conveyed a unique type of humor that is only understood by

African audiences. Some respondents also stated that the comic aspect of Nollywood films was related to the low CGI quality or even the overall low quality of the films. In addition, comedy was not the only genre widely mentioned in the comments. Other genres like "Exaggerated Drama" (4.41%) and "Witchcraft and Black Magic" (1.34%) were also mentioned with some prominence. This reveals that Nollywood is much more directed to the entertainment of audiences than to the creation of artistic or cultural material. The other topics that exceeded 5% of mentions were "Relatability" (9.60%), "Educational: Culture and History" (12.28%), "Portrays the Real Africa" (11.32%) and "African Stories, Storylines" (10.36%). Another relevant topic was "Nostalgia/Reminds of Home" (1.34%) which indicates the use of Nollywood films as an instrument for connecting respondents living in the diaspora with their countries of origin. In addition, the vast majority of the topics mentioned were related to the presence of African cultural elements in Nollywood films.

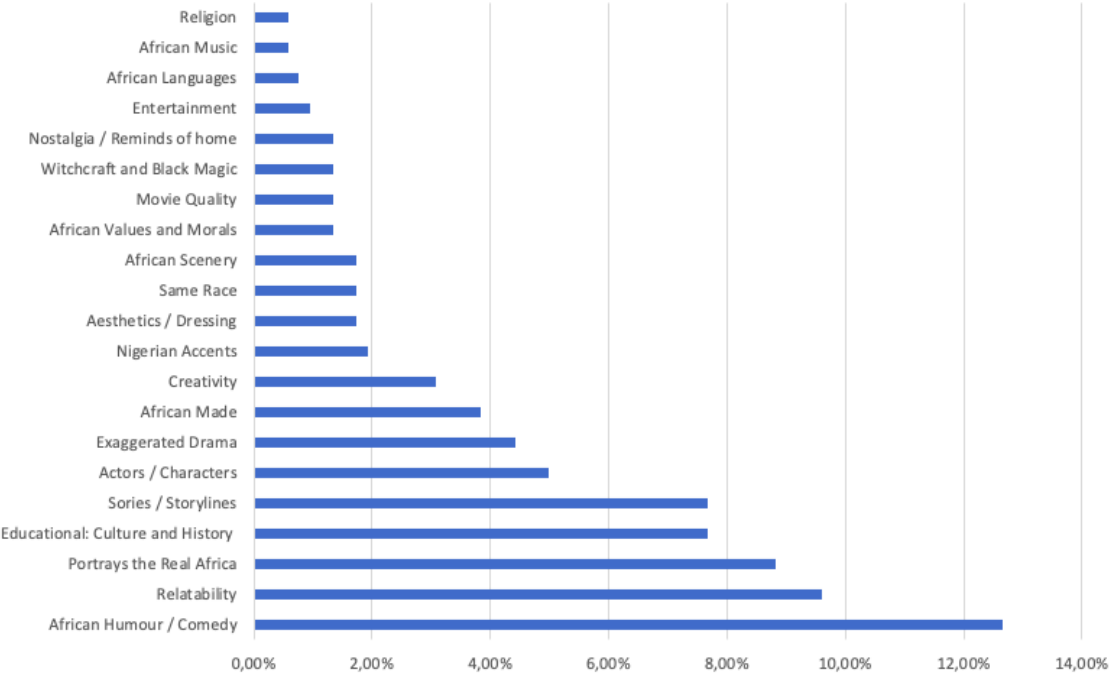


Figure 13 - Features that make Nollywood appealing to respondents (source: author)

**6.1.4.9 Individual Preference: Hollywood vs Nollywood**

All respondents were asked whether they preferred Hollywood or Nollywood. Respondents could choose from 5 different options. These were: (1) "Definitely Hollywood", (2) "Definitely Nollywood", (3) "I prefer Hollywood, but I also watch a lot of Nollywood content", (4) "I prefer Nollywood, but I also watch a lot of Hollywood content" and (5) "I watch them both equally". For the data analysis, the answers were also combined into three main topics: "Preference for

Hollywood" (includes points 1 and 3), "Preference for Nollywood" (includes points 2 and 4) and "Complementarity" (includes points 3, 4 and 5). In addition to the sample of origin, responses were also analyzed according to the age and gender of respondents.

### **Results:**

As we can see on Figure 14, Hollywood seems to dominate the entertainment landscape of Africans. We can assume this hypothesis, since preference for Hollywood corresponds to the most voted element in all samples. Overall, Hollywood is only weaker for Nigerians (R=52.94%), who in contrast consume more Nollywood (R=33.82%) than other groups. However, this observation is not relevant since preference for Hollywood exceeds 50% of the responses in all samples, reaching an incredible 72.94% in the total sample.

If we analyze the responses based on the age group of the respondents, we notice that the preferences follow reversed patterns. As we can see in Figure 15, preference for Nollywood increases with the age of respondents while the preference for Hollywood decreases. However, preference for Hollywood is always comfortably dominant in all age groups. Note that the margin of preference in the under-18 age group is 75.67%, while it always remains over 50% up to the 25-39 age group. This fact is quite discouraging when it comes to Nollywood's internationalization success, since the data reveals that Nollywood does not appeal to younger generations. This may suggest that Nollywood is conceived as an outdated type of content that is only appealing to older generations. In other words, Nollywood is losing ground to a future success of its internationalization.

If we analyze the responses based on the gender of the respondents, we find that the male group has an overwhelming preference for Hollywood (82.21%), while the female group has a slighter one (63.89%). This shows that Nollywood is almost invisible to male audiences, representing only 13.52% of its preference. However, it is slightly more sustained in the female audience with 20.83% of preference.

In short, the data indicates an overwhelming preference for Hollywood at all levels and samples analyzed. Preference for Nollywood tends to be minimal at all levels, especially among younger generations. In general, Nollywood's most affluent audience tends to be Nigerian women over the age of 40. Interestingly, this is the group generally associated with soap opera audiences.

However, there is a relevant factor that stands out in this analysis. It is the prevalence of a complementarity factor in entertainment consumption by African audiences. Figure 16



compares responses that express complementarity with those that exclude any level of complementarity, namely "Definitively Hollywood" and "Definitively Nollywood". As we can see, it now appears that complementarity has a more remarkable presence in African entertainment scene. The existence of the complementarity factor may suggest that these two entertainment poles do not necessarily compete with each other but complement a general need for entertainment consumption by the African public. This perspective devalues the threat of Hollywood's overwhelming preference. Since both film industries are consumed in complementary terms (for different purposes), a growing preference for Hollywood does not imply a decrease in Nollywood consumption.

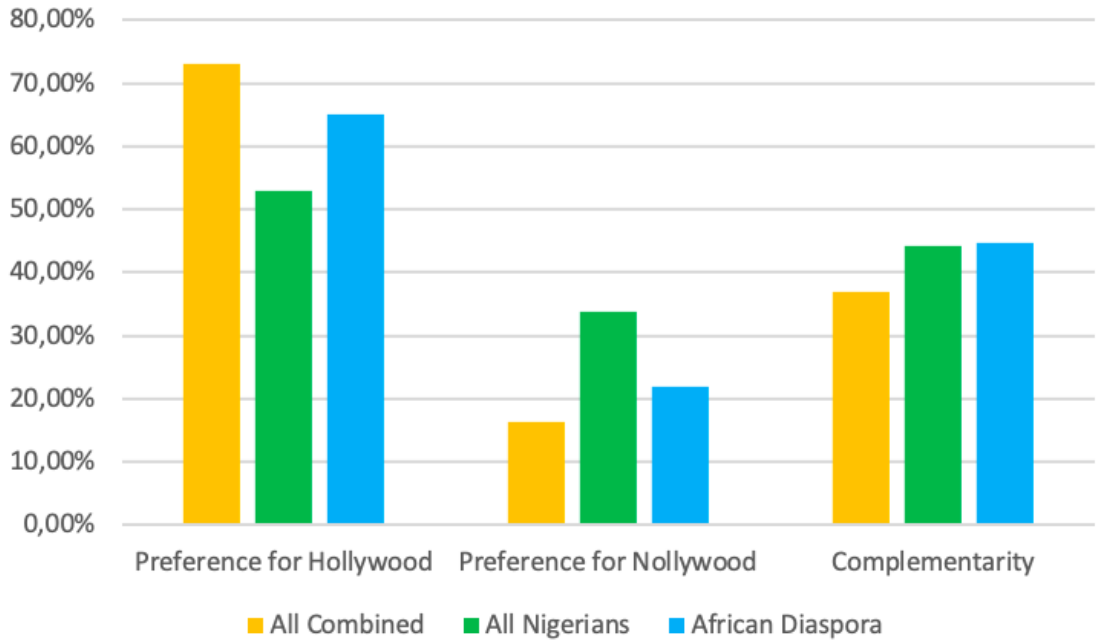


Figure 14 – Entertainment preferences of respondents by sample (source: author)

