Adapting to context: Creative strategies of video streaming services in Nigeria

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Abstract
This article examines the contextual challenges that characterize the video on demand (VOD) market in Africa. It provides critical analysis of the creative strategies employed by Nigeria-based streaming services to navigate the peculiar business environment on the continent. This research is on the background of the poor Internet infrastructure and economic divides in many African countries including Nigeria. Streaming services operating in these markets must understand a context where Internet access is complicated on the levels of availability and/or affordability, including significant lack of confidence in e-payment facilities. All these, together with epileptic power supply and poor standard of living, indicate that streaming services must innovate to capture subscribers within the continent. Despite the harsh operational environment, streaming services in Nigeria have continued to increase in number within the past 5 years. This is attributed to the transnational reach of the streaming services as they are patronized by Africans in diaspora across the globe, while they also enjoy popularity within African countries. This article specifically focuses on the innovative strategies employed by Nigerian streaming services to operate within their African markets in the context of their peculiar challenges. In so doing, it extends extant scholarship about Internet-distributed video using the African context. This article is situated within the Media Industry Studies framework and draws from semi-structured interviews with 7 streaming executives in Nigeria and 10 creative professionals in the Nigerian Video Film Industry (Nollywood). It also relies on desk research of press reports, industry publications, as well as the interfaces of streaming portals. This article underscores the necessity of contextualized research with the digital turn in video distribution. Through contextualized analysis of VOD market realities in a less studied terrain like Africa, it aligns with scholarly call to expand theories of Internet-distributed video to marginal contexts.

Keywords
Digital distribution, digital divide, media industry, Netflix, Nollywood, streaming, the Internet, video on demand
Introduction

The video streaming services operating in Nigeria do so in an environment that is disincentivizing to the business. These streaming services largely provide access to Nigerian video films, though some also have a small number of television shows. Ordinarily, one would not expect video on demand (VOD) business to thrive in Africa, especially when it comes to streaming feature length video films. This is due to the market dynamics that are characterized by significant Internet infrastructural divide and huge economic disparity. Internet facilities are still notoriously poor in many communities in Africa. This is coupled with slow download speed and high cost of mobile data. Regarding economic divide, the level of poverty and unemployment has continued to deepen. Thus, mobile data is scarcely available and even when it is available, access is complicated by affordability. Additionally, VOD firms operate in a market characterized by end users’ pessimism towards credit card payment system. Despite these limitations, VOD firms continue to thrive on the continent. Although streaming services do not publicize users’ data, streaming executives confirmed to me in separate interviews that the African continent has increasingly become active users of their portals. A film producer and content aggregator for AirtelTV observed that the AirtelTV app recorded over a million downloads from Africa within the first 3 months of its unveiling in 2020. Likewise, in 2017, Jason Njoku, the CEO of iROKOtv (the leading streaming service in Nigeria) declared that Nigeria had emerged as its second subscribing country just behind the United States and ahead of the United Kingdom in the third place. This gives a sense of how streaming is developing within the African continent, and this article analyses the context-specific interventions that have been pivotal to this. From the foregoing, the question addressed in this article is How are Nigerian streaming services navigating the peculiar challenges that characterize the VOD market in Africa to expand their market size on the continent?

Since 2010 when iROKOtv pioneered online distribution of Nollywood video films, about 11 other streaming services have launched in Nigeria with physical structures in place. Nine out of the twelve main streaming services that stream Nollywood films were launched within the past five years. This suggests that VOD services for Nollywood films are on the increase. Of the 12 streaming services, 11 are national. That is, they are based in Nigeria and take major decisions from their Nigerian head offices. Such National streaming services include subscription-based services such as iROKOtv, IbakaTV, NevedabridgeTV, CongaTV, LindaikejiTV, SceneoneTV and Nollywood NamasteTV; transactional services such as ShugabanTV; and hybrid services such as AirtelTV, NvivoTV, DeloniferaTV and NollylandTV. Netflix is the only multinational streaming service that is relevant to this discussion because it has opened its office in Nigeria and has begun significant investment in developing original films from Nigeria.

To be clear, this article does not attend to all streaming services that distribute Nollywood films. Rather, the focus is on those that are based in Nigeria and/or have physical structures in place. Thus, the conversations that follow do not apply to streaming services such as Amazon Prime Video, KweliTV, AfroLandTV, Google Play, Plex, Vudu and others that have included streaming Nollywood films as a fragment of broader streaming business agenda and are yet to have physical presence in Nigeria. The point here is that the presence of Nollywood films on certain streaming services does not provide helpful analysis for understanding VOD markets in Africa. Instead, it attests to the transnational circulation of Nollywood films as aided by streaming services. This delineation becomes imperative as this article maps the development and current market dynamics that define the operations of film streaming services that are ‘on the ground’ in Nigeria, aiming to galvanize subscribers in Africa, and are subjected to the
socio-economic factors that affect business strategies of streaming services within the continent.

This article draws from semi-structured interviews with streaming executives \( (n = 7) \) and Nollywood creative professionals \( (n = 10) \). It also includes data from desk research of interfaces of streaming services as well as press reports and publications about digital distribution of films in the Nigerian Video Film Industry (Nollywood). The interviews were conducted between April and August 2020. Due to the safety measures emanating from the COVID-19 pandemic, the interviews were conducted via Zoom and telephone calls. Participants were identified and selected based on their public profiles. Interview was necessary because the information required for this article could not be reliably gathered from other sources apart from the participants who are influential and privileged people within their streaming organizations and within Nollywood. These align with what scholars describe as ‘elite interviews’ (Harvey, 2011; Richards, 1996). Typical of elite interviews, streaming executives only provided information that they were comfortable with, while questions that they felt to be too sensitive (such as viewers data) were declined. Notably, the creative professionals interviewed are those who have business relationship with the streaming services and agreed to provide some background information. However, they were also circumspect in their responses as questions that they felt to be too official were ignored. Specifically, streaming executives answered questions about the challenges they face within their African markets and how they are managing them, while creative professionals provided insights to the production practices and operational practices of the streaming services based on prior relationships.

