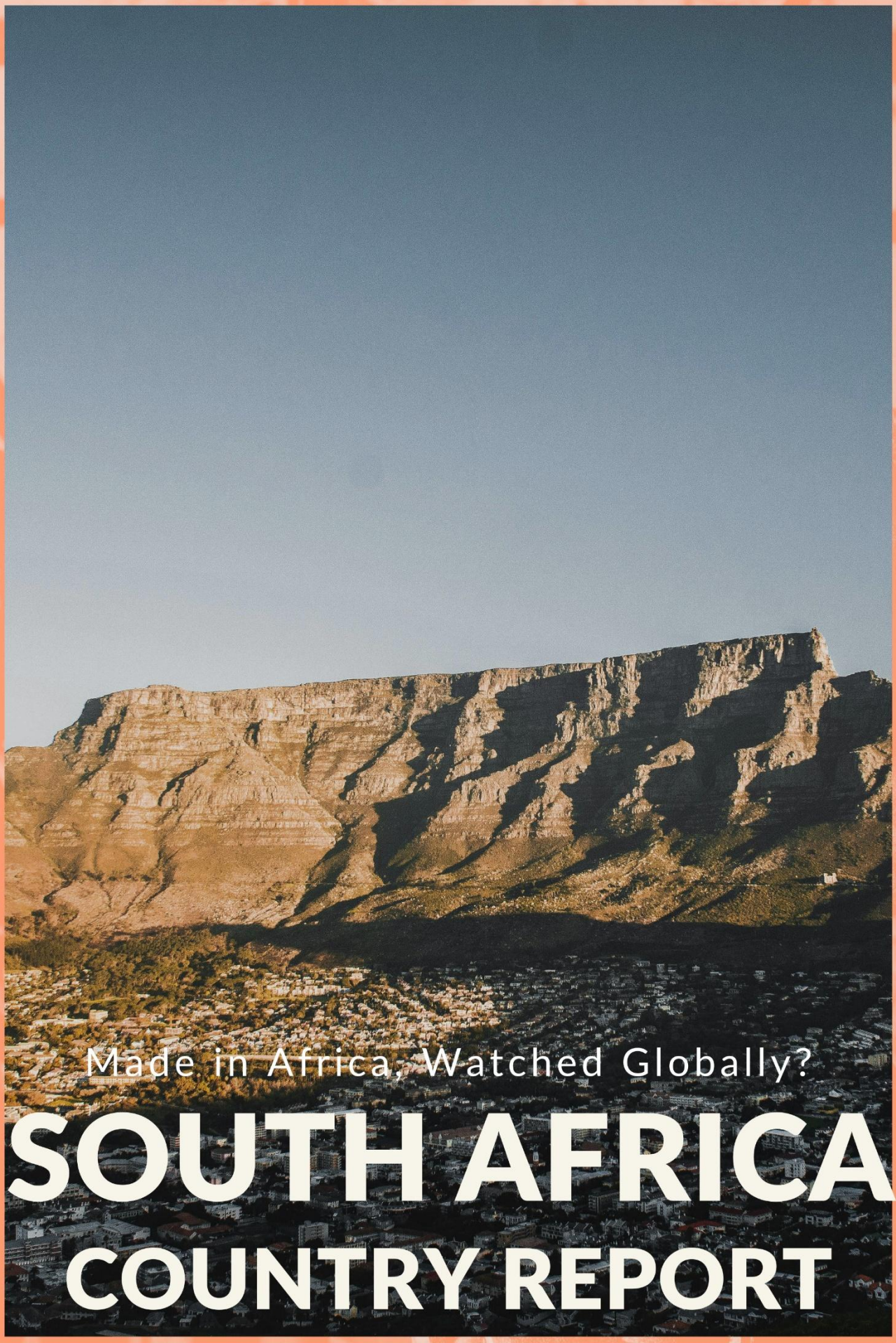


Made in Africa, Watched Globally?

SOUTH AFRICA COUNTRY REPORT

giz Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) GmbH

AFREXIMBANK

CANEX Creative Africa Nexus

Dalberg

Foreword

Over the ages, “interesting times” have been seen as both a blessing and a curse. It is hardly an understatement to say that the South African film industry today is indeed living in those interesting times. To their credit, the industry has survived several cycles of change and turmoil, showing the resilience and the tenacity of an industry in constant flux.

What we have learnt over the years is that times of great change also means times of great opportunity. The world in general has undergone vast changes that have filtered down into this industry and how audiences are engaging with stories. In South Africa, we are still grappling with the effects of the Covid-19 pandemic and how it changed consumer behaviour. Understanding these changes allows the film industry to make room for innovative solutions and greater collaboration with the rest of the continent, to unlock the drivers and obstacles to growth.

As a fervent believer in the ethos of finding African solutions to African problems, I am buoyed by the possibilities that are being unlocked in this current period of change. We are told that by the year 2050, 25% of the world’s population will be of African descent. As a continent, we are already showing incredible growth in our digital engagement which points to gains in the audience potential for our films. The problem has never been the supply, it has been the limited distribution models based on traditional paths that have outgrown their relevance in a changing continent. It is here that we as an industry stand to lead the charge in reaching audiences where they already exist and thus create new models of financing, consumption and monetisation.

Access to data in research reports such as this provides analyses of trends and insights shaping the industry across the continent, identifying the gaps that offer opportunity for growth and the innovations that have overcome existing challenges of scarce resources and provides us with a framework from which we can make informed decisions around the sustainable production and distribution of films.

Despite the challenges, production continues with both local and international projects taking advantage of South Africa’s locations, skilled crews and infrastructure including highly rated studios and post-production facilities. I would therefore challenge all of us who are part of this industry, an industry that has continued to prove its worth through its contributions to the GDP of the creative industries and the greater GDP of the country, to engage with this report in the spirit that it has been compiled. To share insights, comments and observations, to collectively harness the power of the continent and work towards growth in the next 5 years and beyond.

Yours sincerely,

Thandeka Zwana

Indigenous Film

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Executive Summary

South Africa represents one of the most mature and complex film ecosystems on the African continent. With a population of over 64 million, a nominal GDP of approximately USD 426 billion (2025), and an internet penetration rate of roughly 80%, the country offers a significant and digitally engaged audience base. The Cultural and Creative Industries (CCI) sector contributed R161 billion to GDP in 2020, approximately 3% of the total economy, with the audiovisual and interactive media sub-sector alone accounting for R48.4 billion of this figure.

The national film ecosystem has undergone a profound transformation since 1994, shifting from an exclusionary apartheid-era structure toward a more inclusive, though still deeply unequal, industry. Key institutions, including the National Film and Video Foundation (NFVF) and the Department of Trade, Industry and Competition (DTIC) have played central roles in policy development and financing. However, the sector continues to face structural fragmentation, with public entities frequently criticised for inefficiencies, unpredictable funding cycles, and limited cross-institutional coordination.

Urbanisation, digital connectivity, and the rapid growth of streaming platforms have reconfigured how films are produced, distributed, and consumed. While international platforms such as Netflix and Showmax, which was shut down as of 30th April 2026, have expanded global visibility for South African content, their commissioning processes remain difficult to navigate for independent filmmakers. Meanwhile, public broadcasters, once the backbone of local content investment, have weakened significantly due to financial instability, and the training pipeline continues to outpace the industry's capacity to absorb talent.

South Africa is also well-positioned as a continental hub for pan-African co-productions, supported by bilateral treaties with ten countries and a competitive technical infrastructure. Yet this potential remains underutilised, hampered by limited intra-African distribution networks and an enabling environment prone to policy shocks.

Film Distribution

South Africa's distribution landscape is characterised by the decline of traditional theatrical exhibition alongside the rapid growth of streaming and digital platforms. Cinema infrastructure has contracted significantly over the past decade, with cinema sites declining by roughly one-third between 2015 and 2025. Local films remain marginal within theatrical exhibition, accounting for 18% in 2024, up from only 3% of releases in 2023 and less than 1% of total box office revenue in both years. The market is dominated by a small group of distributors and exhibitors who largely prioritise commercially secure international productions, limiting screen access, marketing support, and theatrical run times for South African films.

At the same time, digital distribution has emerged as the primary growth engine for the industry. Streaming platforms such as Showmax, Netflix, eVOD, SABC Plus, and DStv Stream have fundamentally reshaped audience access and viewing behaviour. OTT platforms are projected to grow significantly faster than traditional Pay TV, driven by mobile-first consumption patterns, ad-supported models, and increasing demand for local and regional content. However, while streaming has expanded visibility for African stories, it has also concentrated ownership and decision-making power within a small number of platforms. Commissioning models often require filmmakers to surrender intellectual property rights, limiting their ability to benefit from the long-term value of their content.

The study also highlights the growing importance of alternative distribution channels such as festivals, community screenings, and bioskop-style exhibition models. Although attendance at festivals and community screenings remains limited nationally, these spaces play a critical role in connecting underserved township and rural audiences with local content. Stakeholders increasingly view the revival of community-led exhibition models as essential to rebuilding local audience engagement and improving access outside major urban centres.

Audience Development

South African audiences demonstrate high engagement with film and digital media, supported by widespread internet penetration and strong usage of streaming and social media platforms. Audiences are highly discerning and place significant emphasis on storytelling quality, technical production standards, acting quality, and cultural relevance when selecting films. Social influence remains central to film discovery, with word-of-mouth, social media, and streaming platform recommendations acting as the dominant channels through which audiences learn about new films.

The audience segmentation analysis identified three dominant audience profiles: Urban African Story Loyalists, Trend-Driven Global Streamers, and Culturally African Story Loyalists. Collectively, these segments reveal strong demand for African storytelling alongside continued consumption of international content. Audiences show clear interest in locally grounded narratives, but expectations around production quality and storytelling sophistication remain extremely high. This creates both an opportunity and a challenge for filmmakers, who must compete not only locally but also against globally distributed content.

Despite strong audience interest, several barriers continue to constrain audience development. High subscription and cinema costs, uneven access to cinemas outside urban centres, limited awareness of local film releases, and perceptions of inconsistent production quality reduce engagement with South African content. The findings also reveal a growing shift toward mobile and streaming-based consumption, particularly among younger audiences, reinforcing the need for flexible, affordable, and digitally accessible distribution strategies.

Social Impact

South Africa's film ecosystem demonstrates significant potential for social impact storytelling, particularly through films and series that engage with issues of identity, inequality, gender, history, and social justice. Audiences show relatively high interest in educational and socially relevant themes, while cultural connection and representation remain important drivers of film consumption. This creates a strong foundation for impact-oriented filmmaking that resonates with local realities and lived experiences.

However, the social impact ecosystem remains constrained by commercial pressures within the broader distribution and financing environment. Broadcasters and streaming platforms often prioritise commercially proven genres and formats, limiting space for documentaries, indigenous language content, and socially driven narratives. Public broadcasters such as the SABC continue to play an important role in public-interest storytelling, but financial instability has reduced their commissioning capacity. Similarly, while donors, NGOs, and development partners provide support for impact-oriented content, these initiatives remain fragmented and insufficient to sustain a broad-based social impact film sector.

Community screenings, festivals, and grassroots exhibition models therefore remain essential mechanisms for ensuring that socially relevant films reach underserved audiences. Stakeholders consistently emphasised the need for stronger collaboration between public institutions, broadcasters, funders, and filmmakers to position film not only as entertainment, but also as a tool for social dialogue, education, and cultural preservation.

Financing and Enabling Environment

South Africa's film financing ecosystem is relatively more advanced than its regional peers, anchored by institutional support from the National Film and Video Foundation (NFVF) and the Department of Trade, Industry and Competition (DTIC). The DTIC's 35% restructuring to include tax credits rather than a purely monetary production rebate is a cornerstone of this environment, serving as a "bankable" instrument that helps producers attract international productions and secure additional investment. However, this landscape is characterised by

structural fragmentation and inequality, as funding remains highly competitive and concentrated among a small group of established production companies. Emerging filmmakers and those outside major urban centres face significant barriers, often relying on personal savings due to the lack of private bank lending and the complexity of public grant applications.

While broadcasters and streaming platforms have become dominant financiers, their investment models are strictly commercial and often require the full transfer of intellectual property (IP) rights. This trend limits the long-term financial sustainability for creators, who are unable to benefit from the residual value of their work. Furthermore, the enabling environment is hampered by administrative inefficiencies, policy uncertainty, and a talent pipeline that exceeds the industry's absorption capacity. To unlock its potential as a continental hub, the sector requires systemic reforms, including the stabilisation of tax incentives, the expansion of co-production treaties within Africa, and the implementation of local content quotas to ensure a more inclusive and transparent financing ecosystem

Opportunities and Strategic Levers

The study identifies several strategic opportunities capable of strengthening South Africa's film ecosystem and positioning it as a continental leader in African film distribution and audience development. First, the rapid growth of OTT, AVOD, and FAST platforms presents major opportunities for scalable distribution of African content, particularly through mobile-first and lower-cost access models that align with audience behaviour. There is also growing demand for high-quality regional content, creating space for stronger pan-African distribution partnerships and co-production models.

Second, expanding community-based exhibition and alternative distribution infrastructure presents an important opportunity to reconnect filmmakers with township and rural audiences historically excluded from cinema culture. Revitalising bioskop-style screenings, investing in local film hubs, and supporting community screening initiatives could significantly improve access to local films while stimulating grassroots audience development.

Third, there is a clear need to strengthen industry coordination, financing transparency, and intellectual property protections. Stakeholders repeatedly highlighted the fragmented nature of the ecosystem, weak collaboration across institutions, and the limited bargaining power of independent filmmakers. Strengthening local content policies, improving access to financing for emerging filmmakers, and encouraging more equitable distribution agreements could help diversify participation and improve long-term sustainability.

Finally, South Africa's strong digital engagement and mature audience base provide a unique opportunity to build sophisticated audience data systems and targeted marketing strategies. Improved audience analytics, stronger use of influencers and social media campaigns, and more direct audience engagement by filmmakers could improve discoverability and reduce dependence on distributors and platforms for visibility.

The Path Forward

South Africa's film industry stands at a critical transition point. The decline of traditional cinema and broadcast models, combined with the rise of digital platforms, is reshaping how films are financed, distributed, and consumed. While this transition creates new opportunities for visibility and audience reach, it also risks further concentrating power within a small number of dominant platforms and distributors. The sustainability of the ecosystem will therefore depend on creating a more balanced and inclusive distribution environment that supports both commercial growth and cultural representation.

Moving forward, the industry requires stronger collaboration between government institutions, private sector actors, broadcasters, streaming platforms, and filmmakers. Investments should prioritize accessible distribution infrastructure, support for local storytelling, audience

development, and mechanisms that allow filmmakers to retain greater ownership and long-term value from their work. At the same time, strengthening community-based exhibition, improving affordability and discoverability of local films, and supporting diverse forms of storytelling will be essential to expanding participation across audiences and creators alike.

Ultimately, South Africa has the institutional foundations, creative talent, and audience appetite to remain one of Africa's leading film ecosystems. Unlocking this potential will depend on whether the industry can transition from a fragmented, platform-driven market toward a more coordinated ecosystem that balances commercial viability with cultural inclusion, equitable access, and long-term sustainability.

1. Introduction

1.1 Background and context

Africa's film industries are experiencing rapid growth, driven by demographic expansion, urbanisation, and increased digital connectivity. Key industries in Africa - Kenya, Rwanda, Nigeria, South Africa, Senegal, and Egypt - are emerging as important production hubs, each with distinct national structures but shared challenges in financing, infrastructure, and market integration. At the same time, global demand for African stories is increasing, with streaming platforms, broadcasters, and international partners expanding their engagement with the continent's content.

Despite this momentum, the Africa's film industry remains constrained by fragmented distribution systems, limited audience data, weak intra-African circulation, and underdeveloped mechanisms for measuring social and economic impact. These challenges limit the scalability and sustainability of the industry, particularly in reaching diverse audiences both within Africa and globally. Without efficient marketing and distribution, African films struggle to reach audiences. Without clear audience insights, investment decisions carry higher risk. Without measurable impact, it becomes harder to position film as a priority sector for policy and financing.

Understanding how these challenges manifest across different markets is critical to identifying where targeted interventions can unlock growth, strengthen sustainability, and expand the reach of African film. It is against this background that the Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) GmbH and the African Export–Import Bank (Afreximbank) commissioned this study to deepen understanding of the African film ecosystem and identify pathways to unlock its full potential through improvements around the distribution system.

The partnership leverages the unique strengths of the two institutions. Afreximbank provides the critical USD1 billion financial facility via CANEX to scale production and infrastructure. GIZ, on the other hand, acts as a catalyst for the ecosystem through investing in the generation of industry knowledge, strategic capacity development, and cross-sector partnerships to position African film for sustainable growth across the continent. Together, they bridge the gap between high-level capital and grassroots impact, transforming the industry's financial potential into improved livelihoods for creative professionals.

1.2 Objectives and research questions

The primary objective of this study was to generate actionable insights to inform strategy, policy, and investment decisions across Africa's film sector. It aims to support governments, financiers, industry stakeholders, and development partners in strengthening distribution systems, expanding audiences, and enhancing the (social) impact of film.

Specifically, the study sought to:

1. Map the current landscape of film distribution across the six focus countries (Egypt, Kenya, Nigeria, Rwanda, Senegal, and South Africa) and at the global level, identifying key channels, emerging models, and bottlenecks.
2. Analyse how audience of African films are developed and sustained, including patterns of access, platform use, and engagement.

3. Assess the specifics around social impact films, including financing, marketing campaigns and audience preferences.
4. Map the film financing ecosystem and successful investment models.
5. Identify scalable practices, business models, and partnerships that can strengthen the ecosystem.

1.3 Methodology and scope

The study focused on six countries selected to reflect diversity in geography, language, market size, and industry maturity: Kenya and Rwanda (East Africa), Nigeria and Senegal (West Africa), South Africa (Southern Africa), and Egypt (North Africa). Together, they represent Anglophone, Francophone, and Arabophone North Africa contexts and capture a range of policy environments and production capacities. They also represent a sizable share of films produced in Africa and was therefore used as a proxy to understand the African film topography in this study.

The study adopts a mixed-methods approach, combining:

- Secondary research & media analysis: Literature review and media analysis is used to map how African filmmakers can monetize their work and identify critical challenges facing distribution such as limited financing, weak infrastructure, regulatory hurdles and market access barriers. This helps pinpoint information gaps and structural obstacles, supporting recommendations to strengthen monetization and attract distributors across the continent.
- Primary Research: These interviews focused on understanding the barriers, challenges and experiences of different distribution platforms on airing African films. Also understanding, what drives decision making when interacting with African filmmakers and how can this be improved. The primary research was executed through a three-pronged approach:
    - Key Stakeholder/Informant Interviews with filmmakers and distributors, marketing platforms and policy actors
    - Audience survey, targeting the African film audience/viewers, to capture their perception and drivers of watching films and form a good foundation for audience development.
    - Case studies across the continent in different areas to illustrate innovative approaches to distribution, audience development, and impact.

Analysis

The analytical process employed a triangulation framework to ensure high internal validity across the six study markets. Quantitative data from the audience surveys was cross-referenced with stakeholders' insights from stakeholder interviews and secondary industry reports to identify recurring structural patterns. This mixed-methods approach allowed the study to ground its findings in both empirical market data and lived industry experience, strengthening the relevance and credibility of the resulting insights and recommendations.

A central component of this phase was the Audience Segmentation Analysis. Rather than treating African viewers as a monolith, the study utilised cluster analysis to categorise audiences into four distinct segments based on their viewing habits, content preferences, motivations, platform and device usage and willingness to pay. Multiple segmentation

models were tested, with the final segments selected for statistical robustness and practical relevance. Each segment was then profiled across key dimensions such as demographics, viewing behaviour, and content preferences enabling a nuanced understanding of who audiences are, how they consume content, and what drives their choices. This segmentation allows the report to move beyond broad market averages and provide granular strategies for targeted audience development. Finally, thematic coding was used to synthesize stakeholder narratives, mapping them against the identified economic and distribution barriers to ensure that all recommendations are grounded in both market data and lived industry experience.

1.5 Limitations

This study provides a comprehensive synthesis of the African film ecosystem across six diverse markets. However, the following limitations should be considered when interpreting the findings:

- Data on film production, distribution, and audience behaviour in many African countries are patchy, fragmented, or entirely absent for recent years (2022-2026). In several markets, official statistics on box office, streaming consumption, or informal distribution are either not collected or not publicly available. This forced the analysis to rely on proxies such as revenue estimates from industry associations, box office aggregates compiled by private analytics firms, cinema- ticket- sale trends, film- commission survey data, festival participation and sales- market catalogues, and social- media- engagement metrics. These proxies provide indicative patterns rather than precise, audited indicators.
- The reliance on secondary sources means that some claims about impact, financing, and audience behaviour rest on qualitative narratives and grey-literature evidence rather than systematic impact evaluations or large-scale surveys. Future primary research, including more granular audience data and structured impact assessments, will be needed to refine and test the hypotheses put forward here.

2. Country Context

2.1 Country Context

South Africa represents one of the most significant and diversified economies on the African continent, with a population exceeding 64 million as of 2025[1]. The nation's nominal GDP reached approximately USD 426 billion in 2025[2], supported by a robust services sector that increasingly includes the creative industries. Urbanisation is a defining demographic trend, with nearly 70% of the population concentrated in major metropolitan hubs like Gauteng, the Western Cape, and KwaZulu-Natal, which serve as the primary centres for film production and exhibition. Digital connectivity is exceptionally high, with an internet penetration rate of roughly 80% and users spending an average of over nine hours online daily, creating a massive digital audience for audiovisual content.

The national film ecosystem is integrated into a broader Cultural and Creative Industries (CCI) sector that contributed R271 billion to the GDP in 2023, representing approximately 4% of the total economy[3]. The audiovisual and interactive media sub-sector alone accounts for R53.7 billion of this contribution. This ecosystem is supported by a developed institutional landscape, primarily led by the National Film and Video Foundation (NFVF), which mandates the development and promotion of the industry, and the Department of Trade, Industry and Competition (DTIC), which manages critical financial incentives.

2.1.1 Overview of the National Film Ecosystem: History, Milestones, and Institutional Landscape

South Africa's film ecosystem has undergone a profound transformation, shifting from an exclusionary apartheid-era structure to a more inclusive but still deeply unequal and fragmented industry. While the post-1994 period opened space for new voices, particularly Black filmmakers, structural constraints, especially around funding, distribution, and institutional coordination, continue to limit the sector's full potential.

Historically, filmmaking under apartheid was dominated by white creators, with Black South Africans largely excluded from authorship despite being central as audiences. However, even within this constrained system, a strong culture of film consumption emerged in township cinemas, signalling an early demand for locally relevant storytelling. The democratic transition marked a critical turning point, with deliberate state efforts to redress inequities through institutions such as the NFVF. This period also saw private sector players, notably broadcasters, begin to invest in Black talent, aligning cultural transformation with commercial interests.

The 2000s introduced both expansion and tension. The rapid growth of television, particularly soap operas and telenovelas, created jobs and built mass audiences, but also shifted the industry toward high-volume production, often at the expense of cinematic quality and innovation. Despite this, landmark achievements demonstrated global competitiveness, reinforcing the sector's creative potential.

Today, the ecosystem is shaped by a dense but fragmented institutional landscape. Public entities, including the Department of Sport, Arts and Culture, the NFVF, the Department of Trade, Industry and Competition and Industrial Development Corporation (IDC), whose Audio Visual Department offers up to 49% financing[4], play central roles in policy and financing, yet are frequently criticised for inefficiencies, unpredictability, and policy inconsistency. Provincial film

[1] UNFPA. South Africa Population 2025 - United Nations Population Fund. Link

[2] African National Congress (19 February 2026). South Africa reclaims its position as Africa's largest economy, a clear demonstration of ANC policy working. Link

[3] Capstone Report (2025). The SA Cultural Observatory - Measuring and Valuing SA's Cultural, Creative and Sports Industries. Link.

[4] Industrial Development Corporation (IDC). Link.

commissions and local offices provide important regional support, though their reach remains uneven. Public broadcasters, once key commissioners, have weakened due to financial instability, while private players such as MultiChoice have become dominant content drivers, particularly in television. Recent market shifts, including international acquisitions, are introducing new uncertainties about industry direction and ownership.