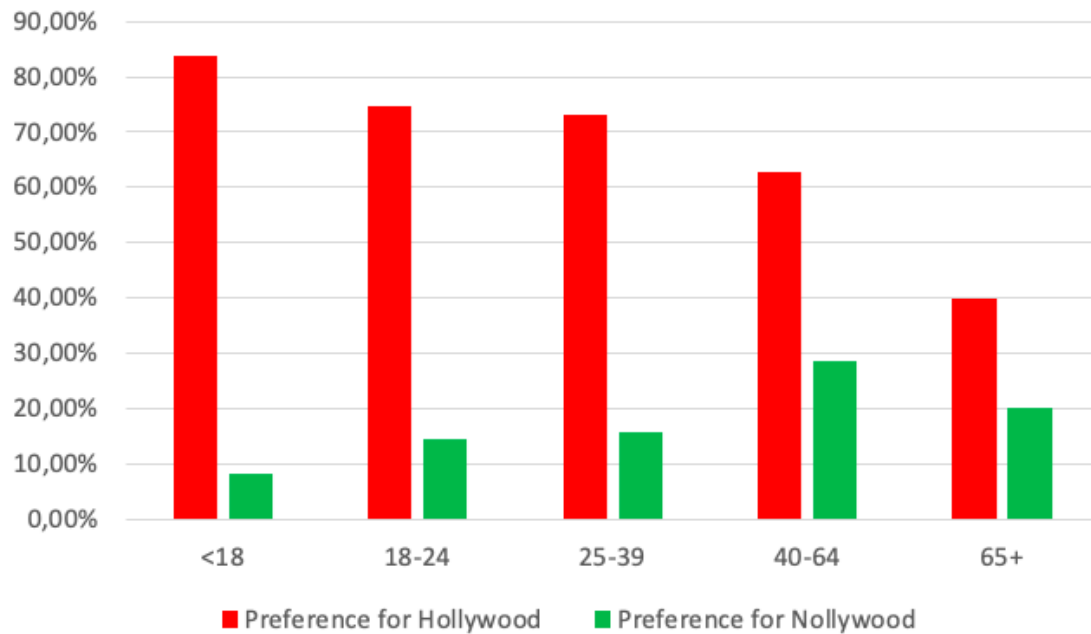


Figure 15 – Entertainment preferences of respondents by age group (source: author)

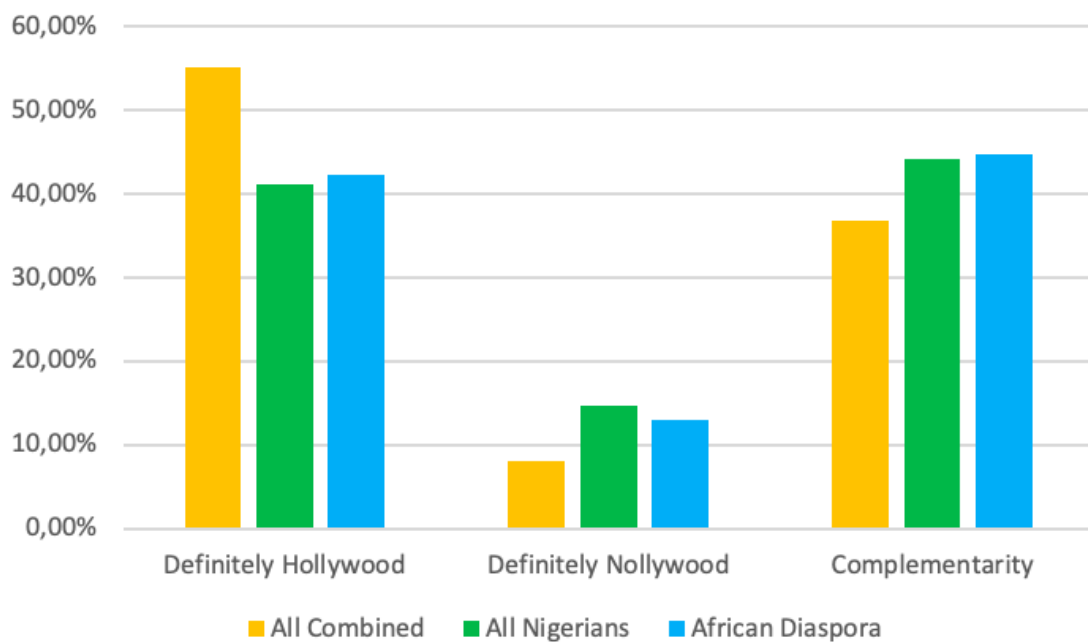


Figure 16 – Entertainment preferences of respondents by sample regarding complementarity (source: author)

#### 6.1.4.10 African Preference: Hollywood vs Nollywood

All respondents were then asked what they thought about the entertainment preferences of Africans in general. This question had only 3 answer options, these were: "Definitely Hollywood", "Definitely Nollywood" and "They watch both equally". The results were

analyzed according to the same samples.

### Results:

As we can see in Figure 17, answers were substantially different from the previous question. Preference for Hollywood is no longer dominant in the Nigerian sample, having lost both to Nollywood (26.47%<29.41%) and to “They watch both equally” (26.47%<44.12%). In the case of Africans living in the diaspora, preference for Hollywood lost only to “They watch both equally” (38.40%<40.08%). In the case of the total sample of respondents, preference for Hollywood (49.52%) remained dominant but with a much lower margin than in the previous question. It is also worth mentioning that there is no topic that exceeds 50% of the answers. In general, we can assume that a large number of respondents consider themselves an exception to the pattern of entertainment consumption by Africans. Thus, they tend to devalue their preference for Hollywood in favor of a supposed complementarity with Nollywood observed by the rest of the population.

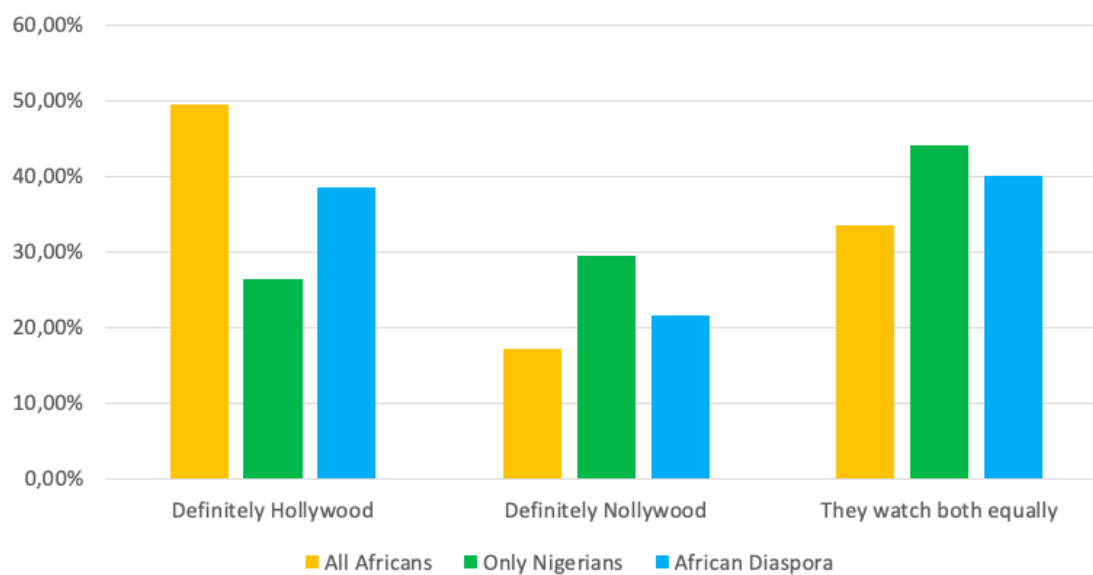


Figure 17 – Entertainment preferences of other Africans by sample (source: author)

#### 6.1.4.11 Language Use in Nollywood

Respondents from the sample of Nigerians living in Africa were asked about their preferences of language use in Nollywood. Two options were suggested, these were: "Nollywood should use English as its main language" and "Nollywood should diversify its content into different Nigerian languages (e.g. Yoruba, Igbo and Hausa)". This question was open-ended and asked respondents to justify their answers. It was only addressed to Nigerians, since it discusses the use of their national languages in their national film industry. However, it was not directed to

Nigerians living in the diaspora, as some could be part of the second generation of immigrants and not master other native languages.