Participants were approached via email and social media platforms. Prior to interview, participants provided consent to be interviewed. This article contributes to the Media Industries Studies subfield (Freeman, 2016; Herbert et al., 2020; McDonald, 2013). It provides critical analysis of how streaming services in Nigeria navigate the distinctive challenges posed to their operations by the peculiar market dynamics within Africa. It also advances extant scholarship (Chayko, 2017; Lim, 2019; Lotz et al., 2018; Lobato, 2019) on the imperativeness of contextualizing media industry studies in the age of Internet-distributed video. In so doing, this article attends to issues of access, digital and economic divides, and digital inclusion-topics that have become prominent in media industry studies considering the digital turn in distribution.

In the sections that follow, I make a case for the imperativeness of context in Internet-distributed video research. Thereafter, I articulate the contextual challenges that streaming services face in their African markets, detailing the creative strategies they employ in navigating the peculiar terrain. After this, I present a case study of Afrinolly app that stopped operations in 2019 due to its failure to adapt to market demands. The last section provides a spotlight on Netflix that continues to operate in Nigeria despite playing by different rules. The evidence presented in this article provides useful details that enhance theories about industrial practices associated with Internet-distributed video, albeit from the less studied Nigerian/African contexts.

**Internet-distributed video research and the necessity of contextualization**

The digital turn in media distribution more broadly and precisely film distribution has rekindled scholarly provocations on the need for contextualization of research aimed at advancing scholarship in media distribution. The need for contextual awareness in media industry studies has earlier been articulated by scholars (Govil, 2013; Lobato, 2010, 2012). These scholars fault the
overabundance of film distribution scholarship on the Euro-American film industries while marginal industries are under-represented. As media industries continue to transform and significant distribution practices now occur through Internet protocols, media scholars have turned attention to how these transformations impact industries in the Euro-American contexts (Chayko, 2017; Curtin et al., 2014; Hiller, 2017; Holt and Sanson, 2014; Iordanova, 2012; Kehoe and Mateer, 2015; Lotz, 2017; Tryon, 2013; Vonderau, 2015; Waldfogel, 2018). These scholars provide critical analysis of how the emergence of streaming services impacts conventional distribution practices in Euro-American film industries as well as how power relations are being renegotiated. They also explicate how the advent of VOD services has expanded access through platform mobility, that is the ability to watch television, videos and movies on-the-go on iPhones, iPads and similar connected mobile devices (Tryon, 2013). This, according to Pardo (2015: 24), has catalysed a new consumer culture of accessing content ‘any time, any place, anywhere’. Holt and Sanson (2014: 1) contribute to this viewpoint by noting that the prevalence of Internet facilities as well as smart and mobile gadgets have orchestrated a culture of ‘connected viewing’ that exemplifies ‘multiplatform entertainment experience and relates to a larger trend across the media industries to integrate digital technology and socially networked communication with traditional screen media practices’. Due to their focus on the developed Euro-American contexts, these scholars are not conscious of Internet and mobile gadgets in the discussions. These gadgets are generally seen as part of life and are not worthy of being overdramatized in scholarship. For instance, Lotz (2017) argues that Internet protocols have become pervasive to the extent that consumers now access content on living room sets, mobile devices, as well as computers. Chayko (2017) in her book, Superconnected: The Internet, Digital Media and Technosocial Life, refused to capitalize ‘the Internet’, preferring to use small ‘i’ due to her argument that the Internet has become such an integral part of so many lives that it seems no longer necessary to consider it ‘A Special Thing That Deserves Capitalization’. Although Chayko acknowledges digital divide among nations in her book, she went ahead to align with the realities she was familiar with. Thus, the theoretical approaches to the Internet and mobile gadgets are reflective of the context that the scholars wrote from. In this article, I use the capitalized ‘I’ for ‘the Internet’ because unlike the ubiquity of Internet facilities in the western nations, the Internet remains scarce in Africa and is largely maximally enjoyed only by the wealthy class (Arora, 2019; Dovey, 2018).

In recent times, scholars have expanded scholarship on streaming by emphasizing the need to contextualize market dynamics of VOD as they relate to specific nations and geographies. It has become progressively clear that digital divide is a defining element in theorizing digital distribution across different geographies. Lobato (2019) provides critical analysis of how multinational streaming service, Netflix, differently operates in its diverse global markets based on contextual realities. The key takeaway from Netflix’s market-specific operations is articulated in Lobato (2018: 243) thus:

it is no longer feasible to speak of ‘a’ single Netflix, understood as a service offering the same content and the same experience everywhere; it is now more accurate to describe Netflix a series of national services linked through a common platform architecture.

Lobato’s analysis repeats his earlier position about the centrality of context both in practice and in theory when we discuss the conventions associated with Internet-distributed video (Lobato, 2009). In a similar trend, Lotz et al. (2018) in their proposed ‘provocations’ of Internet-distributed television research argue that ‘Internet-distributed television depends on where you are’ (p. 38). By
this assertion, they underscore how practices of Internet distribution could be mediated by social, political, economic, historical and infrastructural peculiarities of nations across the world. Acknowledgement and proper utilization of these contextual elements cannot be divorced from Internet distribution research as they largely influence who sees what, where, when and how. Taking a critical media infrastructural perspective to streaming, Parks and Starosielski (2015) in their edited collection ‘Signal Traffic’ observe that an infrastructural approach to streaming helps us to understand how the infrastructure that enables the functionality of streaming operates as dynamic sociotechnical formations that are fundamentally relational and must be studied in relation to operational contexts. They argue that the infrastructural components that enable digital distribution do operate at different levels and scales across the globe. For Plantin and Punathambekar (2019), beyond the surface description of how media infrastructures convey the Signal Traffic (i.e. the movement of electronic media across various parts of the planet), paying attention to infrastructures pushes us to acknowledge the contingent and relational nature of distribution networks and how routine media use and consumption practices shape the dynamics of a media entity in a specific context.