At the same time, streaming platforms have reconfigured distribution and global visibility. Platforms like Netflix and Showmax, which was shut down on 30th April 2026[5], have expanded access to international audiences, but their commissioning processes remain difficult to navigate, often privileging established production companies. Alternative funding sources, such as the National Lottery Commission, exist but are not easily accessible to independent filmmakers due to structural requirements. Meanwhile, the training pipeline continues to outpace industry absorption capacity, resulting in a growing pool of underutilised talent.

Key industry platforms such as festivals and film markets, serve as critical nodes for networking, financing, and visibility. However, these opportunities are rather episodic and often insufficient to address systemic barriers collectively.

"As much as our objective is one which is to develop the film industry, we are not working together. We are not bringing the resources that we have together. Instead, one is doing their own thing at their small corner there and the other one is doing their own thing. So, if all these entities, government departments can come and be united, we could have avoided what happened two weeks ago when filmmakers were marching to DTIC." Funder, South Africa.

[5] Canal+ (2026). Multichoice retires Showmax after comprehensive review. Link.

3. Findings

3.1 Film Distribution

3.1.1. Overview

The distribution landscape in South Africa is currently characterised by a sharp contrast between declining traditional theatrical channels and a rapidly expanding digital streaming market. Theatrical exhibition has faced significant contraction over the last decade. Furthermore, domestic films struggle for visibility within this space; in 2023, NFVF reported that South African titles accounted for only 3% of total releases and less than 1% of the R575 million total gross box office revenue. This marginal presence leaves local producers with limited leverage over exhibitors regarding showtimes and marketing support.

Conversely, streaming and digital platforms have become primary distribution channels, with video streaming subscribers reaching approximately 3.4 million by 2023. Market leaders include the local platform Showmax, which was shut down in April of 2026 after being acquired by Canal+, and the international giant Netflix, followed by others like Disney+ and Amazon Prime Video. While digital terrestrial and satellite stations have seen moderate expansion, traditional Pay-TV subscriptions have experienced a steady decline, reflecting a shift toward more flexible, on-demand consumption. The regulatory environment is anchored by the DTIC's 35% rebate on qualifying production expenditure, which is considered a "bankable" instrument for securing finance. However, gaps remain in reaching rural and peri-urban communities where physical exhibition infrastructure is lacking.

3.1.2. Distribution channels

i. Cinemas

South Africa has historically maintained the largest and most established cinema exhibition and distribution ecosystem on the African continent. According to NFVF data, the country previously supported at least 800 cinema screens across more than 70 cinema complexes, primarily operated by Ster-Kinekor and Nu Metro. However, the theatrical sector has undergone sustained contraction over the past decade. Between 2015 and 2025, the number of major cinema sites declined from 76 to 51, representing a 33% reduction. Ster-Kinekor accounted for the majority of closures, reducing its footprint from 55 to 34 sites, while Nu Metro declined from 21 to 17 sites. In screen terms, current industry estimates suggest that South Africa now operates approximately 570–600 active cinema screens, with most closures concentrated in lower-priced and regional venues, while premium formats have remained comparatively resilient. This structural consolidation has important implications not only for exhibition capacity but also for distribution leverage and market access.

NFVF's 2023 Box Office Reports illustrate a post-pandemic recovery in release volume but not in market diversity. In 2023, 253 films were released theatrically, up from 200 titles in 2022. However, only 8 of these were South African films, accounting for roughly 3% of total releases, down from 11 local films (5.5%) in 2022. The revenue picture is even more skewed. Total gross box office (GBO) revenue in 2023 amounted to R575.0 million, down 11.2% from R647.8 million in 2022. South African films generated approximately R5.2 million, representing just 0.9% of total box office revenue, compared to a 4% share in 2022. All of the Top 10 films by revenue in 2023 were international titles, led by Barbie with roughly R48.1 million in gross earnings. This reflects a highly concentrated theatrical economy dominated by a small number of global studio releases. The table below compares half-year box office numbers from 2021 – 2024. NFVF is yet to release full-year box office reports for 2024 and beyond.

Table 1: Number of films released and revenue (GBO) by month, H1 2021 - H1 2024 | Source: Numero, NFVF

Month	2021	2022	2023	2024	

	Num	Rev (R)	Num	Rev (R)	Num	Rev (R)	Num	Rev (R)	% Change (Revenue)
January	8	R7,808,017	12	R10,849,311	16	R18,065,306	14	R265,107	-98.53
February	9	R2,519,324	12	R31,270,912	18	R23,767,677	19	R1,386,415	-94.17
March	14	R22,548,965	16	R36,464,172	21	R62,708,557	19	R8,092,600	-87.09
Quarter 1 Total	**31**	**R32,876,306**	**40**	**R78,584,395**	**55**	**R104,541,540**	**53**	**R9,744,122**	**-90.68**
April	18	R15,708,887	21	R61,603,916	21	R35,029,761	21	R11,032,031	-68.41
May	12	R12,472,248	14	R90,395,902	27	R79,089,545	19	R50,267,551	-36.44
June	11	R25,901,864	11	R34,007,897	19	R72,083,772	22	R136,775,215	89.74
Quarter 2 Total	**41**	**R54,082,999**	**46**	**R186,007,715**	**69**	**R186,203,078**	**62**	**R198,074,797**	**6.38**
H1 Total	**72**	**R86,959,305**	**86**	**R264,592,110**	**124**	**R290,744,618**	**115**	**R207,818,919**	**-28.52**

The role of film distributors is central to this concentration. South Africa's theatrical distribution market is dominated by a handful of companies that manage access to screens, release timing, and marketing scale. NFVF distributor data shows that Independent distributors released the highest number of films, accounting for 52 titles (21%). Empire Entertainment followed with 29 films (12%), closely followed by United International Pictures (UIP) with 28 films (11%). Filmfinity and Ster-Kinekor each distributed 26 films, also representing 11% apiece. Additional contributions came from Filmfinity (Sony) with 18 titles (7%), Empire (Warner Bros.) with 13 titles (5%), and Filmfinity (Disney) and Gravel Road, each releasing 10 films (4%). Other smaller distributors collectively accounted for 27 films (11%), while Trafalgar Releasing, SK Select, and Indigenous Films contributed marginal shares of 2%, 1%, and less than 1%, respectively. These smaller players are more likely to distribute South African films but operate with significantly lower marketing budgets and reduced bargaining power with exhibitors. As a result, domestic titles typically receive fewer screens, shorter theatrical runs, and limited promotional exposure.

Audience behaviour presents a mixed picture. In 2023, cinema admissions increased from 7.3 million to 8.3 million, a 14.2% rise year on year, indicating renewed audience willingness to return to theatres. However, this recovery in footfall was not matched by revenue growth. NFVF regression analysis estimates that each additional admission contributes an average of R95.57 to gross box office revenue, yet overall revenue declined, implying a fall in average revenue per admission. This is likely driven by promotional pricing, loyalty schemes, and a shift in attendance toward lower-priced venues. For distributors and producers, this reinforces the reality that while theatrical exhibition remains symbolically important, it is increasingly high-risk for local content. Without scale, marketing leverage, and strong distributor alignment, domestic films struggle to secure sustainable theatrical performance—underscoring the growing strategic importance of complementary and alternative digital distribution channels discussed in subsequent sections.

Table 2: Cinema admissions in South Africa by month, H1 2021 - H1 2024 | Source: Numero, NFVF

Month	2021	2022	2023	2024	% Change
January	99,738	139,901	233023	231,882	049
February	30,124	386,141	239774	164,457	31.41
March	271,546	423,214	683469	607,934	11.05
Quarter 1 Total	**401,408**	**949,256**	**1,156,266**	**1,004,363**	**13.14**
April	188,792	793,966	412161	205,448	50.15

May	163,259	940,004	883353	308,379	65.09
June	321,405	385,749	806479	567,327	29.65
Quarter 2 Total	**673,456**	**2,119,719**	**2,101,993**	**1,070,097**	**49.09**
H1 Total	**1,074,864**	**3,068,975**	**3,258,259**	**2,074,460**	**36.33**

The theatrical exhibition space in South Africa has become increasingly marginal for local films, functioning less as a viable distribution channel and more as a constrained, exclusionary platform. Between 2021 and 2024 – H1, local films have averaged 6% of the total theatrical releases with H1 of 2022 recording the highest share at 10% while 2023 constituting only 3% of the total releases. The market is highly concentrated, with a dominant cinema chain shaping what gets screened, typically favouring commercially secure Hollywood productions over domestic content. As a result, South African films struggle to secure meaningful theatrical runs, often receiving limited screening windows and minimal marketing support. This significantly undermines their ability to reach audiences or generate revenue, reinforcing a cycle where local films are perceived as commercially risky.

Beyond market dynamics, the decline of cinema is also deeply spatial and socio-economic. The disappearance of township cinemas, exemplified by the closure of once-thriving venues like Lily and Eyethu in Soweto, has severed a critical link between local filmmakers and their core audiences. What remains is an urban-centric cinema infrastructure that is geographically and financially inaccessible to the majority of the population. High costs associated with tickets, transport, and concessions further position cinema-going as a luxury rather than a mass cultural activity. Consequently, large segments of South African audiences, particularly in rural and township areas, are effectively excluded from theatrical film culture altogether.

"What we have failed… is not only to build cinemas for black people, but simply to have a core relationship with those owners of the Lily and all that. Why? Because my view is the people who are chosen to run, politically in terms of Arts and Culture, those were comrades who had no clue about what cinema is." Filmmaker, South Africa.

Cinema attendance and barriers

The audience survey reveals that cinema attendance is occasional, a median of four visits annually, with mainstream cinemas accounting for 83% of viewing. This masks a deeper structural exclusion. Stakeholders' interviews further reveal that cinemas are overwhelmingly concentrated in urban centres, leaving rural and township audiences with few or no accessible venues.

The 41% who cite high ticket prices as a barrier aligns with stakeholders' observations that cinema has become a luxury, with a family outing costing several hundred rand. 39% of audience indicated that they prefer other platforms and reinforced by stakeholders' observations that the COVID-19 created a permanent shift accelerated, where audiences discovered streaming and mobile viewing as more convenient, affordable alternatives. Further, the 20% citing absence of nearby cinemas understates the scale of the problem.

Together, the audience survey data and stakeholders' insights suggest that cinema is not merely an occasional choice but an increasingly inaccessible channel for large segments of the population, reinforcing the need for alternative exhibition models.

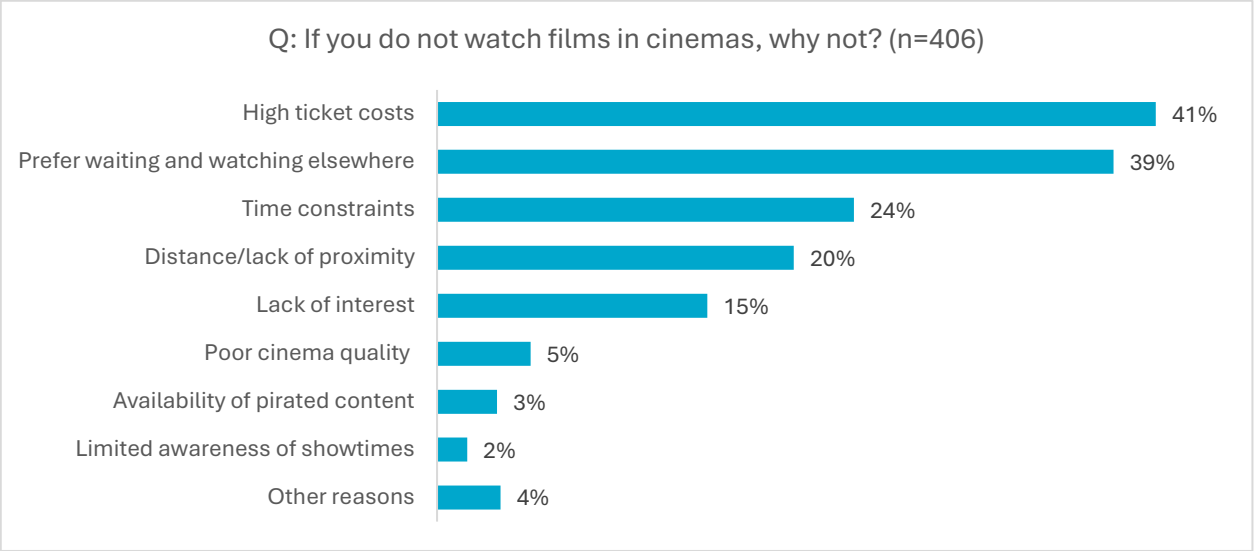


Figure 1: Reasons for not going to cinemas, South Africa | Source: Survey data

Independent national evidence confirms how limited cinema participation has become. In the NFVF's 2026 national audience survey, 58% of respondents said they never or no longer go to the cinema and only 5.5% had attended in the past month; among those who do attend, most (59%) go only once or twice a year. More than half (53%) described cinema location as a barrier, reflecting the concentration of screens in urban malls. Price appears to be only part of the problem: two-thirds (66%) said they would pay the same ticket price for a South African film as for an international one, and those who would not pointed to concerns about quality, trust and awareness rather than cost. Only 6% expect to go to the cinema more over the next two to three years (NFVF, 2026)[6].

ii. Digital platforms - Pay TV and OTT

South Africa's video entertainment market has undergone rapid transformation, with traditional Pay TV (dominated by MultiChoice's DStv) facing subscriber erosion while OTT platforms spanning SVOD, AVOD, TVOD, FAST, and hybrid models gain traction. Economic pressures, including high inflation and cost-of-living challenges, have driven cord-cutting, yet rising broadband penetration and affordable mobile data have fuelled streaming adoption. By 2025, the market reflected a hybrid consumption model: linear Pay TV for sports and live events, SVOD for premium catalogues, AVOD/FAST for free access, and TVOD for transactional rentals. Local platforms emphasised South African stories, while global balanced international hits with growing local originals. South Africa is the largest and most mature Pay TV and OTT market in Sub-Saharan Africa, and it exerts outsized influence on how African films are financed, distributed, and monetised beyond its borders. In 2025, GMI estimates that South Africa's Pay TV and OTT market generated approximately USD 1.77 billion in revenue, a drop from an estimated USD 1.93 billion in revenues in 2022. Looking forward, GMI projects market expansion to exceed USD 2.2 billion by 2030, growing at a 6.8% CAGR, driven primarily by OTT and hybrid consumption models.

For African film distribution, South Africa occupies a dual role. Domestically, it is the highest‑ARPU market in the region and the most commercially reliable outlet for premium African films. Regionally, South African platforms, especially MultiChoice‑owned services, function as gateways to pan‑African visibility, shaping which films travel, on what terms, and

[6] Birguid (2026). South African Audience Research (Cinema, Digital, Film and Video Content). Report prepared for the National Film and Video Foundation (NFVF), RFP19 2025-2026, 27 May 2026. National face-to-face intercept survey of audiovisual consumers aged 18 and over (n=379 completed interviews across all nine provinces), complemented by 17 stakeholder interviews.

with which revenue structures. As a result, South Africa's market design has ramifications well beyond its borders.

Pay TV: Large Base, Slowing Momentum

Pay TV remains the dominant revenue pillar in South Africa, underpinned by premium satellite and digital terrestrial services. Subscriber volumes have stabilised rather than expanded, reflecting saturation in urban households and substitution toward streaming for nonlive content. DStv (MultiChoice) remained the Pay TV leader but lost subscribers due to economic strain and competition. South African active linear subscribers fell from approximately 8.6 million in March 2024 to 7.9 million by March 2025 (part of group-wide losses of 1.2 million, evenly split between SA and rest-of-Africa). Group active subscribers stood at 14.5 million in March 2025 (down from 15.7 million prior year), with further decline noted later in 2025. DStv's hybrid arm, DStv Stream, grew strongly (e.g., 139% subscriber increase in one reported period to March 2024, and 38% YoY in FY25), reflecting a shift to app-based viewing. Blended SA ARPU for MultiChoice's Pay TV operations hovered around ZAR 280–292 in FY25, supported by tiered packages (from entry-level to premium with sports).

For filmmakers, Pay TV continues to offer the most predictable licensing revenues on the continent, supported by strong enforcement and higher licence fees. However, commissioning strategies increasingly prioritise series, studio backed films, and repeatable formats, leaving limited space for independent feature films beyond catalogue acquisitions. Pay TV therefore sustains an established producer class but contributes little to broad-based ecosystem entry.

Broadcast television, once the backbone of South Africa's local content ecosystem, is steadily losing its role as a reliable commissioner and distributor. Financial instability among public broadcasters, particularly the SABC, has significantly reduced investment in original productions, with a shift away from commissioning toward lower-risk licensing models. Private free-to-air broadcasters have similarly scaled back, cutting budgets and narrowing the scope of content they support.

While Pay TV platforms remain influential, their commissioning strategies are increasingly driven by commercial imperatives. This has led to a concentration on high-performing, formula-driven genres such as drama and reality television, often at the expense of diverse storytelling. As a result, access to broadcast opportunities is becoming more limited, particularly for independent filmmakers and those working in less commercially driven formats like documentaries or social impact content.

"I think when SABC faced financial struggles, I think that's where the industry took a dip. Now we all had to rely on Mzansi for our shows, to pitch our shows, which unfortunately cannot cater for all producers, you know. So I think most of the producers are struggling because one of the big giants is, you know, struggling at the moment and needs to be resuscitated." Film maker, South Africa

OTT: Growth Engine, But with Structural Concentration

The South African Over-the-Top (OTT) market in 2026 has reached a pivotal maturity, characterized by a decisive move away from exclusive, high-cost subscription models (SVOD) toward more accessible, ad-supported frameworks. With video accounting for roughly 76% of all mobile data usage in the country, the market is no longer just an alternative to traditional television but the primary arena for audience engagement. High data costs and "subscription fatigue" have led to the dominance of hybrid models, where AVOD and FAST services cater to a mass audience that prioritises local storytelling over expensive global libraries. This digital migration is reflected in the rapid growth of platforms like SABC Plus and eVOD, which have successfully bridged the gap between traditional broadcasting and the mobile-first era.

Table 3: Table 15: Breakdown of South Africa OTT by Subscription Model | Source: GMI

Subscription Type	Platforms	Total Users	% of Market
SVOD	Showmax, Netflix, Amazon Prime, YouTube Premium, eVOD, Viu	3,320,000	43.4%
AVOD/FAST	SABC Plus (free tier), eVOD (free users), AfriForumTV	4,222,000	55.2%
TVOD	MyMoviesAfrica, Circuits TV	100,000	<2%
Total Unique Users	All platforms	7,642,000	100%

SABC Plus operates as a hybrid AVOD and FAST platform, offering a mix of live-streamed national channels and an extensive on-demand library. By February 2026, it reached 2 million registered users, adding roughly 111,000 new sign-ups monthly. The platform acts as a "super aggregator" that increasingly relies on data-driven commissioning. Filmmakers can use granular performance metrics to prove the value of niche or local-language content, which is the primary driver of the platform's 87 million hours of annual watch time. It demonstrates the power of a "freemium" model in a price-sensitive market, forcing competitors to integrate free, ad-supported tiers to maintain scale.

eVOD is a dedicated AVOD platform offering over 9,000 hours of content at no cost to the viewer. It has carved out a significant niche by focusing on "data-conscious" features like offline downloads. It hit 2.2 million users in late 2025, with a staggering 56% increase in watch time. For filmmakers, eVOD presents a massive opportunity through its aggressive investment in "Originals"—with five new productions slated for 2026 alone. The implication for streaming services is a shift towards data-conscious accessibility; by offering features like offline downloads and integration with affordable Hisense Smart TVs, eVOD is successfully capturing the "middle-market" segment that finds premium subscriptions too expensive. This forces all streaming players to reconsider their pricing and data-usage models to remain competitive in the South African territory.

eMedia is aggressively investing in "eVOD Originals", with five new productions slated for 2026. This provides a direct pipeline for creators to produce "binge-worthy" local dramas that premiere digitally before hitting traditional broadcast. eVOD's success proves that accessibility, through partnerships with affordable smart TV brands and mobile-first features, is more critical for market penetration in South Africa than having a massive international catalogue.

iii. Content Strategy and Film Distribution Implications

Content strategy in South Africa's film ecosystem is largely driven by commercial risk aversion, with distributors prioritising genres and formats that have proven market performance. Across cinemas, broadcasters, and streaming platforms, decision-making is heavily influenced by what is perceived to "travel" well, typically action, drama, romance, and reality television. While this approach reduces financial risk, it also narrows the range of stories that are funded and distributed, systematically sidelining documentaries, indigenous language content, experimental work, and socially driven narratives.

This dynamic has significant implications for representation and audience alignment. In attempting to meet global market standards, much of the content produced tends to mirror international formats, often at the expense of local authenticity. As a result, there is a growing disconnect between what is made available and the lived realities and preferences of diverse

South African audiences, particularly those in underserved communities. The industry's output becomes simultaneously more global in appeal yet less reflective of its own context.

The concentration of distribution power further entrenches these patterns. A small number of gatekeepers effectively determine which projects are financed and seen, creating high barriers to entry for independent filmmakers. Without prior commercial success or strong industry networks, access to distribution and funding remains limited. This reinforces a self-perpetuating cycle in which the same production houses dominate, while new and diverse voices struggle to break through.

Streaming platforms intensify this shift by structuring deals around ownership and control. Commissioning models often require full transfer of intellectual property rights, limiting filmmakers' ability to benefit from the long-term value of their work. While these platforms provide critical visibility and upfront financing, they also contribute to the consolidation of creative and economic power within a small set of corporate actors.

Despite these constraints, emerging opportunities point toward a more inclusive future. Digital platforms such as YouTube and TikTok offer alternative pathways to reach audiences without traditional intermediaries, though monetisation remains limited. At the same time, there are increasing calls for policy interventions, such as local content quotas, to encourage greater diversity in storytelling and ensure broader representation. Ultimately, a more balanced distribution landscape will depend on shifting content strategies away from purely risk-driven models toward approaches that recognise the cultural and economic value of authentic, locally grounded narratives. The table below shows the distribution of content across various OTT platforms.

Table 4: Content Library Breakdown | Source: GMI

Platform Name	Operator	Active Subs (K)	Total Hours	Local			Regional			International		
				Titles	Hrs.	%	Titles	Hrs.	%	Titles	Hrs.	%
Showmax	MultiChoice	1,850	7,960	185	370	4.6	620	1,240	15.6	4,395	6,350	79.8
Netflix	Netflix Inc	750	16,400	95	190	1.1	180	360	2.1	7,925	1,5850	96.8
Prime Video	Amazon	120	12,400	38	76	0.6	170	340	2.7	5,992	1,1984	96.7
YouTube Premium	Google	450	-	-	-	-	-	-	-	-	-	-
DStv Stream	MultiChoice	850	81,828	-	26,280	32.1	-	37,080	45.3	-	1,8468	22.6
AfriforumTV	AfriForum	22	498	158	474	95.2	5	15	3	2	9	1.8
Viu SA	Vuclip	150	3,941	28	56	1.4	42	84	2.1	1,900	3,801	96.5
eVOD	e.tv	2,200	555	158	522	94.1	9	27	4.9	2	6	1.1
Circuits TV	Circuit Ent	62	1,680	164	1,308	77.9	39	312	18.6	7	60	3.6
SABC Plus	SABC	2,000	12,555	520	8,685	69.2	162	3,240	25.8	68	630	5
MyMoviesAfrica	Independent	38	615	95	190	30.9	185	370	60.2	5	10	1.6

iv. Pay TV and OTT Revenue

A structural shift in South Africa's Pay TV and OTT market has important implications for filmmakers. While total market revenue declines between 2022 and 2025, projections show growth resumes from 2026, driven overwhelmingly by OTT platforms with a projected 12.8% CAGR far outpacing Pay TV. For filmmakers, this suggests growing demand for platform-ready, digitally distributed content, particularly in SVOD, AVOD, FAST, and hybrid models that rely on content scale rather than long exclusivity. The steady growth in regional content (7.1% CAGR) signals rising appetite for local stories, while movies and entertainment outperform most genres, reinforcing film's central role in platform value strategies. However, stronger platform growth does not automatically translate into improved creator income, and the market expansion occurs within a structurally constrained revenue environment for filmmakers. The table below details the Pay TV and OTT market with projections.