**Results:**

As we can see in Figure 18, 47.50% of the respondents answered that "Nollywood should diversify its content in different Nigerian languages", while 25% answered that "Nollywood should use English as its main language". Interestingly, 15% of respondents indicated an alternative strategy, stating that "Nollywood should use Pidgin English". This perspective was described as an efficient way to adopt the two main strategies simultaneously. The remaining 12.50% did not indicate any preference. On the one hand, respondents who preferred a strategy of diversification mentioned arguments that implied the preservation and representation of the Nigerian cultural heritage. On the other hand, most of the respondents who chose the English option mentioned that it would be a good strategy to reach a wider international audience. In short, there was a general preference for diversifying Nollywood content in different national languages.

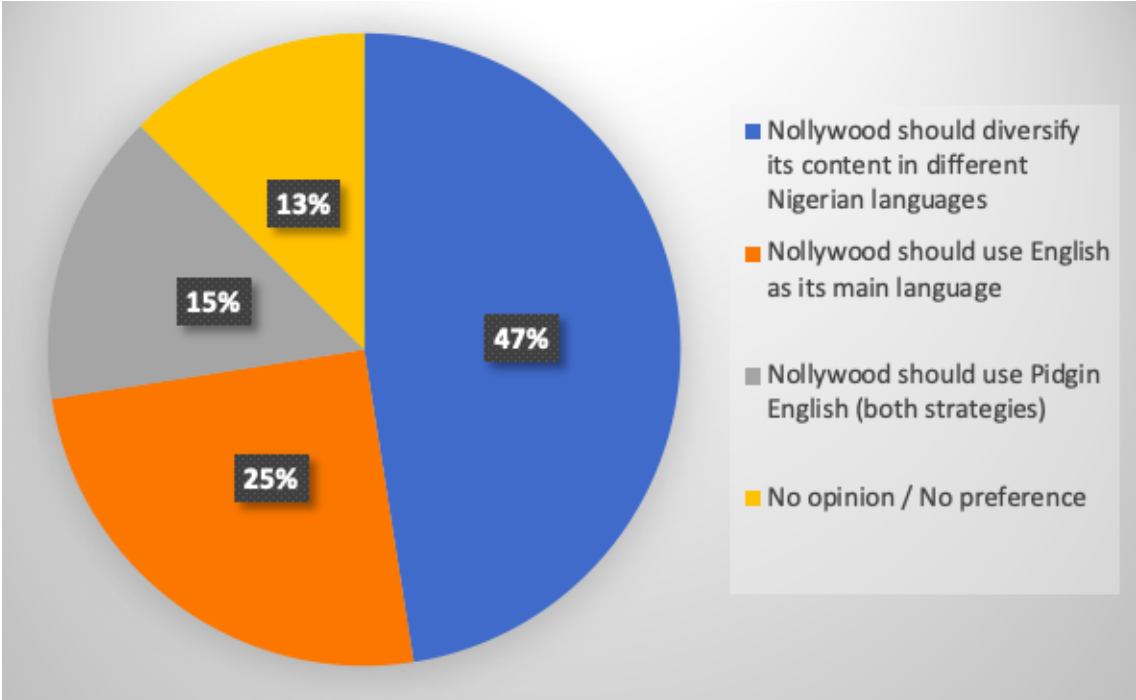


Figure 18 – Preference for language use in Nollywood (source: author)

**6.1.4.12 African Content Audiences**

All respondents were asked if they believed Africans were watching more Nollywood/African content than ever before. Responses were also analyzed according to the age group of respondents.

**Results:**

As we can see in Figure 19, results were quite positive with 74.47% of respondents answering "yes" and 25.53% answering "no". However, there seems to be a growing tendency to disagree with this assumption in younger generations. Although the answer "yes" predominates in most age groups, the margin of difference is smaller the younger the age group is. These data indicate that while there is a majority consensus that Africans are consuming more African content than ever before, the trend is for consumption to decline in the future as younger generations tend to agree less with this assumption.

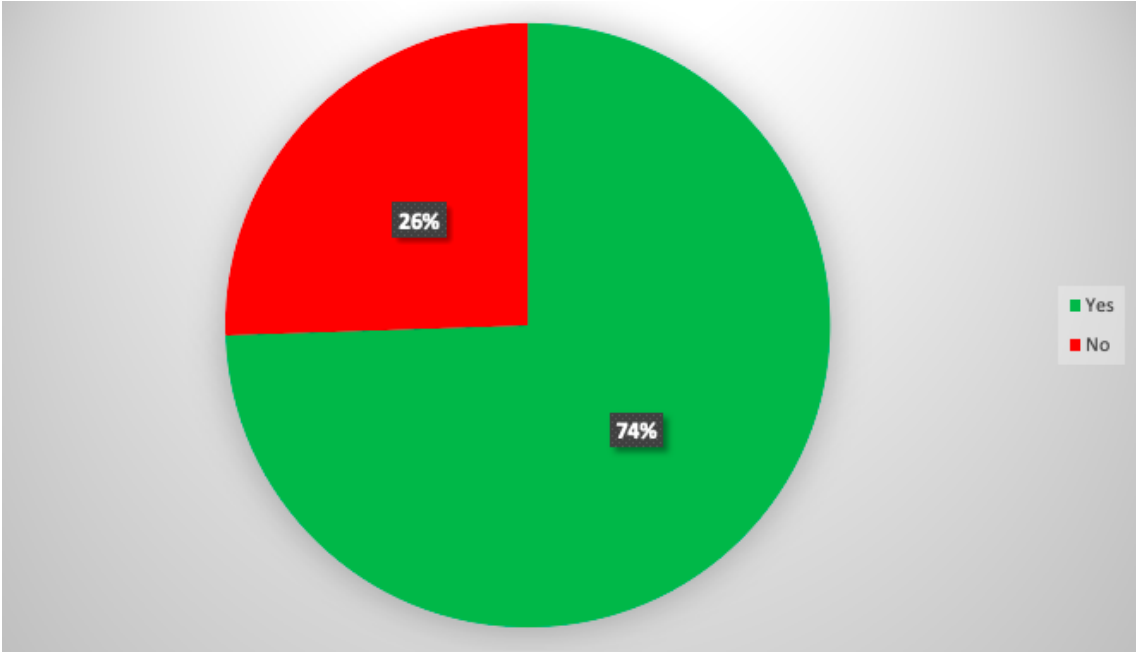


Figure 19 – Belief that Africans are consuming more Nollywood content than ever before (source: author)