Colbjørnsen (2020) in his network model of streaming provides compelling insight to appreciating context in digital distribution research. Drawing from the operations of four streaming services (Spotify, Apple Music, Netflix and KU), he contends that streaming involves complex networked interactions and connections among a wide variety of actors and infrastructures dispersed around the globe. The model demonstrates the complex relationship among streaming services, content providers, the users and device makers and how this relationship sustains streaming practices. While the model provides helpful analytical basis to understand the broader dynamics of streaming, it does not attend to realities across all contexts. For instance, its framing of streaming infrastructure was more tilted towards device makers with no attention to the Internet and Internet service providers. It appears that the Internet is not problematic in discussing access within the western context his analyses focus on. Issues about localized payment system and data compression are not captured as well. Colbjørnsen himself acknowledges the contextual limitations of his model and cautions against ‘a network perspective without context’ (p. 20).

The perspectives of institutional theorists and organizational sociologists are also relevant to the above debates and the conversations that follow. They provide key theoretical insights to identifying context as pivotal to organizational sustenance. For instance, Oliver (1991) contends that organizational behaviours are influenced by external pressures emanating largely from operational environments, and organizations must be responsive to the external realities to survive. Almandoz et al. (2017: 190) expand the argument by emphasizing ‘the enduring influence of embeddedness in geographical communities on organizations’. These debates pointing to the centrality of context across a range of scholarship are pivotal to understanding how VOD firms operate to survive in different contexts across the globe. As Lobato (2019) asserts, though digital distribution provides content with unprecedented spatio-temporal speed, over-the-top distribution does not erase the need for localization. Likewise, Pertierra and Turner (2015) in their critique of some universalizing assumptions on globalization and convergence in Internet-distributed television argue for the need to focus on zones of consumptions as discourse on ‘over-the-top’ distribution is contingent upon contextual realities in many parts of the world.

These perspectives on contextualized research largely frame the discussions that follow. Some of the challenges facing streaming services in Nigeria are contextual and only apply to streaming services that are ‘on the ground’ and aim at penetrating Africans countries. It is worthy of note that while the streaming services are based in Nigeria, their audiences are mainly Africans in Africa and
Africans in diaspora. This is because Nollywood films, which are at the core of their libraries, are consumed in all countries having African settlements across the globe (Adejunmobi, 2019; Okome, 2019). The following discussions about the creative strategies of streaming services within their African markets advance existing arguments on the centrality of context in theorizing conventions and practices that characterize film distribution in the digital space. The analyses unpack the challenges and creative approaches associated with maintaining portals’ libraries as well as key strategies to bolster access for end users within their African markets.

Maintaining libraries: Challenges and strategies

Streaming executives in Nigeria believe that continuous update of new films on the portals are pivotal to their businesses. In separate interviews with me, they unanimously asserted that content runs the streaming business. However, they see the propensity to wholly rely on independent producers as challenging. They noted that producers often demand high licensing fees, while the technical specifications (such as sound and pictures) of licensed films always generate complaints from the users. To address this, streaming services now tilt towards a hybrid of original productions and time-bound licensing from independent producers. This model was introduced to the market by the pioneering firm – iROKOtv – with the creation of ROK studios in 2013. Today, it is an accepted industry practice that streaming companies, especially SVODs, cannot wholly rely on independent film-makers for content. The drive for original content production largely hinges on the desire of streaming companies to have creative inputs in films to be streamed on their portals. Streaming executive Kazim Adeoti, co-owner of IbakaTV (personal communication), noted that the main purpose for producing original films is to oversee a catalogue that reflects the tastes of their subscribers in terms of storylines and technical specifications. He explained further that:

It helps by making sure that you have something reasonably okay to give to people because sometimes, producers may bring movies and you may not be too pleased with what you have for the day. So, when you get involved from the beginning, you will get, if not the best, but something above the average. So, when you know what the audience wants, you can then know the kind of camera to shoot with, the kind of crew wanted, and the kind of cast. This will eliminate dissatisfactions with the quality of film submitted by independent producers.

Basil Nneji, founder of Nollywood NamasteTV (personal communication), noted that though his streaming portal was ready to be launched by 2018, he postponed the switch-on to 2020 as he had to ensure in-house production of a vast library of originals that would be of ‘better quality’ than those from independent producers.

Streaming services also indirectly provide technical inputs to licensed films. Producers told me that each streaming service has technical specifications regarding types of approved cameras, picture resolution, sound design and cinematography. Thus, filmmakers that intend to license their films to certain portals must familiarize themselves with these specifications before shooting.

Among all, iROKOtv is the leading producer of Nollywood originals. As of 2019, the streaming service has commissioned about 540 films (Bright, 2019). According to iROKOtv producers, original film production begins with the submission of a script by a producer. The norm is that the streaming service approaches a producer for a production. Such producer must have licensed their films to the streaming service in the past, and the film must have been highly rated. iROKOtv operates a public rating system within its app and on its website, providing everyone with data about the percentage of viewers that liked each film. Once the producer agrees to work with the
company, he sends a script that would be reviewed by a department created for that. Reviews normally centre on how the storyline connect with viewing trends of subscribers, as well as the viability of the project in relation to the budget. iROKOtv typically spends between US$10,400 and US$18,200 for original productions. The script must be written to be realistically executable within projected budget. Such dynamics between commerce and creativity have been noted by cultural production scholars (Hesmondhalgh and Baker, 2011; Mayer et al., 2009). Once a script is accepted and the producer is financially empowered, they source for the cast and crew. The streaming service is carried along in the casting process because it must be assured that the cast combinations align with viewers data. Producers said they check the iROKOtv app to see films with highest likes and identify their genres as well as cast combinations that they often consider for their own projects. Interviewed producers noted that there are also certain directors who are favoured by the streaming service based on the good performances of their previous films. Once these key decisions have been made, production begins, and principal photography normally takes place within 5–7 days. Any extension of production days would incur further production cost and the producer may run at a loss. When the production process is completed, the producer submits the film to the streaming service, and they upload for subscribers’ consumption.