Table 5: South Africa Pay TV and OTT Market 2022-2025 with projections from 2026-2030 (USD Million) | Source: GMI

Market Value	2022	2023	2024	2025	2026	2027	2028	2029	2030	CAGR
Total Revenue in USD Million	**1,931**	**1,832**	**1,776**	**1,773**	**1,844**	**1,925**	**2,014**	**2,110**	**2,238**	**6.8%**
By Platform Type										
Pay TV platform	**1,637**	**1,511**	**1,431**	**1,405**	**1,449**	**1,498**	**1,548**	**1,602**	**1,672**	**4.6%**
Cable TV	188	173	163	159	163	167	172	177	184	4.0%
Satellite TV (DTH)	1,295	1,194	1,129	1,107	1,140	1,177	1,215	1,256	1,309	4.5%
IPTV	154	145	139	139	146	153	161	169	179	6.2%
OTT platform	**293**	**321**	**345**	**368**	**395**	**428**	**466**	**508**	**566**	**12.8%**
SVOD	230	251	270	287	307	332	362	393	437	12.6%
AVOD	38	42	45	48	52	57	62	68	76	13.3%
FAST	9	10	11	12	13	14	15	17	19	14.0%
TVOD	4	4	4	4	4	5	5	5	6	10.9%
Hybrid OTT Models	13	14	15	17	18	20	22	24	28	14.5%
By Subscription Model										
Postpaid	**558**	**531**	**516**	**517**	**539**	**564**	**592**	**622**	**662**	**7.1%**
Monthly contracts	447	426	414	415	433	453	476	500	532	7.2%
Annual contracts	111	105	102	102	106	111	116	122	129	6.8%
Prepaid	**1,373**	**1,301**	**1,260**	**1,256**	**1,305**	**1,361**	**1,422**	**1,488**	**1,576**	**6.7%**
Daily passes	107	101	98	98	101	106	110	115	122	6.6%
Weekly passes	158	149	144	143	149	155	161	168	178	6.4%
Monthly prepaid vouchers	1,108	1,050	1,017	1,015	1,055	1,101	1,151	1,204	1,276	6.7%
By Content Type										
Movies & entertainment	**475**	**452**	**440**	**441**	**460**	**482**	**506**	**531**	**565**	**7.2%**
Sports	628	596	577	576	599	625	654	685	726	6.8%
News & current affairs	149	140	135	133	138	143	148	154	162	5.9%
Cartoon/animation	**113**	**107**	**104**	**103**	**107**	**112**	**117**	**122**	**129**	**6.6%**
Music & lifestyle	412	392	380	380	396	414	434	455	483	7.0%
Others (docus & educ)	**154**	**145**	**140**	**139**	**144**	**150**	**156**	**163**	**172**	**6.3%**
By Content Origin										
Regional content	819	778	756	757	788	825	865	908	965	7.1%
International content	1,112	1,054	1,020	1,016	1,055	1,100	1,149	1,202	1,273	6.6%
By End Users										
Residential	**1,670**	**1,585**	**1,537**	**1,535**	**1,597**	**1,668**	**1,746**	**1,830**	**1,941**	**6.8%**
Commercial	**261**	**247**	**239**	**238**	**247**	**257**	**268**	**281**	**297**	**6.6%**
Offices	15	14	13	13	14	14	15	15	16	5.5%
Hospitality (Hotels, Restaurants)	215	204	197	197	205	214	224	234	248	6.8%
Public transportation	6	6	5	5	5	5	6	6	6	4.1%

Others	25	23	23	22	23	24	25	26	27	5.8%

Revenue generation in South Africa's film industry is highly fragmented, opaque, and generally insufficient to sustain most filmmakers. Across distribution channels, returns are inconsistent and often fall short of production costs, reinforcing a reliance on blended financing models that combine grants, licensing fees, and deferred payments.

In the theatrical space, box office performance for local films remains weak. Limited screen access, short release windows, and competition from heavily marketed international films constrain earnings, with even relatively successful releases generating only modest returns against their budgets. Profitability in cinemas is the exception rather than the norm, and the channel is widely viewed as commercially unviable for most local productions.

Broadcast television offers more predictable, but still constrained, revenue streams. Budgets for commissioned content vary significantly by format, with higher allocations for entertainment genres such as reality TV and lower returns for documentaries. However, the shift from commissioning to licensing, and increasingly toward broadcaster ownership of content, has reduced long-term revenue potential for producers. While audience reach on television can be substantial, particularly for popular soap operas, the lack of transparency in viewership data limits producers' ability to leverage this reach commercially.

Streaming platforms have emerged as important buyers but operate with the least transparency. Filmmakers typically receive upfront licensing fees, which can help recoup initial investments, but have little to no visibility into performance metrics or downstream revenues. While these platforms provide global exposure, financial returns for independent creators are often modest and non-recurring, with limited participation in the long-term value of their content.

Marketing and distribution costs further constrain profitability. National campaigns require significant investment, often beyond the reach of independent filmmakers, forcing many to rely on low-cost digital promotion. Film festivals play a critical role in visibility and market access, occasionally leading to international sales, but rarely generate direct financial returns.

3.1.3. Informal distribution and piracy

Unofficial streaming platforms form part of the viewing ecosystem but do not appear to dominate film access among audiences. Most viewers reported using such platforms only sometimes (75%), while 20% indicated that they rely on them often. A small share (5%) reported using them rarely. This pattern suggests that piracy exists alongside legal distribution channels rather than replacing them entirely.

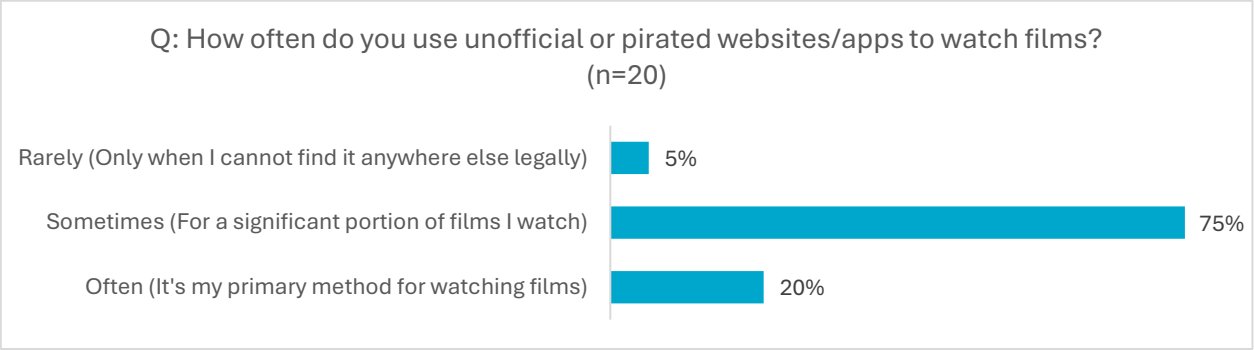


Figure 2: Frequency of consuming unofficial or pirated websites/apps in South Africa | Source: Survey data

Informal circulation of films also occurs through peer-to-peer channels. Among audiences who reported renting or purchasing films, the most common source was friends or informal sellers

(92%). Digital video rentals were cited by 42% of audiences, while local video shops account for 33%. Street vendors appear less frequently at 8%.

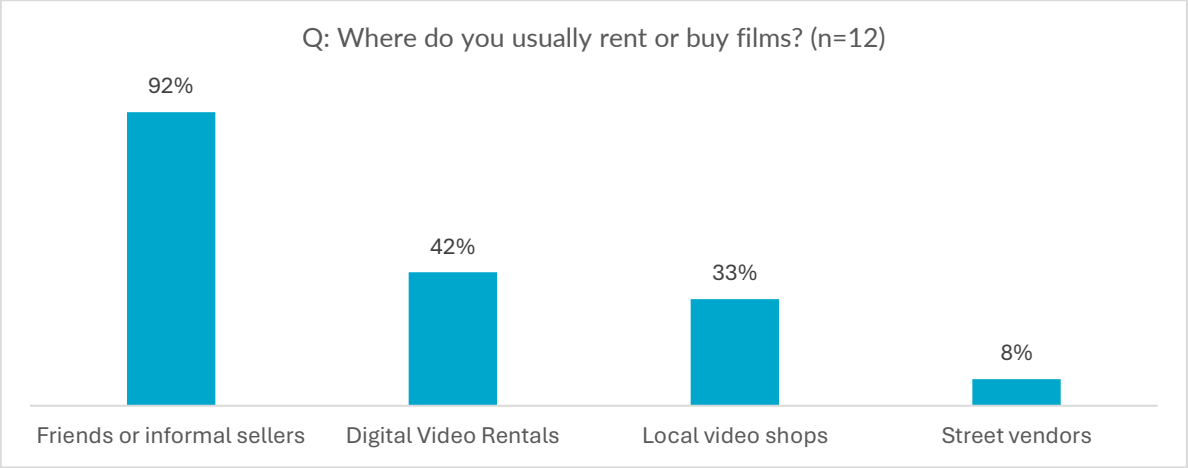


Figure 3: Video rental sources in South Africa | Source: Survey data

These responses indicate that film circulation still occurs through both digital platforms and informal personal networks.

Stakeholders across the value chain understand piracy primarily as a consequence of accessibility failures rather than a simple consumer preference. During the DVD era, informal circulation often exceeded legitimate sales, driven by price barriers and limited distribution infrastructure. The transition to digital platforms has reduced physical piracy but introduced new challenges: audiences increasingly turn to illegal streaming when official channels are unavailable due to geographic restrictions, high subscription costs, or exclusive licensing windows. Rural and lower-income consumers remain particularly vulnerable, as data costs and limited connectivity restrict legal options.

Mitigation strategies cited by industry actors focus on expanding affordable, accessible legal alternatives: scaling community-based screening models, reducing data costs through partnerships, and improving the discoverability and availability of local content across all platforms. There is broad consensus that enforcement alone is insufficient as sustainable piracy reduction requires closing the gap between audience demand and the availability of legitimate, affordable access.

"What happens is filmmakers struggle, they sit with a particular product because the distributor wants money upfront to distribute that show. And if there's no funding for that, then they can't distribute it. So you find that a lot of projects never see the light of day. And when people can't access your film legally, they will find it illegally. It's not because they don't want to pay; it's because the film isn't there for them to pay for in the first place." Filmmaker, South Africa.

3.1.4. Festivals and community screenings as alternative distribution channels

The audience survey revealed that a very small proportion (less than 1%) of film consumers have attended film festivals or community screenings, with a median spend of USD 13.44 among those who did. This points to the limited reach of these channels in the broader population. Yet, this low attendance does not reflect a lack of value; rather, it underscores the structural marginalisation of these alternative distribution pathways. Stakeholders' interviews reveal that festivals, particularly the Durban International Film Festival and the Durban FilmMart, are regarded as essential nodes for networking, deal-making, and showcasing work to international buyers. Community screenings, while often small-scale, generate deep audience engagement in underserved areas, yet they remain episodic and underfunded.

"We do have community screenings… where people are not able to gain access to cinemas, people will just put up a marquee, throw up a screen and have their showings." Distributor, South Africa

Stakeholders also noted that community-based bioskop (or biskop) screenings represent an alternative distribution channel that once thrived in South African townships but has largely collapsed, leaving a critical gap in access for majority audiences. This model was informal, low-cost, and community-driven, serving audiences who could not afford or travel to urban cinemas. The decline of bioskop is tied to the collapse of township cinemas like Lily and Eyethu in Soweto, venues that after 1994. Today, reviving the bioskop model is repeatedly cited as a priority opportunity to reconnect filmmakers with underserved rural and township viewers. The Durban Film Office has piloted such screenings in hostels and townships, reporting deep audience engagement.

"It might mean going back to the culture of bioskop, you know, where we used to know that on a Friday afternoon from 5:00 to 7:00, we have a bioskop set up at 'Mr Who, who's' shop, outside the shop, the bioskop type of situation set up and we all know that from 5:00 to 7:00 we're going to be watching short films. That will then expose us more to filmmaking. There's also independent cinemas that flight only local films, there was a place, what's this place called? I forgot, but in town they used to call it Biskop, you know, and filmmakers take their films there, and viewers come and watch." Ecosystem partner, South Africa

3.2 Audience Development

3.2.1. Overview

South African audiences are highly engaged with digital media, particularly social platforms like YouTube, TikTok, and Facebook, which offer significant opportunities for targeted film marketing. Despite this engagement, dedicated marketing for local films remains inconsistent and underdeveloped. Less than half of domestic films maintain dedicated social media accounts, and most rely heavily on the promotional infrastructure of distributors or international platforms like Netflix. This dependency often prevents producers from building direct, sustainable relationships with their audiences or accessing critical consumption data.

Cultural representation remains a primary driver of audience interest, with social media discourse frequently highlighting the importance of films that reflect local realities and identities. Festivals and national film events play a vital role for arthouse and "festival-circuit" films, leveraging institutional infrastructure to build visibility through red carpets and networking. However, high pricing and the spatial concentration of cinemas in wealthy urban hubs remain significant barriers to broader audience development. While film schools and the NFVF's Tier 3 funding for new entrants support the talent pipeline, there is a perceived need for more robust initiatives to transition emerging filmmakers into mid-tier and experienced categories.

3.2.2. South Africa film audience segments

The South African audience segments reflect differences in platform use, content preference, and the balance between local and global viewing:

a) **Urban African story loyalists:** This segment is urban and female-led, with viewing shaped by shared, family-oriented habits. They consume both local and international films, but African content, especially Nigerian titles, features strongly. Viewing is TV-centred, with high use of Smart TVs, Pay TV, and multiple streaming platforms. Despite high spending, discovery and subscription costs remain key constraints.
b) **Trend-driven global streamers:** This is a younger, male-skewed, digitally connected audience. Viewing is individual and mobile-first, with strong influence from social media and peer recommendations. They favour international, high-intensity genres such as action and sci-fi. Engagement is driven by trends, convenience, and content visibility.
c) **Culturally African story loyalists:** This segment shows the strongest cultural attachment to African content. Viewing is anchored on Pay TV and established streaming platforms,

with less experimentation across newer channels. They are more critical of production quality, particularly acting and technical execution. Engagement depends on both cultural relevance and consistent quality.

The segments show strong demand for African storytelling alongside a parallel pull toward global content. Improving discovery and maintaining production quality are central to expanding local viewership.

Table 6: South Africa film consumer segments | Source: Survey data

Dimension	Segment 1: Urban African Story Loyalist	Segment 2: Trend Driven Global streamers	Segment 3: Culturally African Story Loyalist
Segment distribution	n = 153 (35%)	n = 152 (35%)	n = 129 (30%)
Gender	69% female	56% Male	77% female
Age distribution	25 - 54 years - 77%	25 - 44 years - 68%	25 - 44 years - 75%
Content preference	African and international films (88%), local (66%)	African and international films (72%), American films (86%)	Local films (74%)
Top genres	Drama (75%), Action (69%) and Comedy (54%)	Action (78%), Horror (43%) and Sci-Fi (22%)	Drama (74%), Comedy (30%) and Romcom (30%)
Primary device	Smart TV (58%) and Smartphone / Tablet (55%)	Smartphone (57%), Smart TV (57%) and Laptop (31%)	Smart TV (47%) and Smartphone/Tablet (27%)
Main platforms	YouTube (82%), Netflix (78%), Showmax (72%) and DStv Stream (33%)	Netflix (66%), YouTube (55%), Showmax (47%) and DStv Stream (31%)	Netflix & DStv Stream (53%), Showmax (46%) and YouTube (40%)
Fallback option	Free-to-air TV (37%)	DVDs/USB sticks (32%)	Free-to-air TV (42%)
Main motivations	Entertainment (60%) and cultural connection (41%)	High-quality storytelling (66%), Entertainment (57%) and Actors/director (49%)	Entertainment (53%), high-quality storytelling (43%) and affordability (35%)
Key barriers to watching local films	High subscription cost (37) and Lack of awareness of new releases (29%)	Low production quality (36%), lack of awareness (28%) and poor connectivity (24%)	High subscription cost (33%), lack of awareness (27%) and low production quality (18%)
Median monthly streaming spend	$30	$19	$20
Avg. streaming platforms	2	2	2
Cinema willingness to pay	$12	$16	$11
Net Promoter Score African films	57%	26%	36%
Growth triggers	Lower subscription prices and high-quality original African films (40%)	High-quality original African films (44%)	High-quality original African films (48%)

3.2.3. Film discovery and marketing channels

Film discovery among audiences in South Africa is also strongly influenced by social networks, with 70% of audiences hearing about films through friends and family, confirming that word-of-mouth remains the most powerful driver of awareness. However, digital and promotional channels play a more prominent role. Social media accounts for 48% of discovery, making it a major secondary channel, while streaming platforms contribute 37%, indicating that platform recommendations and in-app promotions significantly influence viewing choices. Out-of-home advertising such as billboards (21%) also has notable visibility, suggesting that public advertising still contributes meaningfully to film awareness. Traditional media advertising through radio or TV stands at 11%, while influencers/bloggers (3%), cinema advertisements (2%), and film festivals (1%) play relatively minor roles.

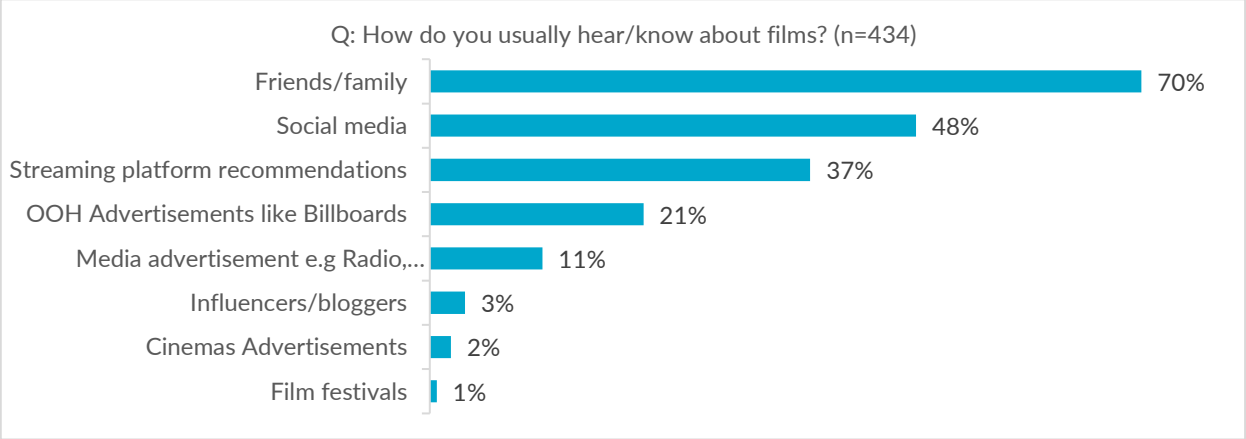


Figure 4:How audience in South Africa know/hear about new films | Source: Survey data

These film-specific results differ from national evidence on television content, where discovery is more strongly social and creator-led. In the NFVF's 2026 survey, 75% of television viewers discovered content through social media and 42% through influencers or TikTok clips, compared with 41% through friends and family and 21% through platform recommendations. The difference partly reflects content type and sample: the Dalberg survey focused on film audiences, while the NFVF survey covered all audiovisual consumers. Taken together, the evidence suggests that personal recommendation remains the most trusted signal for films, while social media and short-form clips play a growing role in first awareness.

Overall, while interpersonal recommendations remain central, film discovery in South Africa is supported by a more diversified ecosystem combining word-of-mouth, digital engagement, streaming platform promotion, and visible outdoor advertising. Film marketers should adopt integrated campaigns that combine strong social media promotion, streaming platform visibility, and targeted outdoor advertising, while continuing to encourage organic sharing and discussion among audiences to amplify reach.

3.2.4. What drives audiences to watch films

While entertainment and relaxation (57%) stand as the leading motivation for film consumption in South Africa, audiences demonstrate a stronger emphasis on content quality (49%), indicating that storytelling, production value, and narrative depth significantly shape viewing decisions. Practical factors such as affordability and accessibility (38%) and family-friendly content (33%) also play an important role, while audiences are relatively more motivated than other countries by educational or socially relevant themes (32%) and interest in actors or directors (32%). Cultural identity (29%) and social recommendations (29%) also influence discovery, suggesting a mature and diverse film consumption ecosystem. Industry stakeholders should prioritize high-quality production and compelling storytelling, while also leveraging well-known actors and

directors as audience drawcards. Streaming platforms, broadcasters, and cinemas can further strengthen engagement by promoting locally relevant narratives with social themes, while policymakers should support funding and training initiatives that enhance production quality and global competitiveness of South African films.

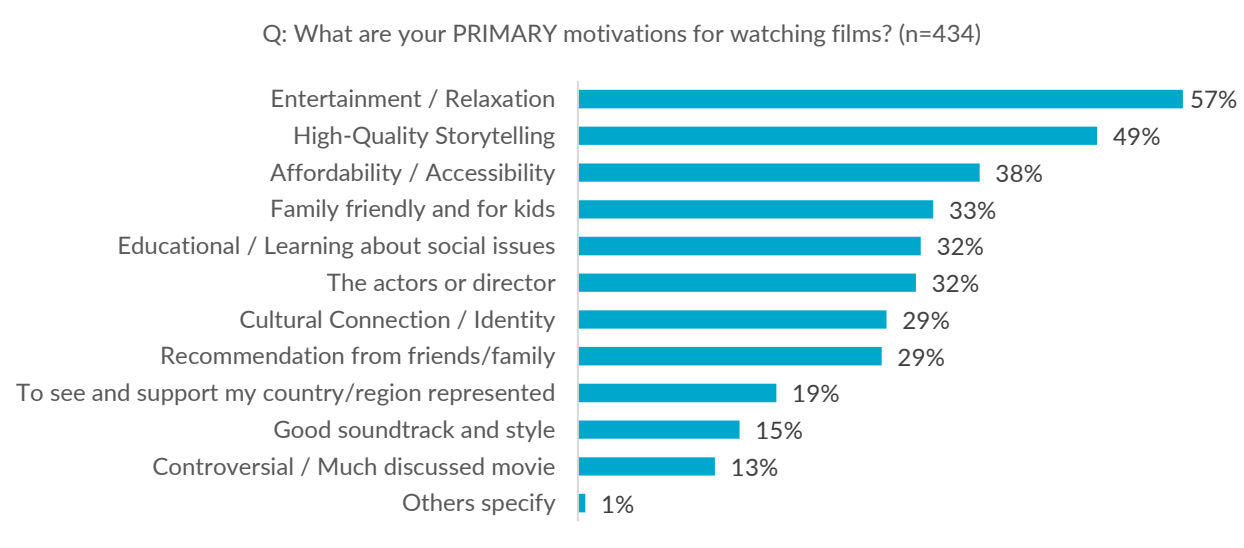


Figure 5: Primary motivations for watching films | Source: Survey data

South African audiences demonstrate extremely high expectations across multiple factors, with acting quality (98%), technical quality (96%), plot/theme (96%), movie type (95%), and genre (94%) ranking as the most important determinants when choosing films. Social discovery is also particularly influential, with peer recommendation or word-of-mouth (96%), actors (92%), and popularity/trending films (92%) playing major roles in film selection. Marketing campaigns (88%) and reviews/ratings (90%) are also highly influential, indicating a sophisticated media environment where audiences actively use multiple signals to decide what to watch. For South Africa, stakeholders should focus on high production value and strong storytelling, while also investing in strategic marketing, influencer engagement, and review platforms that amplify visibility and discussion. Studios and distributors should leverage star power and audience reviews, while industry bodies may strengthen competitiveness by supporting high-quality productions capable of performing both locally and internationally.