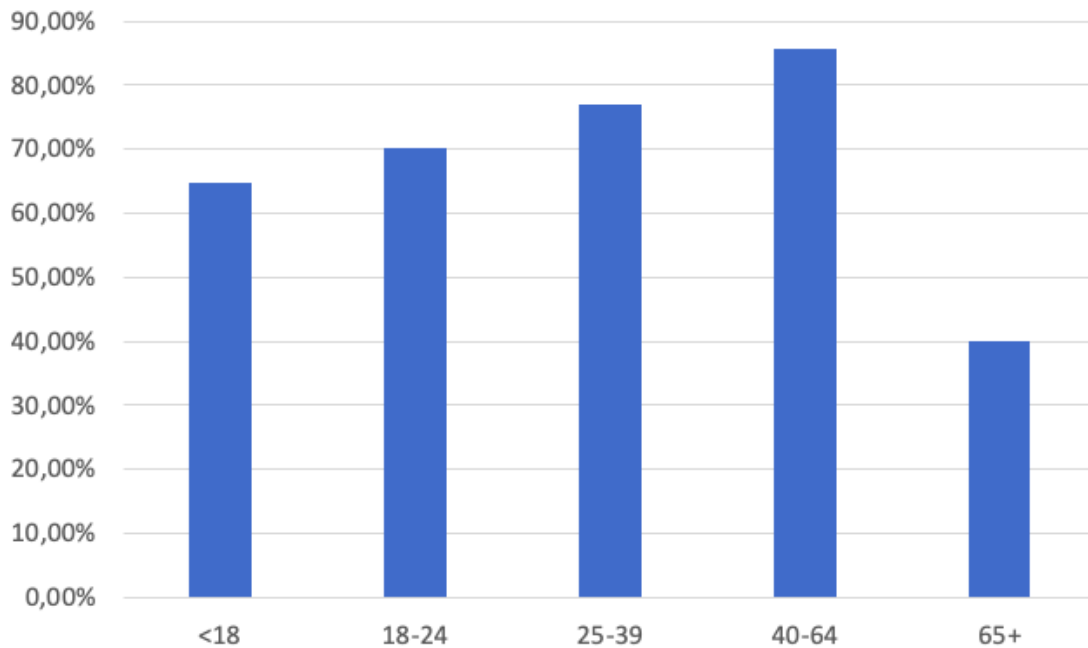


Figure 20 – Belief that Africans are consuming more Nollywood content than ever before by age group (source: author)

#### 6.1.4.13 Nollywood’s Popularity in the future: Nollywood vs Hollywood

Respondents living in the diaspora were asked if they thought Nollywood could become as popular as Hollywood in the future. The diaspora group was seen as best suited to answer this question, as they tend to be more aware of the real dimension of Nollywood's international popularity. The sample of Nigerians in diaspora was included in the graphical representation of the results as a means of comparison.

#### Results:

As we can see in Figure 21, results are quite positive with 66.67% of respondents in the diaspora answering “yes” and 82.14% of Nigerians in the diaspora also answering "yes". A more optimistic result was expected by the Nigerian diaspora group due to greater familiarity and devotion to the industry. A deeper analysis will be conducted on this topic in the next question.

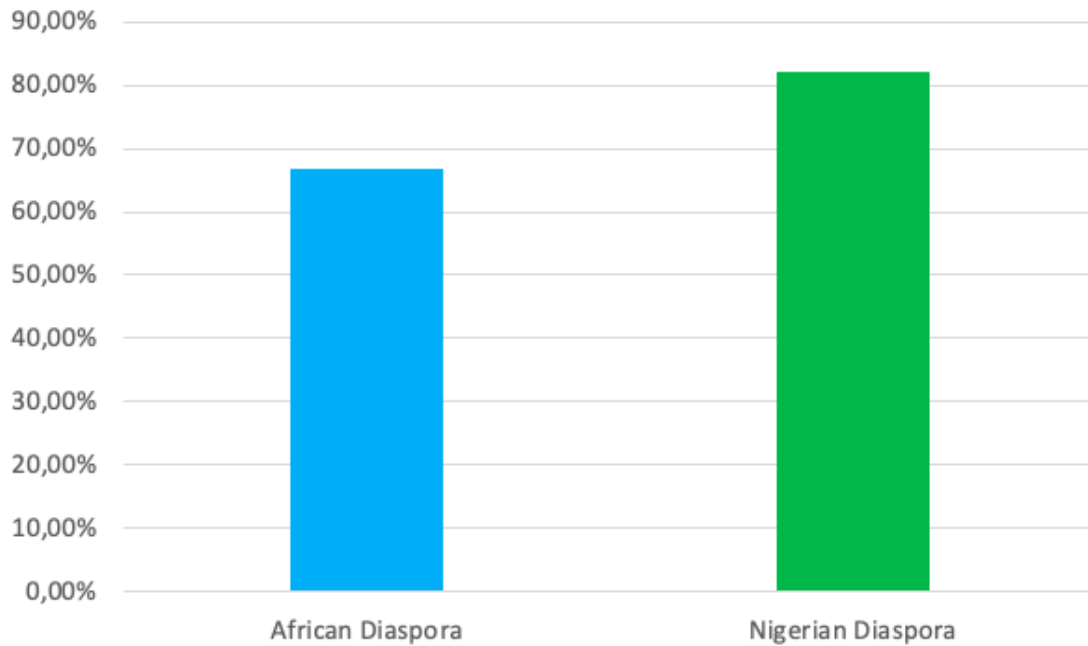


Figure 21 – Belief that Nollywood can become as popular as Hollywood in the future (source: author)

#### 6.1.4.14 Nollywood’s Popularity in the future: Hollywood model vs Bollywood model

All respondents were asked to comment on this statement "Nollywood will never be as internationally popular as Hollywood because it only appeals to the African public and diaspora. It will resemble more Bollywood (only popular for Indians) than Hollywood." This question was open-ended, so the answers were analyzed and organized into three determining topics: "Agree", "Disagree" and "Don't know / Answer not clear enough". Agreeing with this statement implies that Nollywood will resemble the Bollywood model more than the Hollywood model. To disagree with the statement implies the exact opposite. The Bollywood model is understood as a film industry oriented towards the internal market and the country’s diaspora communities. Note that this notion of Bollywood model is not correct, since it portrays a misconception of Bollywood by the Western world. However, the explanation of the model is precise, so that the inadequate notion of Bollywood did not seem to affect the basis of the answers received. By Hollywood model is understood a film industry characterized by a gigantic international popularity, which is oriented to both domestic and foreign markets. The Nigerian sample was also included in the graphical representation of the results as a means of comparison.

#### Results:

As we can see in Figure 22, most respondents agreed with the statement (45.49%). The same did not occur with the Nigerian sample, which mostly disagreed with it (44.12%). This more positive result was expected by the Nigerian sample. However, the margins between those who agreed and those who disagreed with the statement were quite low, being 15.74% for the total sample and 4.41% for the Nigerian sample. This demonstrates that Africans are deeply divided on what they expect to be the future of Nollywood. I will now enumerate and comment on some answers that raise pertinent issues regarding this sentence:

- A recurring response was the following gradation: “Hollywood > Nollywood > Bollywood”. This indicates that some respondents consider the Nollywood model to be substantially different from the other models presented. The assumption is that Nollywood will be more internationally successful than Bollywood but will still lag behind Hollywood;
- Another recurring response portrayed Nollywood's disadvantage to Hollywood in terms of funding and marketing budgets. According to respondents, Nollywood would have the same quality and international success as Hollywood if it had the same funding. This assumption rejects any relevance of cultural identification as a means of internationalization of a film industry;
- Another common response was that Nollywood is unique because it represents a set of distinctive West African cultural practices. Aspects such as African humor, regional traditions, accents and native languages make Nollywood a very specific cultural product that is difficult for foreigners to understand. In contrast, Hollywood does not value these cultural aspects. It adapts its films in a culturally neutral way in order to be more internationally appealing. This makes Western films to be seen as the norm, while any other film industry struggles to appeal to a large international audience. Interestingly, some respondents said they would prefer Nollywood to maintain its cultural identity instead of becoming more neutral and internationally appealing;
- Many respondents answered that cultural differences should not be considered as a barrier to the internationalization of cinema as they become invisible in the presence of captivating and relatable stories. Many mentioned the case of K-dramas, which despite being the "cultural opposite of Africa" proved to be incredibly addictive for African audiences. Thus, Nollywood may have the same international success despite its cultural specificity;



- A final recurring response was the prevalence of a set of advantages that will allow Nollywood to become an entertainment powerhouse in the future. This includes: the fact that Nollywood's most widely used language is English (which differs from Bollywood), the existence of a large African diaspora community around the world (and also a large African-American audience in the United States), and Nigeria's status as a superpower in Africa (cultural imperialism/soft power). This set of advantages should be fundamental for Nollywood's future international success.

