



A NEXT NARRATIVE AFRICA FUND REPORT IN

PARTNERSHIP WITH PARROT ANALYTICS



FROM
TO

INFLUENCE INVESTIBLE

Quantifying Global Demand, Travelability & Investment Opportunity

Executive Summary

From Cultural Influence to Investible Opportunity

Next Narrative Africa Fund (NNAF) is a \$40M commercial content fund, paired with a \$10M Venture Studio, created to accelerate the global scale of African and diasporan storytelling.

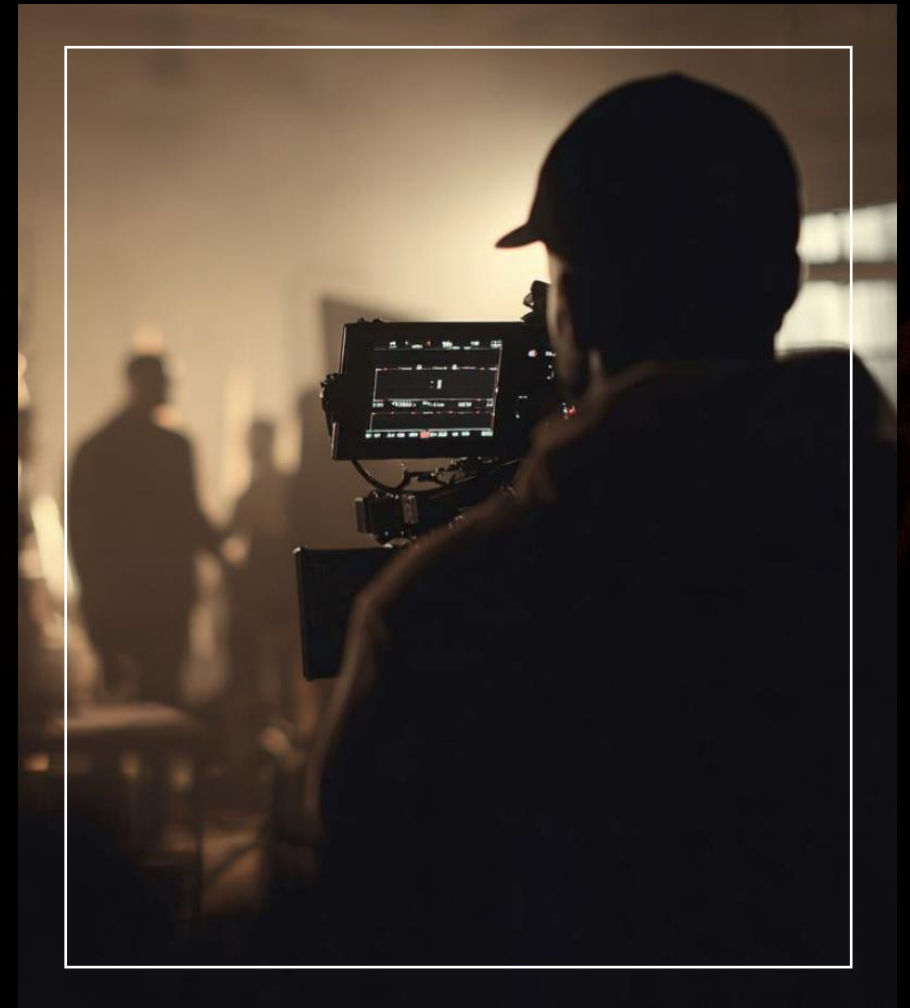
In March 2026, NNAF announced its inaugural slate of projects, selected from more than 2,000 submissions from creators around the world. Alongside the slate announcement, NNAF is releasing this landscape study in partnership with Parrot Analytics to test a central investment thesis:

African and diasporan storytelling on screen represents one of the most undervalued asset classes in global entertainment.

This study moves beyond anecdotal evidence to quantify the investment opportunity using global audience demand data, cultural signals, and cross-market analysis.

Across every module of the research, the data points to the same conclusion:

The global audience infrastructure already exists. The supply of African stories has not yet caught up.



Executive Summary

The Global Arbitrage: Demand Is Outpacing Supply

Over the past five years, global demand for African and diasporan stories has accelerated across multiple markets simultaneously. The United States represents the largest share of global demand at 8.7%, illustrating the broad distribution of consumption across international markets and reinforcing the global audience for African storytelling. The top consuming markets span four continents, including the United Kingdom, South Africa, Canada, France, Brazil, and China.. At the same time, demand is running ahead of supply in key categories. Non-English African stories represent 28% of audience demand but only 16% of available supply, revealing a clear structural gap within the global streaming ecosystem.

This imbalance illustrates the core arbitrage opportunity: global audiences are already engaging with African stories at scale, but the industry has not yet invested proportionately in producing them. Looking at supply and demand by genre reveals untapped opportunities in the market. While Drama accounts for the largest share of overall demand (18%), several globally scalable genres - including Action, Crime, Adventure and Children & Family - demonstrate demand levels that exceed their relative supply compared to the global content baseline, indicating a structural opportunity for African storytelling within commercial genres that drive global streaming demand.



Executive Summary

Travelability: African Stories Already Move Across Borders

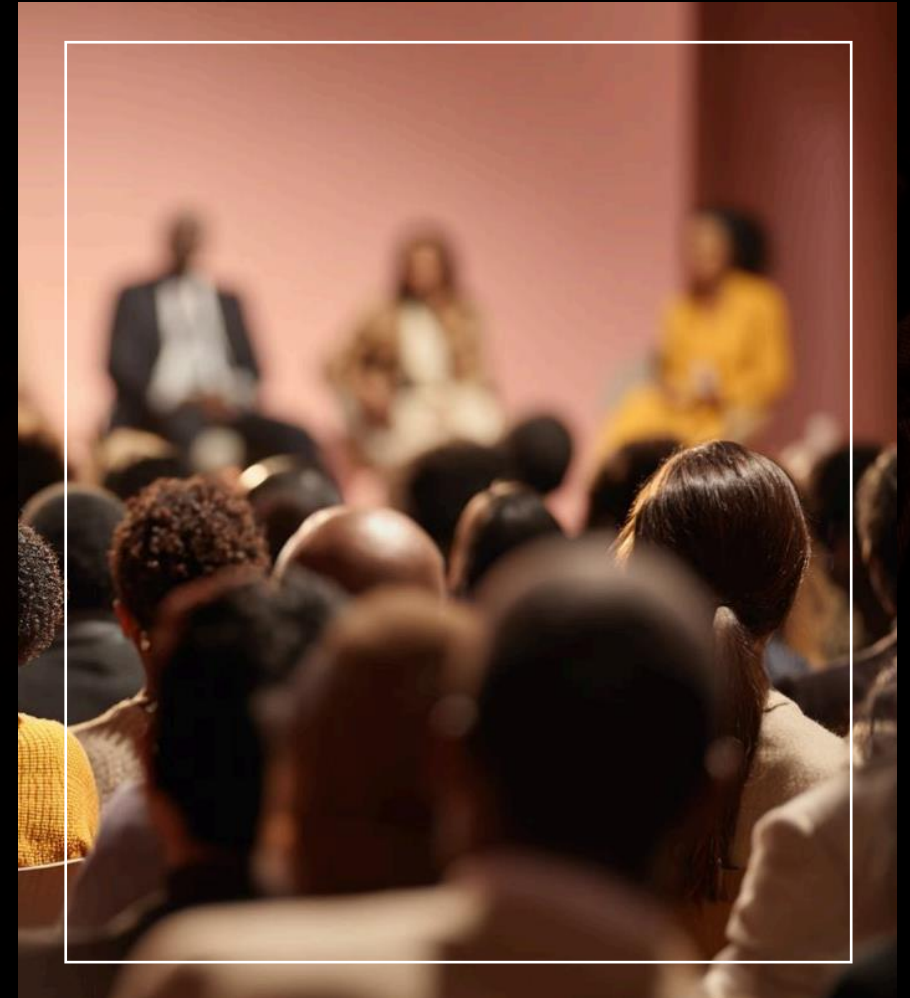
One of the central questions of the study is whether African storytelling travels beyond its origin markets.

The data shows that it does - and often through diaspora discovery before reaching mainstream audiences. Markets such as Belgium and Portugal over-index strongly for African content consumption, driven by culturally connected diaspora communities.

At the same time, strong demand is emerging in markets both within and beyond traditional diaspora corridors. Countries such as Brazil - which shares deep historical and cultural ties with Africa - alongside markets like China, illustrate how audience appeal is expanding well beyond the continent itself.

Within Africa and the Caribbean, African and diasporan stories already account for over 60% of demand compared to other global import cohorts, including Korean, Japanese, and Turkish content.

Taken together, these signals demonstrate that African storytelling is not a regional niche - it is a traveling global format



Executive Summary

The Bridge Audience: Cultural Validators Drive Crossover Success

The study also tests the “Bridge Audience” hypothesis as to which audiences validate African content before it breaks into the mainstream.

The data identifies a clear leading indicator. Black American women consume Black-led content at roughly six times the rate of the U.S. general population, making them the single most predictive audience segment for crossover success.

Titles that first break through within this audience consistently go on to achieve wider cultural and commercial reach.

Black American men play a complementary role, particularly as early adopters of non-English African storytelling, helping expand reach beyond English-language titles.



Executive Summary

Music provides one of the clearest bridges from culture to screen. For example, the documentary *Wizkid: Long Live Lagos* achieved 9× average demand globally, placing it within the top 3% of titles worldwide. Within the music documentary category, this positions the film alongside projects featuring globally recognized artists such as *Avicii: I'm Tim* (7×), *Justin Bieber: Our World* (6×), and *Moonage Daydream* (6×), and approaching the performance range of titles like *Olivia Rodrigo: Driving Home 2 U* (12×) and *I Am: Celine Dion* (19.1).

This comparison highlights how African music IP is already competing within the same global demand ecosystem as major international music documentaries, reinforcing the role of music as a powerful gateway for African storytelling to reach global audiences.

Audience behavior further reinforces this cultural pipeline. Black American women index 4× higher than the U.S general population in their affinity for Black-led cultural festivals, with Black American men indexing 3× higher.

Festivals such as *Essence Festival*, *AfroPunk*, *Coachella*, and *ONE MusicFest* frequently serve as cultural launchpads, where music, fashion, creators, and storytelling converge before influencing wider media consumption patterns



Executive Summary

Proof in Market: The Blueprint

The final module of the study analyzes a reference comp set of globally recognized African and diasporan titles, spanning global hits, streaming series, and independent prestige films.

Across the reference comp set, top-performing titles achieve demand multiples exceeding 50 times the market average, placing them within the top 0.2% of all titles measured worldwide.

The results demonstrate that the commercial model is already proven across multiple formats and platforms.

Films such as *The Woman King* and series such as *Blood & Water* have generated over \$100M in combined streaming revenue, demonstrating the commercial viability of African storytelling at scale.

Meanwhile breakout titles such as *Sinners* have reached 54× the demand of the average title

Audience sentiment analysis across the comp set also reveals consistently strong positive reception, particularly around authenticity, representation, and genre ambition.



Executive Summary

For example:

- Black Panther achieved the #1 peak domestic demand rank and #1 peak global demand rank, demonstrating the global breakout potential of African-inspired storytelling.
- Sinners achieved #1 peak domestic demand and #1 peak all-time demand within the cohort, praised for its genre-blending storytelling and cultural allegory.
- The Woman King reached #5 peak domestic demand and #22 peak global demand, placing it among the strongest performing historical dramas in Parrot Analytics' demand distribution.
- Blood & Water became the #1 domestic African series, proving the global streaming potential of Africa-set stories with universal themes.
- Independent titles such as Atlantics and Mami Wata earned major international recognition at Cannes and Sundance, demonstrating that African storytelling resonates not only commercially but critically.

Across key comps - including Black Panther, Sinners, The Woman King, American Fiction, Supacell, Blood & Water, Young Famous & African, King of Boys, Fatal Seduction, Shaka iLembe, Atlantics, The Black Book, and Mami Wata - the analysis reveals a consistent pattern of success.



Executive Summary

The Investment Opportunity

Taken together, the findings point to a clear conclusion.

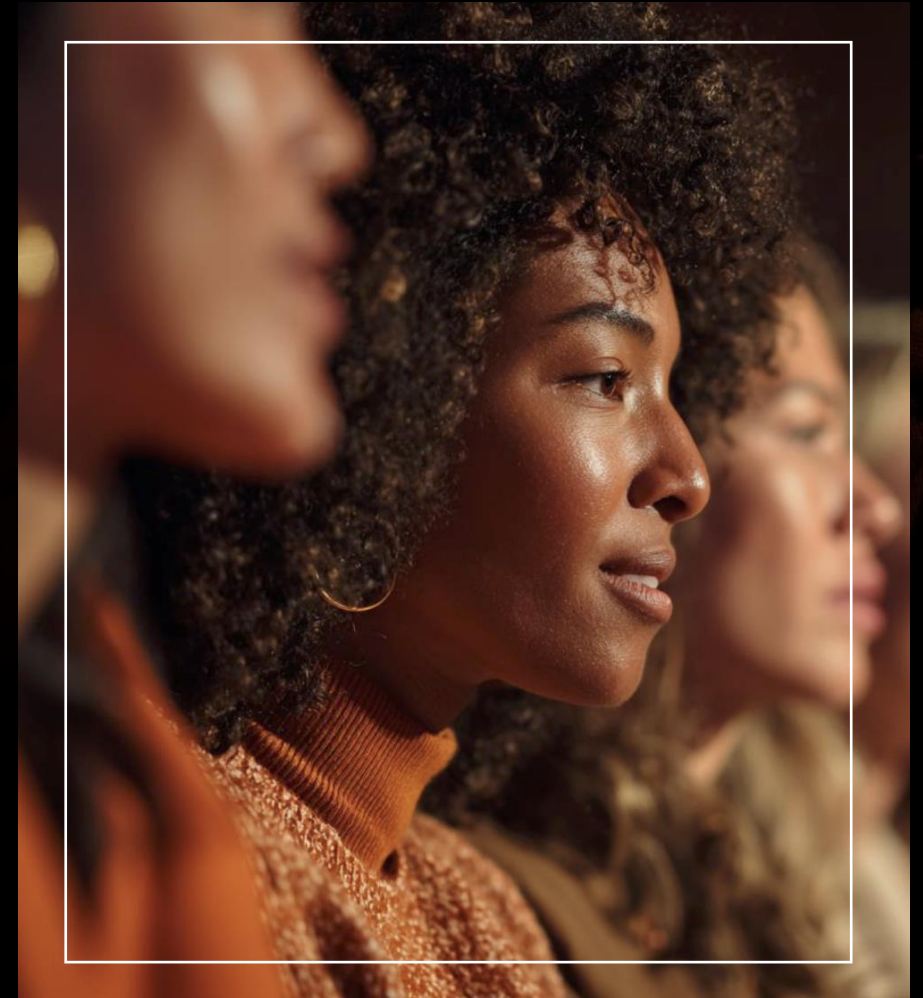
Global demand for African storytelling is already established and expanding, supported by diaspora networks, music-driven cultural momentum, and identifiable audience validators.