Unlike what obtains in originals, streaming services have no direct creative or technical inputs during production for licensed films. However, producers said they take into considerations the presumed favoured genres and technical specifications of destination streaming services during production. Producers said that streaming companies operating in Nigeria (except for Netflix) rarely license a film above US$10,000. In some cases, licensing fee could be as low as US$1200 depending on agreements. Streaming services license on exclusivity and non-exclusivity basis, though the former is preferred. The penchant for exclusivity deals is part of the content strategies because streaming executives believe that the longer a film stays exclusively on their portal, the more its likelihood to enrich their libraries and attract new subscribers. Film-makers complain that many streaming services always push for a long period of exclusivity that could be up to 2 or 3 years in return for paltry licensing fee. Big players such as iROKOtv, IbakaTV, NevadaBridgeTV and Netflix have made exclusivity a de facto element of their licensing agreements. However, B-rated portals such as LindaikejiTV, CongaTV and SceneOneTV rarely push for exclusivity as they are not well capitalized to afford it.

In a nutshell, hybrid content strategy – originals and licensing – has become the dominant content model. Pioneer firm iROKOtv is a handy example of how this model works. For instance, I monitored the iROKOtv library from August 2020 to December 2020. My investigation shows that it averagely releases three films per week. Within the 5-month period, 63 new films were released. Of these, 33 were commissioned films, 8 were outright acquisitions, while 22 were licensed on time-bound basis. Other new entrants are yet to have such sustained frequency of release. However, the likes of NevadaBridgeTV, NivoTV, SceneOneTV and Nollywood NamasteTV now produce original films. Even streaming services that do not fund originals at the moment said they intend to seek funds to start doing so soonest. For instance, the co-founder of IbakaTV, Kazim Adeoti, confirmed to me that funding originals was the next goal of the company as they can no longer rely on independent film-makers. He noted that they desire to have more control of the creative processes to better serve subscribers.

For transactional video on demand (TVOD) portal, ShugabanTV, the company was already strategizing to partner with film-makers who would generate content for it. According to the Business Development and Acquisition Manager, Alex Edeh (personal communication), this
decision was driven by the desire to ‘get involved in production by investing money and providing technical support’.

**Facilitating access: Mobile data/broadband and economic strategies**

Streaming executives identified complicated access as a major challenge facing streaming services within their African markets. This challenge is a product of digital and economic divides in African countries. As Nnamdi Utti of NollylandTV (personal communication) observed, it is of no use to have a rich library if targeted consumers are unable to access it. Lobato (2019) in his discourse on the socio-spatial differences in connectivity within a country suggests that in many developing countries, while elites may have access to high-speed home Internet connections for video streaming, most of the population are either offline or access the Internet through mobile devices. This is further explained by Arora (2019)’s book that focuses on *digital life beyond the west*. Her case studies drawn from select contexts, including Africa, underscore how digital access in these terrains are complicated by digital and economic divides in the Global South. Although Internet penetration is increasing in Africa, yet it is not evenly distributed. Strong Internet connections are mainly limited to urban areas such as the capital cities of states while suburban areas and local communities are poorly connected or outrightly disconnected (Adejunmobi, 2019; Dovey, 2018). Even when connection is available, access is further complicated by slow download speeds, and affordability arising from economic limitations. Using Nigeria as an example: Nigeria has a low National Minimum Wage of #18,000 (US$47) per month, while many citizens earn far lesser. This is coupled with the high unemployment rate (24.1% as of 2020). On top of these, poverty rate continues to worsen. According to the ‘2019 Poverty and Inequality in Nigeria’ report published by the National Bureau of Statistics, 40% of the total population, or almost 83 million people, live below the country’s poverty line of 137,430 naira (US$381.75) per year. The situations are not better in many other African countries. These combine to complicate access to streaming services. To flourish in this environment, streaming services are adopting innovations that they argue help to mitigate access complications arising from broadband scarcity in some geographical areas and make subscription costs or transactional charges more reflective of the economic situations. The conversations that follow resonate with scholarly calls for recognition of local embeddedness and appreciation of zones of consumption in Internet distribution research (Almadoz et al., 2017; Oliver, 1991; Perttierra and Turner, 2015).

**Internet access and mobile data innovations**

Unlike what obtains in more developed western contexts where Internet is ubiquitous to the extent that it is no longer consider a special thing that deserves much attention (Chayko, 2017), the same cannot be said of Africa where streaming executives must have Internet strategies to navigate the African VOD market. The dominant Internet access and data-saving innovation among streaming services is the development of mobile applications to be installed on smartphones. All streaming services operating in Nigeria have their mobile applications that are specifically tailored towards the African market. Streaming services focus on mobile application for the continent due to the ubiquity of smartphones among residents, including the mobility they facilitate (Witt, 2017). The Global System for Mobile Communications (GSMA) reports high proliferation of smartphones in Africa and projects that smartphone users on the continent would rise to about 700 million by 2025. Alex Edeh of ShugabanTV (personal communication) noted that the mobile apps are
designed to allow for downloads so that a customer could download films when they get to a place of relatively stable Internet access for offline viewing later. With this, Internet challenges are, to an extent, reduced. This suggests a shift from ‘platform mobility’ synonymous with western contexts (Tryon, 2013) to ‘user mobility’ as the user is expected to move around to access content rather than content moving from one device to another for user consumption. The apps also have affordances for data saving. According to the Human Resources Manager of Sceneone TV, Abimbola Akindele:

In as much as many people love our contents, internet service is a major issue that most of our subscribers have. Most times, when we advertise movies on social media, what we hear is ‘It’ll finish my data o’. They say it that apart from them subscribing, they are going to pay a lot of money to get internet to watch. (personal communication)

To reduce the amount of data needed to watch a film, the apps are designed to present viewing options to viewers. For instance, the iROKOtv app has the ‘Download High Quality’ and ‘Data Saver’ download options. When I wanted to watch ‘Love Duty’, a feature film on the iROKOtv app, the ‘High Quality’ version was 337 MB while the ‘Data Saver’ version was 108 MB. For IbakaTV, downloads are allowed based on choices categorized as ‘High, Medium and Low’. For NevadabridgeTV, subscribers can download either in high definition (HD) or low definition (LD), respectively. The choice made determines the download MB. Apart from the reduced data and implied reduced cost, low MB films complete downloads faster than high MB films. Expatiating the logic of data-saving innovations in the VOD market, Nollywood NamasteTV founder, Basil Onyeka, explained that:

We are aware of data issues in Nigeria. That is why for every video we upload online; we always compress it so that it would consume less data. And on our platform, you have the option to minimize the quality of video you are watching. If you want HD, you will choose it. This is what we do to save data. (personal communication)

Notably, Sterne (2015) has demonstrated how infrastructural initiatives such as file compression that eliminates redundant data can shape access and expand possibilities for distribution in specific contexts. Market leader iROKOtv continues to set the pace in terms of Internet innovations. In a bid to attract more subscribers who might be discouraged by fluctuating Internet facilities, the streaming services have created physical kiosks in strategic places in Nigeria and Ghana. Internet facilities are provided within the kiosks. The streaming service also employed clients service officers that attend to subscribers. Active subscribers who experience poor Internet connections in their homes and localities visit the kiosks to download films using the Internet facilities provided by the company for free. In this sense, iROKOtv shoulders the cost of Internet for downloads. The films are downloaded and stored in the iROKOtv app for users to watch offline later. It is noteworthy that viewing device has been pivotal to Nollywood films distribution. Jedlowski (2012), using ‘remediation’ as a theoretical landscape, explains how video distribution on ‘small screens,’ that is TV sets, historically facilitated the transnational distribution of Nollywood films when transnational theatrical distribution was inexistent. With the digital turn in distribution, we now witness another form of ‘remediation’ from ‘small screens’ to ‘super small screens’ (Dovey, 2018) as part of strategies to advance access to Nollywood films. These contextual peculiarities underscore the assertions of critical infrastructure scholars (Parks and Starosielski, 2015; Plantin and Punathambekar, 2019) about the sociotechnical dynamics of media infrastructure and their relational characteristics.
Portal access cost and payment protocols

Another critical practice that defines the operations of streaming services are innovations aimed at enhancing access through strategic pricing and payment protocols. These strategies are in response to the economic and cultural realities in Africa. Apart from the economic situations that I have earlier discussed, the culture of distrust in online payment still lingers among Africans. Lobato (2019) underscores how pricing and payment protocols impact access to streaming services in particular zones of consumption. According to him, ‘even when high-speed internet infrastructure exists in a particular city, pricing practices and social context may be more important in determining levels of access’ (p. 85). He stresses further that ‘Payment systems must be adapted so that people can pay with local debit cards and through their mobile carriers ... over-the-top distribution does not erase the need for localization’ (p. 116). Nigeria streaming services have various pricing options strategically aimed at wooing potential consumers. iROKOtv is a handy example here. Prior to 2021, the streaming service charged #3000 (US$7) annual subscription fee for its Nigerian web version. In Ghana, annual subscription costs GHC 40 (US$7), while in South Africa, it costs R148 (US$8.99). Subscribers in countries outside Africa were required to pay US$24.99 annually. However, as from January 2021, it now charges #10,000 (US$25) annual subscription fee for its Nigerian subscribers, while in Ghana and South Africa, annual subscription costs US$20. Notably, subscribers outside Africa now pay US$14.99 quarterly (US$59.96 annually). As noted by the iROKOtv CEO, the change in subscription costs was a response to the current economic realities. He explained further that the significantly lower subscription prices for African subscribers is a strategy adapted to the economic peculiarity of the continent, while leveraging on the relative economic buoyancy of developed nations.

Unlike iROKOtv, other subscription-based portals have uniform pricing across all countries. However, there are varying subscription options that consider the realities of both low-income and high-income subscribers. Unlike iROKOtv with country-specific pricing models, other portals allow subscribers to choose the pricing that works for them from the low to high options. Table 1 presents the subscription prices of other streaming services distributing Nollywood films.

Table 1 reveals the competitive pricing strategy put in place by each SVOD portal. SceneoneTV observably has the single and family options. The single plan is the same as Netflix’s basic plan where subscribers can only watch on a single device at a time, while the family plan allows for streaming on multiple screens at the same time. Netflix’s Standard Plan allows watching on two screens, while the Premium Plan permits watching on four screens simultaneously. It is worthy of note that streaming services that have both subscription and transactional components such as DeloniferaTV and NollylandTV; including others such as freemium AirtelTV and TVOD ShugabanTV are all price conscious as well. Renting single premium films on DeloniferaTV costs US$0.53 for viewers in Nigeria and US$1 for those outside Nigeria. AirtelTV charges between US$0.51 and US$0.79 for its rentals. Notably, AirtelTV operates only in Africa. For NollylandTV, a film could be rented for as low as US$0.39. NollylandTV also gives ‘Daily Pass’ to select catalogue of films for US$2.99. ShugabanTV charges US$0.79 for rentals, while outright purchase costs US$4.50.