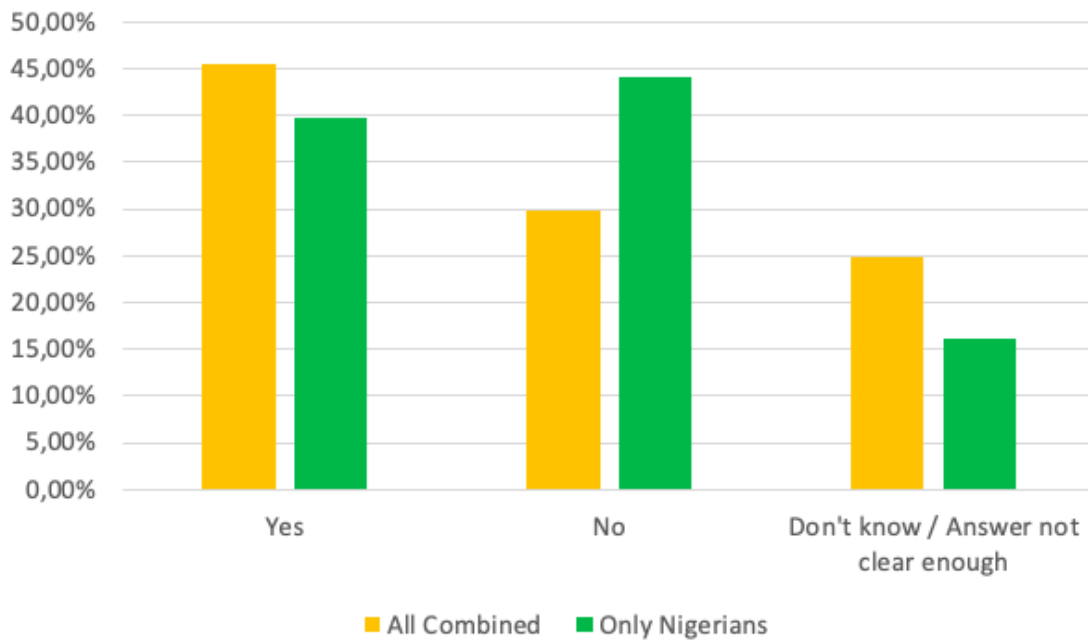


Figure 22 – Approval of the statement (source: author)

## 6.1.5 Data on SVOD platforms

### 6.1.5.1 Netflix: Usage

All respondents were asked if they used Netflix in Africa. In the case of Africans living in the diaspora, they were also asked if they used Netflix in their host country. The use of Netflix in the different African regions will not be analyzed due to the similarity of results. However, African countries will be combined between groups of developed and developing countries through development indexes, namely: HDI, GDP per capita and percentage of Internet users.

#### Results:

As we can see in Figure 23, the proportion of Netflix users in the diaspora (R=83.19%) is almost twice as high as in Africa (R=44.91%). The low proportion of Netflix users in Nigeria

(R=30.88%) is also noteworthy. In addition, Figure 24 shows that Netflix usage in Africa is more prevalent in developed countries. The margins are quite relevant as the lowest difference recorded was of 10 percentage points in GDP per Capita. Another interesting factor is the prevalence of a higher proportion of responses coming from developed countries. In conclusion, we can say that in Africa the level of development of a country influences its proportion of Netflix users.

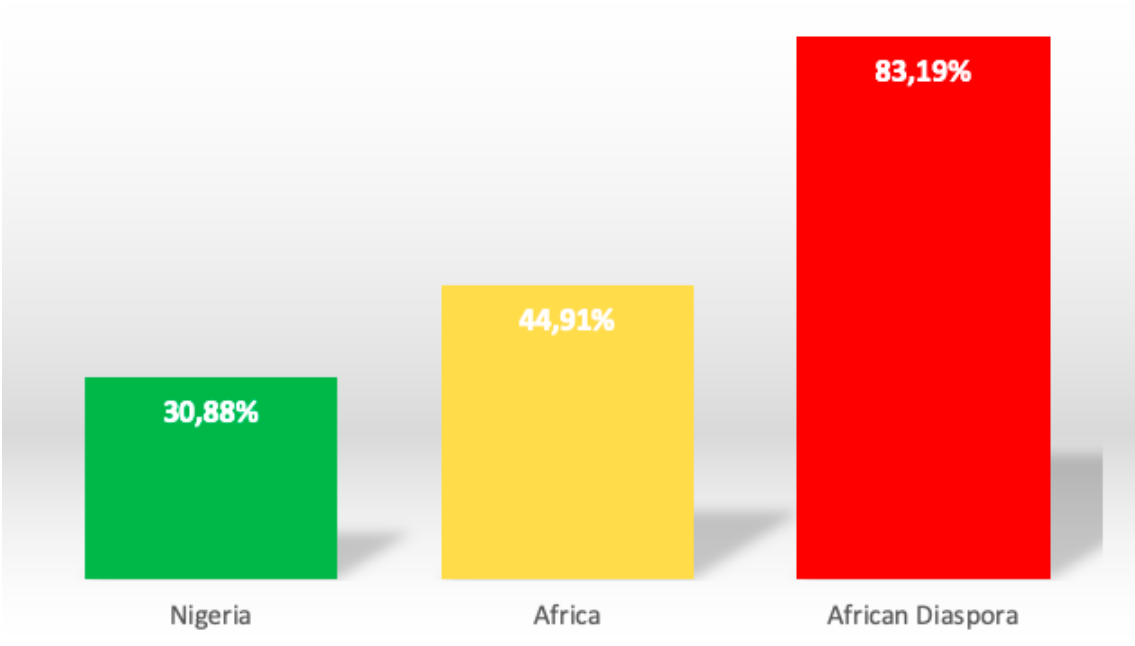


Figure 23 – Netflix usage by sample (source: author)

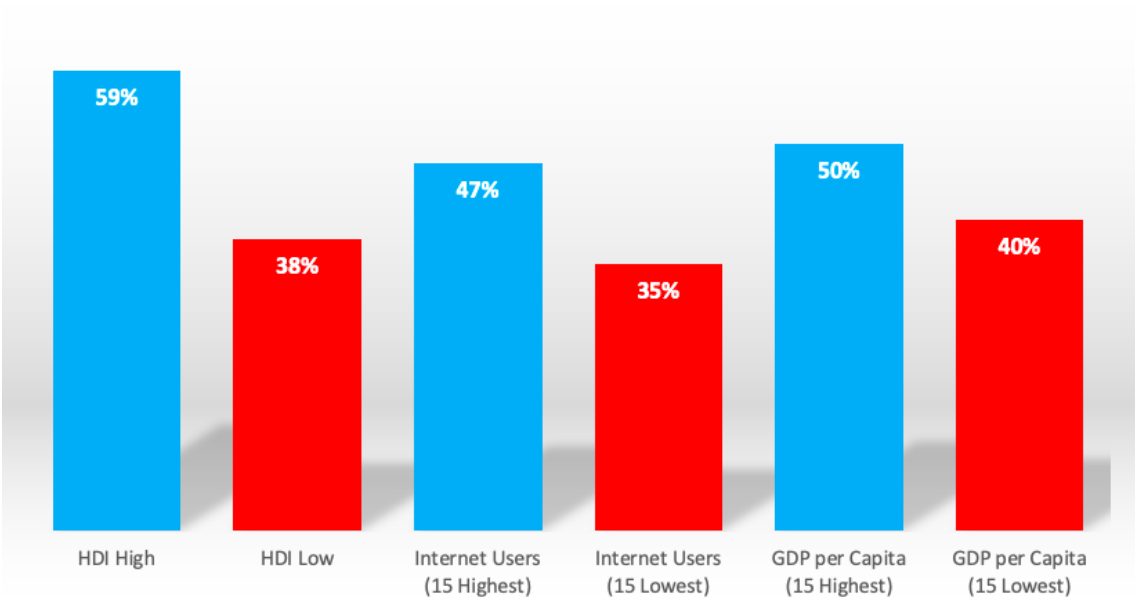


Figure 24 – Netflix usage in Africa by sample (source: author)

### 6.1.5.2 Netflix: Usage Barriers

All respondents were asked about why they do not use Netflix in Africa. This question was not mandatory and presented the options described in the Literature Review that hinder the use of the Internet and SVOD platforms in Africa. Respondents could choose as many options as they found relevant. They were also allowed to add other relevant options in the following optional question.