Yet the global supply of African content - particularly across high-demand genres and non-English languages - remains structurally constrained.

This imbalance creates a rare moment of creative and financial arbitrage.

- The audience infrastructure exists.
- The cultural momentum is accelerating.
- The commercial proof points are already visible.

The key factor defining the next phase of growth is who invests early enough to scale the opportunity.



Executive Summary



The strongest-performing titles share five common characteristics: Cultural authenticity and linguistic integrity, often incorporating African languages and locally grounded narratives.

- High travelability across markets, with demand expanding beyond origin territories into diaspora and mainstream global audiences.
- Narratives that move beyond stereotypes, portraying African characters in aspirational or globally relatable settings.
- Genre ambition, blending local storytelling with globally scalable formats such as action, thriller, and prestige drama.
- Strong female agency and character-driven storytelling, a recurring driver of audience resonance across both film and television.

African storytelling is not an emerging category - it is already producing globally competitive hits.

How to Read This Study

African stories are traveling across borders through anecdote, festival circulation, and isolated breakout moments. Across multiple markets, audiences are generating measurable patterns of discovery, engagement, and repeat demand. This study is designed to make those patterns visible to serve as a practical starting point; a framework for investors, distributors, and creators deciding where to place their attention, capital, and conviction.

The study measures digitally expressed audience demand and travelability for African and diasporan film and television across markets from 2020 through 2025. It combines those signals with title metadata, audience segmentation, and scenario modelling to identify where African stories are finding audiences, which viewer communities help them scale, and where current supply appears misaligned with audience appetite.

Where this report references music, creator-economy signals, or selected global benchmark titles, it does so to contextualize



audience formation and crossover dynamics around African stories; those adjacent indicators are not substitutes for the report's core film and television analysis.

The purpose of the study is practical. It highlights where demand over-indexes, which markets act as bridge territories, how language shapes cross-border reach, which genres show unmet audience appetite, and which audience segments appear most likely to validate breakout potentially early.

In that sense, the report should be read as decision support: a structured way to move from cultural momentum to investible insight.

It should also be read with clear boundaries. This is not a census of the entire African screen economy, nor does it claim equal measurement depth across every territory.

Digitally expressed demand is not the same as box office receipts, acquisition prices, licensing fees, or audited financial performance.

Used appropriately, the value of this study is substantial. It does not flatten Africa into a single market or promise perfect foresight.

It offers something more useful: a comparable cross-market framework for understanding where African and diasporan stories are already gaining traction, how that traction travels, and where smarter development, distribution, and investment decisions can be made with greater confidence than intuition alone.



WHAT THIS STUDY IS:

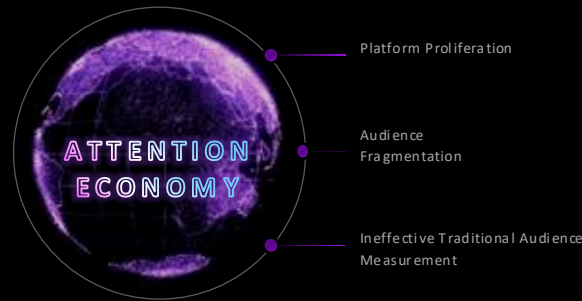
- A cross-market view of digitally expressed audience demand
- A travelability and audience-discovery framework
- A genre, audience, and title-positioning tool
- A decision-support input for investment and development

WHAT THIS STUDY IS NOT:

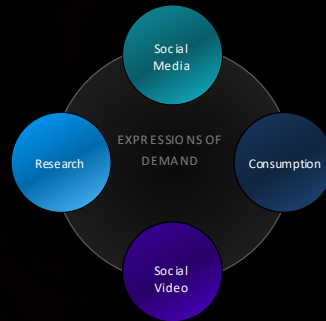
- A census of all African screen content
- A disclosure of private licensing or acquisition terms
- An audited revenue or box office report
- A statement of confidence about every market on the continent

METHODOLOGY

Understanding DEMAND



TIME & ATTENTION ARE A FINITE RESOURCE



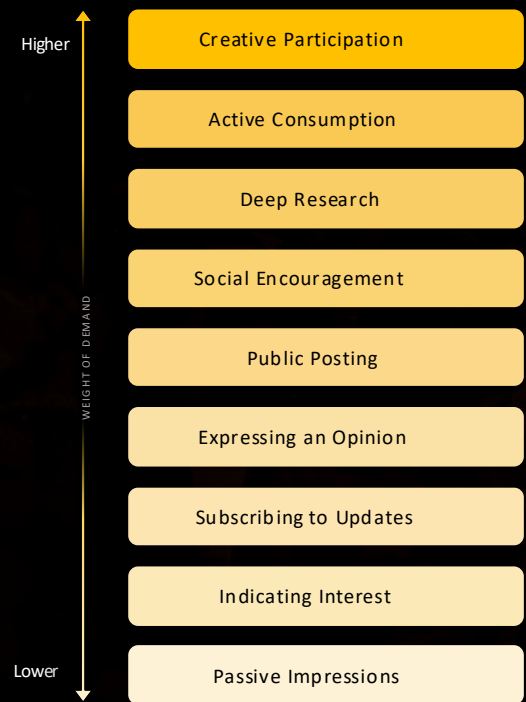
CONSUMER JOURNEY IS MUCH MORE COMPLEX THAN BEFORE

We capture the behavior of 2 billion consumers around the world

We clean, enrich, and combine all digital signals users emit for content into a single metric and weighting by the time and effort it takes for each interaction

We provide the world's only global audience demand measurement system quantifying the value of content, talent & all forms of IP

DEMAND SYSTEM:



Parrot Analytics' comprehensive entertainment analytics system captures the world's largest audience behavior dataset. We extract the signals from the noise to deliver the first globally standardized measurement of audience demand for all markets, in all languages and across all platforms and devices. Now for the first time ever, it is possible to value a piece of content, sports or IP with a precise \$ value figure for each title, service and market.

Our technology quantifies global consumer demand for TV, movies, talent and sports. billions of people interact with content and talent each month and Parrot Analytics systems collect and analyze the activities, interactions and behaviors from over 2 billion people every day, which includes exclusive first-party consumption datasets from hundreds of millions of households globally as well as hundreds of millions of households' search, posts, reading and social interactions activity.

The **NNAF** Cohort

Despite surging global appetite for Black storytelling, content originating from Africa remains vastly underrepresented in the streaming landscape. Recognizing that Black and African narratives have long travelled beyond their source — carried through diaspora communities across the US, U.K., and beyond — we identified every title in Parrot Analytics' global database featuring African, Black, or diasporan stories. These titles, spanning continent and diaspora alike, form the NNAF Cohort at the center of this analysis. Thus, the NNAF Cohort is defined by story, not by geography.



All Content in Parrot Analytics' Database →

750 titles were examined as part of the NNAF Cohort — above is a snapshot of the type of content captured from Parrot Analytics' content database, spanning TV & Film



The Opportunity is Already Here.

While these stories have long travelled internationally, more are now cutting through mainstream audiences than ever before, with the United States continuing to lead overall consumption.

This report draws on Parrot Analytics' global demand and audience behavior data, developed in partnership with Next Narrative Africa Fund, to examine where African stories are watched, which markets over index, and how engagement has evolved from 2020 to 2025.

The findings point to steady and sustained growth. African and diasporan stories are reaching wider audiences, building deeper engagement, and strengthening their position within the global entertainment landscape

DOES NNAF COHORT CONTENT TRAVEL?

Who Drives Its Global Movement First?

Which non-African markets have the highest organic demand for African stories?





It Travels. The Question Is How Far.

The global reach of African and diasporan content is becoming increasingly visible, with growth concentrated in a number of key markets. Belgium, The U.K., and France currently rank highly outside the continent.

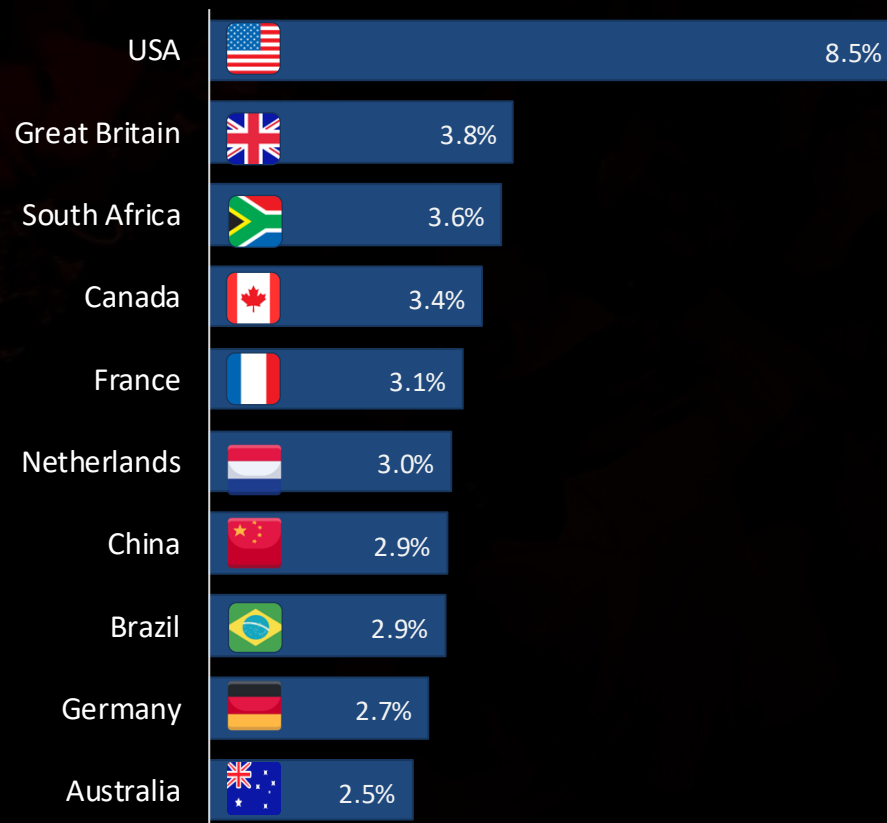
Diaspora communities across Europe often support early discovery and engagement, while North America remains an important market for scale and commercial impact.

This section explores where African stories tend to find their first international audiences, which viewer communities help extend their reach, and how language can influence how far a title travels beyond its home market.

The U.S. Leads, but Demand is Spreading

The top 10 NNAF markets span four continents, proving these stories are building global audiences, not just diaspora ones

NNAF COHORT GLOBAL DEMAND SHARE TOP 10 MARKETS

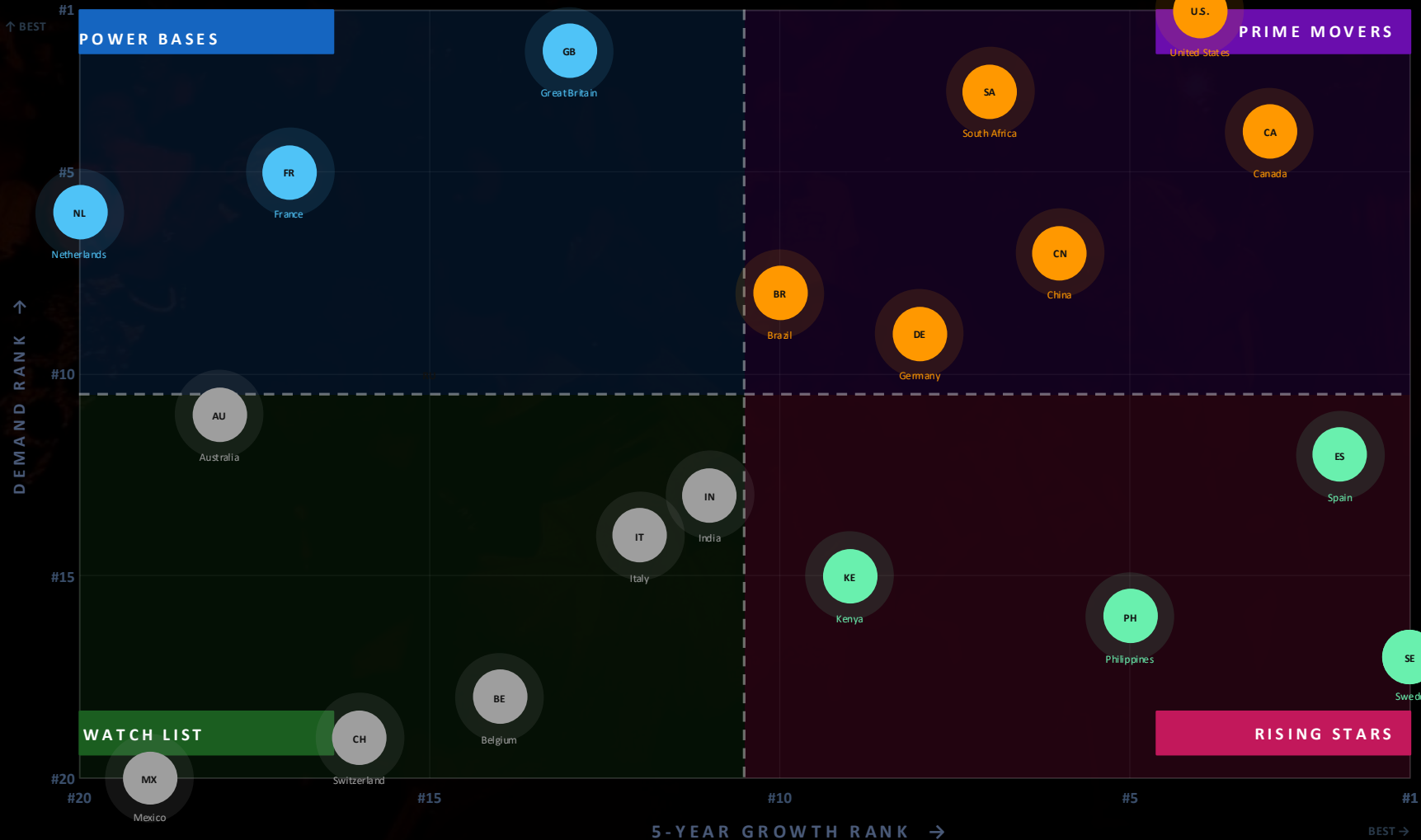


The United States accounts for the largest single share of global demand for African and diasporan content, but more than 90% of audience activity now originates outside any one market. From the U.K. and South Africa to France and Brazil, a widening set of territories is driving discovery and sustained engagement.