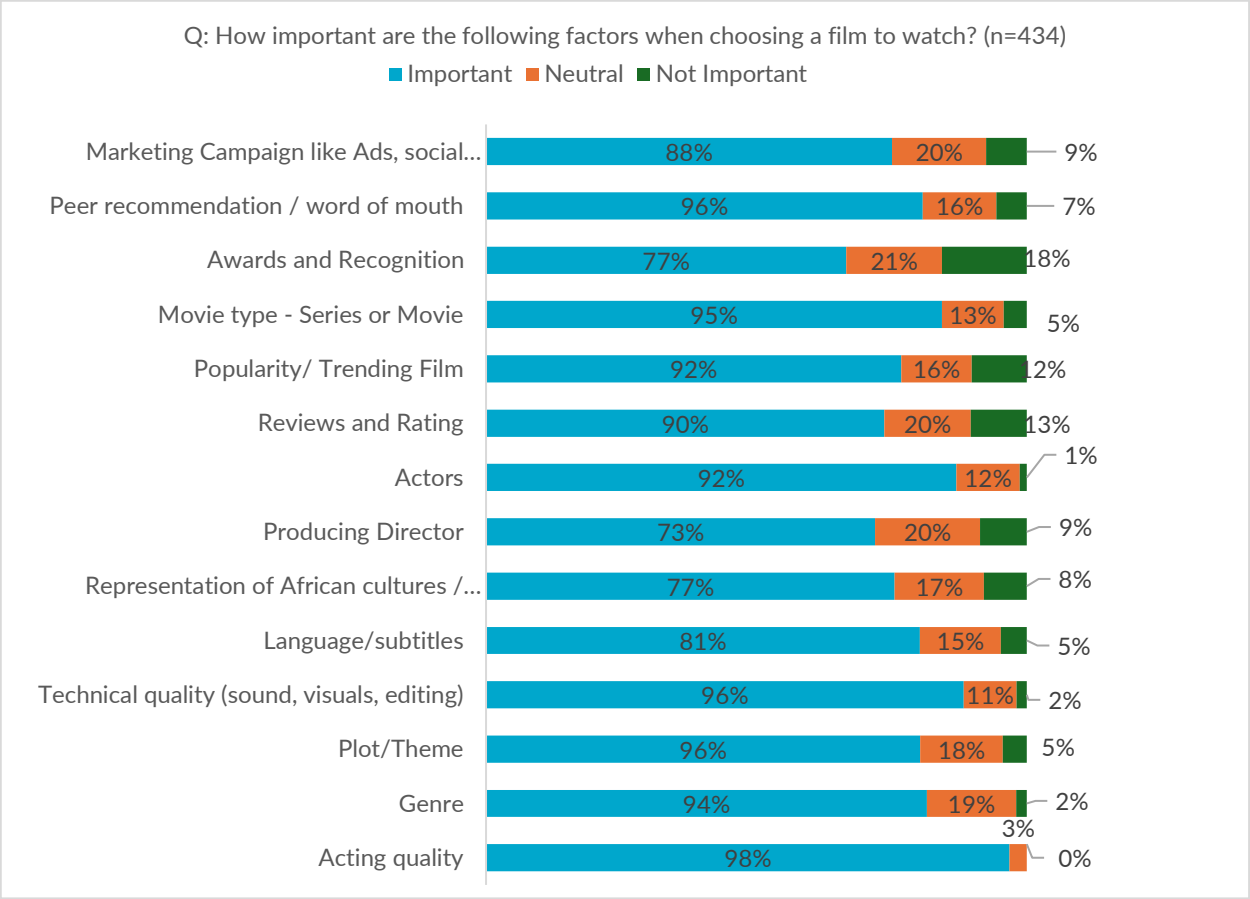


Figure 6: Important factors when choosing film to watch | Source: Survey data

South Africa represents a highly mature and discerning film market where audiences combine a strong desire for entertainment with rigorous expectations around quality and storytelling. Success in this market is not driven by content volume alone, but by delivering high-production, culturally relevant, and narratively compelling films that can compete across multiple dimensions, technical excellence, talent, and audience resonance. At the same time, discovery is heavily influenced by social validation, marketing, and visibility signals, making strategic promotion as critical as the content itself. For stakeholders, this means that winning in South Africa requires an integrated approach: investing in quality production, leveraging star power and audience trust mechanisms, and strengthening distribution and marketing ecosystems to ensure films stand out in an increasingly competitive landscape.

The NFVF's 2026 national audience survey points in the same direction. Respondents rated South African content close to international content on storytelling (3.9 versus 4.0 on a five-point scale) and audience alignment (3.8 versus 4.0), but notably lower on production quality (3.7 versus 4.3), post-production (3.8 versus 4.2) and marketing and distribution (3.8 versus 4.2). Asked what would make them watch more South African content, respondents most often cited better stories (72%) and better acting (66%), followed by greater language diversity (43%) and better marketing (35%). The gap is therefore one of execution and visibility rather than cultural relevance.

3.2.5. Audience viewing platforms and access to films

Film viewing takes place across a range of devices. Smart TVs are the most used, cited by 55% of audiences. Smartphones and tablets follow at 47%, while Pay TV connected devices account for 37%. Usage of smartphones is skewed to viewership of international films (57%), while pay

to is skewed to viewership of African films (41%). Laptops are used by 15% of audiences, while free-to-air and satellite television devices appear less frequently.

When audiences were asked where they mostly watch films, television and video-on-demand platforms emerge as the dominant access points. Television was cited by 62% of audiences, while streaming platforms were mentioned by 59%. Social media plays a smaller role in film viewing (19%), while cinema attendance was reported by 8% of audiences. Video rentals appear to be largely marginal, cited by only 1%.

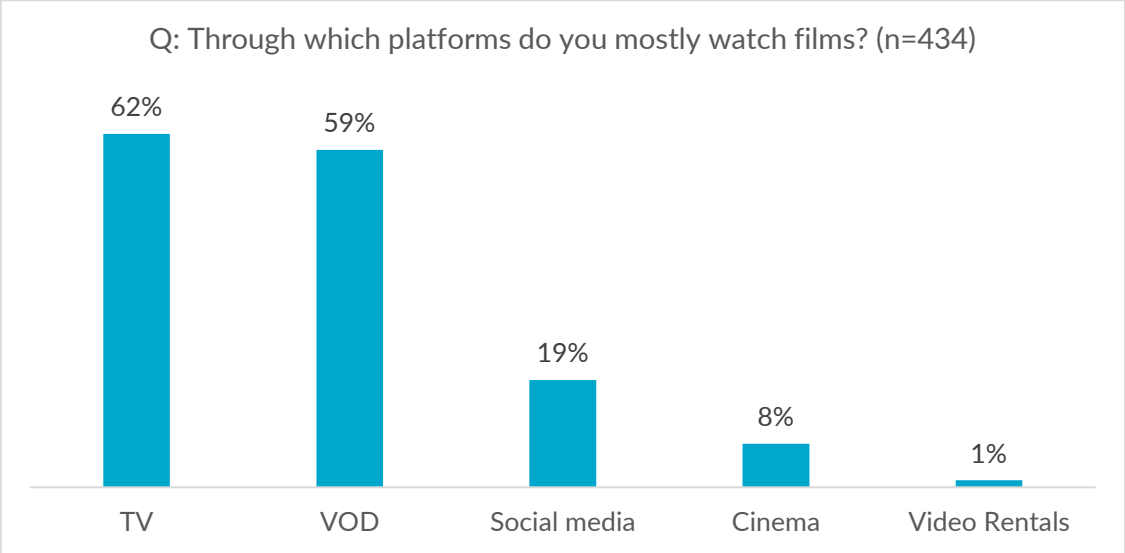


Figure 7: Primary viewing platforms in South Africa | Source: Survey data

Within the streaming ecosystem, Netflix is the most widely used platform among audiences, cited by 67%. YouTube follows at 61%, while the local platform Showmax was mentioned by 56%. DStv Stream is also widely used (38%), reflecting the continued presence of Pay TV operators in the digital streaming space. Other international platforms such as Disney+ (7%) and Amazon Prime Video (6%) appear less frequently. Digital piracy platforms were mentioned by a small share of audiences (4%).

Television remains an important distribution channel. Pay TV services such as DStv were cited by 94% of audiences, while free-to-air television was mentioned by 10%. This suggests that subscription television continues to play a central role in film distribution alongside streaming platforms.

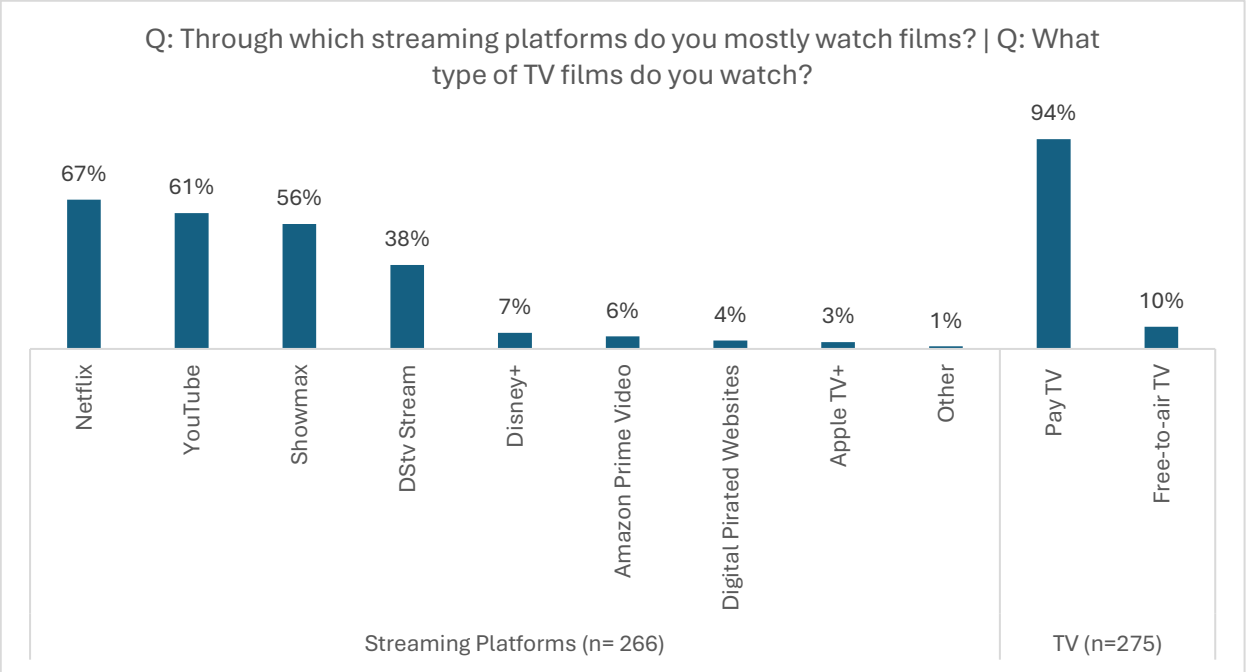


Figure 8: TV & streaming platforms used in South Africa | Source: Survey data

Television viewing takes place across several connected devices. Smart TVs are the most used, cited by 55% of audiences. Smartphones and tablets follow at 47%, indicating that a significant share of viewers also access television content through mobile-connected environments. Pay TV systems account for 37% of viewing, reflecting the continued role of subscription television services in film distribution. Other devices appear less frequently. Laptops were mentioned by 15% of audiences, while free-to-air digital television (10%) and free satellite TV (7%) account for smaller shares. These findings indicate that film distribution in South Africa operates through a hybrid system. Streaming platforms and Pay TV services appear to coexist as major channels through which audiences access films.

National evidence shows that access to digital content is broad but cost-managed. In the NFVF's 2026 survey, which covered all audiovisual consumers rather than film audiences alone, 95% of respondents used the internet at least weekly, but a quarter (25%) relied on mobile data only, 31% described data for video as expensive and just over half (52%) spent less than R300 a month on data or internet. Nearly half downloaded content over public Wi-Fi (48%) or used data-free platforms (46%) to manage costs, and among respondents who paid for no content service, 71% cited lack of money as the main reason. The Dalberg sample, in which smart TVs and multiple streaming subscriptions are common, is therefore likely to reflect the better-connected end of the market; offline downloads, zero-rated access and low-cost tiers remain essential for reaching the wider audience.

Looking ahead, audiences expect gradual rather than rapid change. In the same survey, 34% expected to stream more over the next two to three years, while 39% expected their viewing habits to stay the same and 21% expected to watch more television. Younger, urban and middle-income respondents were most likely to expect more streaming, while older, rural and lower-income respondents were more likely to remain anchored in television (NFVF, 2026).

3.2.6. Streaming behaviour and platform preferences

Audiences reported watching a wide range of film origins through streaming platforms. Local South African films were cited by 32% of audiences, while American films account for 28%. Films from other African countries were mentioned by 17%. European, Indian, and other international productions appear in smaller shares.

Platform-level viewing patterns reveal notable differences. On Netflix, both local and American films are widely watched. 70% of audiences reported watching South African films on the platform, while 66% watch American titles. Showmax also hosts a strong share of local content, cited by 76% of viewers.

YouTube plays a slightly different role. While local films remain popular (70%), the platform also hosts a significant share of African films from outside South Africa (43%). These differences suggest that audiences rely on multiple platforms to access different types of content.

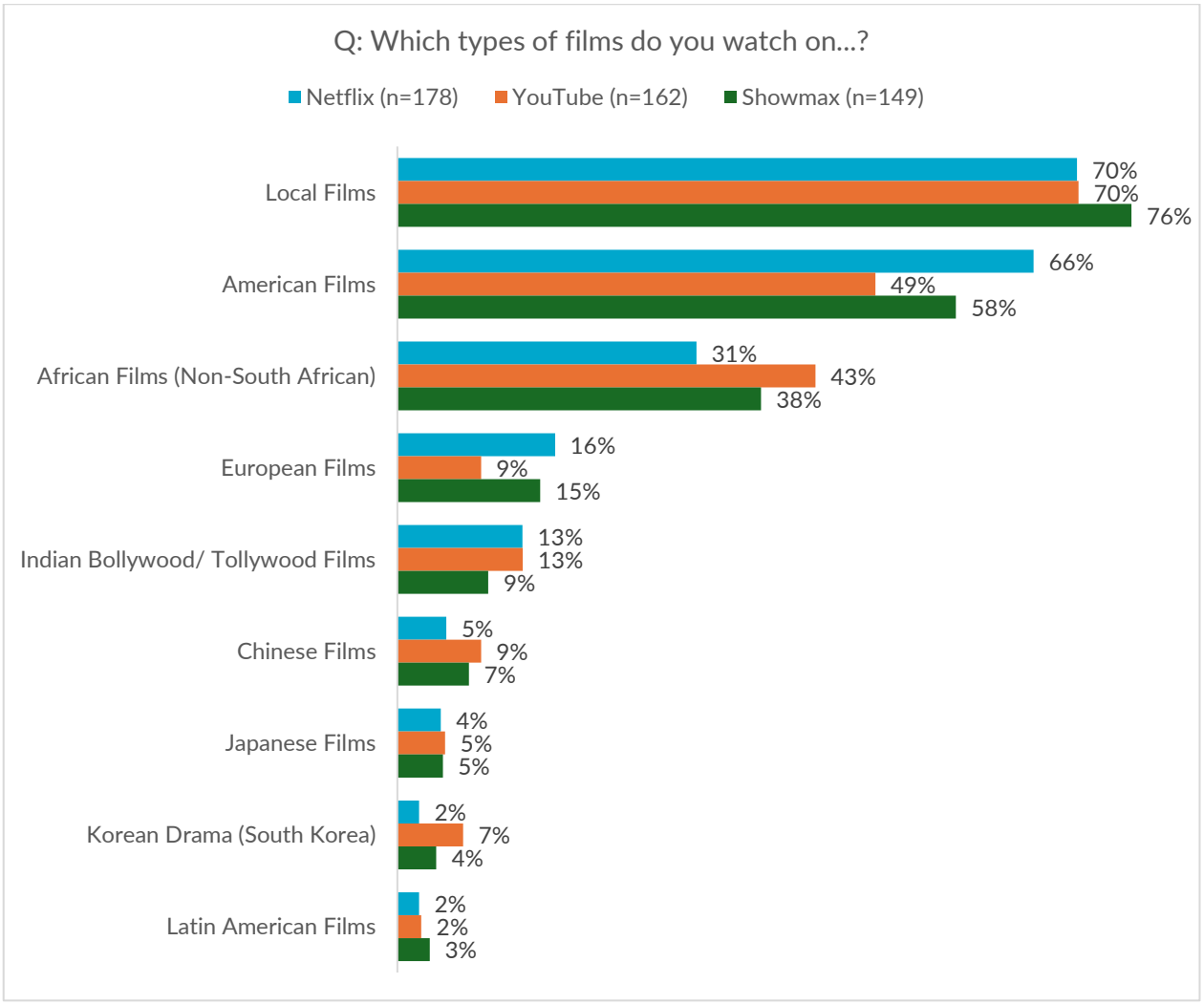


Figure 9: Films streamed on Netflix, YouTube & Showmax in South Africa | Source: Survey data

Streaming appears to be a frequent activity among audiences. Local films and American films are most watched either daily or weekly. African and European films follow similar patterns, though with slightly lower daily viewing levels. Monthly or rare viewing is reported by smaller shares of audiences across most film categories. Overall, the distribution indicates that streaming platforms form part of regular viewing habits for many audiences.

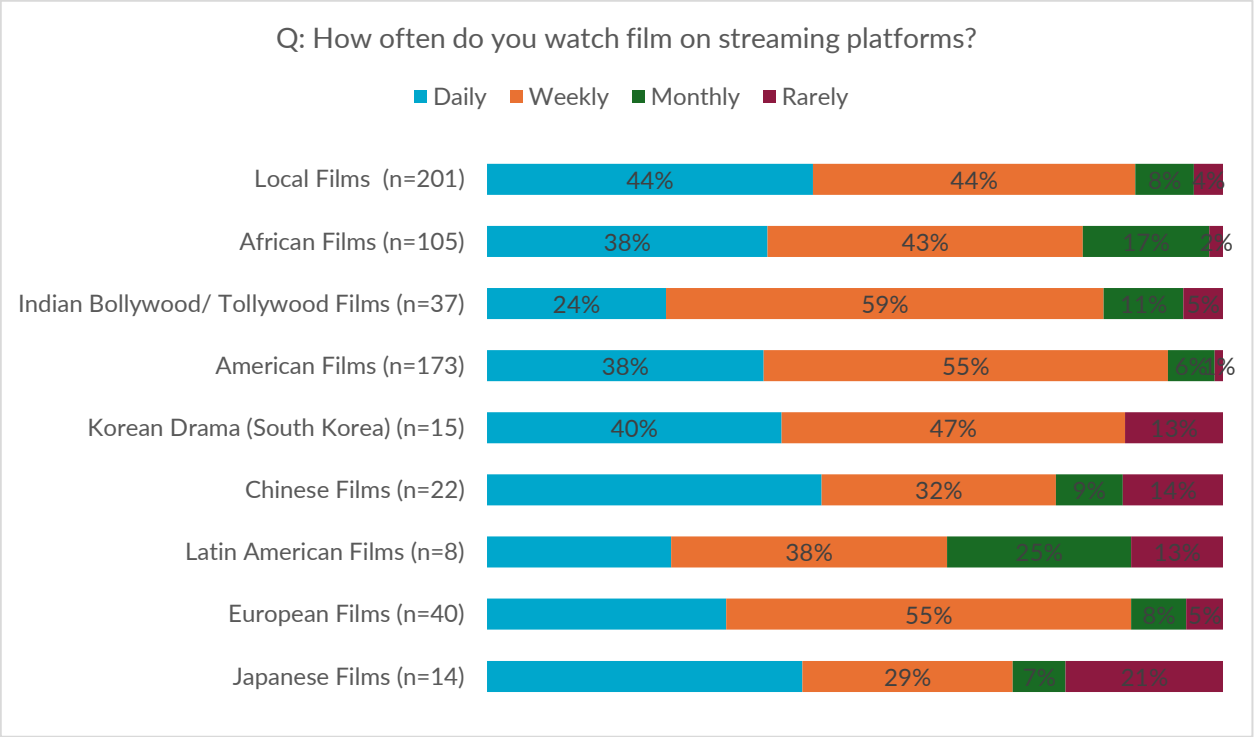


Figure 10: Frequency of streaming in South Africa | Source: Survey data

Smart TVs are the most used devices for streaming, cited by 71% of audiences. Smartphones and tablets follow at 59%, while Pay TV connected devices account for 36%. Laptops appear less frequently at 18%. These responses indicate that streaming primarily takes place on larger household screens, with mobile devices also serving as a significant access point.

Audiences reported subscribing to an average of two streaming services, with both the mean and median values recorded at two subscriptions. Monthly spending on streaming platforms shows a median value of approximately USD 17.92. This suggest that streaming platforms form a structured part of household entertainment spending in South Africa, with audiences maintaining multiple subscriptions to access different content libraries.

3.2.7 Campus circuits and university-based screenings role in audience building

Campus circuits and university-based screenings play an important but underutilised role in developing future audiences and filmmakers. Several interviewees noted that tertiary institutions, such as AFDA, DUT, and UKZN, host student film screenings and short film competitions. Funders described that competition for schools encouraged young people to shoot films on cell phones, sparking early interest. However, these circuits remain fragmented and lack sustained funding. Ecosystem partners suggested that more structured campus programmes could cultivate a new generation of viewers who grow up with an appetite for local content.

International cultural institutes play a consistent and strategic support role within South Africa's film ecosystem, particularly in areas where local funding is limited or unreliable. Through financing workshops, enabling co-productions, and supporting participation in international festivals, these institutions help build skills, facilitate cross-border collaboration, and expand global visibility for South African filmmakers. Their involvement often strengthens the artistic quality and international competitiveness of local productions, while also opening access to networks and markets that are otherwise difficult to reach. However, this support is largely oriented toward cultural exchange and global exposure, meaning it does not always translate into sustained local distribution or commercial success within South Africa.

Despite their value, film festivals and cultural institutes are constrained by structural limitations that reduce their long-term impact on distribution and audience development. Festivals are typically one-off events that reach niche audiences, with limited mechanisms to extend a film's lifecycle beyond initial screenings. In the absence of sustained exhibition infrastructure, films showcased at festivals often fail to secure wider or continuous distribution. At the same time, these platforms operate under precarious funding conditions, limiting their scale and consistency. Cultural institutes, while reliable supporters, tend to prioritise co-productions and cultural exchange, which may enhance artistic visibility but do not always align with commercial pathways or local audience access. As a result, many supported films achieve critical recognition without securing meaningful presence in the domestic market.

3.2.8 Education and Training Actors as Audience Builders

Film schools and media programmes in South Africa produce a large number of graduates annually, over 10,000 according to one long-time educator, yet the industry cannot absorb them. This creates a paradox: while many graduates end up in unrelated fields, they also form a core segment of the most engaged, "woke" audience. These young people, trained in film language and critical appreciation, are precisely the viewers who demand high quality and authenticity, and they become influential tastemakers in their communities. Film schools function as audience-building institutions, cultivating a generation of discerning consumers even when they do not become practitioners.

Several programmes explicitly link training to audience development. The MultiChoice Talent Factory, for instance, places recent graduates on active productions, giving them direct exposure to industry standards while fostering lifelong engagement with local content. The National Film and Video Foundation (NFVF) offers scholarships and runs the Sediba screenwriting programme, which not only trains writers but also immerses them in the ecosystem. Campus film competitions, such as those supported by the Durban Film Office, encourage students to shoot films on cell phones, turning them into both creators and active viewers.

A critical gap in South Africa's film ecosystem lies in the disconnect between training and distribution. While film schools effectively equip students with production skills, they largely overlook the business side of filmmaking, particularly distribution, marketing, and audience development. This leaves graduates capable of creating content but ill-prepared to navigate how that content reaches viewers. Addressing this gap requires a more integrated approach that links education with industry realities, including stronger regulation, practical exposure through internships and mentorship, and curricula that incorporate audience insights and distribution strategies. Embedding distribution literacy within training institutions would not only enhance employability but also position emerging filmmakers to actively contribute to audience growth and a more sustainable industry.

3.2.9. Demand for local and African content

The survey finding that 82% of South African audiences consume local films, alongside 63% who watch American films and 44% who engage with African content, reveals a viewing public that is simultaneously interested in local stories and globally oriented. Yet the interviewees' data clarifies this picture: the high consumption of American films reflects not merely preference but structural dominance as Hollywood productions saturate cinema schedules, streaming libraries, and broadcast prime time, while local films often receive only fleeting theatrical runs and minimal marketing. Audiences are thus not choosing international over local; they are consuming what is made available. The 44% engagement with Pan-African content signals a latent demand, yet stakeholders insights reveal that this market remains underdeveloped. Stakeholders observe that films from elsewhere on the continent must first generate exceptional buzz such as through awards, festival recognition, or viral social media traction, before South African audiences will take notice.