#### Results:

As we can see in Figure 25, only three options were mentioned in more than 15% of the respondents' answers. These were: "unaffordability of unlimited Internet package fees" (R=33.10%), "Internet too slow for Netflix" (R=31.01%) and "unaffordability of Netflix subscription fee" (R=25.09 %). Also noteworthy is the answer "don't reside in Africa since Netflix became popular" (R=13.24%), which, despite not being among the set of available options, proved to be quite recurrent among respondents living in the diaspora.

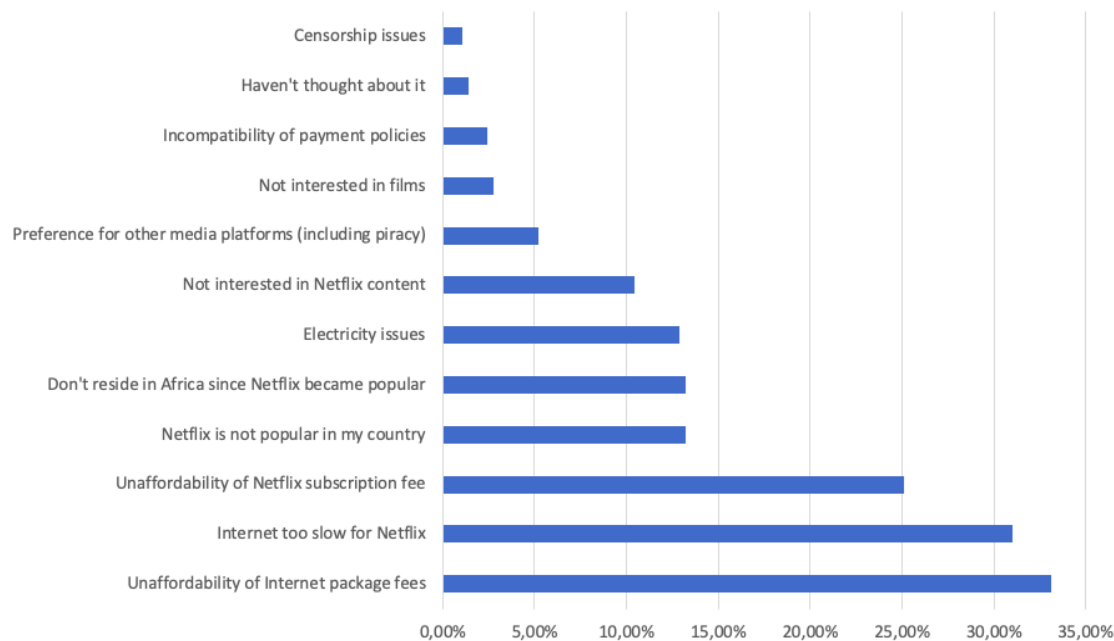


Figure 25 - Barriers for Netflix usage in Africa (source: author)

### 6.1.5.3 iROKO TV: Usage

All respondents were asked if they used iROKO TV in Africa. In the case of respondents living in the diaspora, they were also asked if they used it in their host country. As we can see in

Figure 26, the proportion of iROKO TV's use is relatively higher in the diaspora (R=18.49%) than in Africa (R=10.36%). However, the highlight goes to its notorious use among Nigerians. In addition, it is also more prevalent among Nigerians living in the diaspora (R=53,57%) than in Nigeria (R=32,35%). It is also important to note that the Nigerian audience represented a large part of iROKO TV use. If we remove the data from Nigeria, we notice that the use of this SVOD platform drops to 7,06% in Africa and 13,41% in the diaspora. In addition, the use of iROKO TV was only reported in about 40% of the African countries analyzed. These data are interesting, as they demonstrate that iROKO TV is still at a very early stage of internationalization. It is also relevant to note that this platform is still more popular among the diaspora communities despite the company's efforts to adapt services to the African market.

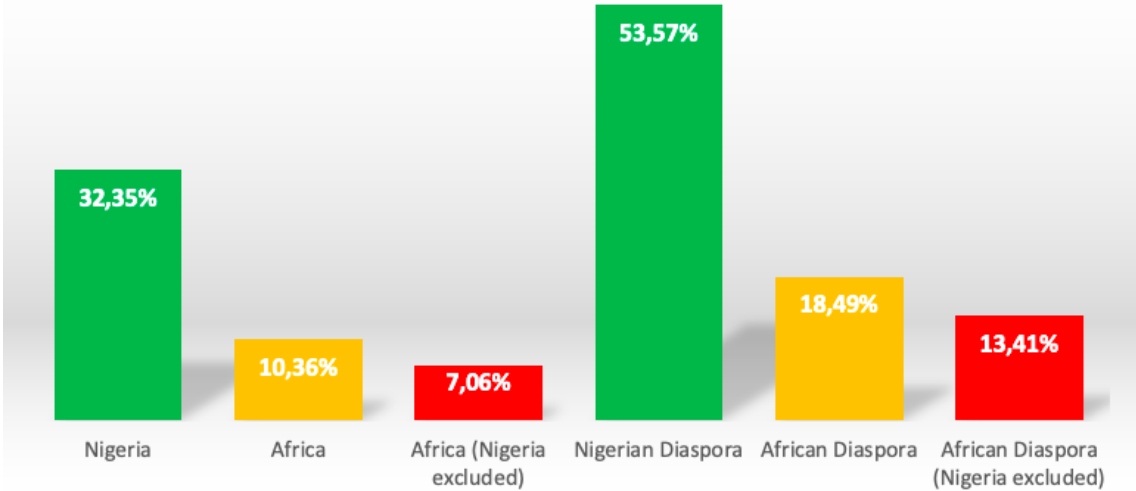


Figure 26 - iROKO TV usage by sample (source: author)

**6.1.5.4 iROKO TV: Advantages**

Respondents were asked about the advantages of iROKO TV compared to Netflix. This question was optional and had a very small number of answers (N=30).

**Results:**

As we can see in Figure 27, the 3 main reasons mentioned were "wider variety of Nollywood content" (R=50%), "cheaper subscription fees" (R=17%) and "easier to access/use" (R=13%). These three options combined accounted for 80% of the reasons described by respondents.

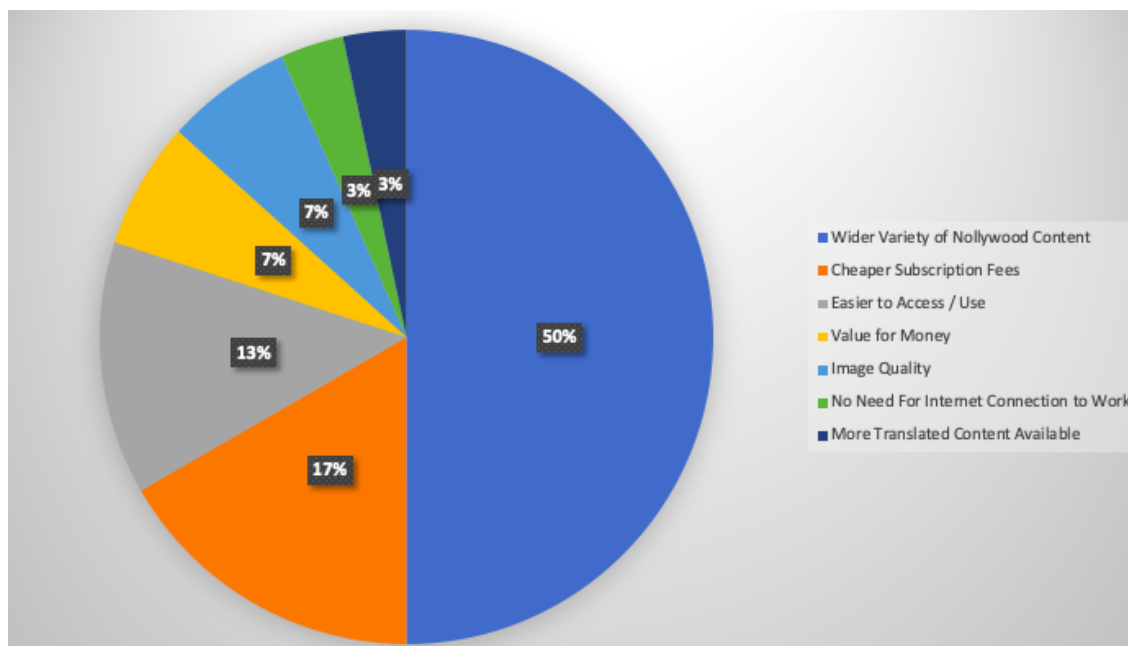


Figure 27 - Advantages of using iROKO TV compared to Netflix (source: author)

#### 6.1.5.5 Internationalization through SVOD platforms

All respondents were asked if they thought SVOD platforms were helping Nollywood to internationalize.