The top markets include territories with no historical or linguistic ties to the African continent (such as China). This signals that audience interest is extending well beyond culturally proximate corridors and into mainstream global viewership. European markets like France and the Netherlands reflect the pull of established diaspora communities, while markets such as Brazil point to the growing weight of the Global South in shaping demand. The tightness of the cluster below the U.S. — with six markets packed between 2.6% and 3.8% — suggests a broad, distributed base of demand rather than dependency on a handful of lead territories.

Strong Demand, Fast Growth: The Markets Where NNAF Content Has the Most to Gain

Market Opportunity Matrix



HOW TO READ THIS CHART

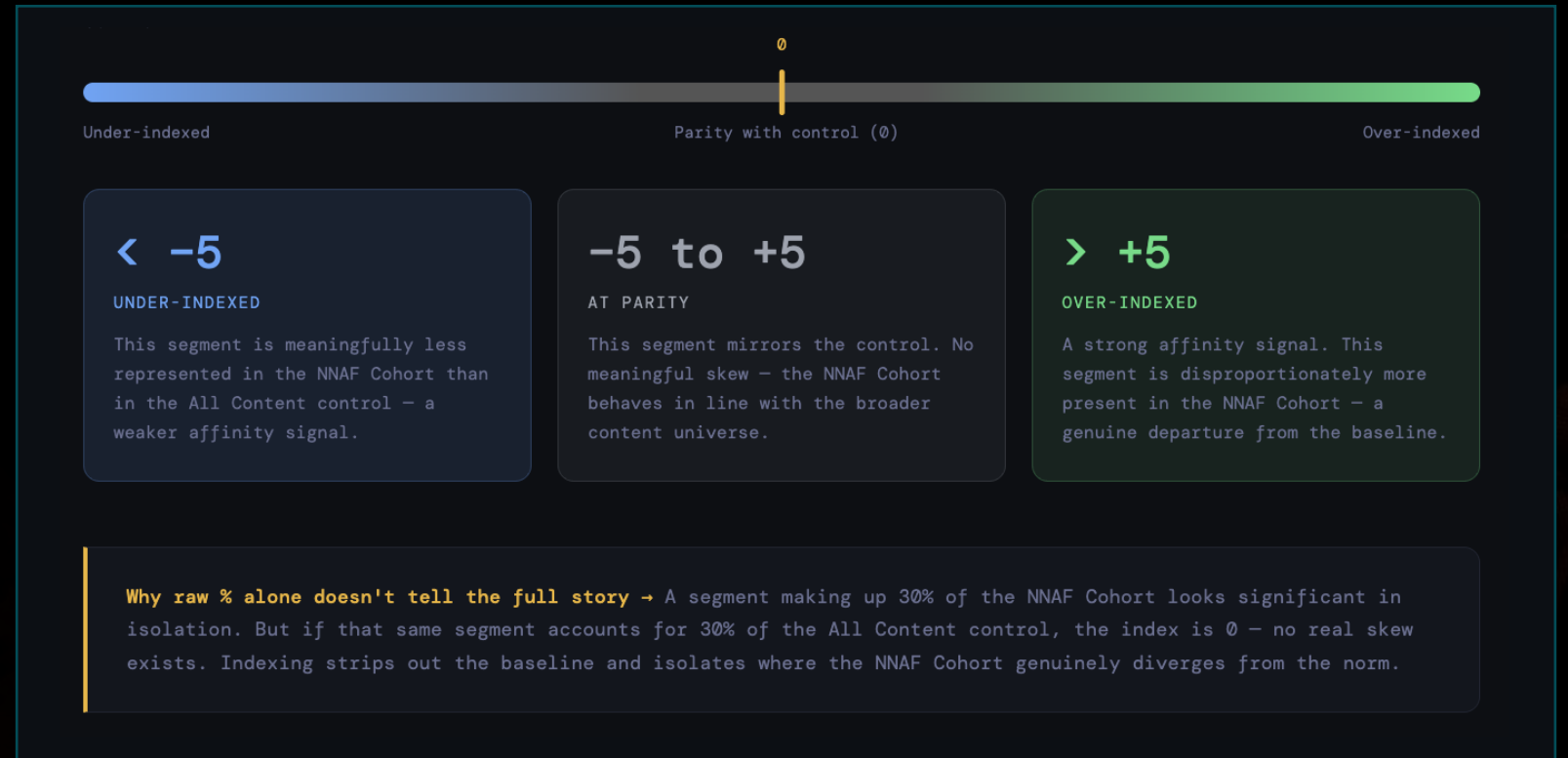
Each market is plotted on two axes: demand rank (vertical) and five-year growth rank (horizontal). Markets closest to the top-right lead on both. The four quadrants — Prime Movers, Power Bases, Rising Stars, and Watch List — emerge from where each market naturally falls across those two dimensions.

What stands out is the composition: meaningful NNAF demand exists across established markets, fast-growing emerging economies, and African territories simultaneously — pointing to an audience that is genuinely global in its distribution.



Understanding the Market Index

How indexing the *NNAF Cohort* against the *All-Content* control surfaces genuine audience skew - not just raw demand share.



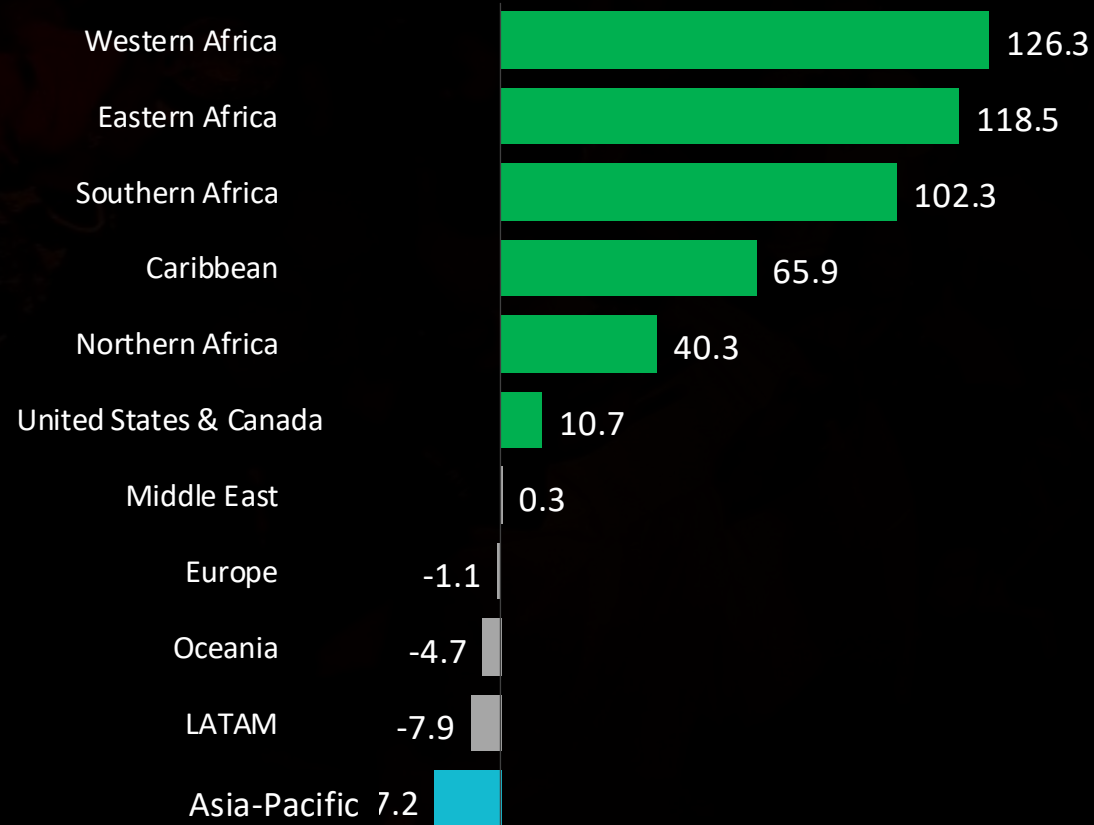
What The Index Tells You:

The baseline is always 0. Any deviation signals meaningful over- or under-representation relative to the All-Content control.

The Diaspora Recognizes Itself

Across every African region, NNAF content is the preferred choice relative to all content available

REGIONAL NNAF COHORT INDEX



Western Africa (index +126) and Eastern Africa (+119) don't just consume NNAF content - they actively prefer it over the broader content universe available to them.

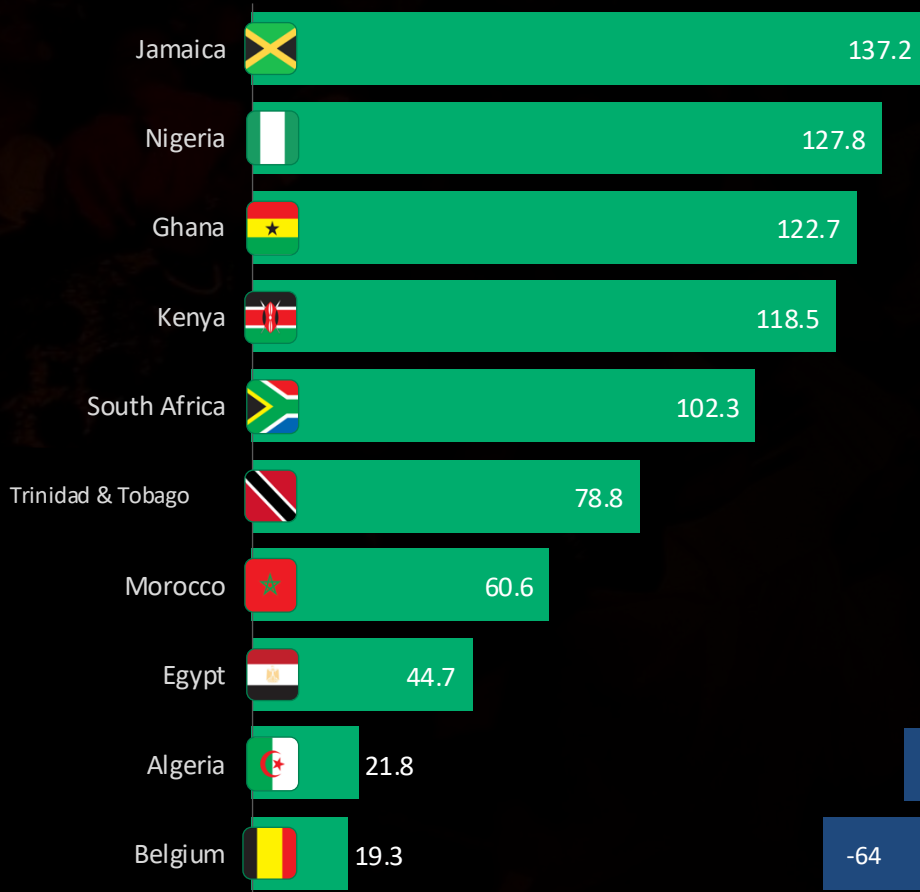
This is a meaningful signal of genuine cultural resonance, not simply the absence of alternatives. Europe's score of -1 reflects a different dynamic: the all-content baseline naturally includes a rich volume of locally produced and locally resonant European content, which sets a high bar for any cohort to index against.

A near-parity score in that context is quietly encouraging - and with the scale of African diaspora communities across the U.K., France, and beyond, the underlying demand is very much there to be developed.

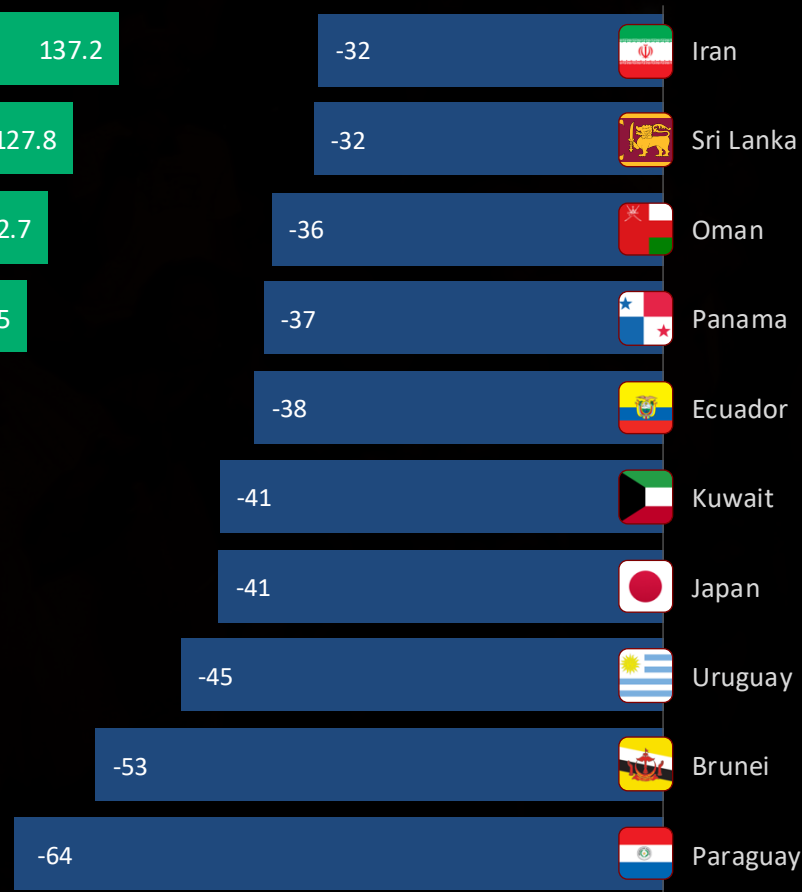
Cultural Familiarity Shapes Where This Content Resonates

The markets where NNAF content over-indexes most strongly share a deep, lived connection to African and diasporan storytelling.