Streaming executives noted that with the low prices, they have been able to get more subscribers. Alex of ShugabanTV (personal communication) explained: ‘We (in Africa) are a large population but not a very wealthy one. So, it becomes strategic about how we need to price for the content to be more affordable’. Basil of Nollywood NamasteTV (personal communication) corroborated by noting that
We adopted the low pricing for people to subscribe, and once you subscribe and watch good movies, it will help you to promote our works. We anticipate that at current price, it won’t be difficult for us to get subscribers.

Closely associated with the pricing are the payment protocols put in place. Streaming executives told me about the lack of confidence in online payment among many Africans who are often wary of giving out their bank information. Nollywood producers also believe that many Africans have more confidence in foreign-owned platforms for digital payments. This is partly due to the notion that the banking system on the continent is still weak compared to those of the more developed contexts. As explained by producer Kevin (personal communication):

There is something called ‘trust’ in financial dealings. You can comfortably buy something from Amazon because you can trust them with your financial details. You can put your card on the platform. On the contrary, people are less likely to put their details on platforms from Nigeria with the same level of enthusiasm.

Streaming executives confirmed that the lack of trust was due to cases of cyber fraud that has become a stigma for many Nigerians. Streaming executive Basil (personal communication) expatiates on this:

Because of many cases of online fraud, people find it difficult to use their credit cards to pay for something that is online. Once a platform is from Nigeria, they find it difficult for them to subscribe. They fear that once they subscribe with their cards, hackers would collect their bank details to hack into their accounts. That is one of the most difficult things we face.

Although things have improved in recent times as more people have taken to digital payment, streaming services still have eyes for those who are yet to migrate online. Consequently, these portals use the services of third-party payment platforms such as Paystack, Stripe, e-wallet, Paypal and Mobile Money. In addition, portals such as iROKOtV, IbakaTV, NevadabridgeTV,

| Portal                  | Monthly | Quarterly | Biannual | Annual |
|-------------------------|---------|-----------|----------|--------|
| IBAKATV                 | 7       | 15        | 35       | 60     |
| LINDAIKEJITV            | 6       | 15        | 30       | 60     |
| NOLLYLANDTV             | 5.99    | 16.99     | 32.99    | 64.99  |
| NEVADABRIDGETV          | 1.97    | 6.58      | N/A      | 19.74  |
| CONGATV                 | 5.99    | 12.99     | N/A      | N/A    |
| SCENEONETV              | 1.58 (single) | N/A | N/A      | 18.43 (single) |
|                         | 5.26 (family) |      | N/A      | 18.43 (family) |
| NOLLYWOOD NAMASTETV     | 1.84    | N/A       | N/A      | 18.95  |
| DELONIFERATV            | N/A     | N/A       | 15       | 25     |
| NETFLIX                 | 10.99 (Basic) | N/A | N/A      | N/A    |
|                         | 15.99 (Standard) |   | N/A      | N/A    |
|                         | 19.99 (Premium) |   | N/A      | N/A    |
| IROKOTV                 | Prices are country-specific as already explained |

Table 1. Nollywood SVODS subscription prices.
DeloniferaTV, NollylandTV and CongaTV partner with local banks in Nigeria to facilitate payment either via mobile payment options or physical bank payment. Mobile payment involves the use of USSD codes provided in partnership with banks, while physical payments entail paying by cash in banks and mailing the payment tellers to the streaming services who, upon receiving the mails, activate subscriptions from their offices. There are also other streaming services that are leveraging on partnership with telecommunication companies for payment with airtime. As indicated in its mobile app, iROKOtv has ongoing partnership with MTN, Airtel and Vodafone for its Ghanaian market. AirtelTV also enables Airtel SIM users in all African countries to pay for content with airtime. NvivoTV’s founder, Chioma Ude (personal communication), also revealed that the company was in partnership talks with telecom giant MTN for its African markets.

Explaining how third-party payment system has helped increased subscribers for their streaming service, John Oluwaseyi, System Administrator at SceneoneTV (personal communication) noted:

"We know that most Africans are concerned about security when it comes to their credit cards being used online. So, we came up with local bank transfer method. With that, we give out our bank details which people can transfer money into. That was one way we got many subscribers. We recently launched MOMO (Mobile Money) in Ghana. That does not involve card too. With that, many Ghanaians have been able to make payment on our platform."

These strategic innovations are the defining factors of streaming services targeting the African VOD market. As these analyses have revealed, the Internet, Internet service providers and localized payment apparatus that are omitted from Colbjørnsen’s (2020) network model of streaming are pivotal within Africa. This reality also justifies his warning against adapting the network model in non-contextualized form.

**Afrinolly app’s demise as a case study for the problematic VOD market in Africa**

While the previous section has presented specific challenges that characterize VOD market in Africa, including the strategies employed by streaming services to navigate the terrain, this section looks at the demise of Afrinolly app as a case study to understand the difficult operational environment for the streaming business on the continent. During my interviews with streaming executives, they observed that apart from the challenges identified in the sections above, they also face internal crisis emanating from poor funding opportunities, inability to attract Venture Capital, high maintenance cost for streaming infrastructures and poor electricity supply that increases cost of operation as they have to spend a huge sum on diesel. These challenges have no direct connections with subscribers. They are socio-economic challenges that must be tackled for smooth service delivery. Many of the streaming executives have been struggling to manage these challenges. However, what happens when a streaming service is unable to successfully navigate such difficult operational environment? The case of Afrinolly app provides a glimpse into the likely outcome.