#### Results:

As we can see in Figure 28, answers were mostly positive with 75.05% of respondents answering “yes” and 18.62% of respondents answering “no”. The results obtained in the sample of Africans living in the diaspora were even more positive, with about 78.06% of respondents answering “yes”. These optimistic results were expected in the diaspora sample, since respondents from this sample tend to have greater purchasing power and to be more familiar with the use of SVOD platforms. Regarding the age group of respondents, those who most agreed with this assumption were between 25-39 years old (Yes=77.97%) and 40-64 years old (Yes=75.71%). The remaining age groups maintained a percentage of approval above 70%, except for the 65+ age group. Thus, we can conclude that most Africans are aware of the positive effects that SVOD platforms have on the internationalization of Nollywood.

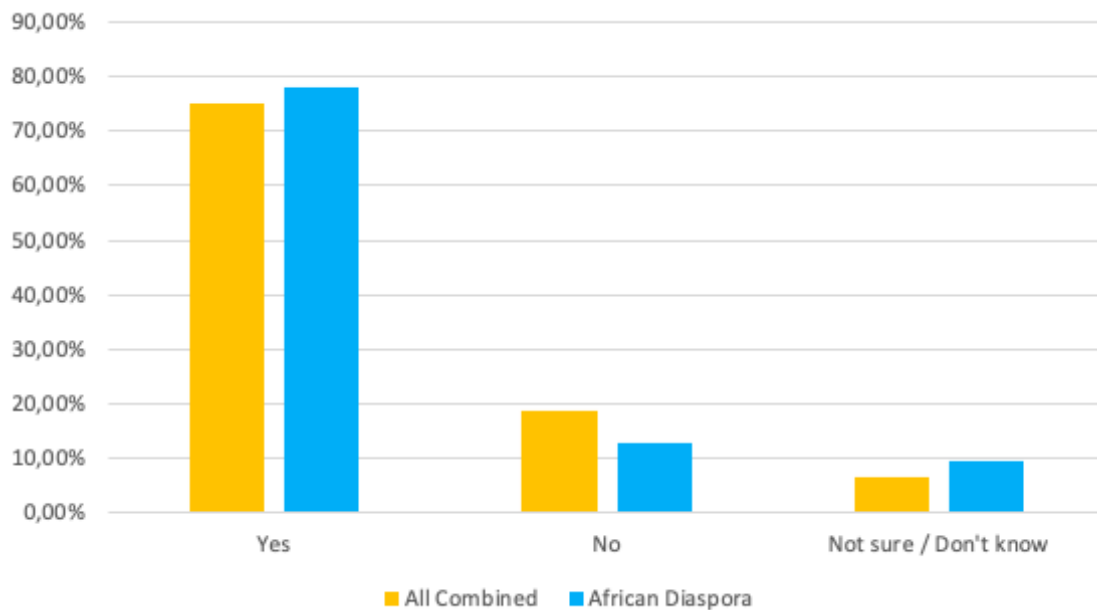


Figure 28 - Belief that SVOD platforms are helping Nollywood to internationalize (source: author)

## 6.2 Interview

### 6.2.1 Interview with Nader Sobhan

Nader Sobhan is a co-founder of iflix, one of the most popular VOD platforms in emerging Asian markets. He is an expert in entertainment and digital products, having developed several services and founded some companies in these areas. The interview with Nader Sobhan was conducted by Zoom on the topic of internationalization of SVOD platforms in emerging markets. The main conclusions drawn from the interview will be listed. The interview can be found in its entirety in the appendices.

#### Main conclusions:

- Having local content is both important and profitable. Thus, it is in the interest of any digital platform to support national film industries. However, investing in original content is more expensive than finding acquisitions;
- For a film to be successful abroad it must have a good marketing budget or else be relevant to local markets;
- Cultural, linguistic and religious barriers do not prevent the consumption of international content, since people can relate to the message and morals of the story. However, there is also a factor of "tribalism", which hinders the process of

internationalization of film industries. Tribalism is characterized by the repudiation of content from a foreign country, due to historical, diplomatic or religious reasons. Thus, what is culturally closer does not always promote greater relatability.

- SVOD platform's subscription fees and payment methods are not compatible with the African market. Services should be adapted to better respond to the consumption habits and peculiarities of local infrastructure;
- The future of SVOD platforms will be marked by the adaptation of local content for global audiences. Thus, we will see a more multicultural collection of content on SVOD platforms.

## 7 Conclusions

Following the previous findings, multiple conclusions can be drawn from this case study.

First, Nollywood consumption is more prevalent among English-speaking countries of Sub-Saharan Africa. This demonstrates that cultural relatability tends to influence a country's level of Nollywood consumption in Africa. However, cultural relatability is not fundamental for a film's international success. Global audiences can connect with human stories that transcend the culture and language represented in films. Thus, Nollywood's cultural specificity does not hinder its international success.

Second, Nollywood consumption is more prevalent in the diaspora. The greater popularity of the industry among Africans in diaspora seems to be related to several factors, including: a more conventional use of digital platforms in developed (host) countries, a need for these communities to connect with their home countries and the recent Nollywood strategy to target the diaspora market.

Third, the use of SVOD platforms in Sub-Saharan Africa is rare. These services are exclusive to the elites, as the precarious infrastructure and low wages on the continent do not allow for their conventional use. They also tend to be more popular in more developed African countries. Thus, SVOD platforms must follow a strategy of adapting their services to the African market in order to become more popular on the continent.

Fourth, Nollywood was born out of the video revolution and has internationalized largely due to digital platforms. However, Nollywood's future remains uncertain. On the one hand, Nollywood is having enormous success in Sub-Saharan Africa and among the African diaspora, being described as the first representation of African popular culture on video. On the other hand, it is unlikely to reach the Hollywood level, as it lacks the funding and marketing budgets of American films. In addition, younger generations seem to be less interested in Nollywood films which is also a discouraging indicator about Nollywood's future.

Fifth, global and local content do not compete for media space. They both complement an audience's need for entertainment consumption. Thus, the consumption of international content will never replace the consumption of local content. Furthermore, obtaining local content is a critical step for SVOD platforms to ensure their popularity in different markets.



## **8 Limitations**

The limitations associated with this paper are mainly related to the data collected in the questionnaires. The vast majority of these questionnaires were published in African or African diaspora groups on social networks, namely Facebook and Reddit. Thus, it is important to reflect a possible bias in responses at various levels:

- A large part of the African population does not speak the official European business language of their country. Thus, those who answered the questionnaire tend to be from a higher social class. In addition, many of those who answered the questionnaires for the group of Africans in Africa must actually reside in the diaspora, where European languages are more widely spoken
- A large part of the African population does not have access to the internet and does not use social networks. Thus, those who answered the questionnaire tend to be from a higher social class. In addition, many of those who answered the questionnaires for the group of Africans in Africa must actually reside in the diaspora, where internet activity is more common;
- Most responses come from African countries with higher levels of HDI, GDP per capita, and Internet penetration. Therefore, responses tend to be biased to the extent that they present a large sample coming from more developed African countries;
- I assume that many of those who do not know Nollywood have avoided answering the questionnaire or gave up responding in the middle of it. Therefore, Nollywood consumption figures will tend to be higher than the reality.