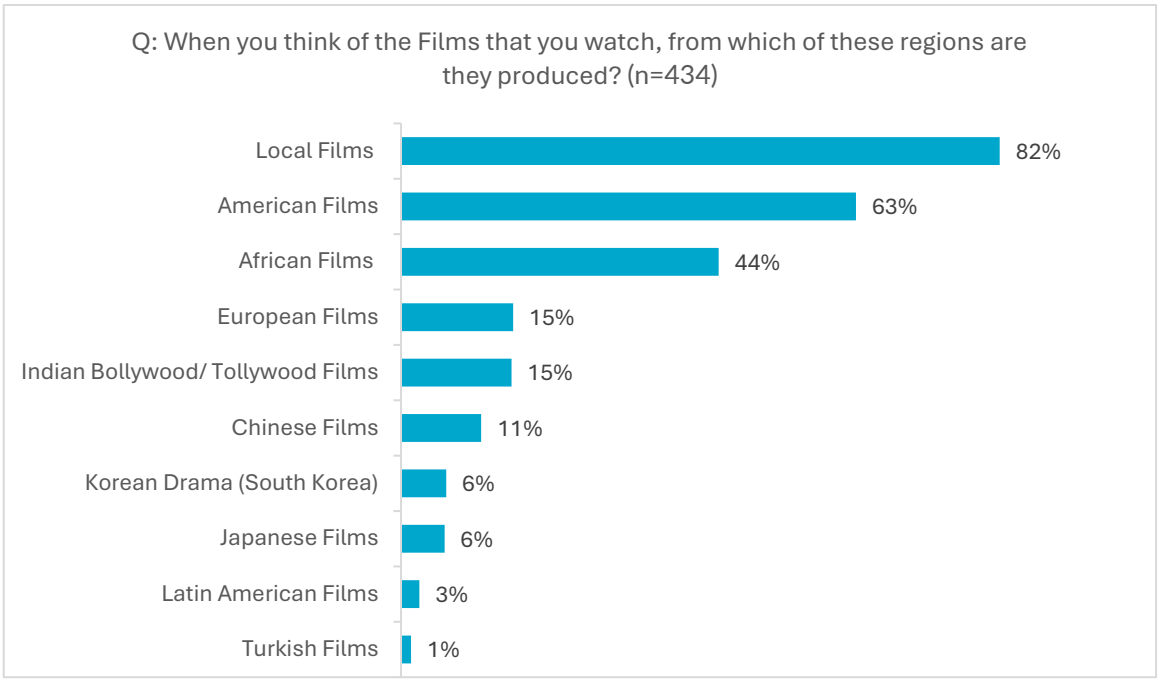
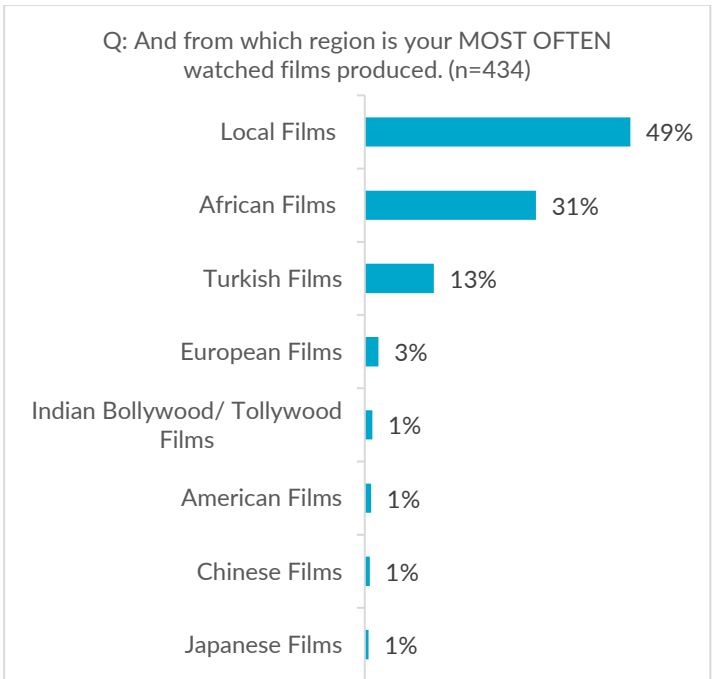


Figure 11:Regions of films watched | Source: Survey data

South African audiences demonstrate a more diversified viewing pattern. While 49% most often watch local films, a significant share also consumes films from other African countries (31%) and Turkish productions (13%). At the same time, 79% of audiences consider it important that films are locally produced (56% very important; 23% somewhat important), indicating both national orientation and openness to international content. Industry stakeholders should continue investing in strong local productions while also leveraging South Africa's role as a continental content hub by encouraging co-productions and regional collaborations that blend local storytelling with broader African and global appeal.



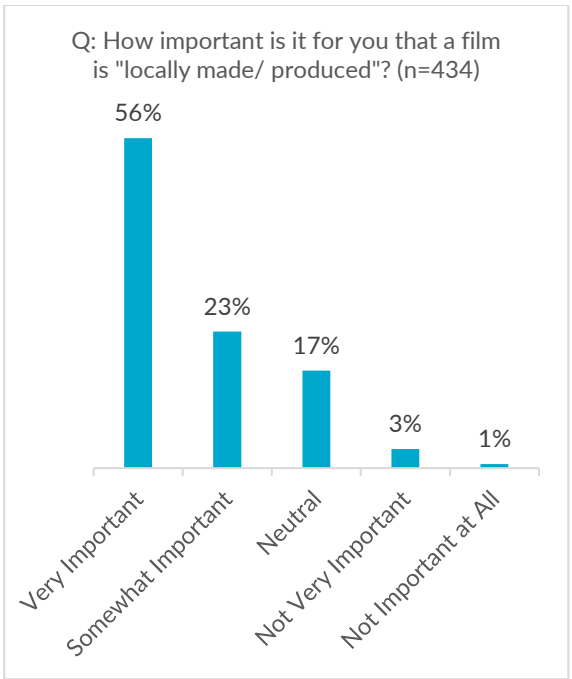


Figure 12:Most frequently watched region and Importance of films being locally produced | Source: Survey data

South African audiences exhibit a dual preference for both local and international content, combining strong consumption of domestic films with significant engagement with global and regional productions. While there is clear pride in and demand for locally produced films, audiences are also open to diverse content from other African countries and international markets, reflecting a well-integrated and outward-looking viewing ecosystem.

Language plays a central role in these choices. In the NFVF's 2026 survey, language was the strongest single driver of content choice, rated very or extremely important by 79% of respondents. Among television viewers, English was the main viewing language (81%), with isiZulu (10%) and Sesotho (5%) also cited; 70% were comfortable watching subtitled content and a further 20% said it depended on the language. This supports investment in subtitling and dubbing as a relatively low-cost way to widen the audience for local and African films.

Overall, this positions South Africa as both a robust domestic market and a strategic gateway for broader distribution. For stakeholders, the opportunity lies in strengthening high-quality local productions while simultaneously leveraging co-productions, regional collaborations, and global partnerships to serve audiences that value both cultural relevance and international diversity.

3.2.10. Barriers to audience growth for local films

Among South African audiences, barriers to watching local or African films are more distributed across preference, quality, and moderate structural factors. Preference for international content leads (45%), indicating strong competition from global industries, while concerns around production quality (25%) and lack of interest in local stories (23%) suggest both execution and content relevance gaps. Awareness (14%) and language barriers (13%) are more pronounced, pointing to fragmentation in discoverability and linguistic accessibility within a diverse audience. General disengagement with films (11%) and platform availability (7%) play a smaller but notable role, while cost is negligible (2%). Overall, increasing viewership in South Africa will require a balanced approach, enhancing storytelling and production quality, while also improving localization (e.g., subtitles/dubbing) and targeted discovery strategies.

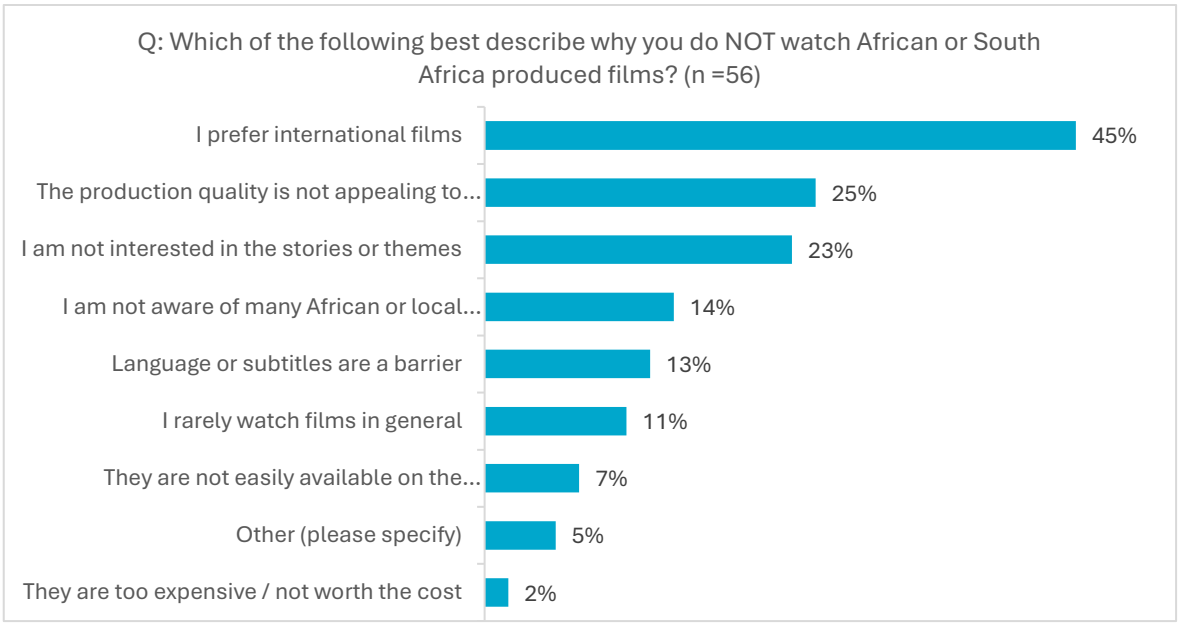


Figure 13: Why audience do NOT watch Local or African films | Source: Survey data

In South Africa, barriers are more diverse, with high subscription costs (31%), lack of awareness about new releases (28%), and perceived low production quality (27%) being the top constraints. Additional barriers include internet/data costs and difficulty finding where to watch films (both 20%). This indicates that both content perception and market visibility affect consumption. Industry stakeholders should prioritize investing in production quality, improving marketing and discovery of African films, and strengthening platform partnerships to make local content easier to access and more competitively positioned against international films.

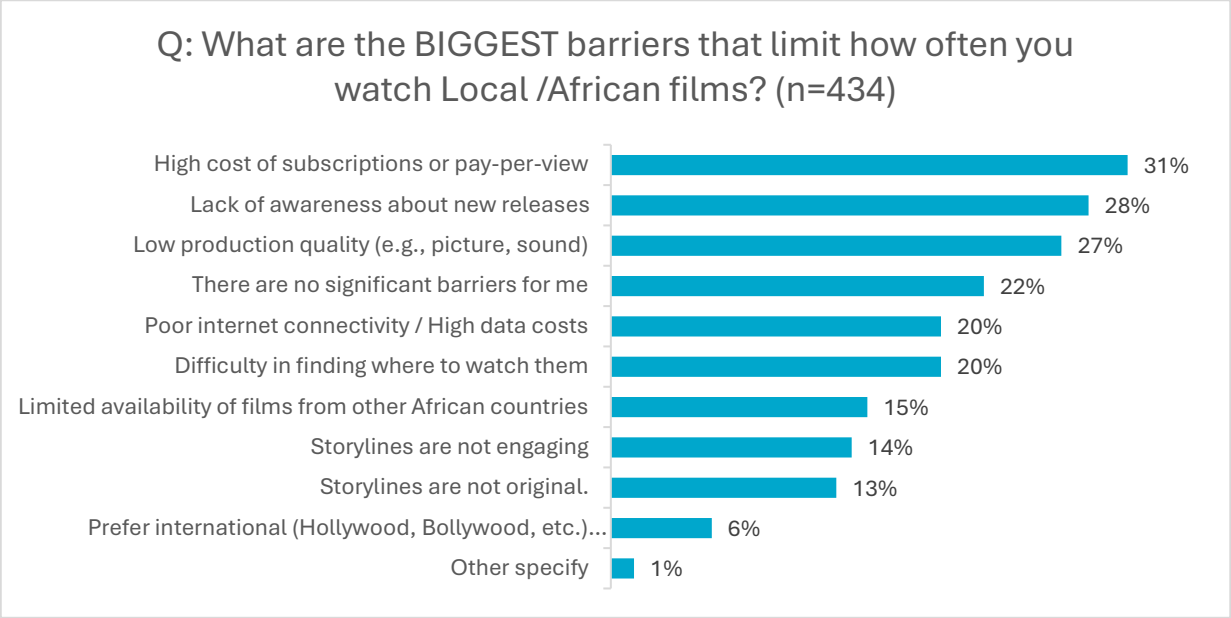


Figure 14: Barriers to watching Local or African films | Source: Survey data

South African audiences demonstrate strong confidence in local and African film quality and storytelling. Around 54% believe production quality has improved, and a significant 69% agree that local films tell authentic and relatable stories. Importantly, willingness to pay for high-quality local content is also high (65%), suggesting commercial potential for premium African productions. However, accessibility remains a key barrier, with 51% agreeing that it is difficult to find local films on mainstream platforms and 60% believing they are not sufficiently marketed. Industry stakeholders should therefore focus on improving distribution strategies, partnerships with major streaming platforms, and stronger promotional efforts to convert positive audience sentiment into higher viewership and revenue.

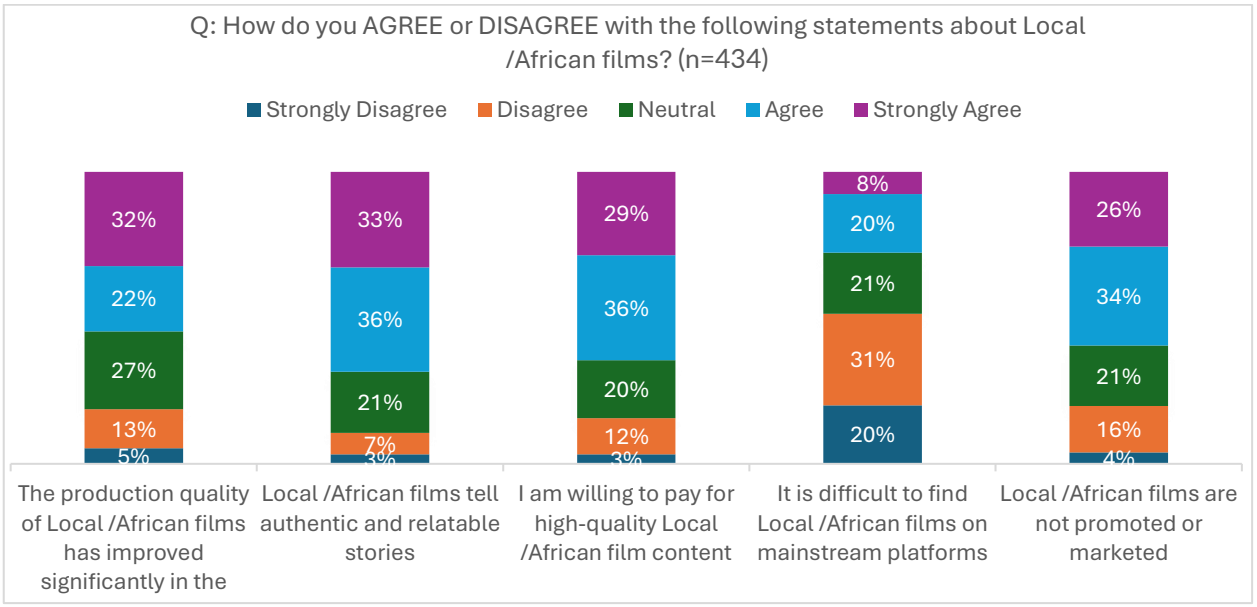


Figure 15: Perceptions on local/African films | Source: Survey data

South Africa's barriers to consuming local and African films reflect a mix of competitive pressure, perception gaps, and access challenges. While audiences show strong appreciation for authentic local storytelling and increasing confidence in production quality, along with a clear willingness to pay for high-quality content, viewership is constrained by competition from international films, inconsistent perceptions of quality, and fragmented discovery. Key bottlenecks lie in limited awareness, weak marketing, and difficulty accessing content on mainstream platforms, compounded by costs related to subscriptions and data.

Overall, the core issue is not demand but conversion: audiences are open and willing, but face friction in finding, accessing, and consistently valuing local content. For stakeholders, this underscores the need to simultaneously strengthen production quality, invest in targeted marketing and discovery, improve platform distribution and partnerships, and enhance localization to ensure African films are visible, accessible, and competitive within a crowded global content landscape.

3.2.11. Audience engagement and word-of-mouth

South African audiences show a more active and layered engagement after watching films. Nearly half (48%) recommend films in person, 38% search for more films from the same country, and 26% read reviews or articles, suggesting a more research-oriented and discussion-driven audience. Additionally, 18% share films on social media, and 20% search for actors or directors, indicating a broader ecosystem of discovery and discourse around films. Industry stakeholders should leverage this engagement by investing in strong film marketing, media coverage, and online discussions, as audiences are already inclined to research and recommend films, making critical reviews, press coverage, and talent branding important drivers of film visibility.

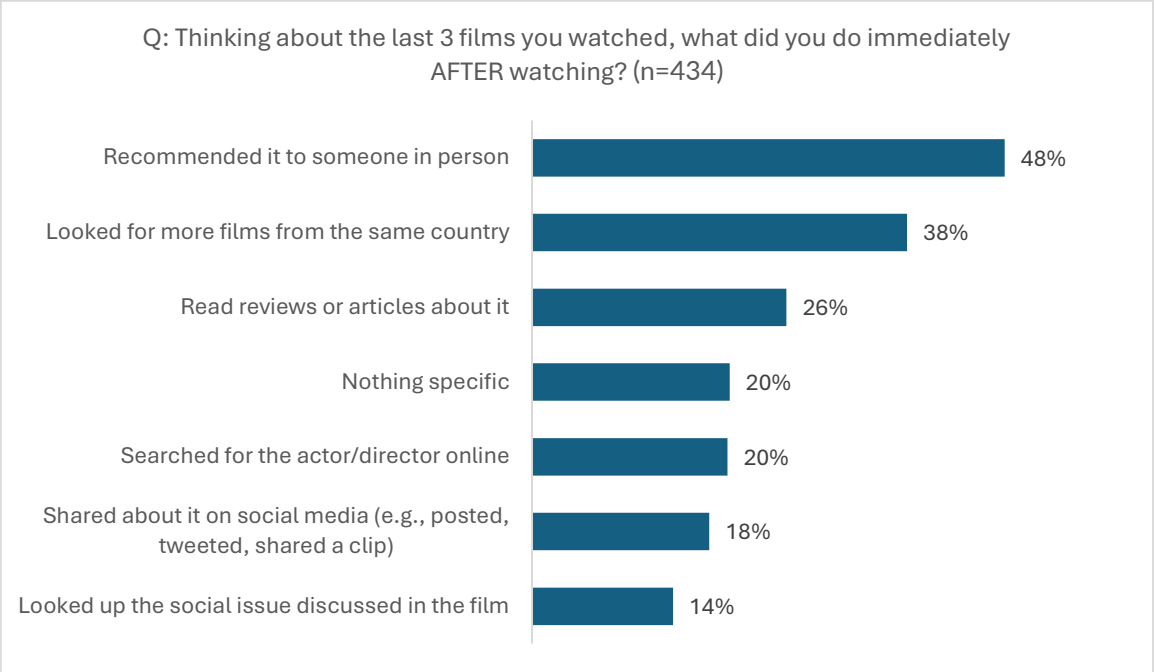


Figure 16: Actions after watching a film | Source: Survey data

South African audiences display moderate curiosity about films but relatively low proactive engagement. A notable 38% reported doing none of the listed activities in the past three months, suggesting a passive consumption pattern. While 33% actively searched for films and 30% followed actors or directors online, only 16% purposely went to cinemas and 8% attended community screenings, and just 5% paid for digital platforms. Stakeholders should focus on converting passive interest into active participation by strengthening digital marketing, leveraging talent-driven promotion on social media, and improving incentives or experiences around cinema-going and paid streaming to increase engagement.

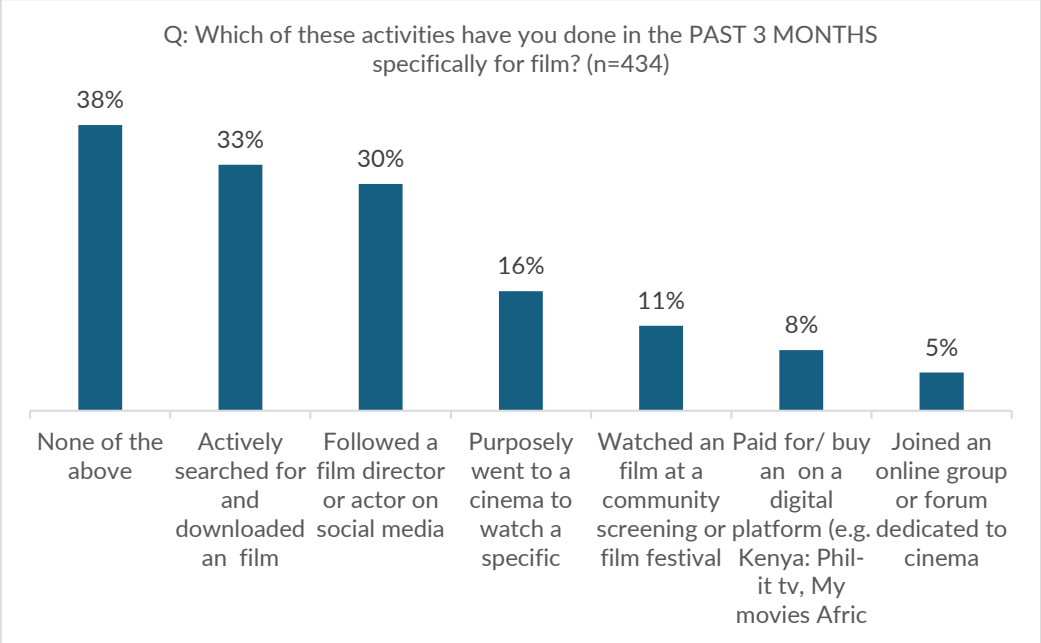


Figure 17: Engagement in past 3 months | Source: Survey data

South Africa shows strong audience advocacy for African films, with more than half of audiences (54%) willing to recommend them and relatively few detractors (13%), resulting in a robust NPS of 41. This suggests a mature audience segment that already values African storytelling and is prepared to promote it within their networks. Filmmakers should leverage this supportive market by continuing to produce high-quality, diverse content that reflects both local and pan-African narratives. Distributors and exhibitors have an opportunity to expand theatrical and streaming availability of African films, as strong word-of-mouth potential indicates viable demand. Streaming platforms and broadcasters should invest in curated African film catalogues and algorithmic promotion to amplify discovery. Government agencies and film bodies can reinforce this momentum through co-production treaties, tax incentives, and export support that position South Africa as a regional hub for African cinema. Funders and industry partners should focus on scaling production pipelines and facilitating regional distribution networks to capitalize on an already receptive audience base.

Overall, South African audiences demonstrate a mix of strong advocacy and layered engagement, but with a notable gap between interest and active participation. On one hand, viewers are highly engaged in discussion and discovery behaviors, recommending films, exploring related content, and engaging with reviews and talent, while also showing strong willingness to promote African films within their networks. On the other hand, a significant share remains passively engaged, with limited participation in paid platforms, cinemas, or community screenings. This points to a conversion challenge rather than a demand issue. Audiences are receptive, curious, and willing to advocate, but require stronger triggers to translate interest into sustained and monetizable engagement. For stakeholders, the opportunity lies in activating this base through targeted digital marketing, talent-led promotion, improved cinema and streaming experiences, and curated discovery pathways that make it easier, and more compelling, for audiences to move from passive consumption to active participation.

3.3 Social Impact

3.3.1. Overview

Film in South Africa is increasingly recognized for its potential to drive social discourse and highlight critical national issues. Themes such as housing, homelessness, contemporary apartheid, and race-based laws spark significant public conversation, reinforcing the role of cinema in reflecting the country's social fabric. However, the formal measurement of social impact remains limited, and few films deploy structured advocacy or education campaigns. While productions like *I Am All Girls* (2021) address themes such as human trafficking, they often lack the multi-sector NGO partnerships and sustained community engagement that are more prevalent in other markets like Nigeria.