TOP 10 MARKETS, BY INDEX: ▲



BOTTOM 10 MARKETS, BY INDEX: ▼

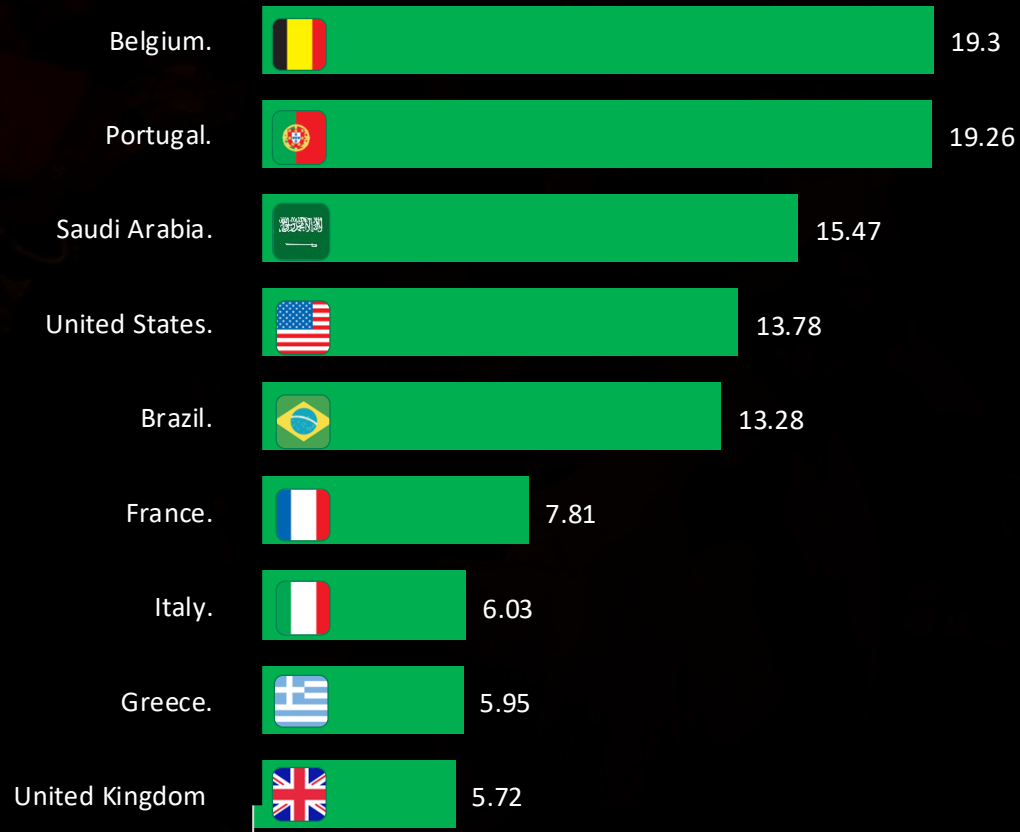


The index reflects cultural proximity as much as content preference. Jamaica (+137), Nigeria (+128), Ghana (+123), and Kenya (+119) lead because these are communities for whom this storytelling carries genuine personal resonance. Trinidad, Morocco, and Egypt follow a similar pattern.

Markets at the lower end - Paraguay, Brunei, Japan - simply reflect audiences with less existing familiarity with African and diasporan narratives, and fewer current touchpoints through which to encounter them. The distance between top and bottom is less a measure of appetite and more a reflection of where awareness and distribution have yet to reach.

Belgium and Portugal Punch Above Their Weight - Diaspora Communities Are the Hidden Driver

Top Over-Indexing Markets Excluding Caribbean & Africa

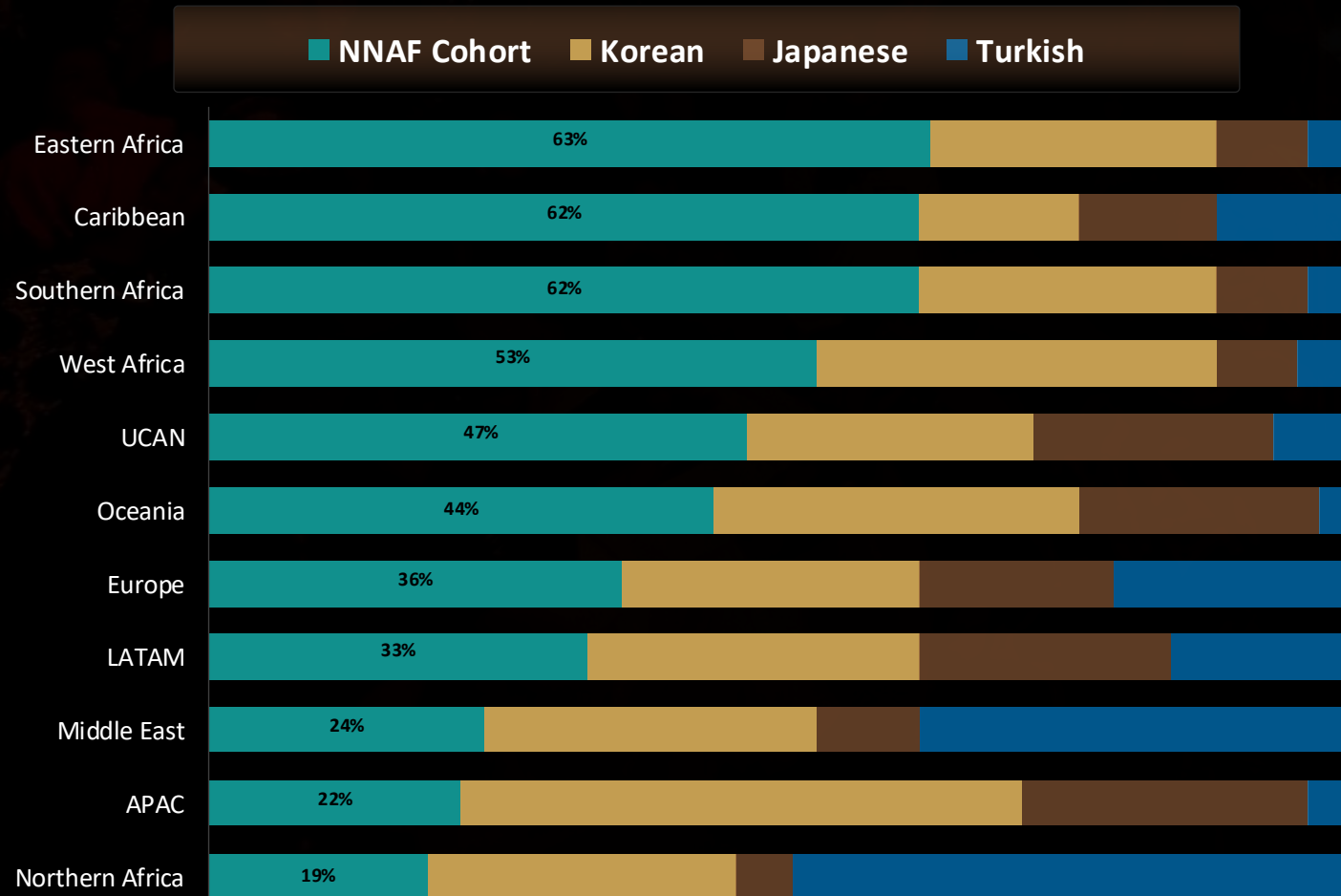


Excluding Africa and the Caribbean, the markets where NNAF content over-indexes most are shaped less by market size and more by who lives there.

Belgium (+19.3) and Portugal (+19.26) leading Western Europe is not a surprise when viewed through a diaspora lens - both countries have African communities that provide a ready, culturally connected audience. Saudi Arabia's presence reflects similar dynamics within its own resident population. The U.S. (+13.78) and U.K. (+5.72) index more modestly despite their scale, suggesting that while the diaspora base exists, it is competing against an enormous volume of locally dominant content. France and Italy follow a comparable pattern. The consistent thread across this chart is that NNAF content finds its audience through cultural connection first - market size comes second.

Across 4 Regions, NNAF Content Accounts for More Than Half of All Demand Within This Peer Set

Measured against Korean, Japanese and Turkish imports, African and diasporan content holds its own across every major global region.

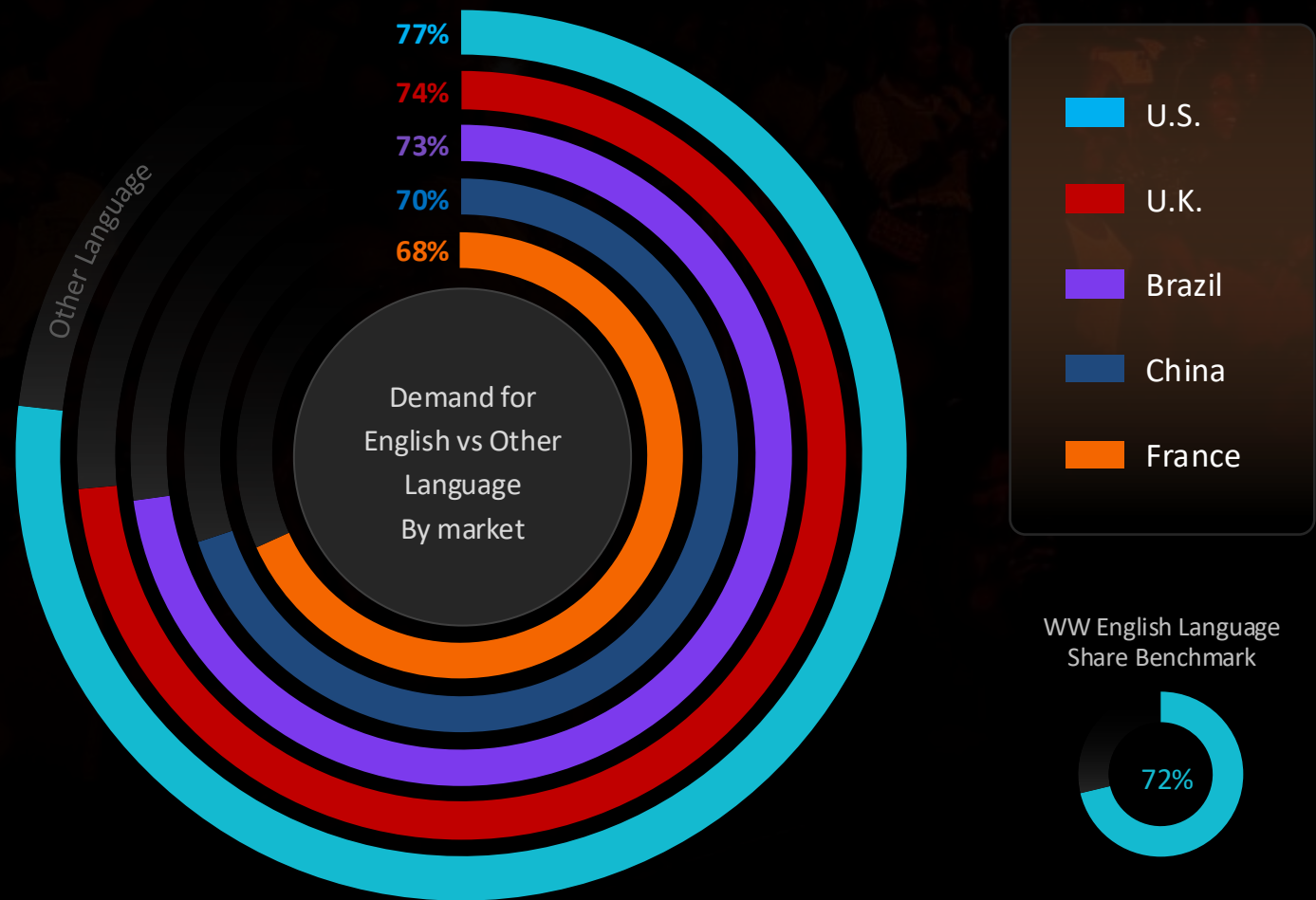


In the Caribbean, Eastern Africa, and Southern Africa, NNAF content accounts for more than 60% of average demand across the four cohorts shown. Western Africa follows at 53%. In UCAN — the world's largest streaming market — it holds 47%, sitting neck and neck with the combined share of Korean, Japanese and Turkish content. The Middle East and Northern Africa skewing toward Turkish content is expected given shared linguistic and cultural ties — and if anything, validates the index. Markets gravitate toward content that feels familiar. The same logic underpins every region where NNAF content leads.

English Opens Doors. But 1 in 4 Viewers Are Asking for More.

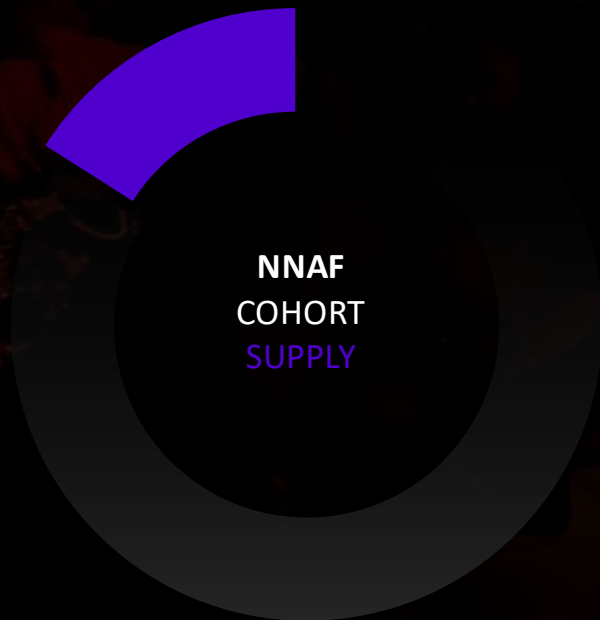
Across every major market, English-language NNAF content dominates demand — yet non-English content consistently accounts for 23–32% of consumption, signaling appetite that supply is not yet meeting.

- The worldwide English-language benchmark sits at 72% and most markets in this cohort land close to or above it.
- The U.S. and U.K. skew highest at 77% and 74% respectively, reflecting the gravitational pull of English-language production.
- But the non-English share holding at nearly a third across Brazil and France points to something the headline number obscures.
- There is a meaningful audience already seeking African and diasporan stories in their own languages. Which raises the question: is the industry producing enough of them?



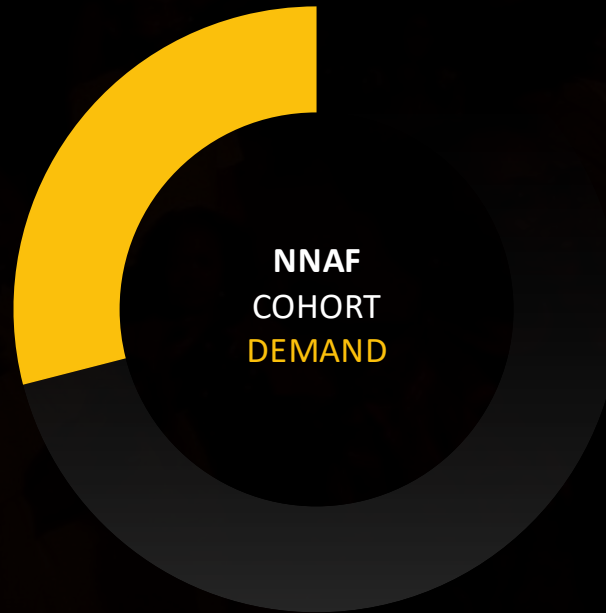
Demand Is Running 12 Points Ahead of Supply Implying Non-English African Stories Are Being Under-Made.

Non-English content makes up just 16% of NNAF cohort supply - yet accounts for 28% of demand. The gap suggests a market signal.