The Afrinolly app was well celebrated when it was launched in 2011 as a directory or a kind of IMDB for African films. It initially contained only film trailers and news feeds about events happening in African entertainment industries. So bright was the idea that in 2011, it won Google’s first Android Developers Challenge for sub-Saharan Africa in the entertainment category and got
Afrinolly took the ambitious move into streaming Nollywood films in 2015 when it launched the Afrinolly Marketplace. The Afrinolly Marketplace was a facility within the Afrinolly app that enabled secure distribution of screen content among mobile phone users in Africa and other parts of the world. It was also the first app-based TVOD portal in Nigeria. Ebelebe (2017) observes that the app was widely accepted as it recorded over four million downloads. According to a former executive of the company, Bobola Oniwura (personal communication), the company aimed at enabling users to pay for specific films that they wanted to watch instead of paying time-specific subscription fee for access to an entire library that they may not want. African customers were required to pay as low as US$0.26 to rent a film, while outside Nigeria, rentals cost US$1 per film. Afrinolly’s content strategy was a hybrid of original productions and time-bound licensing. The CEO, Chike Maduegbuna, founded the Afrinolly Creative Hub to serve as a film production company and a platform for creative development for emerging and established content creators. Bobola revealed that film-makers were given access to Afrinolly app’s back end where they could upload their films once a deal has been agreed, and they were able to track audience engagement with their films. Revenue was shared between the company and film-makers based on agreed percentage.

Viewers were mainly Africans in diaspora with the bulk of viewers logging in from Europe, America and UAE. Most of the consumers were Nigerians and Africans in those places who were desirous of content from home to watch. Bobola attributed the concentration of viewers in more developed countries to the low Internet speed and high Internet cost in Africa which was too limiting for people to watch full length movies. Jolted by the unwillingness of subscribers to give out their credit or debit cards information online, the company partnered with MTN, a leading telecommunication company in Africa with headquarter in South Africa. This was to enable viewers that use MTN SIM cards to easily pay for contents using their airtime instead of credit cards. Ebelebe (2017) observes that the partnership was also a strategic stride targeted at positioning the app to the over 200 million MTN subscribers across 20 African countries of operation. Afrinolly, being an app-based service, was distinguished from other portals that had web versions and was positioned as a sure bet against online piracy. The app had in-built Digital Rights Management (DRM) apparatus that made its contents unplayable outside the app. This, according to Bobola, was necessary because existing portals with web presence were constantly witnessing unpleasant experiences of online-related piracy. Explaining the functionality of the DRM tool, Bobola (personal communication) noted that:

The technology was built into the Afrinolly app to protect the content because each content was encrypted. So, if it gets out of AfriNolly, it stops showing. But that is only possible for you to do on mobile app. If we have had a web platform, then people would still be able to copy. So, we did not have a web platform because of that.

Despite the huge potentials of the app, it became defunct in 2019 due to two main reasons: low patronage and cost of operations. Bobola observed that TVOD is still an endangered VOD model in Africa where there is low culture of a la carte online content rentals and purchases. The proliferation of YouTube channels that provide free access to Nollywood films is also major a challenge for portals, especially TVODs. The Afrinolly app was not exempted from this reality. Bobola noted that while many users visited the app daily, majority of them only watched the free trailers that were available while only a few opted to watch feature length films. The low patronage was complicated by the cost of operations. Bobola recalled that the technology implemented in
building the app was very expensive to maintain. To cap it, all effort made to secure Venture Capital failed. The management was also not interested in increasing the cost of film rentals. Unable to navigate the crisis, the management decided to discontinue the app. The experience of Afrinolly app underscores the tough realities of the VOD market in Africa. It also explains the uncertainties that characterize the market and provides justification for the creative strategies that have become the saving grace for streaming services that must stand the test of time.

Playing by different rules: Spotlight on Netflix

In her analysis of Netflix as a distinctive global streaming service with unique operational patterns in many markets across the globe, media industries scholar, Amanda Lotz, describes it as a ‘zebra among horses’ (Lotz, 2020: 2). This is an apt way to consider Netflix within the African VOD market. Netflix has cemented itself as a distinctive player in the streaming ecosystem of Nollywood films to the extent that conversations on VOD services must include its operations. Although it does not boast of many Nollywood titles like the national streaming services, yet its presence in Nigeria and its operations in Nollywood provide key insights for holistic analysis of VOD market in Africa. The complication that Netflix provides to analysing the African VOD market largely connects with its operational strategies that, to a great extent, differ from other streaming services that I have examined thus far. Although it is gradually funding original productions from Nollywood, its licensing practice centres on acquiring premium Nollywood films that have had their cinema runs. Netflix has also made high-profile acquisitions such as Lionheart (2018), Oloture (2020), Citation (2020) and King of Boys 2 (2021) that are all branded as ‘Netflix Originals’. With this, Netflix positions itself as the destination for Nollywood’s most premium contents. Curiously, it has not localized its pricing system for Nigeria or any African country. Payment is only through cards. Also, no partnership with local banks and/or Telcos has been announced. Considering the economic reality of Nigeria and many African countries, it remains unclear how Netflix intends to permeate the continent considering its distinctive pricing that makes it the most expensive streaming service operating on the continent as it has extended its uniform pricing policy to the African markets. Lobato (2019) observes that since 2016, there has been an option within the Netflix app to download shows over Wi-Fi to watch later – a feature designed for commuters, users with irregular access to the Internet, and those who need to carefully manage their bandwidth. However, the download option is not data-sensitive like the case with other streaming services earlier explained. Netflix has no feature to download on high, medium or low resolutions.