Films addressing cultural heritage and local history generate high levels of pride and relatability among viewers, but the transition from audience sentiment to measurable policy influence or behaviour change is an area requiring further exploration. The enabling environment for social impact is also complicated by unresolved legislative issues, such as the Copyright Amendment Bill and the Performers' Protection Amendment Bill, which impact the rights and remuneration of local creators.

3.3.2 Definition and measuring of social impact through behaviour

Social impact in South Africa's film industry is broadly understood as storytelling that raises awareness, stimulates dialogue, and encourages positive social change, but its definition varies across stakeholders. Filmmakers emphasise authentic, reflective narratives that engage audiences on real issues, while funders focus more on tangible outputs such as job creation, skills development, and community upliftment. In contrast, broadcasters and streaming platforms tend to prioritise entertainment value, often integrating social themes only when they

align with commercially viable formats. As a result, socially driven content is frequently marginalised within mainstream distribution channels.

Measuring social impact remains a major gap. Most stakeholders rely on anecdotal evidence, audience reactions, community screening feedback, and social media engagement, without systematic tools to assess behavioural change or long-term outcomes. Formal measurement frameworks are largely absent, with funders tracking outputs rather than impact, and limited mechanisms to follow up on whether content influences attitudes or actions. This creates a disconnect between the intent to drive social change and the ability to demonstrate it.

Approaches such as integrating audience feedback systems, leveraging digital analytics, and building partnerships with NGOs and public institutions could enable better tracking of outcomes. Embedding impact assessment into funding and commissioning processes would also strengthen accountability. Ultimately, advancing social impact in film requires shifting from simply reaching audiences to understanding how content shapes perceptions, conversations, and behaviour.

"Social impact movies are created not just to entertain, but to raise awareness, inspire dialogue, and encourage positive change in society. We are not here just to entertain. We're here to raise awareness, inspire dialogue and we want people to sit up. If you write a song, make sure it has meaning to it. We want to make movies that change things." Distributor, South Africa.

3.3.3 Audience interest in socially relevant storytelling

The audience survey reveals that viewers are most drawn to stories about youth pursuing opportunities (50%) and women overcoming challenges (47%), followed by relationship and family health narratives (34%), identity and belonging (32%), and politics and social justice (29%). Environmental themes and cultural coexistence attract smaller but notable shares. These figures point to a clear audience appetite for stories grounded in lived social realities.

Stakeholders amplify these findings, demonstrating that such themes resonate not merely as entertainment but as catalysts for dialogue and reflection. Films exploring masculinity, fatherhood, and gender-based violence such as *The Heart is a Muscle* (2024) generated profound community engagement, with audiences using screenings as spaces to discuss how to create safe spaces for men to share emotions. Similarly, films addressing cultural identity and marginalised languages like *Elelwani* (2012), the first Venda feature, sparked pride and a sense of validation among communities long excluded from mainstream representation. Yet stakeholders consistently noted that these are precisely the genres broadcasters and streamers dismiss as not exciting, preferring action, thriller, and romantic comedy.

The gap between audience interest and available content is stark. While 50% of audiences want stories about youth pursuing opportunities, filmmakers observe that young people's hunger for relatable narratives is underserved, particularly in rural and township areas where distribution is weakest. The 29% interest in politics, corruption, and social justice aligns with calls from industry insiders for more stories tackling governance failures such as the electricity crisis, that "would take off" because they reflect daily realities. Meanwhile, environmental themes and cultural coexistence, though lower in the survey, represent underexplored opportunities where targeted funding could build new audiences.

"If someone had to include that into a film… for example, our ESKOM, our electricity initiative, you know, we used to have so much of load shedding and stuff. So, if someone had to include that into a film, it will take off." Filmmaker, South Africa.

Only a small share of audiences (9%) indicated that they prefer films purely for entertainment without social themes. This creates an impression that audiences are open to films that engage

with social realities, particularly when stories focus on personal experiences, aspirations, and everyday challenges.

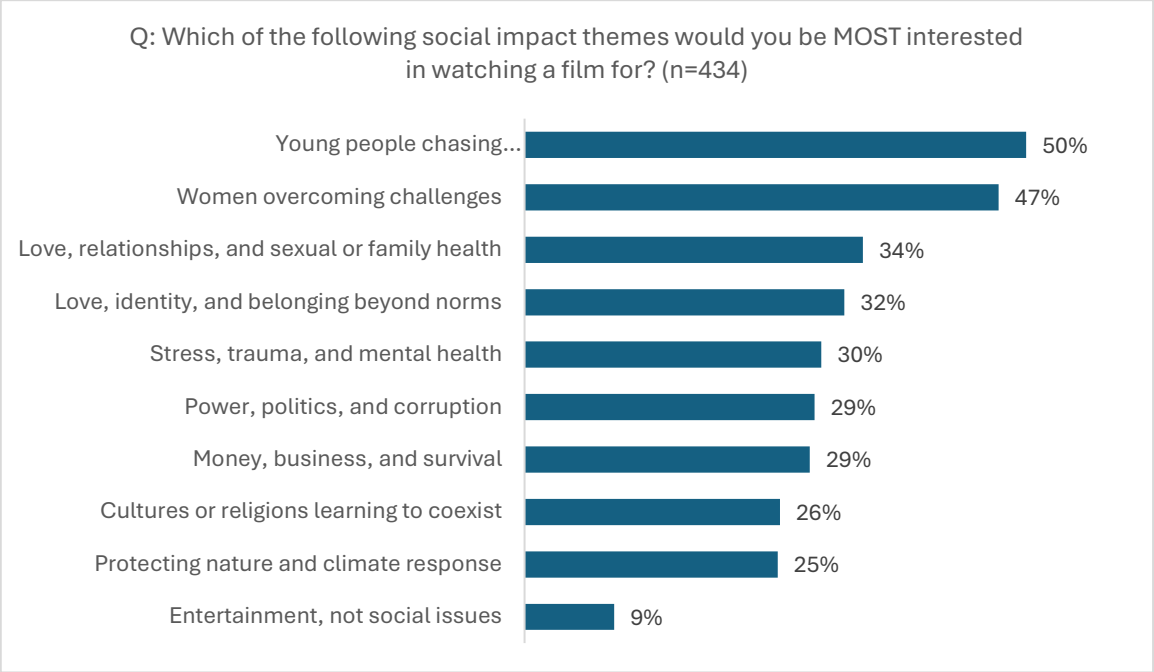


Figure 18: Social impact themes South African audiences want to watch | Source: Survey data

3.3.4 Priority and underexplored film themes/genres and their potential for growth and impact

The South African film market is heavily skewed toward a narrow set of commercially successful genres. Action, crime thriller, romantic comedy, and reality TV dominate the distribution landscape, driven by the acquisition strategies of streaming platforms and broadcasters. This commercial orientation has created a self-reinforcing cycle: the genres that receive funding and distribution are precisely those that already command the largest audiences, leaving little room for experimentation or for stories that reflect the full diversity of South African life.

Several underexplored genres hold significant potential for both audience growth and social impact. Animation is repeatedly cited as a major opportunity. International studios are already outsourcing animation work to South Africa, attracted by lower costs and high skill levels, yet locally produced animated content remains scarce. Investing in original South African animation could tap into global markets while creating local jobs and telling stories that appeal to children and families.

Indigenous language films are another underexplored area with proven demand. The Venda feature *Elelwani* demonstrated the power of a film in a minority language to mobilise audiences and build community pride. Similarly, the BraZulu model, Brazilian films dubbed into isiZulu, has found a massive audience on the Viu platform, proving that linguistic diversity can be commercially viable. Yet few films are made in languages beyond English and isiZulu. Expanding production into Xhosa, Tsonga, Afrikaans, and other official languages could unlock new regional markets and deepen cultural resonance.

Historical redress and Pan-African stories remain largely untapped. Several stakeholders noted that while American and European cinema continually revisits their histories, South African filmmakers have largely moved on from the apartheid era without fully exploring its complexities or the untold stories of the liberation struggle. Pan-African stories that connect South Africa with the broader continent, also offer opportunities for co-production and regional distribution, particularly as platforms expand their African footprint.

"If you look at American films, they still tell the Djangos, 12 Years a Slave… but in South Africa, I feel like we are saying, 'that's the past'." Funder, South Africa.

Social impact genres, including documentaries, gender-based violence narratives, mental health, and disability representation, have strong audience interest but struggle to secure funding or distribution. Broadcasters and streamers often dismiss such content as "too arthouse" or "boring TV". Yet community screenings of films like *The Heart is a Muscle*, which tackled fatherhood and trauma, generated intense engagement, with audiences demanding continued dialogue. Partnerships with NGOs, government departments, and corporate foundations could provide alternative funding streams for these genres, ensuring they reach the viewers who need them most.

Finally, youth-focused and contemporary governance themes offer growth potential. Young South Africans are the most engaged demographic, yet much of the content targeting them is imported. Local stories about education, unemployment, digital culture, and even topical issues like the electricity crisis resonate deeply.

3.3.5 Examples of socially impactful films and campaigns

Several films and campaigns cited in the interviews illustrate the potential of South African cinema to spark dialogue, shift perceptions, and engage communities.

i. Films with strong social impact

The Heart is a Muscle (2024) - This feature film about fatherhood, trauma, and male friendship had a particularly profound impact through community screenings. In Wynberg, where it was shot, audiences responded with emotional discussions about providing safe spaces for men to share their feelings. The film won Best Feature Film and was selected for Academy Award consideration.

Inxeba (The Wound) (2017) - A drama exploring masculinity and contested Xhosa initiation rituals, Inxeba generated national controversy and widespread debate. Though it faced protests, it demonstrated how film can force society to engage with sensitive cultural traditions.

Yesterday (2004) - This landmark film about an HIV-positive woman in rural KwaZulu-Natal was repeatedly mentioned as a powerful example of a social impact film. One ecosystem partner noted that it "educated and informed people about HIV & AIDS, creating awareness" at a time when stigma was pervasive.

ii. Campaigns and initiatives

Presidential Employment Stimulus Programme (PESP) - This government initiative, running for six editions since 2020, provided economic stimulus funding to filmmakers and artists during and after COVID-19, supporting projects with social impact goals.

NFVF Community Screenings - The National Film and Video Foundation invests in audience development by funding screenings in rural and township areas, including workshops and panel discussions that accompany film showings to deepen engagement.

*https://multichoicetalentfactory.com/*3.3.6 Role of public broadcasters, NGOs, donors, and foundations in impact-oriented content

Public broadcasters occupy a contradictory space in South Africa's film ecosystem. While entities like the SABC are mandated to serve the public interest and remain key outlets for culturally and socially impactful content, financial constraints have severely limited their commissioning capacity. Mzansi Magic, though more active in production, prioritises high-rating genres and incorporates social themes only sporadically, often within telenovelas rather than dedicated impact-driven projects. As a result, while broadcasters can provide essential support for social impact content, their focus on ratings and entertainment value constrains the scope and consistency of meaningful storytelling.

NGOs and foundations play a critical but often underappreciated role in supporting impact-oriented South African film. European cultural institutes such as the French Institute, Goethe-Institut, and British Council, provide consistent funding for workshops, co-productions, and festival participation. Local NGOs also facilitate distribution of social impact films, particularly when partnerships align objectives and respect creative integrity. However, these collaborations are typically ad hoc, and international co-productions often prioritise cultural exchange over commercial distribution, leaving many films without sustained access to local audiences.

Donors and Foundations particularly international ones, fill gaps left by government and private sector. The National Lottery Commission (NLC) funds social impact projects but requires applicants to be registered as non-profits, excluding many individual filmmakers. The Presidential Employment Stimulus Programme (PESP), funded by government, provided critical relief during COVID-19 and continues to support impact-oriented projects. International donors like the Ford Foundation and others are occasionally mentioned but are not described as a consistent presence.

Opportunities lie in stronger coordination among these actors. Several interviewees called for partnerships between broadcasters, donors, and NGOs to create dedicated funding streams for both production and distribution of impact-oriented content. The BraZulu model, dubbing content into local languages demonstrates how foundations could support accessibility. Expanding the NLC's criteria to include individual filmmakers, and linking public broadcasters with donor-funded projects, could ensure that impact films move beyond festivals and into the communities where they can effect change.

3.4 Financing and Enabling Environment

The financing of South African film is a mix of public grants, tax incentives, and increasingly, international licensing. The DTIC rebate is the cornerstone of this environment, providing a rule-based and auditable incentive that reduces risk for both domestic and international investors. NFVF grants serve as catalytic funding for the development and early stages of production, though the total annual budget is often insufficient to meet the high volume of demand. Private sector participation is significant, accounting for roughly 32% of production funding in the mid-2010s, yet the market remains sensitive to macroeconomic shocks.

A major shift in the financing landscape occurred in early 2024 when international streamers like Amazon Prime Video pivoted away from commissioning original African content in favour of licensing existing titles, widening the "funding gap" for mid-tier projects. Emerging regional capital, such as Afreximbank's USD1 billion Africa Film Fund, represents a promising future catalyst for infrastructure and production support. However, the efficiency of the enabling environment is often hampered by administrative delays in funding disbursements and rising production costs that outpace existing support structures.

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

Public financing remains the cornerstone of funding for South African film, yet it is marked by instability, bureaucracy, and a concentration of resources among established players. The National Film and Video Foundation (NFVF) provides annual grants for development, production, distribution, and training, though the process is slow and highly compliance driven. The Department of Trade, Industry and Competition's (DTIC) Section 12Q tax rebate has been crucial for attracting productions, but sudden freezes have caused industry-wide disruption and job losses. Provincial film offices, such as the Durban Film Office, offer smaller, targeted grants for micro-budget and intermediate projects, yet only a fraction of funded films about 10% in one example, reach mainstream broadcasters, underscoring the persistent gap between production support and distribution success.

Private financing in South African film is limited and largely inaccessible to grassroots filmmakers, with banks rarely lending to projects without substantial collateral. Investment is concentrated among a few established production houses that maintain relationships with broadcasters and streaming platforms, leaving emerging filmmakers dependent on personal savings, family contributions, or informal networks, an often-unsustainable model. Corporate sponsorship and product placement remain underutilised, despite their potential to provide alternative funding streams.

International financing plays a critical role in supporting South African films, especially those with cross-border or continental appeal, but it often prioritises cultural recognition over commercial viability. European cultural institutes; the French Institute, Goethe-Institut, and British Council, consistently fund workshops, co-productions, and festival participation. International film funds and foundations, such as the Ford Foundation and Hubert Bals Fund, provide additional support, while initiatives like the African Development Bank and Afreximbank's "Next Africa Fund" generate strong interest in Pan-African storytelling.

"The French and German… co-production deals with local filmmakers… those usually will win many awards but don't travel very far." Filmmaker, South Africa.

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

South Africa's film financing landscape is supported by a patchwork of public incentives, grants, and co-production schemes, but these mechanisms are plagued by inconsistency, complexity, and a persistent gap between funding production and supporting distribution.

Government tax credits and incentives

The Department of Trade, Industry and Competition (DTIC) administers the Section 12Q tax rebate, considered the most significant government incentive for film production. While the rebate provides substantial financial support to filmmakers, its instability, highlighted by sudden funding freezes that have halted productions and triggered industry protests, undermines its effectiveness as a reliable tool for planning and sustaining projects.

"What they do is if you want to make a film… they will give you 1.5 off that as a tax refund… a lot of filmmakers were doing a lot of projects via the DTI." Distributor, South Africa

Public grants and funds

The National Film and Video Foundation (NFVF) serves as the main public grant-maker, supporting projects across development, production, distribution, and training, as well as offering scholarships and programmes such as Sediba (screenwriting) and the Presidential Employment Stimulus Programme (PESP), which has been credited with sustaining filmmakers during and after COVID-19. While these programmes provide valuable support, the application process is often seen as overly complex, particularly for emerging filmmakers. At the provincial level, offices like the Durban Film Office offer smaller, targeted grants for micro-budget and intermediate projects without claiming intellectual property rights, while the KwaZulu-Natal Film Commission provides additional incentives and partnerships, including learnerships with platforms like Netflix. The National Lottery Commission funds social impact and community-focused projects but limits eligibility to registered non-profit organisations, leaving many individual filmmakers without access to this source of support.

Co-production schemes

South Africa maintains bilateral co-production treaties with Australia, Brazil, Canada, France, Germany, Ireland, Italy, Kenya, Netherlands, New Zealand and the United Kingdom, enabling films to access funding and incentives from both partner nations. Managed by the DTIC, these treaties are considered crucial for attracting international investment, with innovative cross-border projects like the BraZulu model, Brazilian films dubbed into isiZulu, demonstrating creative collaboration even outside formal treaty structures. European cultural institutes, such

as the French Institute, Goethe-Institut, and British Council, provide consistent support through workshops, co-productions, and festival participation, though these partnerships often focus on cultural exchange rather than commercial distribution, leaving local audiences with limited access to the films.

Gaps and challenges

Despite the variety of funding mechanisms, significant gaps remain in South Africa's film ecosystem. Private sector investment for independent filmmakers is virtually non-existent, while distribution and marketing receive limited support, leaving many films unable to reach audiences. Additionally, bureaucratic complexity including compliance requirements, lengthy adjudication periods, and the emphasis on established track records, creates barriers that disproportionately exclude emerging talent, reinforcing a cycle that favours established producers.

Opportunities

Stakeholders identified several concrete financing opportunities that would make the South African film industry more investable and sustainable.

Stabilise the DTIC Tax Rebate (Section 12Q)

The tax rebate is widely recognised as the most effective government incentive for attracting production investment, but its sudden freezes have created industry-wide instability. Stakeholders call for predictable, multi-year funding cycles that would allow producers to plan projects with confidence, rather than facing annual uncertainty that drives talent and investment away.

Simplify Application Processes for Public Grants

Emerging filmmakers are systematically excluded by overly complex application forms, compliance burdens (e.g., NLC requiring NPO registration), and lengthy adjudication periods. Simplifying language, reducing documentary requirements, and creating tiered application pathways for micro-budget projects would open public funding to grassroots talent currently locked out.

Expand Co-Production Treaties to More African Countries

South Africa has bilateral treaties with six European nations but only one with an African country (Kenya). Expanding treaties within the continent would unlock pooled financing, shared incentives, and access to multiple markets, reducing reliance on European partners whose cultural exchange priorities often leave films without commercial distribution pathways.

Launch a Vertical Drama Development Fund

The mobile-first vertical drama model has proven highly profitable in Asia but is absent in South Africa. A targeted fund to pilot local vertical drama production including training, production support, and platform partnerships could create a new, scalable revenue stream that bypasses traditional gatekeepers and reaches young, mobile audiences directly.

3.4.3 Business models and revenue mixes across distribution channels

Stakeholder interviews highlighted several business models that make South African film projects investable by creating clear pathways to revenue, asset retention, and scalability for funders such as banks, private equity firms, and impact investors. Below are the key business models that the stakeholders identified:

The Intellectual Property (IP) Retention and Global Licensing Model

This model prioritises retaining ownership of the film as a long-term asset that can be licensed across multiple territories, platforms, and time periods. Instead of accepting commissioning deals (where broadcasters or streamers own the IP outright), producers finance production

through a combination of public grants, private investment, and pre-sales. They then license the completed film to broadcasters, for example, SABC for R800,000–R1.2 million for a documentary, or international distributors such as a European distributor acquiring rights at festivals like Berlinale. Investors are attracted because the film retains residual value: it can be relicensed after initial windows expire, sold into new territories, or adapted into other formats. The Venda feature *Elelwani* exemplified this model, generating returns through a European distribution deal, local licensing, and airline screenings and with the filmmaker retaining a percentage of all revenue streams.

"The only film that I produced that I can say I had a say on was Elelwani. I had a percentage on it. It was shown all over. It opened the Durban Film Festival and was also picked up by Berlin International Film Festival. We identified a distributor who bought the rights to show the film in Europe. Locally, we had an independent distributor. I had people telling me, 'I saw your film in the aeroplanes.' As a producer, I get feedback from the distributor every time the film is sold. That is how I monitor it." Filmmaker, South Africa

The slate financing model

Rather than funding one film at a time, slate financing pools investment across multiple projects, reducing risk through portfolio diversification. This model appeals to institutional investors who cannot take single-project risks. In South Africa, the Durban Film Office's micro-budget programme (funding five projects annually at R350,000 each) operates as a quasi-slate model, though it relies on public grants rather than private capital. A more commercial example is the MultiChoice Talent Factory, which effectively operates as a slate by developing multiple graduates and projects simultaneously. For private funders, a structured slate model, combining high-potential commercial genres with lower-budget social impact films, could offer predictable returns while supporting diverse storytelling.

The co-production and treaty-based model

Bilateral co-production treaties allow South African producers to access funding and incentives from partner countries, effectively increasing the available resources while sharing risk. Under this model, a film becomes a joint asset, with revenues split according to each partner's contribution. European cultural institutes provide consistent co-production funding, though these deals often prioritise cultural exchange over commercial returns. The BraZulu initiative (Brazilian films dubbed into isiZulu) demonstrates an emerging variation: cross-territory adaptation that creates new revenue streams without full co-production. For investors, treaty-based models offer de-risking through diversified funding sources and access to multiple markets.

The corporate sponsorship and product placement model

This model leverages brand partnerships to cover production costs in exchange for integrated marketing. While underdeveloped in South Africa, stakeholders identified its potential: instead of pitching to SABC, a producer might pitch to a corporate (e.g., Coca-Cola) for sponsorship in exchange for brand integration. The revenue is not box office but marketing spend, and the film becomes promotional content as much as creative work. Formalising product placement agreements and developing sponsorship packages could unlock private funding currently absent from the sector.

The vertical drama and mobile-first monetisation model

Originating in Asian markets, this model produces short, episodic content (60–90 seconds per episode, 40–100 episodes per series) designed exclusively for mobile viewing on platforms like TikTok and YouTube. Monetisation occurs through in-app purchases (viewers buy "coins" to unlock episodes), advertising revenue, and brand integrations. The model is highly capital-efficient: production costs are low, turnaround is fast, and revenue is direct-to-consumer without intermediaries. South African stakeholders identified this as an untapped opportunity, noting that payment could be integrated with mobile data plans, making content accessible to

audiences without credit cards. For investors, the appeal lies in predictable, recurring revenue from engaged micro-audiences. Literature review also noted that to monetise a YouTube channel in South Africa, creators must join the YouTube Partner Program by reaching 1,000 subscribers and either 4,000 watch hours in a year or 10 million Shorts views within 90 days. Once eligible, South African YouTubers typically earn between R8.50 and R53.79 per 1,000 ad views, receiving monthly wire transfers to their bank accounts once they hit a $100 withdrawal threshold.

"I recently read about the boom of what they call micro-drama. It's very big in Asia. You shoot like 40 episodes. You make sure that your first 3 episodes are free. Once they gain traction, people can start watching them. The good thing is that anybody in Africa can pay for those because the payment methods to access those movies could be the data that you use to make calls. It's online, the future is online, and it's just a matter of knowing the right way to monetise it or speak with the stakeholders, the people who control these platforms, the phone networks." Filmmaker, South Africa

The community screening and social impact recovery model

Unlike commercial models, this approach prioritises audience reach over direct revenue, but it can generate indirect financial returns that attract impact investors. Organisations like the Durban Film Office screen films in hostels and townships, measuring success through engagement and dialogue rather than box office. Revenue is replaced by outcomes: documented behavioural change, community dialogue metrics, and partnership value with NGOs and government departments. For impact investors, this model offers verifiable social returns, which can be monetised through outcome-based funding, government social impact bonds, or corporate ESG (Environmental, Social, and Governance) budgets. Scaling this model requires standardised impact measurement frameworks and also availing more funds from government and impact investors, which are currently absent or under development.

3.4.4 Key constraints and promising innovations in film ecosystem development

The stakeholders highlight a significant mismatch between film education and industry demand. While film schools graduate thousands of students annually, sometimes over 10,000, the industry lacks sufficient opportunities to absorb them. High tuition costs, often exceeding R120,000 per year, limit access for many aspiring filmmakers, and although public funding through NFVF bursaries and programmes like Sediba exists, it is highly competitive and insufficient to meet demand. This has created a growing pool of trained but unemployed talent, whose skills risk deteriorating when not applied within the industry.

Collaborative structures in the South African film industry are highly fragmented and often exclusionary, with opportunities concentrated within closed networks. Misalignment between government entities, broadcasters, and production houses hampers formal collaboration, leading to duplicated efforts, competing criteria, and missed opportunities for synergy, while many emerging talents remain marginalised.