16%

Non-English
language
supply share



28%

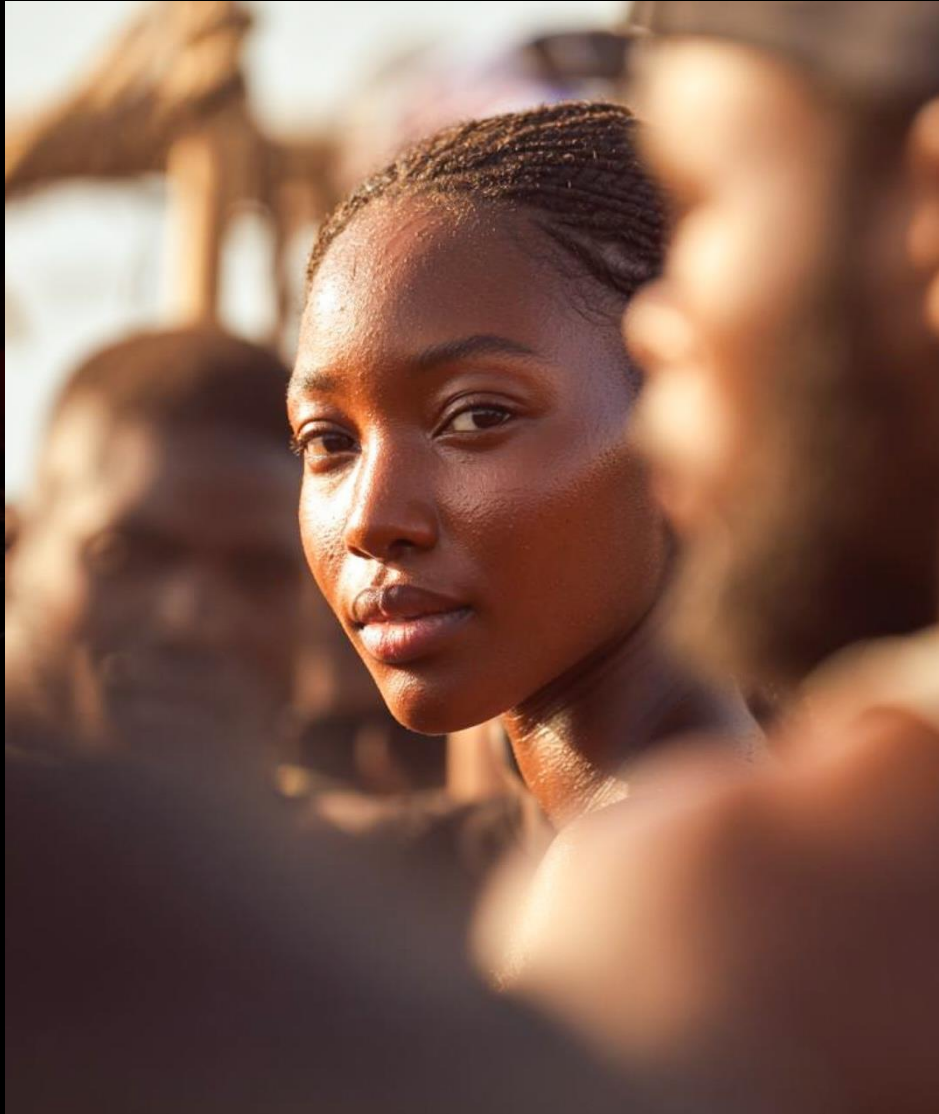
Non-English
language
demand share

- When demand for a content type outpaces its supply, it typically points to one of two things: a production bottleneck or an investment gap.
- In the case of non-English African and diasporan storytelling, it is arguably both. The audience is already there - watching, seeking, and over-indexing for content in languages closer to home.
- Closing this gap represents one of the clearest, most data-supported opportunities within the NNAF investment thesis.

THE "BRIDGE AUDIENCE" HYPOTHESIS

Are Black American Women the Leading Indicator of African Content Success in the U.S.?





Black Women Lead. The Market Follows.

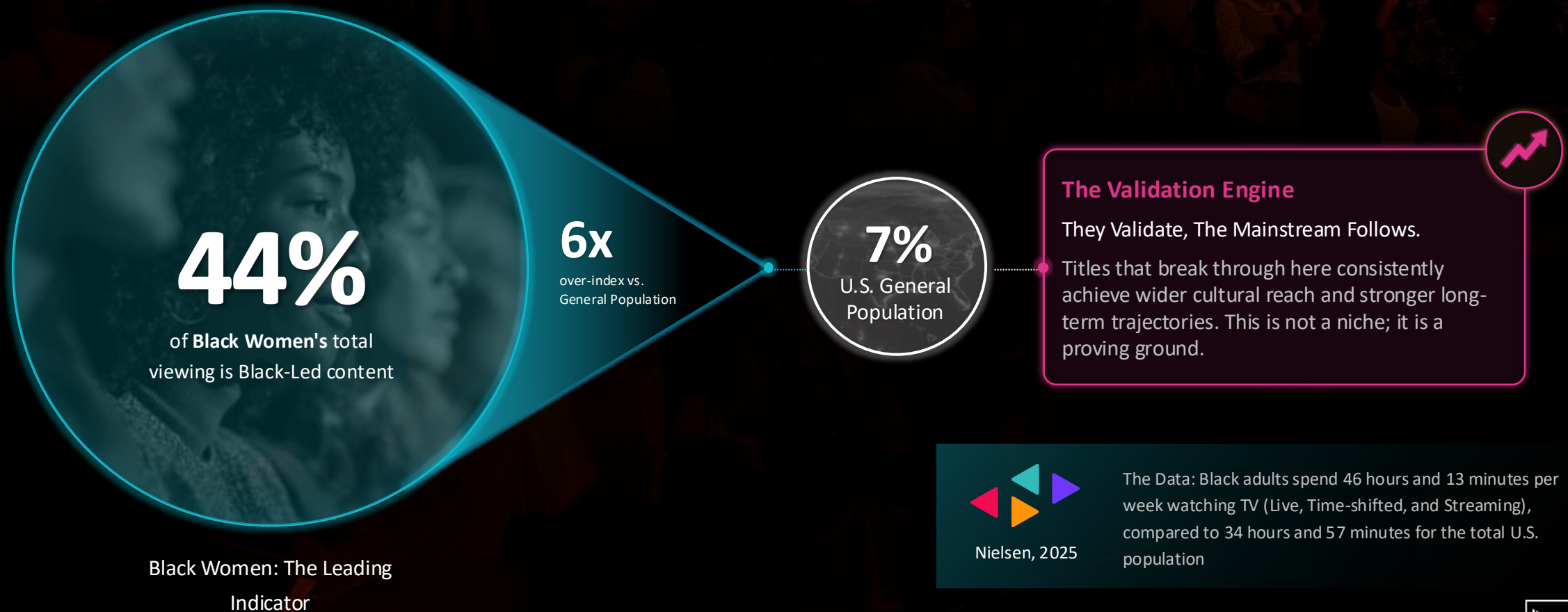
Black American Women do not simply watch more Black-Led content - they validate it.

Their engagement is the clearest early signal of which titles will cross over into mainstream demand, making them the single most commercially significant audience segment in this dataset.

This section quantifies that dynamic, and sets out what this pattern means for a coherent programming strategy.

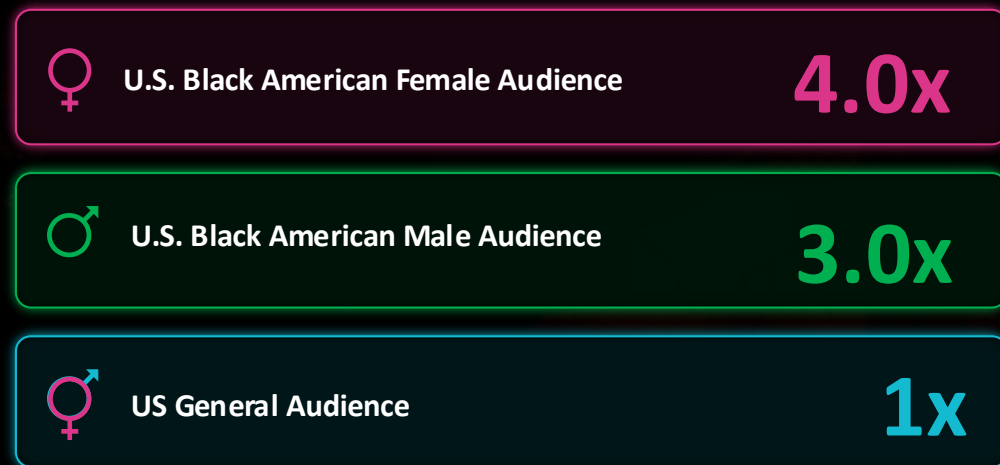
Black American Women demand cohort content at 6x the rate of the general US population

Core audience for African & Black-led content and a key signal for breakout success.



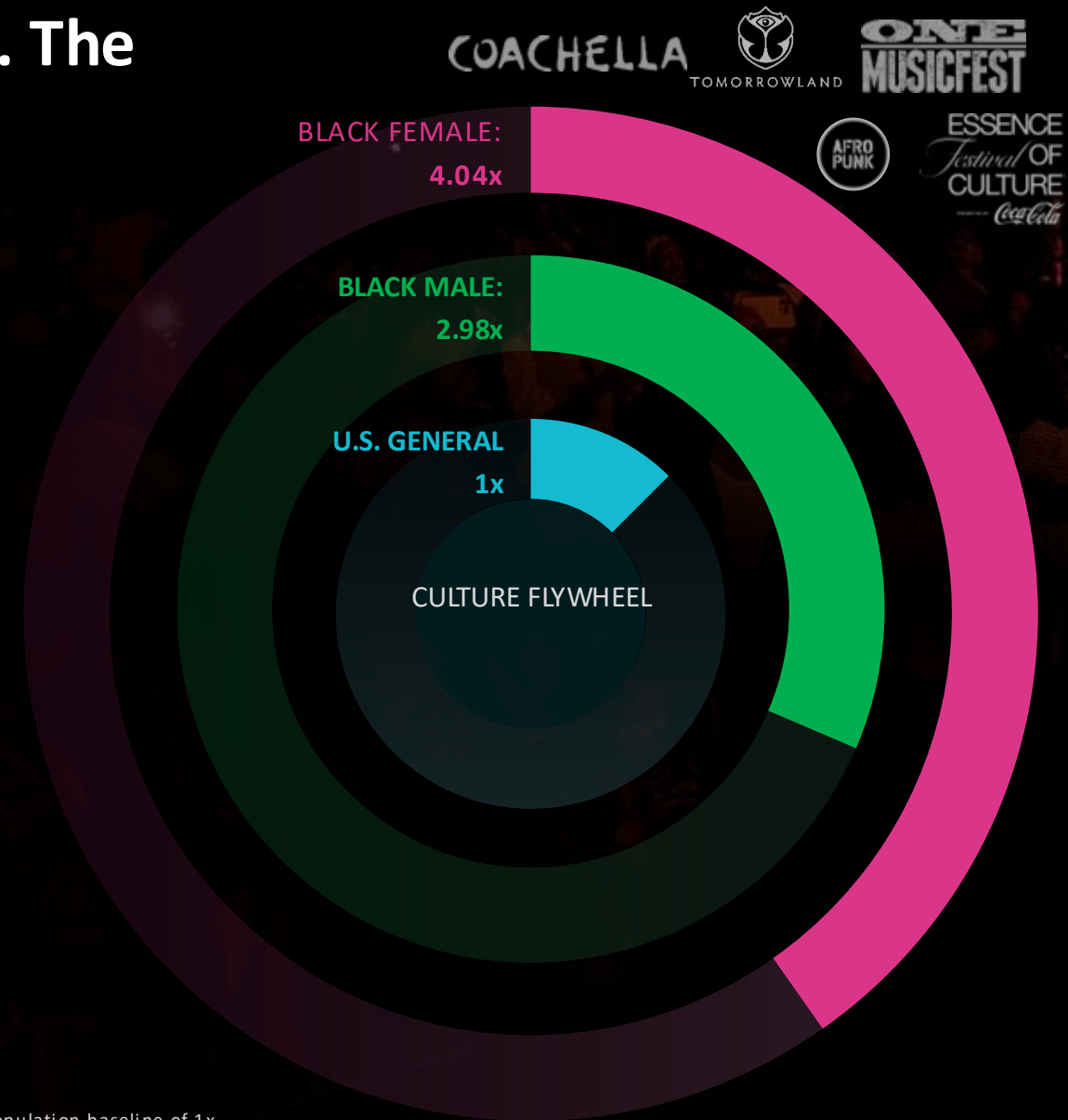
The Culture's Early Adopters Index at 4x. The Rest of the Market Follows.

Black American Women index at 4.0x the US general population for Black-led festival affinity, with Black American Men close behind at 3.0x. This data reveals a clear pattern: Black communities show significantly higher engagement with cultural events centered on Black narratives and artistry. The festivals represented here—from Essence to Afropunk—demonstrate that Black Women are leading consumption of Black cultural content through live events. This speaks to the strength and vitality of Black-led cultural spaces and the communities that actively support them.



HOW TO READ THIS CHART:

Each ring represents a different audience segment, sized by their average festival affinity score relative to the US general population baseline of 1x. The further a ring extends outward, the stronger that segment's affinity for Black-led cultural events.



THE CREATIVE MOMENTUM HYPOTHESIS

*Do Afrobeats & Creator Economy Engagement Signal Future Demand
for African Cinema?*





Music Moved First. Cinema Is Following.

From 2020 to 2025, Afrobeats and Black cinema expanded in parallel across multiple global markets, often gaining momentum within the same audience ecosystems.

This pattern reflects broader cultural adoption dynamics seen in other export industries, where engagement with music helps open pathways for wider storytelling. In this case, both sectors appear to be benefiting from the same underlying conditions rather than directly driving one another.