Accurate figures about Netflix’s subscriber base are not in public domain. However, Netflix is estimated to have less than 50,000 subscribers in Nigeria out of the 180 million population and fewer than 1.5 million in sub-Saharan Africa with over one billion population (Kelechi, 2020). Netflix’s pricing and content strategies denotes a one-percenter streaming service, targeting the wealthy class. For Nigeria, Nollywood film-makers believe that Netflix is not particularly focused about the Nigerian markets as of now. Instead, the focus is on the African diaspora communities whose appetite for quality Nollywood films is not in doubt. This logic, it is believed, currently drives Netflix’s activities in Nollywood. According to producer Darlington Abuda:

The diaspora market has now changed the way Netflix views Nigeria. At a time, they look at every country from their own subscription platform. If you have one million subscribers from Nigeria, for instance, they look at the country like that. But when they started putting our content out, from the second half of 2019 they realized that for Nigeria and Africa, our diasporic market was bigger than those in the country. The reason
for that is that we have millions of Nigerians and Africans from across the world who want to consume content from home, and because they are in those countries (with strong internet and disposable income for subscription), Netflix was readily available for them.’ (personal communication).

Darlington’s comment is instructive. His film *30 Days in Atlanta* (2014) was one of the first set of films licensed by Netflix in 2015. After that, Netflix has licensed five additional films that he produced. The deals were brokered by Filmone Distribution, one of Netflix approved aggregators in Nigeria. A producer also corroborated Darlington’s assertion when I interviewed her. She recalled having a conversation with a Netflix executive who revealed that they were after local stories for the international audience. She explained further that ‘I think Netflix has a strategy to come into Africa, and as a business strategy, they would use Nollywood films to get the eyeballs on their platform. What they are doing is to use Nollywood as an entry point’ (anonymous producer, personal communication).

Notably, in September 2020, when Netflix announced three original feature films from Nigeria, Ben Amadasun, Netflix’s Director of licensing and co-productions in Africa, observed that the new deals were demonstrations of ‘how we’re building a home for the best-in-class Nigerian content for our members in Nigeria and beyond. It’s amazing to see how Nigerian films and series resonate with audiences around the world’. Just like industry sources suggested, Amadasun’s comments show that Netflix’s interest in Nollywood is significantly influenced by how ‘Nigerian films resonate with audiences around the world’ and not necessarily to actively capture the Nigerian or African markets. This underscores the complexity of how Netflix views its markets.

While Netflix intends to build its subscriber base in Africa considering the ‘streaming wars’ with other players such as Apple TV, Amazon Prime and Disney+ in the US market (Kelechi, 2020), its pricing system currently accommodates the one percent on the continent. Netflix’s seeming uninspiring interest in the African market is not unconnected to the economic and Internet challenges on the continent. Netflix has previously extended similar approach to India. In 2016, after Netflix launched in India, one of its executives was quoted in a press report that the streaming service was after English-speaking Indians who travel abroad and are wealthy (Lobato, 2019). Similar strategy appears to have been extended to its African markets. Netflix is obviously interested in capitalizing on the vast transnational audiences of Nollywood while also appealing to the wealthy class resident in Nigeria and Africa. This strategy has defined Netflix’s operation in Nigeria and Africa till now. When it decides to accommodate more subscribers from below the economic spectrum, it must begin by localizing its subscription prices to reflect the economic realities of an average Nigerian or African and also localize payment protocols by exploring partnership with Telcos and local banks. In addition, it must increase content acquisition. Although it currently boasts of premium Nollywood content, it is not the go-to portal for Nollywood films on the same scope of iROKOtv, IbakaTV and many other national portals. Unlike the national streaming services, Netflix can afford to play by different rules because it is more capitalized and has wider subscription base than any of the national streaming services. Thus, it can achieve economies of scale by leveraging on its developed markets while appealing to the wealth class in Africa. Afrinolly app, for instance, did not have all these financial muscles and huge subscriber base; hence, its demise.

**Conclusion**

This article has examined the strategies employed by streaming services in Nigeria to navigate the business climates in their African markets. The article explains how digital and economic divides have been strategically approached by these streaming services.
This culminates in different approaches to the developed markets and the African markets. While no serious efforts are being put in place to mediate access for the developed markets that are characterized by infrastructural development and more disposable income, streaming services devise creative means to get consumers on board in Africa. As this article has articulated, such creative means are principally aimed at making access more affordable.

The case study of Afrinolly app was also presented to underscore the fragility of survival of streaming services in the African markets. Notably, multinational streaming service, Netflix is still uninterested in the mass audience in Africa, preferring to appeal to the wealthy residential Africans and Africans in diaspora. Its continuous survival despite playing by different rules and the demise of undercapitalized Afrinolly app provide useful insights to the peculiar operational terrain of VOD firms targeting Africa. The market dynamics that this article interrogates extend extant theories in media industries scholarship, especially as they pertain to the call for context-grounded studies that would provide holistic overviews of practices and conventions that characterize the digital turn of media distribution in many contexts across the globe.

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Notes

1. I use ‘market’ in this article to represent the ‘zones of consumption’ or where the end users of streaming services reside.
2. Personal communication, anonymous aggregator, AirtelTV.
3. See Ndiomewese (2017).
4. For broader history of iROKOtv, please see Miller J (2016).
5. Personal communication, anonymous iROKOtv producer.
6. Personal communication, anonymous, iROKOtv producer.
7. Personal communication, Abimbola Akindele, Human Resources Manager, SceneoneTV.
8. Personal communication, Producers Khing Bassey and Happy Julian; ibid.
9. Only iROKOtv arranges its library to reflect month of release. Films released within the past 3 months are visible on the portal and are categorized based on the release month. Thus, only it offers a helpful feature that makes for easy tracking of the frequency of film release.
10. See Asu F (2020).
11. See The World Bank (2020).
12. https://www.sos-usa.org/about-us/where-we-work/africa/poverty-in-africa
13. See GSMA (2020).
14. See Udoh (2020).
15. See Economic Confidential (2020).
16. Personal communications, Alex Edeh of ShugabanTV and Nnamdi Uti of NollylandTV.
17. See Wole (2019).
18. See Szala G (2020).
19. For detailed discussion, please see Lobato R (2019).
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