3.4.5 Film ecosystem development

Emerging collaborative models are beginning to bridge the gap between grassroots talent and the established film industry. Co-production initiatives with young creators, such as the comedy series *Bella's*, developed in partnership with Urban Brew Studios, show how established production houses can amplify new voices while maintaining commercial viability. Regional and cross-border collaborations, like the BraZulu initiative that dubs Brazilian films into isiZulu, expand audiences and generate new revenue streams. Platforms such as the Durban FilmMart provide structured opportunities for local filmmakers to connect with international buyers, funders, and co-production partners, offering an effective alternative to informal networking.

Although still emerging, several mentorship initiatives are showing impact in the South African film industry. The Durban Film Office's coaching model pairs funded filmmakers with experienced professionals to guide them through development, production, and post-production, while the MultiChoice Talent Factory embeds trainees within production teams for

direct mentorship. Independent efforts, such as filmmaker-led intensive workshops that bring in industry experts and festival representatives, further illustrate the benefits of structured guidance. These small-scale initiatives highlight the value of mentorship and offer scalable models for supporting emerging talent.

Across capacity building, collaborations, and mentorship, mobile-first platforms such as TikTok and YouTube are already playing a significant role in South Africa's film ecosystem, enabling grassroots creators to bypass traditional gatekeepers, reach audiences directly, and gain visibility with minimal resources. While monetisation remains a challenge, these platforms serve as low-cost training grounds for storytelling, audience engagement, and independent distribution, skills increasingly essential in a digital-first landscape. In addition, stakeholders have identified vertical drama formats such as short, episodic content designed for mobile phones, as a promising opportunity to copy from highly profitable Asian markets. Although not yet an established trend in South Africa, this model could offer a new pathway for local creators to generate revenue and build audiences outside conventional distribution channels.

3.5 Children's Consumption Landscape

This section examines children's film and media consumption behaviours within the South African context, with a focus on viewing patterns, content preferences, and access channels. Understanding how younger audiences engage with film is critical to assessing the future trajectory of the industry, as early exposure shapes long-term viewing habits, cultural affinity, and platform adoption. The analysis draws on primary research insights to highlight key trends, barriers, and opportunities in engaging children as an emerging audience segment.

The study adopts an age-segmented approach to capture differences in age and decision-making across childhood stages. Children aged 0–5 years and 6–9 years were represented through parent or guardian responses, reflecting the high level of supervision and support required for media consumption in these groups. In contrast, children aged 10–13 years and 14–17 years participated directly in the research, with appropriate parental guidance and consent, under the assumption that they exercise a greater degree of independence in content selection and viewing behaviours.

Findings

3.5.1 Content preferences and exposure to film types

Teenagers in South Africa watch a wider variety of film content compared to children, showing stronger engagement with both local and international films. American films are the most watched content among both groups, with significantly higher viewership among teenagers (61%) than children (50%). Local films are also highly popular, particularly among teenagers (61%) compared to children (45%), suggesting stronger appreciation for local storytelling as audiences grow older. Teenagers demonstrate greater exposure to international content across African, European, Chinese, Indian, Japanese, and Korean films, indicating more diversified viewing habits. Chinese films attract relatively notable viewership among both groups, though teenagers remain consistently more engaged with Asian content overall.

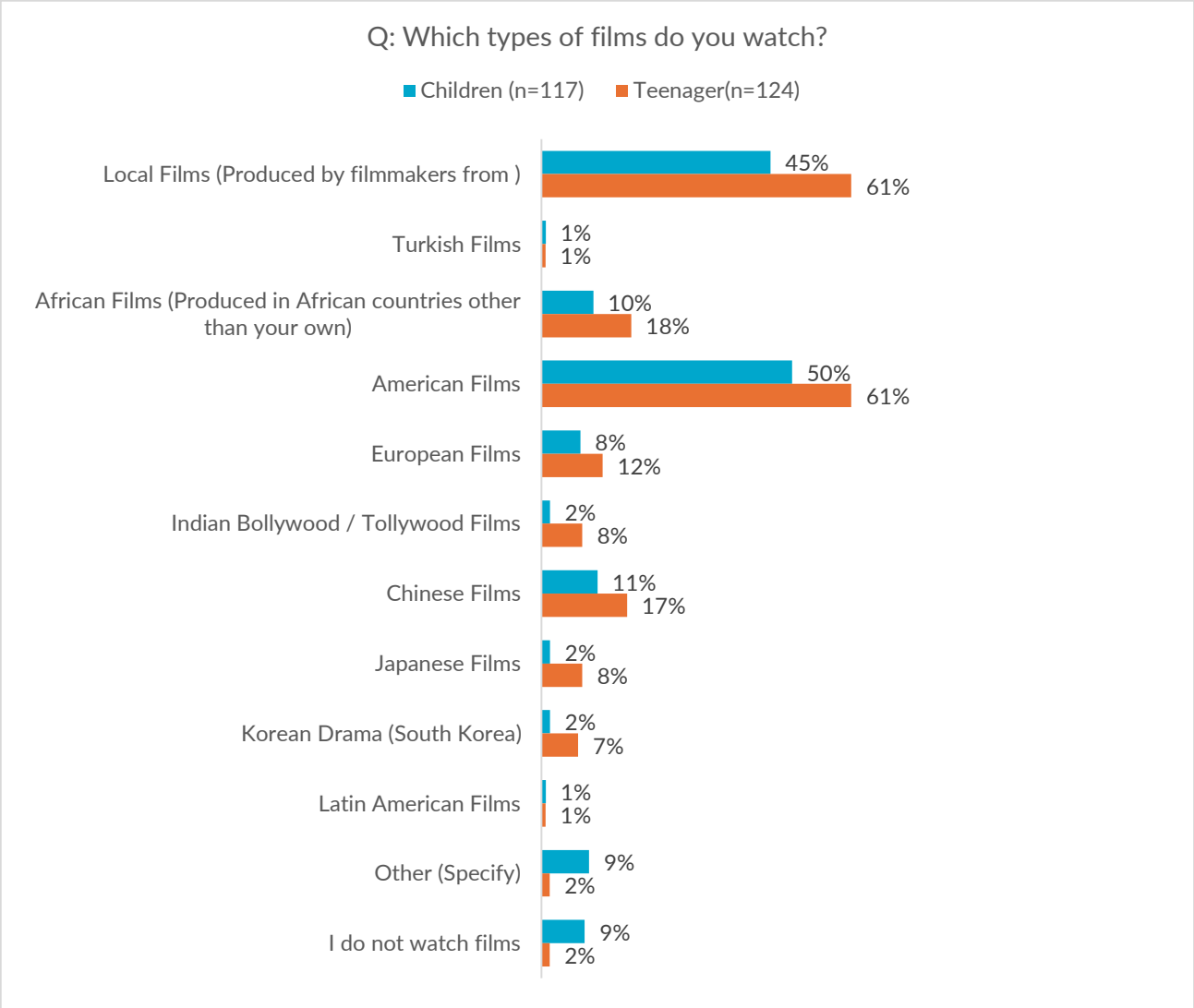


Figure 19: Type of films watched by teenagers and children in South Africa | Source: Survey data

3.5.2. Genre preferences among young audiences

Animation and cartoons dominate among children in South Africa, with 84% watching this genre compared to 53% of teenagers, making it the strongest differentiating genre between the two groups.

Teenagers show significantly stronger preference for more mature and story-driven genres, particularly comedy (66%), action (50%), and drama (47%), compared to children at 31%, 16%, and 20% respectively.

Action, horror, and sci-fi films are substantially more popular among teenagers than children, suggesting increasing appetite for thrill, adventure, and complex storytelling as audiences grow older.

Horror films show one of the largest age-related gaps, with 29% of teenagers watching horror compared to only 7% of children.

Documentary viewing remains relatively niche overall, though teenagers (16%) are nearly three times more likely than children (6%) to watch documentaries.

Romantic comedy is watched almost exclusively by teenagers (12%), while no children reported watching the genre, highlighting clear differences in age-appropriate content preferences.

Fantasy and mystical genres attract moderate interest across both groups, though teenagers (22%) remain more engaged than children (11%).

Overall, children's viewing habits are strongly concentrated around animation-focused entertainment, while teenagers exhibit more diversified genre preferences spanning comedy, drama, action, horror, and documentary content.

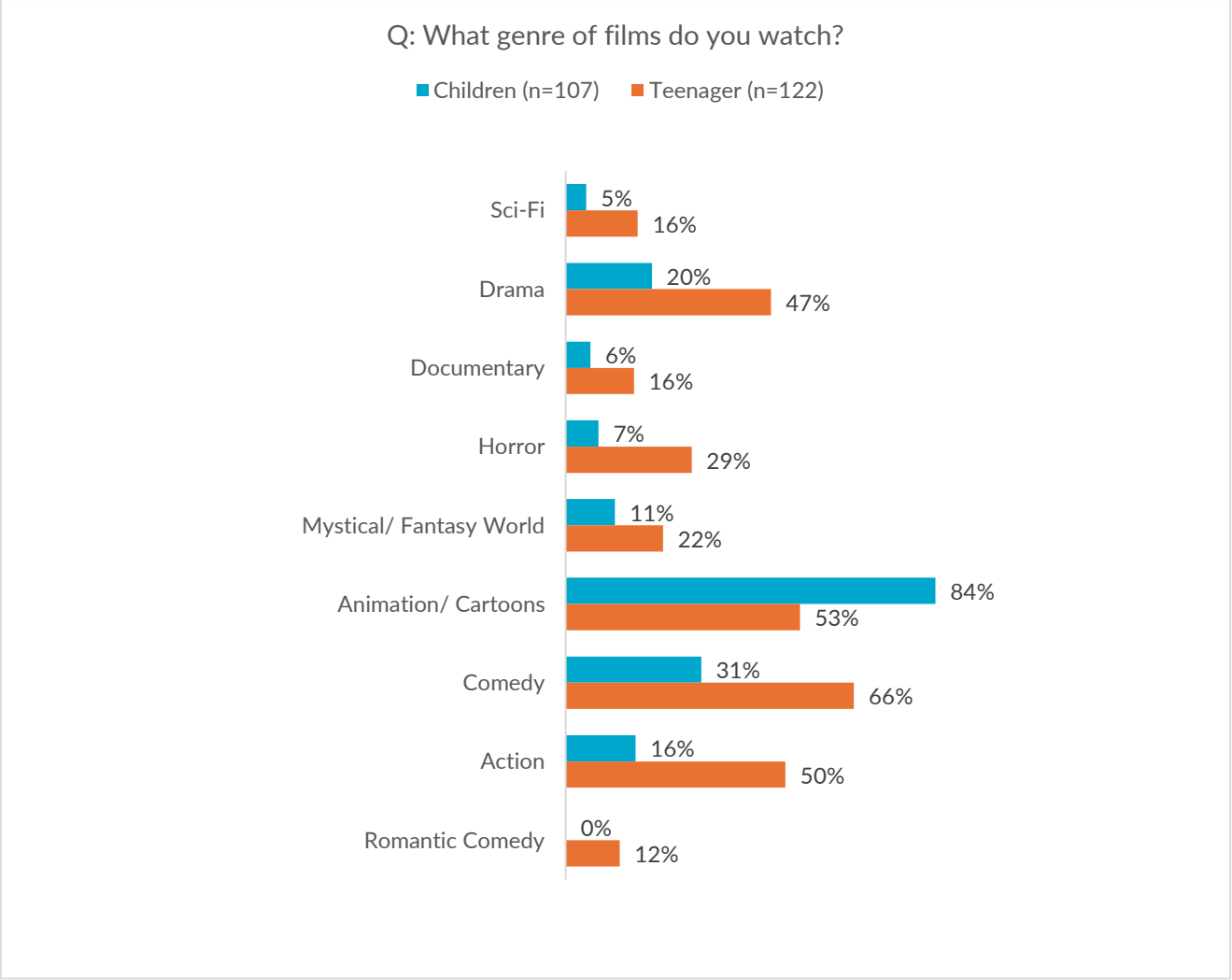


Figure 20: Genre of films watched by children and teenagers in South Africa | Source: Survey data

3.5.3. Digital platforms dominate film access

YouTube/YouTube Kids is the leading platform for film consumption among both children and teenagers in South Africa, especially among children (63%), highlighting the dominance of free digital video platforms among younger audiences.

Teenagers show stronger usage of Pay TV (45%) and streaming platforms (42%) compared to children, indicating greater access to subscription-based and on-demand entertainment services.

Streaming platforms such as Netflix, Showmax, Amazon Prime, and others play a significant role for both groups, demonstrating the growing importance of digital streaming within youth viewing habits.

Social media is a much more important film-viewing and discovery platform among teenagers (12%) than children (2%), reflecting teenagers' stronger integration into social digital ecosystems.

Traditional cinema attendance remains very low among both children and teenagers, suggesting that film consumption is increasingly home-based and digitally driven.

Free-to-air television still retains some relevance, particularly among children (15%), although its usage is significantly lower than YouTube and streaming services.

Pirated websites, film festivals, community screenings, and video rentals have minimal reach overall, indicating that formal digital platforms dominate film access among young audiences in South Africa.

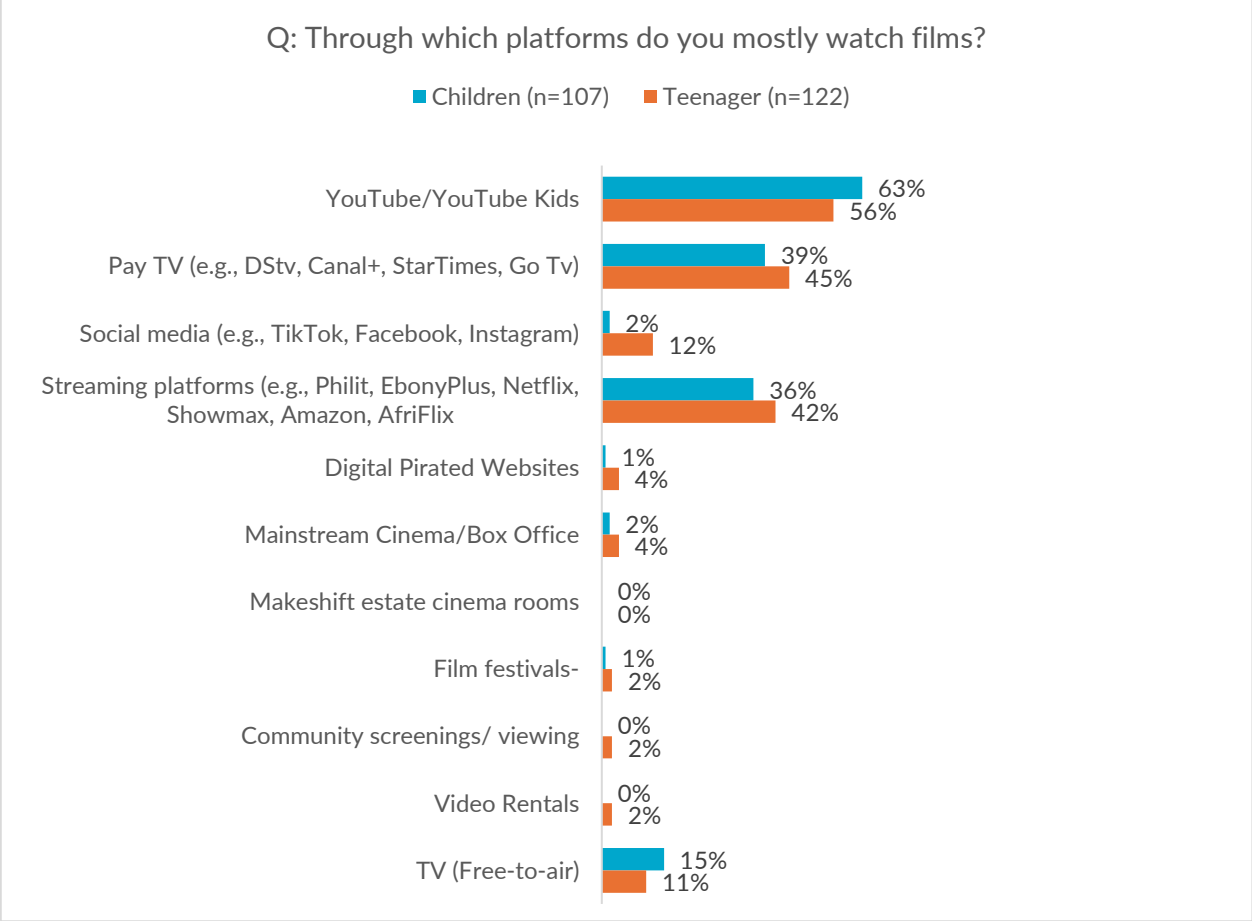


Figure 21: Platforms used mostly by children and teenagers to watch films in South Africa | Source: Survey data

3.5.4. Film consumption frequency among young audience

Film watching is highly frequent among both children and teenagers in South Africa, with the majority consuming films either daily or at least once a week.

Children are more likely to watch films at least once a week (55%) compared to teenagers (43%), indicating very strong routine engagement with film content among younger audiences.

Daily film consumption is also high across both groups, though slightly higher among teenagers (42%) than children (39%), suggesting that teenagers maintain more intensive day-to-day viewing habits.

Occasional viewing is relatively uncommon among both segments. Only small proportions watch films once a month or once every 2–3 months, highlighting that film consumption is largely embedded into regular entertainment habits.

Children are more likely than teenagers to watch films 2–3 times a month (10% vs. 4%), suggesting a slightly broader spread between moderate and highly frequent viewers among younger audiences.

Overall, the findings indicate that film consumption among South African youth is highly habitual and digitally sustained, with both children and teenagers engaging with film content on a consistent weekly or daily basis.

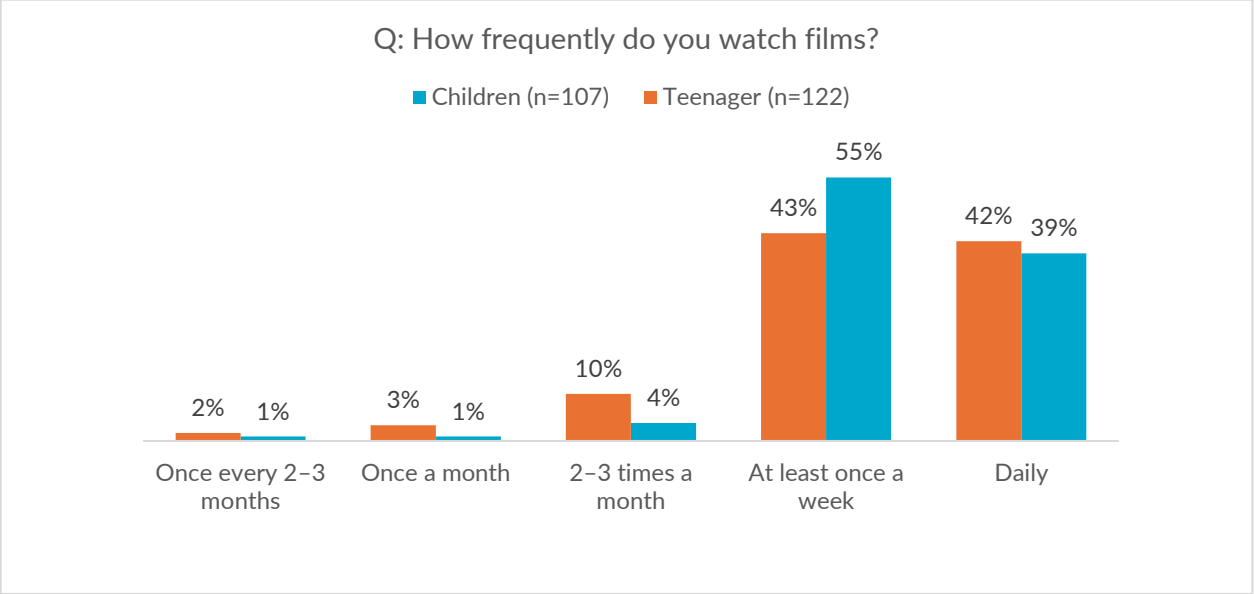


Figure 22: Frequency of children and teenagers watching films in South Africa | Source: Survey data

3.5.5. Family-Centered Viewing Behaviors

Film watching among both children and teenagers in South Africa is strongly social and family-oriented, with siblings/relatives emerging as the most common viewing companions for both groups (56% teenagers; 54% children).

Parents also play a major role in film-viewing experiences, particularly among children (50%) compared to teenagers (48%), highlighting the continued importance of family co-viewing among younger audiences.

Teenagers are significantly more likely to watch films alone (44%) than children (32%), suggesting increasing independence and personalized viewing habits with age.

Watching films with friends is more common among teenagers (27%) than children (19%), reflecting stronger peer-oriented entertainment behaviors among older youth.

Viewing with classmates or schoolmates remains very limited among both groups, indicating that film consumption primarily occurs within home and close social environments rather than school-based peer settings.

Overall, film consumption among South African youth remains deeply embedded within family and household contexts, although teenagers increasingly shift toward independent and peer-driven viewing behaviors.

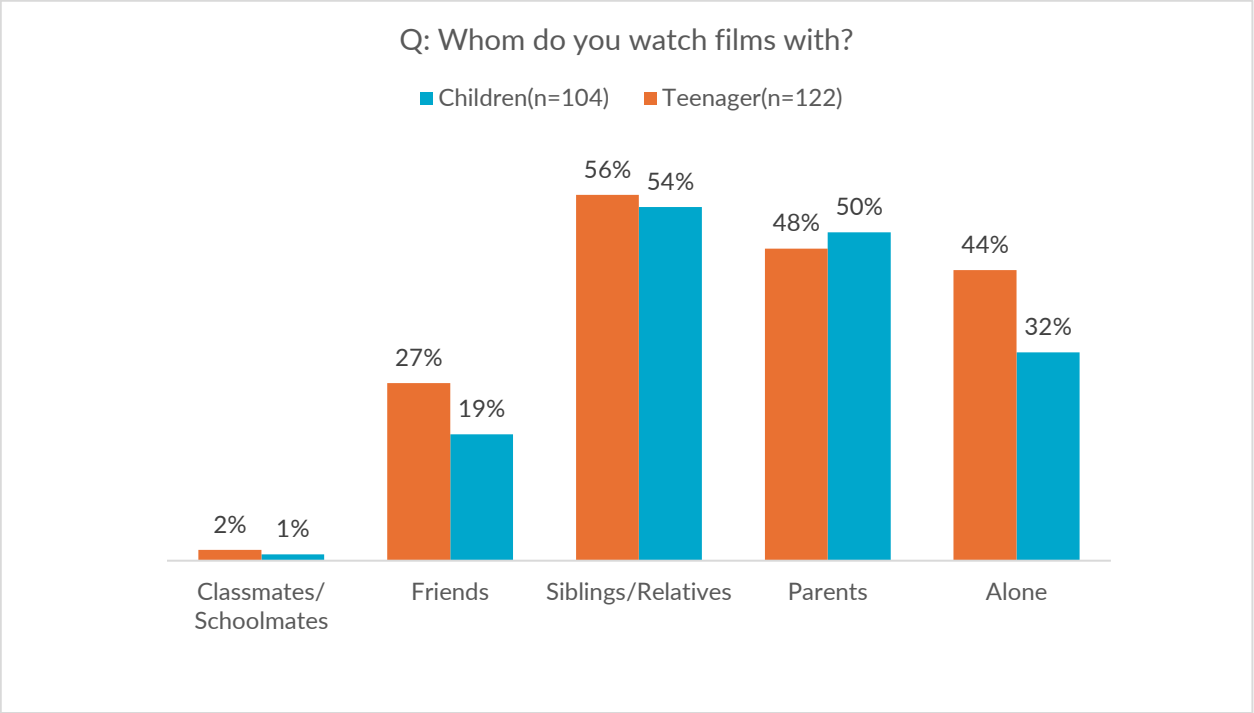


Figure 23: : Whom do children and teenagers in South Africa watch films with | Source: Survey data

3.5.6. Film discovery pathways among young audiences

Friends and family are the dominant source of film discovery among both children and teenagers in South Africa, cited by 86% of children and 80% of teenagers, highlighting the strong influence of interpersonal networks on viewing decisions.

Teenagers are significantly more likely to discover new films through social media (43%) compared to children (13%), demonstrating the growing importance of digital and social platforms in shaping film awareness among older youth audiences.