## 9 References

- Aguiar, L., & Waldfogel, J. (2018). 'Netflix: Global Hegemon or Facilitator of Frictionless Digital Trade?', *Journal of Cultural Economics* 42(3), 419-445.
- Dovey, Lindiwe (2018). 'Entertaining Africans: Creative Innovation in the (Internet) Television Space.' *Media Industries*, 5 (2). pp. 93-110.
- Endong, F. P. C. (2017). Nollywood in Cameroon: Transnationalisation and Reception of a Dynamic Cinematic Culture. *CINEJ Cinema Journal*, 6(2), 129-143.
- Georgiou, Myria (2012). *Watching soap opera in the diaspora: cultural proximity or critical proximity?* *Ethnic and Racial Studies*, 35 (5). pp. 868-887. ISSN 0141-9870
- Haynes, Jonathan (2007). 'Nollywood in Lagos, Lagos in Nollywood Films', *Africa Today*, 54, 2, 130–150.
- Haynes, Jonathan (2007) 'Video Boom: Nigeria and Ghana.' *Postcolonial Text*, 3(2), 1-10.
- Haynes, Jonathan (2011). 'African Cinema and Nollywood: Contradictions', *Situations: Project of the Radical Imagination* 4(1): 67-90.
- Haynes, Jonathan (2014). "'New Nollywood": Kunle Afolayan', *Black Camera*, 5, 2, 53–73.
- Jedlowski, Alessandro (2011). 'When the Nigerian video film industry became "Nollywood": Naming, branding and the videos' transnational mobility' *Estudios Afro-Asiaticos* 33(1,2,3): 225-251.

- Jedlowski, Alessandro (2013). 'From Nollywood to Nollywood: Processes of Transnationalization in the Nigerian Video Film Industry', in Matthias Krings and Onookome Okome (eds) *Global Nollywood and Beyond: Transnational Dimensions of an African Video Film Industry*. Bloomington: Indiana University Press, 25–45.
- Kende, M., & Quast, B. (2016). 'Promoting content in Africa.' Retrieved from Internet Society website: <https://www.internetsociety.org/wp-content/uploads/2017/08/Promoting20Content20In20Africa.pdf>
- Leaman, Oliver (2001) *Companion Encyclopedia of Middle Eastern and North African Film*. London and New York: Routledge.
- Lobato, R. (2019). '*Netflix nations: The geography of digital distribution*'. New York, NY: New York University Press.
- McCall, J. C. (2004). 'Nollywood Confidential: The unlikely rise of Nigerian video film.' *Transition Magazine*, 95, 98–109.
- Murphy, David (2000). 'Africans filming Africa: Questioning theories of an authentic African cinema.' *Journal of African Cultural Studies* 13 (2): 239-49.
- Okome, O. (2007). 'Nollywood: Spectatorship, Audience, and the Sites of Consumption.' *Postcolonial Text* 3 (2): 1–20
- Onuzulike, U. (2007), 'The birth of Nollywood: The Nigerian movie industry', *Black Camera*, 22(1), 25-26.
- Russell, Sharon (1998). *Guide to African Cinema*. Westport: Greenwood Press.
- Ryan, Connor (2015). 'New Nollywood: a Sketch of Nollywood's Metropolitan New Style.' *African Studies Review* 58(3):55–76.

- Saul, Mahir, and Ralph Austen (2010). *‘Viewing African Cinema in the Twenty-First Century: Art Films and the Nollywood Video Revolution’*. Athens: Ohio University Press.
  
- Uzo, U., & Mair, J. (2014). Source and patterns of organizational defiance of formal institutions: Insights from Nollywood, the Nigerian movie industry. *Strategic Entrepreneurship Journal*, 8, 56–74.

## 10 Appendices

### Interview with Nader Sobhan

Nader Sobhan is a co-founder of iflix, one of the most popular VOD platforms in emerging Asian markets. He is an expert in entertainment and digital products, having developed several services and founded some companies in these areas. The interview with Nader Sobhan was conducted by Zoom on the topic of internationalization of SVOD platforms in emerging markets. The questions addressed to Nader Sobhan will be listed and followed by his responses as well as a brief discussion on the topics.

**Question 1:** Was iflix's strategy to support national film productions in a variety of different countries?

- **Answer:** "Local content is important. You can build a service with some level of international funfair, but people want their own stories. I would warrant that a lot of services are very keen on supporting local content but not many of them have the budgets to be able to do so. Rather than buying or commissioning a lot of originals, you find acquisitions is kind of the general trend. (...) So, of course they want a healthy local market, because a healthy local market helps them as well. But they also want to think about themselves. They would rather be the only outlet for local content than being one of many. (...)"
- **Discussion:** Having local content is both important and profitable. Thus, it is in the interest of any digital platform to support national film industries. However, investing in original content is more expensive than finding acquisitions. Therefore, companies will always choose the most profitable option depending on their budgets.

**Question 2:** Who do you think has more influence in the internationalization process of a film industry: the film studios (creators of the content) or the dissemination platforms such as SVOD, VOD and social media?

- **Answer:** "It depends. You look at Hollywood movies (...) the big blockbusters that spend hundreds of millions of dollars. You know, half of their budget is just on marketing (...). Now, this has changed somewhat with the streaming services. They have found that yes international content works but for a continuous engagement of viewers, they need more local content. (...) if you want the big mass market in emerging markets, you need local languages, you need local content."

- **Discussion:** Film studios are responsible for creating quality content and promoting it through marketing campaigns. SVOD platforms promote movies according to local tastes and demand. For a film to succeed abroad it must have a good marketing budget or else be relevant to the local markets.

**Question 3:** Sudanese people seem to be more interested in Bollywood than Nollywood (of which they are mostly unaware). However, as a Sub-Saharan African country, Sudan tends to be culturally closer to Nigeria than to India. How can you explain this? Isn't relatability the main key for internationalization?

- **Answer:** "What you have in Africa is this strong tribalism, and so something that might be closer in geography maybe further away because of reaction to it (...). They don't want that Nigerian content being pushed out them. In Uganda, for example, Korean content is exceptionally popular. Sometimes the global story connects more deeply than something that looks similar but it's actually culturally divergent. (...) the human story is the human story, you'll see it across the borders. A good human tale can be told in a variety of different ways and people connect to that."
- **Discussion:** On the one hand, relatability is not exclusive to local content as it can be present in the message of the story. The message is usually transversal to cultural, linguistic and religious barriers. On the other hand, there is a factor of "tribalism" that hinders the process of internationalization of film industries. Tribalism is characterized by the repudiation of content from a foreign country, due to historical, diplomatic or religious reasons. Thus, what is culturally closer does not always promote greater relatability.

**Question 4:** Given the low internet penetration and infrastructure in Africa, which strategies should SVOD platforms adopt to expand and prevail in the continent?

- **Answer:** "Data packages are quite extraordinarily expensive for the average person. Sometimes studying the viability to pay or even the viability to access the platforms is important. So, one thing that iflix did that now many services have, was to watch and download offline."
- **Discussion:** Services should be adapted to better respond to the consumption habits and peculiarities of local infrastructure.

**Question 5:** What are your views for the future of SVOD platforms presence in Africa?

- **Answer:** “I think that we’ve always considered Africa as an amazing opportunity. (...) the problem is that a lot of people are going to struggle with payments. Even two years ago, you struggled to find SVOD platforms that could do weekly payments. Whereas, actually in Africa you need daily payments, you need daily packages, you need absolutely the smallest fraction possible. You need a way to make sure that the cost for subscription is absolutely minimal, which makes it extremely hard (...).”
- **Discussion:** Most Africans cannot afford SVOD platforms subscription fees. The payment model provided by these platforms is not adequate for the African market. SVOD platforms need to adapt their strategy in order to be more competitive in the African market.

**Question 6:** Do you think SVOD platforms future is towards a multicultural approach?

- **Answer:** (...) there was this category, the Nordic thriller that suddenly become super popular. You will have these genres coming out (...) and suddenly everybody was doing these Nordic thrillers. So, you do see these phenomena of internationalization. What I think is that with the global platforms now. What you see with Netflix for example, is that they are creating certain local content but it’s more like local-global content. You look at Dark, the German show, and yes, it’s made for Germany but is not purely made for the German users. It’s made for a global user and (...) that’s where there’s an opportunity. Otherwise, everyone would give up and say “Hey, let the global players take all of it”. No, there is a lot of content available, there is a lot of interesting matching that needs to be done. It’s not about what is the best content for everyone, it’s what’s the best content for the right person at the right time!”
- **Discussion:** The future of SVOD platforms will be marked by the adaptation of local content for global audiences. Thus, we will see a more multicultural content collection on SVOD platforms. However, the increase in local content on SVOD platforms will affect the authenticity of the content, as it will be adapted to please global audiences.