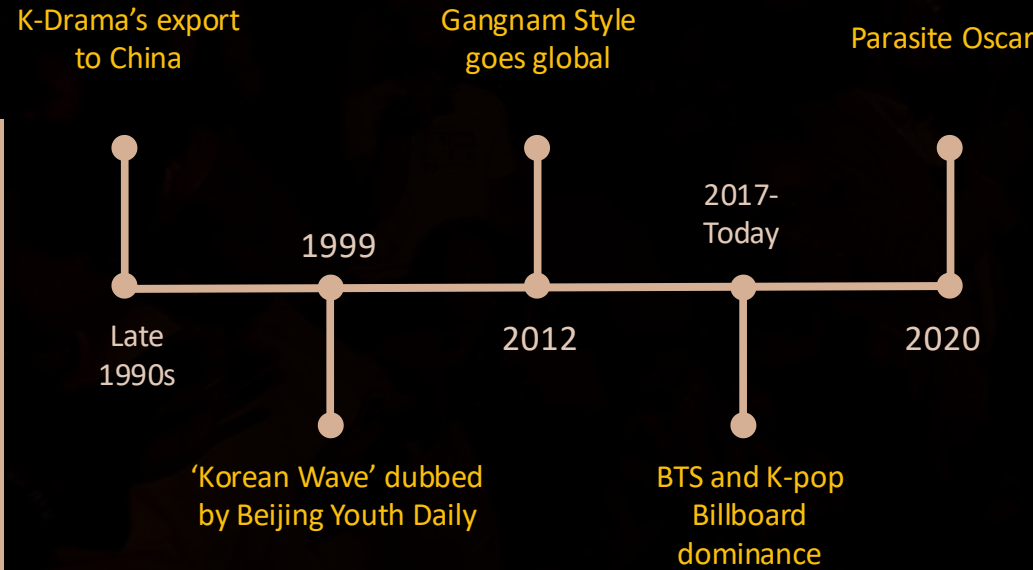
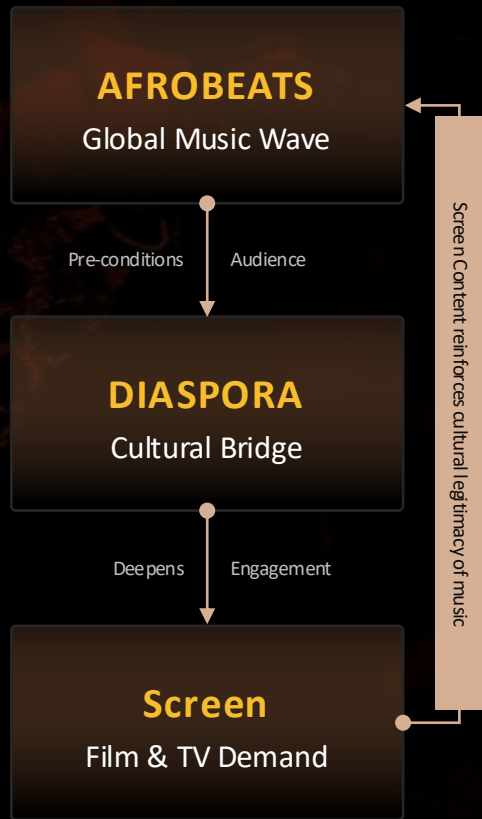
Together, their growth signals a wider shift. Different parts of the African creative economy are reaching international audiences at the same time, reinforcing overall global visibility and cultural presence.

Music opened the door

AFROBEATS STREAMING GROWTH SINCE 2020

Cultural Feedback Loop

Case Study: The Korean Wave

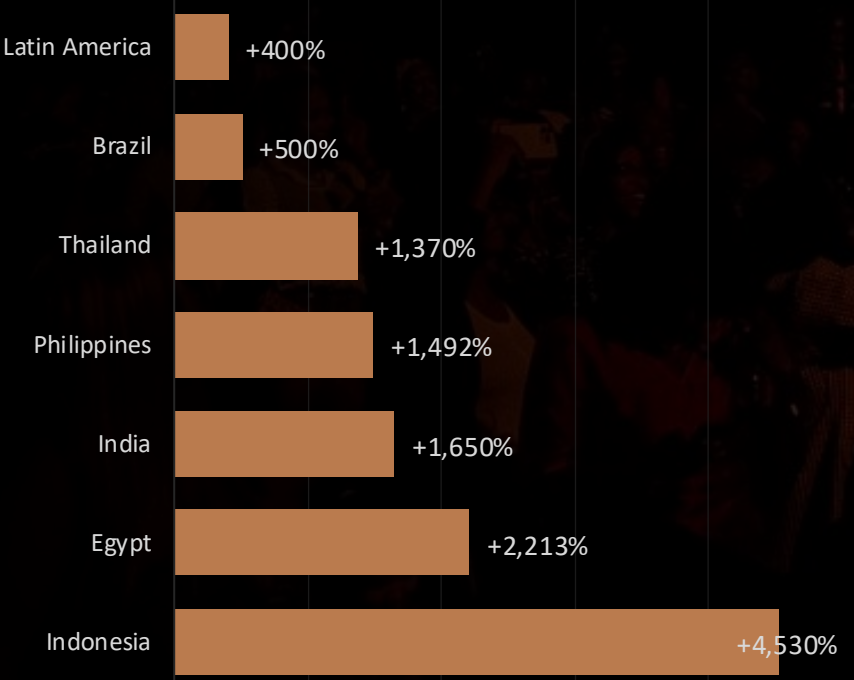


550%
Stream Growth
2017 - 2022

14B+
Global streams
in 2023

\$1.4B
Nigeria creative
sector GDP, 2023

132%
Artist payout
growth in 1 year



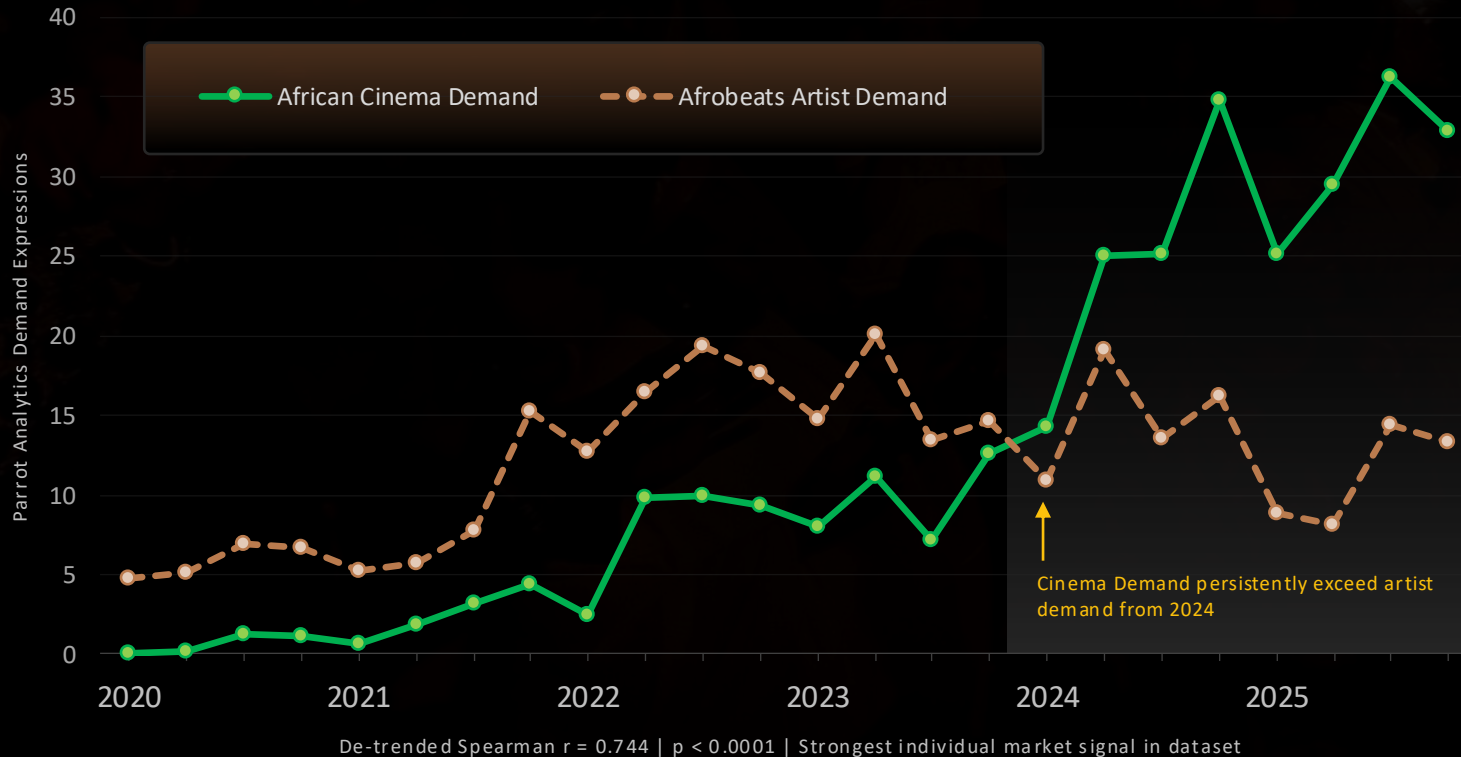
Source: Spotify 'Culture in Motion' (2025)





Cinema is moving through this moment on its own terms.

United Kingdom: African Cinema Demand vs Afrobeats Artist Demand (2020 – 2025)



U.K: $r = 0.744$ — strongest signal of any market. London is where Afrobeats crossed over first.

The structural conditions for replication of the Korean Wave are increasingly present

Scaled diaspora audiences, mature streaming infrastructure, and growing institutional recognition. What remains largely absent is deliberate coordination between governments and industry to activate and sustain the feedback loop at scale

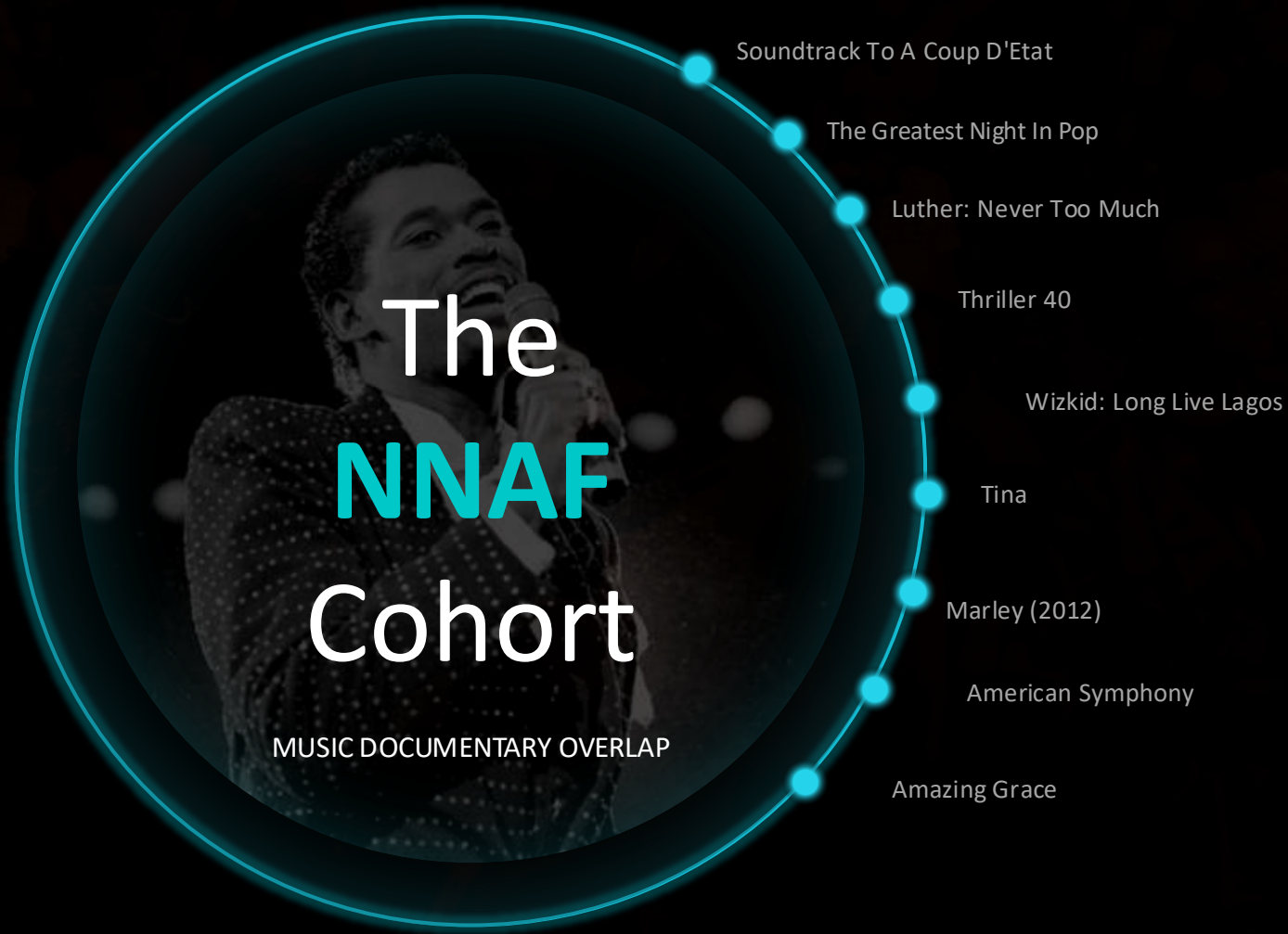
Source: Parrot Analytics, 12 markets, Q1 2020–Q4 2025. Cohort 2 (127 Sub-Saharan African cinema titles).



Afrobeats has built the audience. The task now is to convert listeners into viewers — and complete the cultural feedback loop.

1 in 4 of the Top 50 Docs Watched by NNAF Audiences Tell a Black Music Story

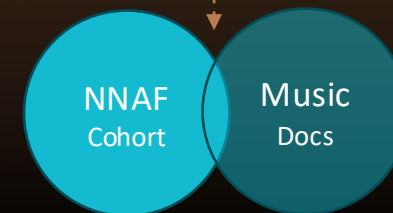
The titles that NNAF audiences choose beyond the cohort reveal a clear pattern - Black music documentaries dominate, suggesting music is the cultural gateway through which this audience travels.



Each title shown features within the top 20% of all music docs consumed by the NNAF cohort. From Wizkid: Long Live Lagos to Amazing Grace and Luther, the pattern holds: this is the same audience, moving across formats.

Music is be the entry point.
Film is where that demand lands next.

Measuring the Consumption Overlap



Consumption overlap measures how many viewers of NNAF cohort content also watch music documentaries

Wizkid

CASE STUDY



Peak Demand in 10 Markets Across 4 Continents — Wizkid Proves Afrobeats Takes Film Along With It

The market map for Long Live Lagos reads like a tracklist of Afrobeats' global footprint. Nigeria, the U.K., Ireland, and the United States — the same diaspora corridors where Wizkid built his streaming base — are precisely where demand for his documentary peaks. This is the wedge hypothesis in action: music travelled first, and film demand followed the path it carved. With 8.7x peak demand placing the documentary within the top 3% of all titles globally, Wizkid is not a niche case. He is a proof of concept — evidence that when African talent achieves genuine music scale, the audience appetite for the fuller story is already there, waiting to be served.

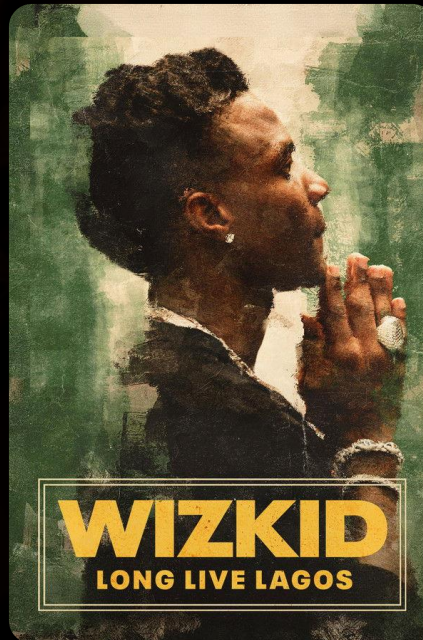
Wizkid Talent Demand Rankings



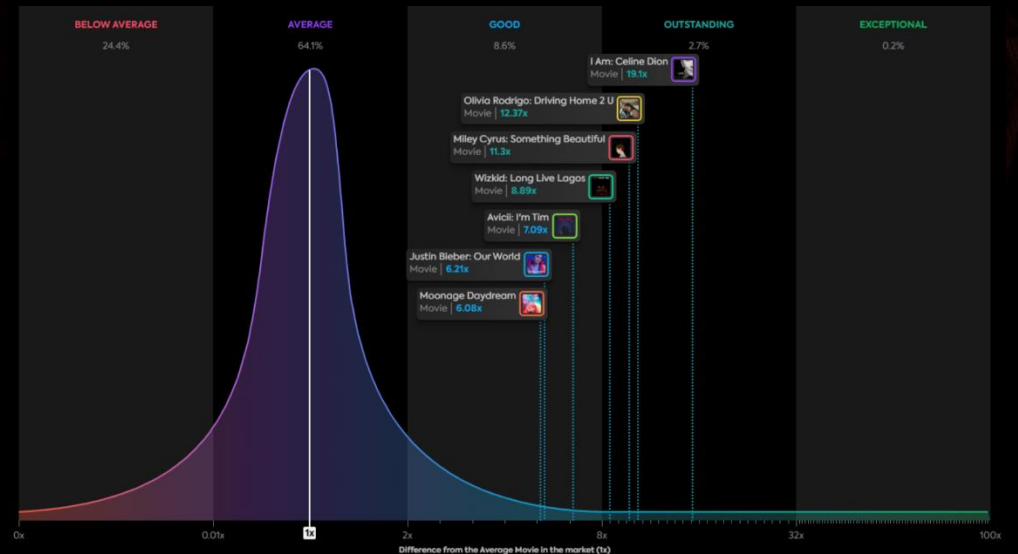
Wizkid's trajectory illustrates how African talent can scale from regional dominance to global relevance.

Despite competing in a saturated global market, Wizkid ranks #1 domestically and has achieved a peak global ranking of #26 underscoring the international travelability of Afrobeats.

Wizkid Documentary

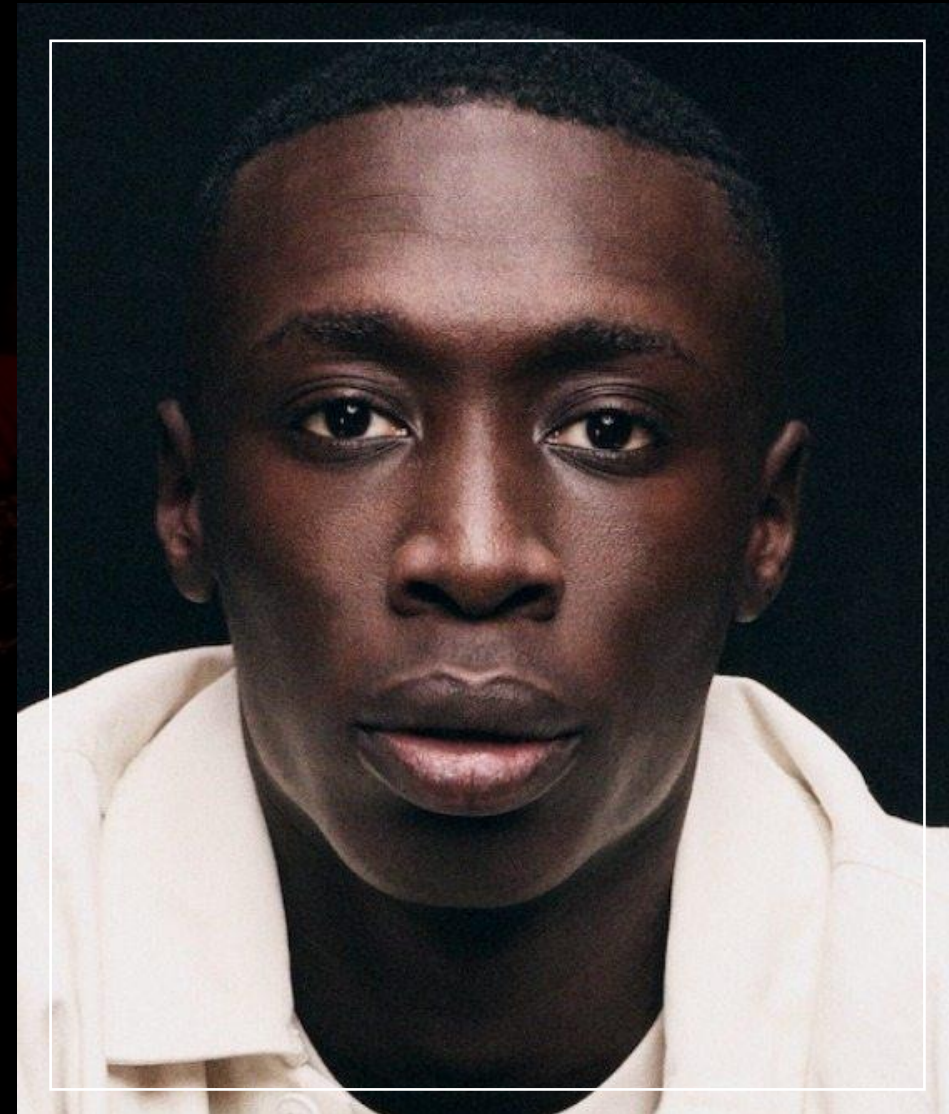


Demand Performance: **8.7x** **OUTSTANDING PEAK DEMAND**
Within the top 3% of all titles



Top Markets

Nigeria	United Kingdom	Hong Kong	South Africa
Ireland	Italy	Germany	China
United States	Hong Kong	Brazil	

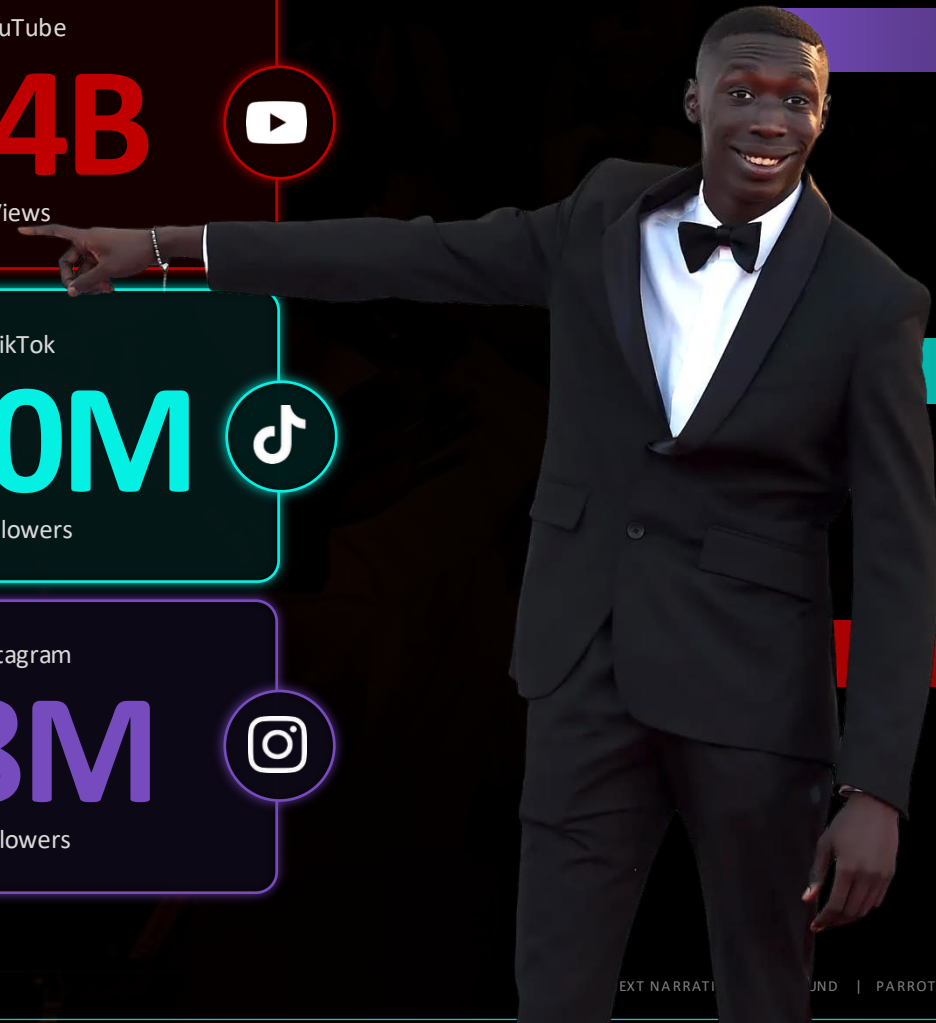
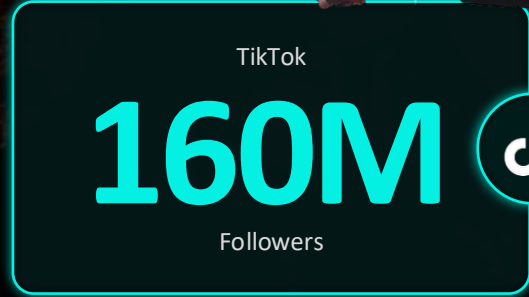


Khaby Lame

CASE STUDY

160M TikTok Followers. 2.4B YouTube Views. Khaby Lama Built a \$975M Business From African Roots.

Khaby Lama proves culture travels — and digital attention is a monetizable asset at enterprise scale



THE SCALE

As the most followed person on TikTok, the Italian Senegalese creator Khaby Lama built a vast international audience through universally understood content, then converted that reach into significant economic value — including a reported \$975M sale of a controlling stake in his business.

THE SIGNAL

Creator growth patterns provide early indicators of where cultural momentum is forming. When talent with African roots builds large cross-border audiences, it signals expanding global curiosity, engagement, and emotional connection.

THE FRAMEWORK

Tracking creator reach, audience geography, engagement intensity, and commercial conversion maps the pathways through which cultural narratives gain global traction — and where future demand for film and television is most likely to emerge.





IShowSpeed

**Africa Tour:
CASE STUDY**

SPEED DOES AFRICA

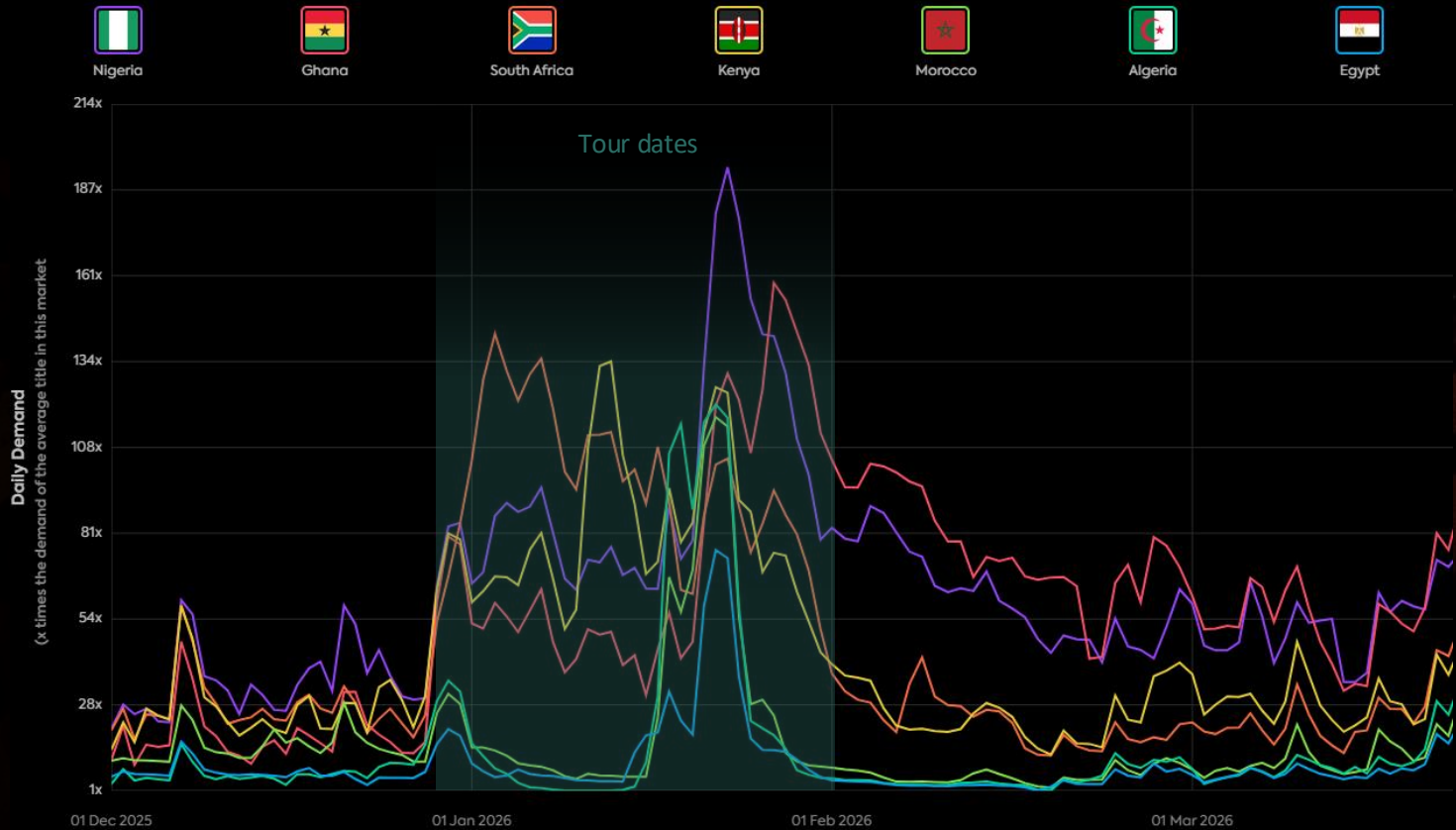
IShowSpeed Time Series Across African Markets (Dec 2025 – March 2026)

January 2025 Top Markets

- 1 US
- 2 CL
- 3 PE
- 4 EC
- 5 NZ

January 2026 Top Markets

- 1 US
- 2 ZA
- 3 NG
- 4 KE
- 5 GH



IShowSpeed's 'Speed Does Africa' tour ran **12-29-2025 to 01-26-2026**, spanning 20 countries.

During this window, daily demand across Nigerian, Ghanaian, South African, Kenyan, Moroccan, and Algerian markets spiked dramatically - peaking at nearly 187x the average title demand — before settling at a sustained elevated baseline well above pre-tour levels.



DECODING SUCCESS

*What Separates Global Hits, Breakout Series,
and Prestige Standouts?*





Not All Hits Are Built the Same Way.

Global reach and deep audience resonance are different things and the most successful titles navigate both. Some achieve wide travelability at the cost of emotional depth. Others capture critical sentiment without breaking into mainstream scale.

This section maps the performance matrix across reach, resonance and demographic composition, identifying which content archetypes are best positioned for global commercial impact and where the next breakout is most likely to emerge.

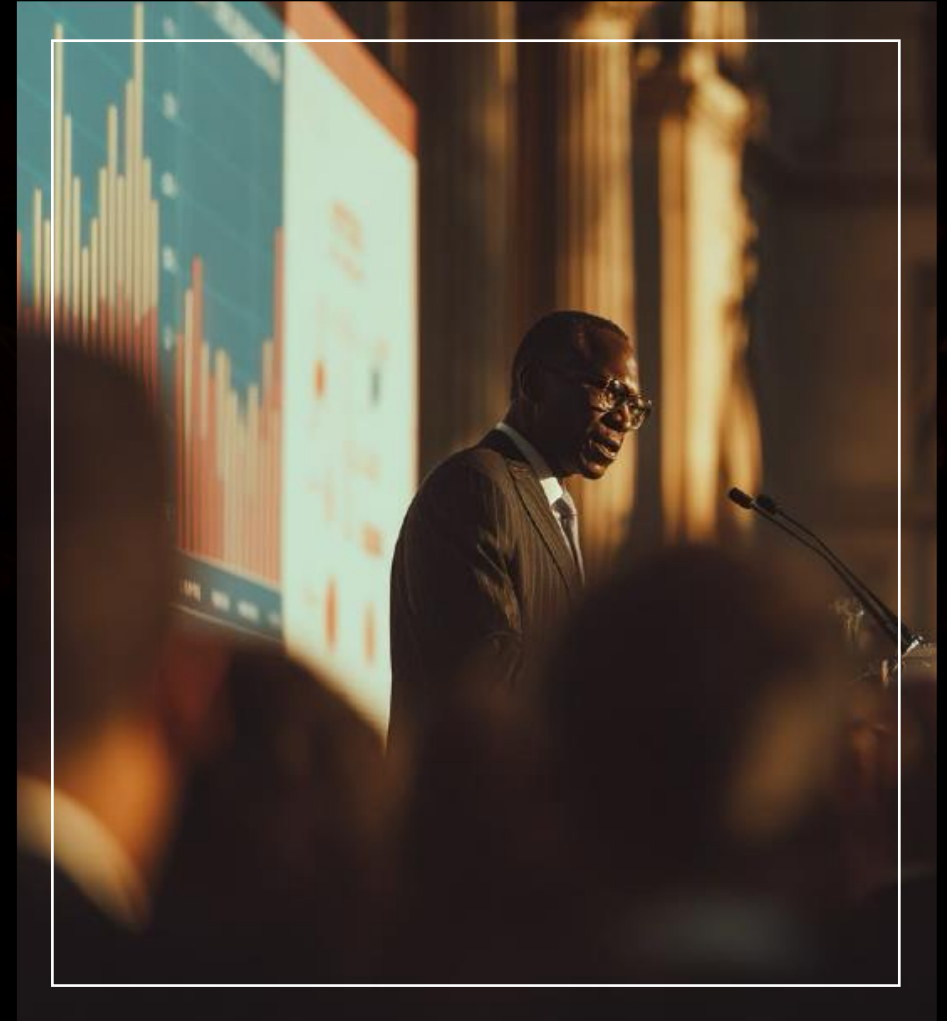
Demand. Sentiment. Breakout. Most Titles Are Still Building Momentum Across Both.

- When measuring how African and diasporan content performs globally, two forces matter most: the scale of demand and the strength of audience sentiment. Together, they show not just what travels, but what truly connects.
- Demand without sentiment drives scale. Sentiment without demand limits reach. Breakout success sits where both align — as seen in the top-right of the chart.
- These titles are rare. But the matrix also reveals clear upside: culturally resonant content that has yet to translate into global scale, with strong potential to grow given the right distribution and support.



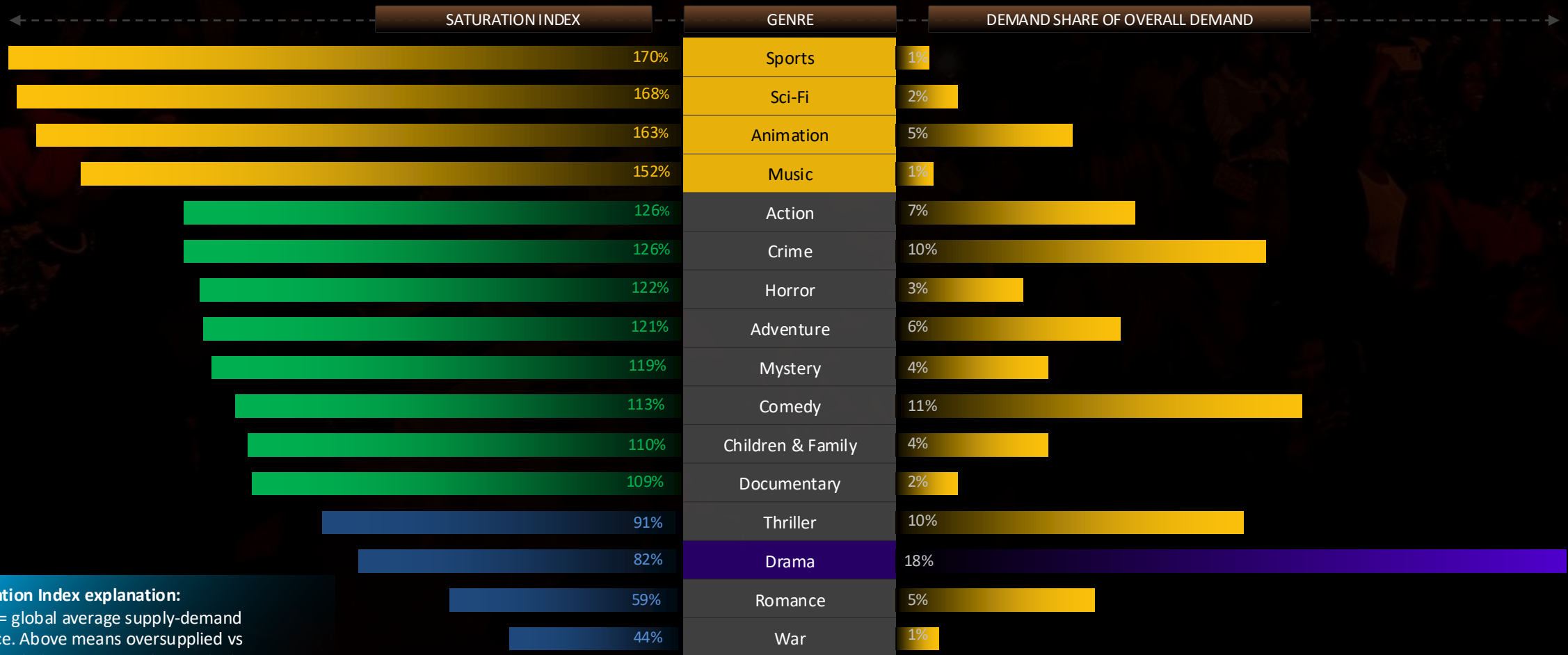
UNLOCKING HIGH-DEMAND FUTURE GROWTH

Genre Growth Potential



Genre Opportunity Index

Genres with both high demand share and low saturation scores indicate audiences are seeking content that the market has not yet delivered.



Saturation Index explanation:
 100% = global average supply-demand balance. Above means oversupplied vs average; below means undersupplied vs average.

GENERATIONAL AUDIENCE DYNAMICS

*Which Age Groups Are Driving Engagement
with Black Content?*





Different Generations. Different Entry Points.

Zennials (aged 27-33) are the dominant generational cohort across Series, while Millennials (aged 34-43) and Gen X+ (aged 44 & over) anchor Global Hits and Indie/Prestige titles.

These are not interchangeable audiences — each generation requires a distinct content hook, platform strategy and distribution window.

This section breaks down engagement by age group across content types, identifies which generational segments are most underserved by current African content output, and maps the titles already performing across generational lines.

From Pattern to Practice: Matching Titles to Audiences

The quadrant is not abstract — it predicts real performance. Series cluster young-female, Hits balance across all four quadrants, Indie/Prestige locks into older-male. Knowing where a title sits before release de-risks the programming decision.

GLOBAL HITS

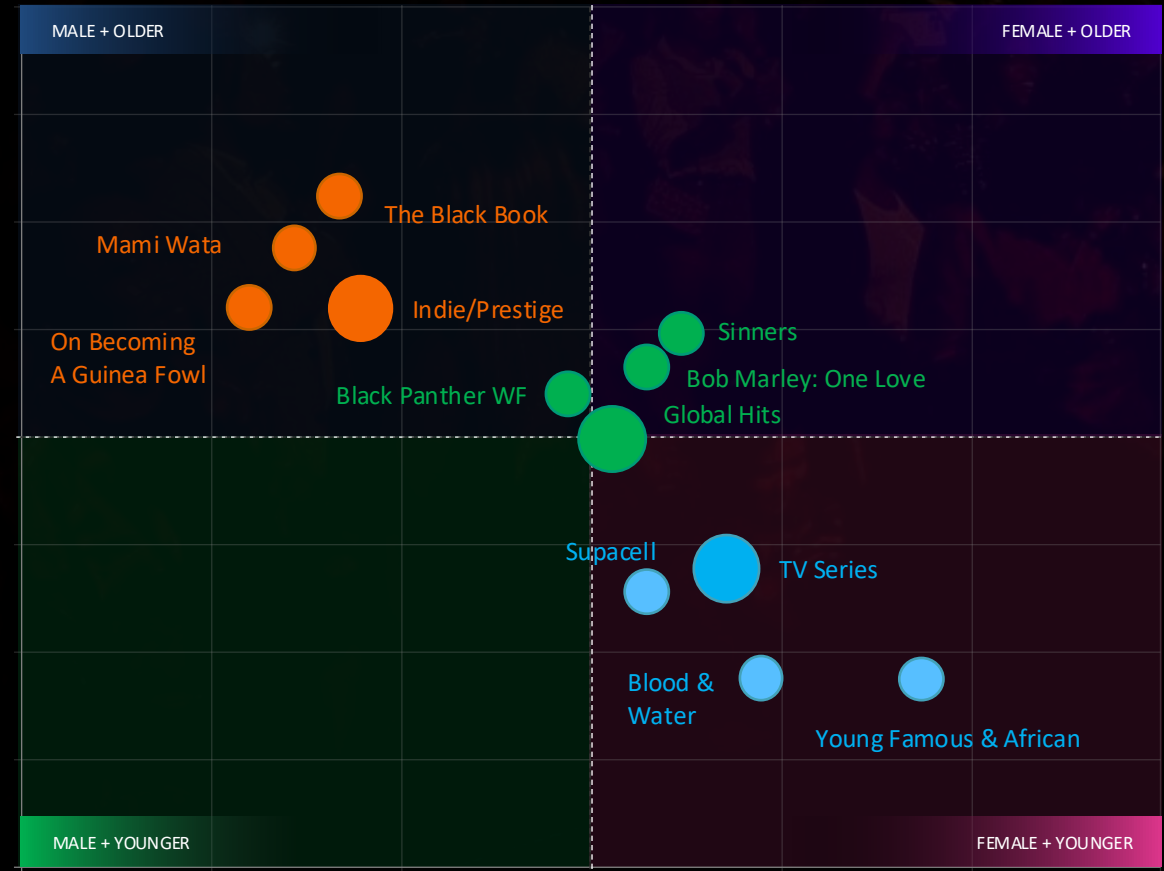
Consistently skew toward younger female audiences — strong engagement among digitally native and socially driven viewers.

INDIE/PRESTIGE

Demonstrate broad, cross-demographic appeal — attracting balanced engagement across all four audience quadrants.

TV SERIES

Resonate more strongly with younger female viewers — a selective but deeply engaged audience drawn to critical storytelling and thematic depth.



What The Data Tells Us

COMMERCIAL THRESHOLD

Demand is compounding across every major market.

Since 2023, African content has accelerated globally and now outperforms Korean, Japanese, and Turkish imports in UCAN and Southern Africa. The commercial window is open, but it will not stay open indefinitely

AUDIENCE INFRASTRUCTURE

6x crossover concentration already exists.

Black American Women consume Black-led content at 6x the rate of the U.S. general population, while Black Men act as the gateway to non-English African content. The audience is already built, reachable, and primed for scale.

GENRE OPPORTUNITY

The supply gap is structural, not cyclical.



Action, Thriller, and Crime — the world's highest-demand genres — remain underrepresented in African content supply. Romance and Family are equally underserved. These are not niche categories; they are the commercial engine of streaming.

PROOF IN MARKET

\$100M+, 54.4x demand, and 220% origin-market pull.



The Woman King and Blood & Water generated over \$100M in combined streaming revenue. Sinners reached 54.4x average portfolio demand, while Long Live Lagos hit 220% of origin-market demand. These are not outliers. They are the blueprint.

Testimonials



Akunna Cook | CEO & Founder **Next Narrative Africa Fund**

Africa and its diaspora have always influenced the global entertainment industry. Meanwhile, this content has historically been treated as a niche cultural export rather than a high yield asset class. This report shows that the perceived risk of African and diaspora storytelling has been a product of bias rather than a reflection of reality. We leveraged world-class analytics to prove that our narratives are a globally undervalued asset class that is already performing and poised for explosive growth. The question now is who invests early enough to capture the opportunity.



Wared Seger | CEO & Founder **Parrot Analytics**

By partnering with NNAF, we are closing the gap. We are bringing the same global demand measurement used by Hollywood’s biggest studios to the African continent, scientifically proving that these stories don't just resonate locally - they have the power to travel globally. We are providing the critical intelligence layer that allows NNAF to deploy capital with confidence and industrialize the African creative economy. In doing so, we aren't just providing analytics; we are validating an entire asset class





For more information about the Next Narrative Africa Fund visit:

www.nextnarrativeafricafund.com