Streaming platform recommendations play an important role for both groups, with similar levels among children (28%) and teenagers (27%), indicating that algorithm-driven discovery is increasingly embedded in youth viewing behavior.

Traditional advertising channels such as billboards, radio, newspapers, magazines, and blogs have relatively limited influence overall, particularly compared to interpersonal and digital discovery channels. Out-of-home advertising maintains moderate visibility among both groups, though its influence remains considerably lower than recommendations from family, friends, or digital platforms.

Influencers/bloggers and film festivals have minimal influence on film discovery among both children and teenagers, suggesting that mainstream social interactions and platform ecosystems remain the primary awareness drivers.

This indicate that film discovery among South African youth is primarily socially driven, with teenagers increasingly shifting toward digital and social media ecosystems, while children remain more reliant on family-based recommendations.

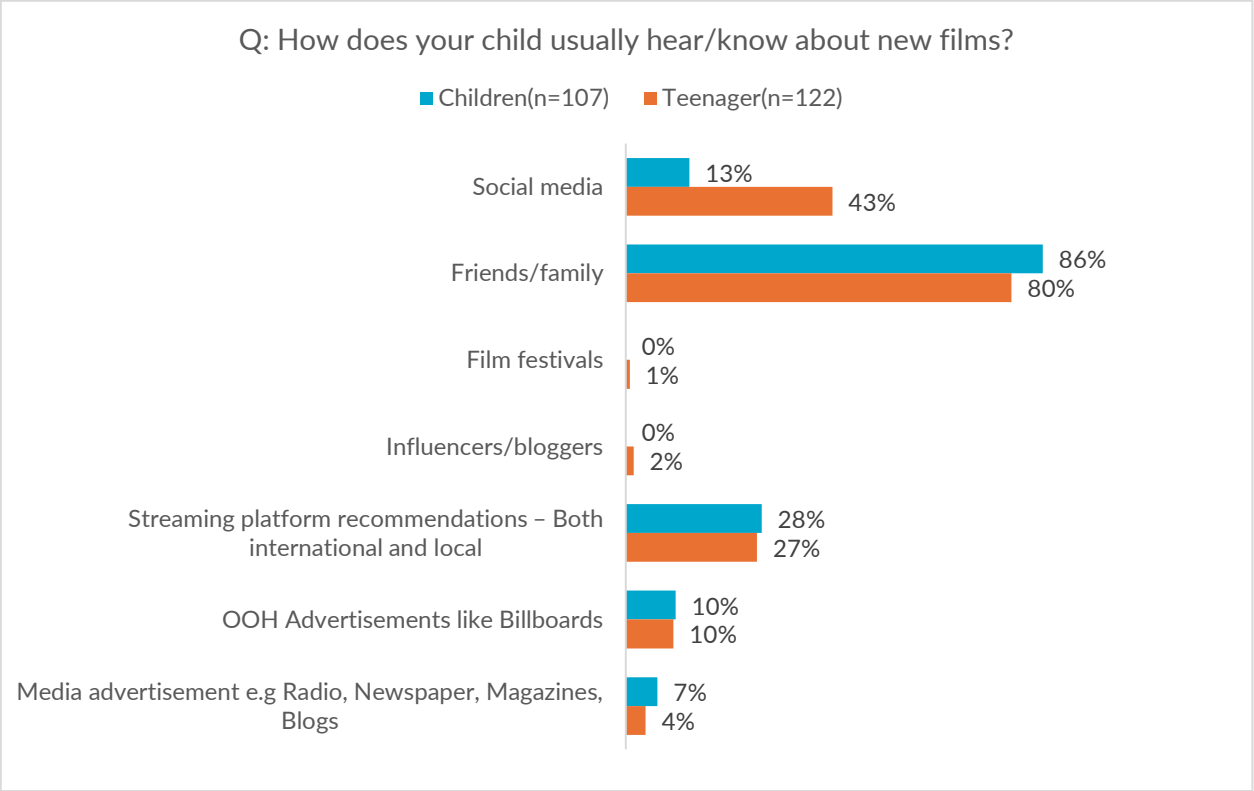


Figure 24: How children and teenagers hear about new films in South Africa | Source: Survey data

3.5.7. Motivations driving film consumption

Entertainment and relaxation are the primary motivations for watching films among both children (79%) and teenagers (72%) in South Africa.

Children are more strongly motivated by family-friendly and safe content (58%) and educational value (60%) compared to teenagers at 45% and 50% respectively, highlighting the importance of safe and learning-oriented viewing experiences for younger audiences.

Teenagers place greater emphasis on interesting stories that keep attention (47% vs. 35% among children), as well as films that are popular with friends or family (35% vs. 21%), reflecting stronger influence of storytelling quality and peer culture.

Representation and relatability are also more important among teenagers, with 28% motivated by seeing familiar places, languages, or people like themselves, compared to 18% of children.

Favourite actors, characters, or creators are equally influential across both groups, cited by around 30% of respondents (30% teenagers; 30% children).

Overall, children's motivations are more centered around safety, learning, and family suitability, while teenagers are more influenced by compelling storytelling, social relevance, and relatability.

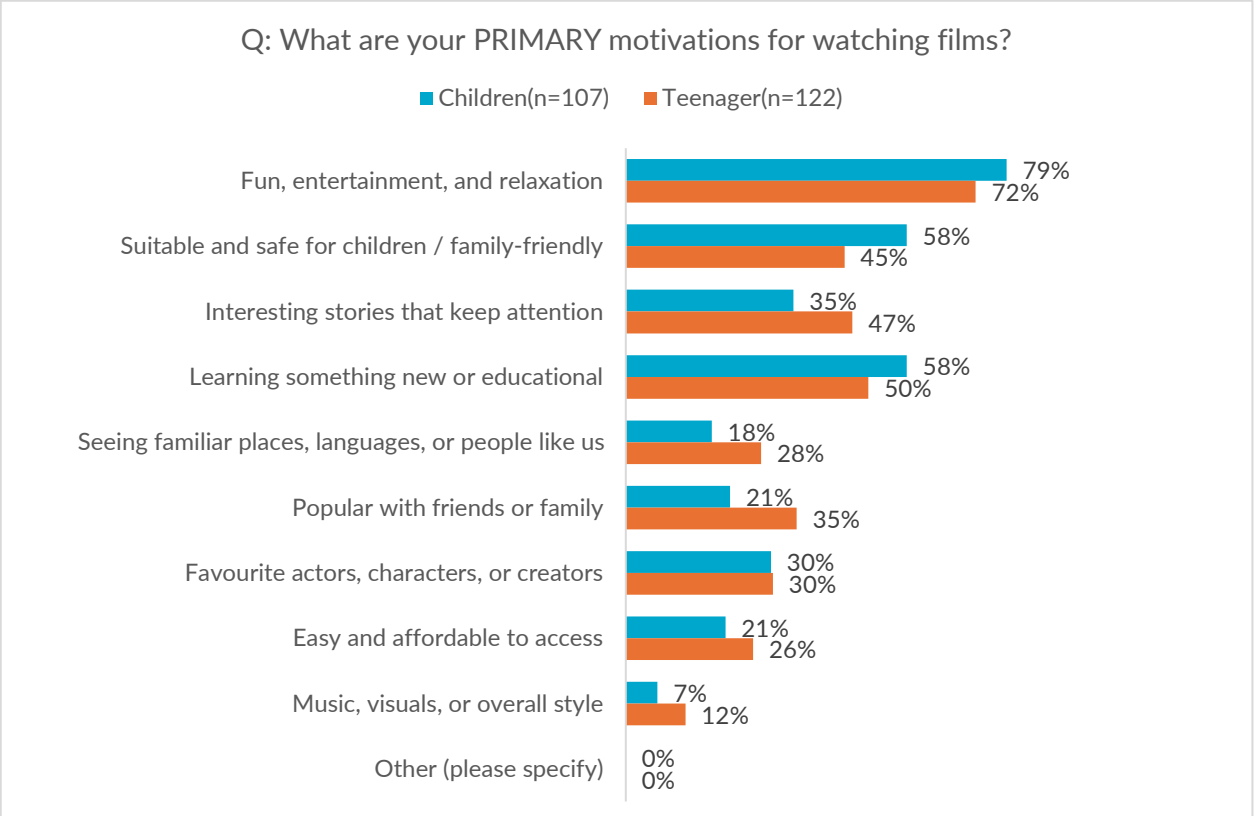


Figure 25: Primary motivation for children and teenagers to watching films in South Africa | Source: Survey data

Conclusion

From the findings we see that South African children and teenagers are highly engaged film audiences, with consumption patterns increasingly shaped by digital platforms, social influence, and evolving content preferences. Film viewing is deeply embedded within everyday entertainment habits, particularly through YouTube, streaming platforms, and Pay TV, while traditional cinema and offline viewing channels play a relatively limited role. Younger children remain strongly oriented toward animation, educational, and family-friendly content, often consuming films within household and family settings. In contrast, teenagers demonstrate more diversified and globally oriented viewing habits, with stronger interest in mature genres, socially relevant storytelling, and independent viewing behaviors.

The findings also highlight the growing importance of digital ecosystems in shaping youth audience development. While family and friends remain central to film discovery across all age groups, teenagers increasingly rely on social media and streaming recommendations to discover new content. At the same time, the strong popularity of both local and international films suggests that younger audiences are receptive to culturally relevant storytelling alongside global entertainment trends. These patterns present important opportunities for filmmakers, distributors, and platforms to invest in youth-centered content strategies that combine entertainment, representation, accessibility, and digital-first engagement approaches to strengthen long-term audience development within South Africa's film ecosystem.

4. Recommendation

4.1 Country-Specific Priorities and Opportunities

A primary priority for South African distribution is the development of regional networks and niche market targeting to improve the baseline performance of domestic films in cinemas. There is a significant opportunity to leverage the country's high internet penetration by developing more independent, producer-led digital marketing strategies that move away from total platform dependency. In terms of audience development, expanding the reach of local-language content and investing in community-based exhibition could help bridge the gap between urban and rural consumption.

For social impact, the priority lies in fostering stronger collaborations between filmmakers, NGOs, and public broadcasters to create sustained advocacy campaigns that extend beyond a film's initial release. Scaling the industry's potential will also require resolving the current uncertainties surrounding intellectual property legislation and improving the administrative efficiency of existing incentive schemes. South Africa is well-positioned to serve as a hub for pan-African co-productions, provided it can maintain its competitive edge in technical infrastructure and incentive predictability in the face of increasing continental competition.

4.1.1 Priority opportunities in distribution

Stakeholders across the South African film ecosystem identified several interconnected priority opportunities to address the structural bottlenecks that limit access to audiences and revenue. At the top of the list is the urgent need for enforceable local content quotas on streaming platforms and broadcasters. Without such regulation, the market will remain dominated by international players who face no obligation to support South African storytelling.

Equally critical is the revival of community cinema and mobile screening models. The closure of township cinemas has severed a vital link between filmmakers and majority audiences. Returning to the bioskop model, mobile screenings in community halls, schools, and open spaces, would not only restore physical access but also rebuild a culture of local film consumption.

At the same time, stakeholders pointed to the potential of mobile-first platforms such as TikTok, YouTube, and emerging vertical drama formats, as alternative distribution channels that allow grassroots creators to bypass traditional gatekeepers. These platforms are already where young South Africans consume content, and they offer low-cost entry points for building audiences directly.

Strengthening co-production and regional distribution networks also emerged as a priority. Collaborations within Africa, exemplified by the BraZulu dubbing model, which brings Brazilian films to isiZulu-speaking audiences, can expand viewership beyond national borders and create more sustainable revenue streams.

Despite the NFVF publishing annual box office reports, current audience data in South Africa is fragmented, underutilised, and largely inaccessible to filmmakers. Broadcasters and streaming platforms collect extensive viewership analytics-ratings for television, proprietary metrics for platforms like Netflix and Showmax, but treat this information as confidential, leaving independent producers with no insight into who watches their content or why. The data that is shared lacks granularity as it is limited to aggregate numbers, excludes rural and township audiences due to research panel biases, and offers no explanation of audience motivations or post-screening behavioural change. Stakeholders agree that before collecting more data, the system needs three improvements namely access (data must be shared with filmmakers), granularity (demographic and regional breakdowns), and timeliness (real-time or near-real-time availability).

A more cost-efficient and collaborative research structure can be achieved by leveraging existing low-cost tools rather than expensive new surveys. Social media analytics such as engagement rates, sentiment analysis, can provide real-time audience feedback at minimal cost, and partnerships with mobile network operators could generate anonymised streaming behaviour data without building new infrastructure. Pooling resources across the NFVF, DTIC, and provincial film offices would eliminate duplicated data collection. The stakeholders suggest a public-private data collaborative as a model where broadcasters, streamers, and public agencies would contribute anonymised, aggregated data to a centralised, open-access platform offering standardised dashboards, mobile-based audience surveys (via USSD or WhatsApp), and a shared repository of preference studies. Realising this would likely require regulatory incentives, such as mandating streaming platforms to share anonymised data as a condition of operating in South Africa, and a designated coordinating body.

Finally, stakeholders called for support to mid-level and independent distributorsl. Creating incentives for these intermediaries and integrating film festivals into sustained distribution pathways through market days, curated partnerships with streamers, or year-round online platforms, would provide essential stepping stones for emerging filmmakers. Leveraging that opportunity into lasting distribution relationships could transform a fragmented system into one that consistently connects South African stories with the audiences waiting to see them.

"My biggest recommendation is, I think government needs to get involved to force broadcasters and streaming platforms to show like a certain quota of local films. If government does not step in, we don't stand a chance. You can't just go to Netflix and then you are going to be able to be assisted. You need to go through certain distributors and limited distributors. So we need to create more platforms of distribution, then maybe we wouldn't have to sort of like beg for our work to be seen. It's online, the future is online, and it's just a matter of knowing the right way to monetise it." Distributor, South Africa

4.1.2 Priority opportunities in audience development

Audience development in South Africa requires a fundamental shift from viewing audiences as passive consumers to mobilizing them as active participants in a film culture. The most urgent opportunity lies in rebuilding the communal viewing experience that was lost with the closure of township cinemas.

Equally critical is the cultivation of a more discerning, engaged audience through education. South African viewers are already becoming "woke", they demand quality and authenticity, and they reward films that reflect their realities. Yet this sophistication is largely self-taught through exposure to foreign content. Integrating South African film literacy into schools, supporting campus screening circuits, and investing in audience research would complement this evolution. Developing that awareness into a sustainable market requires not just more films, but audiences equipped to appreciate and advocate for them.

"We have a very smart audience in South Africa, they really do appreciate quality and it will be evident through the feedback you get from the audience. So it's a positive, it's a very positive feedback that we are getting from our audiences. People are more prone to a light-hearted comedy now, love stories because really people are having it's hard out there, so they wouldn't want to get home in the evening to watch something that will drain them once again. But also they want to be intellectually challenged… they want to leave a film having discussions about it. They want things to talk about with their friends and families and on how to change the state of our country." Ecosystem partner, South Africa

4.1.3 Priority opportunities in social impact

The central opportunity in social impact filmmaking lies in redefining success beyond commercial metrics. Social impact films are not necessarily excluded from mainstream distribution by design; rather, they often target audiences who cannot access cinema due to high ticket prices and limited theatre locations, or who prefer alternative viewing platforms. Consequently, these films may perform poorly at the box office not because they lack impact,

but because the distribution channel does not match their intended viewers. As with any film, reaching the right audience requires dedicated marketing budgets and distribution strategies. For social impact content, this means investing in community screenings, mobile platforms, and partnerships with NGOs and public institutions, channels that prioritise reach and dialogue over ticket sales. Creating dedicated funding streams, alternative distribution pathways, and evaluation frameworks that measure success by people reached and conversations sparked, rather than box office returns, would enable social impact films to fulfil their potential without being judged by the wrong metrics.

A critical opportunity is formalising partnerships with NGOs, government departments, and corporate foundations. These organisations have already funded awareness campaigns on issues such as gender-based violence, HIV, and youth unemployment, yet film remains an underutilised tool in their outreach strategies. Integrating film production and distribution into their programmes would provide both sustainable funding and guaranteed channels to reach target communities. Additionally, investing in measurement frameworks that capture behavioural change through pre- and post-screening surveys, longitudinal studies, and social listening tools would enable the sector to build an evidence base that attracts further investment and demonstrates the unique power of film to drive social change.

4.1.4 Scaling potential recommendations

Scaling the South African film industry requires shifting from fragmented, short-term interventions to systemic reforms that address the root causes of fragmentation and exclusion. Three interconnected priorities stand out.

Unite government entities under a coherent film strategy

Multiple institutions such as the NFVF, DTIC, provincial film offices, and the Department of Arts and Culture, operate in silos, duplicating efforts and sending mixed signals to the industry. Creating a coordinating body or formalising cross-institutional collaboration would streamline funding, align incentives, and ensure that policy shocks such as the DTIC funding freeze, do not repeatedly destabilise the sector.

Build sustainable financing models that leverage private sector and co-production partnerships

Over-reliance on unpredictable government grants traps filmmakers in a cycle of project-by-project survival. Scaling requires diversifying funding sources such as incentivising private sector investment through tax breaks, scaling co-production treaties with African and European partners, and formalising corporate sponsorship and product placement models.

Invest in shared audience data and research infrastructure

Without reliable data on viewership, demographics, and audience preferences, the industry will remain dependent on gatekeeper intuition. Scaling audience development and distribution decisions requires accessible, granular intelligence that all stakeholders can use. Establishing a centralised, open-access data resource would enable filmmakers, funders, and platforms to make evidence-based decisions and match content to demand.

5. Annex

5.1 Links

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

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

To see full dataset, see the link (Placeholder)

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

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

5.2 Qualitative Questionnaire

Below is the Audience survey questionnaire used during data collection.

African Film Audience Survey

Introduction

Good morning/Good afternoon/Good evening.

My name is xxxx and I am working on behalf of Dalberg Research, a company specializing in market and social research. We are conducting this research to **better understand the viewing habits and preferences of audiences like you**. The goal of this research is to gather evidence-based information on audience demand to inform and **foster the distribution of films from** [Insert Country] and to generally **support the growth of the African film industry**. The data we collect will be vital in developing effective **audience cultivation strategies** and addressing current knowledge gaps regarding audience numbers and characteristics. This survey will take approximately **30 to 45 minutes to complete**.

Please be assured that **your responses are anonymous and confidential**. Your participation is completely voluntary, and if at any point during the interview you feel uncomfortable or wish to stop, you are **free to drop out without needing to give a reason**.

Do you agree to begin the survey?

a. Yes- Continue
b. No – End the Interview

SECTION A: DEMOGRAPHICS & PROFILE

A1. **Enumerator code country. SA**[7]

1. Kenya
2. Rwanda
3. Nigeria
4. South Africa
5. Egypt
6. Senegal

A2. Town/County/ City:(Scripter Instruction: Match the country to the city). SA

Kenya	Rwanda	Nigeria	South Africa	Egypt	Senegal
1.Nairobi	1.Kigali	1.Lagos	1.Jo' Burg	1.Cairo	1.Dakar
2.Kisumu		2.Abuja	2.Cape Town		
3.Mombasa					

What is your name (open end)

[7] SA-Single Response

A3 (Enumerator: Please observe and code gender) . SA

1. Male
2. Female
3. Non-binary- (Ask only in South Africa)

A4. What is your age? SA

1. 18 - 24
2. 25 - 34
3. 35 - 44
4. 45 – 54
5. 55 – 64
6. 65 – 74
7. 75 – 84
8. 85 and above

A5. What is the highest level of education you have completed? SA

1. Secondary/High School or lower
2. College Diploma / Certificate / Intermediate Institute
3. Bachelor's Degree/Higher National Diploma
4. Postgraduate Degree

A6. Which best describes the area you live in? SA

1. Urban
2. Peri-Urban / Suburban
3. Rural

A7. Which of the following best describes your current employment status? SA

1. Employed Full-Time
2. Employed Part-Time
3. Student
4. Self-Employed / Freelancer
5. Unemployed
6. Retired
7. Housewife
8. Prefer not to say

A8. Approximate Household Monthly Income in your local currency:

Type in_____

A9. Which devices do you own?

1. Feature phone
2. Smartphone
3. Tablet/iPad
4. Desktop
5. Laptop
6. Smart TV
7. TV set-top box/ streaming stick (e.g., Roku, Amazon Fire)
8. Projector
9. Gaming consoles – Xbox, Play station etc

10. Free satellite TV
11. Free to air digital TV
12. Other (Specify)
13. None

A10. Do you have children under 18 living in your household SA

1. Yes (Ask A.11)
2. No (Skip to A.13

A.11 What is the age of the children starting from the oldest SA

	0-5 years	6-9 years	10-13 years	14-17 years
Child 1	1	2	3	4
Child 2	1	2	3	4
Child 3	1	2	3	4

A12. Does your household have any domestic workers or caregivers who influence or supervise children's media consumption? ASK IF CODED 1 IN A.10

1. Yes
2. No

A13. Who typically makes decisions about what films, TV shows, or media the household watches? MA

1. Myself
2. Another adult in the household
3. Joint decision-making (multiple adults)
4. Children influence decisions
5. Each person watches individually
6. Other (Specify)

A14. Does your household share devices for watching films (e.g., TV, smartphone, tablet)? SA

1. Yes — shared devices
2. No — everyone has personal devices
3. Mixed (some shared, some personal)

A15.Which devices are shared? (Ask for what was selected in A9) MA

1. Feature phone
2. Smartphone
3. Tablet/iPad
4. Desktop
5. Laptop
6. Smart TV
7. TV set-top box/ streaming stick (e.g., Roku, Amazon Fire)
8. Projector
9. Gaming consoles – Xbox, Play station etc
10. Free satellite TV
11. Other (Specify

SECTION B: GENERAL FILM CONSUMPTION HABITS

B1. When you think of the Films that you watch, from which of these regions are they produced? MA

1. **Local Films (Produced by filmmakers from [Insert Country])**

2. **African Films (Produced in African countries other than your own)**
3. American Films
4. European Films
5. Indian Bollywood/Indian Tollywood Films
6. Chinese Films
7. Japanese Films
8. Korean Drama (South Korea)
9. Latin American Films
10. Turkish Films
11. Other (Specify)
12. I do not watch films- Terminate

B1a. And from which region is your MOST OFTEN watched films produced. SA

(Select options mentioned from B1)

1. **Local Films (Produced by filmmakers from [Insert Country])**
2. **African Films (Produced in African countries other than your own)**
3. American Films
4. European Films
5. Indian Bollywood/Indian Tollywood Films
6. Chinese Films
7. Japanese Films
8. Korean Drama (South Korea)
9. Latin American Films
10. Turkish Films
11. Other (Specify)

B1b. Which device(s) do you use to watch [Insert B1a] **films? MA**

1. Smartphone / Tablet
2. Laptop
3. Smart TV
4. Pay TV (e.g., DStv, StarSat, Canal+)
5. Other (Specify)

B1c: Which other African countries' films do you watch? (Select all that apply)
(ASK IF B1 = 2)

(don't show country coded in (A1))

1. Nigeria
2. South Africa
3. Kenya
4. Egypt
5. Senegal
6. Rwanda
7. Ghana
8. Tunisia
9. Morrocco
10. Other (Specify)

B1d. Which of the following best describe why you do NOT watch African or [Insert Country] **produced films? MA**

(ASK IF B1 = 1 and/or 2)

1. I am not interested in the stories or themes
2. I prefer international (e.g. Hollywood, European, Asian) films

3. I am not aware of many African or local films
4. The production quality is not appealing to me
5. They are not easily available on the platforms I use
6. Language or subtitles are a barrier
7. They are too expensive / not worth the cost
8. ~~I do not have time to watch films~~
9. I rarely watch films in general
10. Other (please specify)
11. Prefer not to say

B1e. Which of the following, if any, would make you more likely to watch an African or locally produced film in the future? MA

(ASK IF B1 = !1 and/or 2)

1. Strong recommendations from friends or family
2. Positive reviews or ratings
3. Better storytelling or more relatable stories
4. Higher production quality
5. Availability on platforms I already use
6. Lower cost or free access
7. Well-known actors, directors, or producers
8. Awards, festival recognition, or international success
9. Better marketing or promotion
10. Nothing would make me interested
11. Other (please specify)

B2. Through which platforms do you mostly watch [Insert B1] **films? MA**

1. VOD- Streaming platforms for example YouTube, Netflix, Philit, EbonyPlus, Netflix, Showmax, Amazon, AfriFlix, Shahid, WatchIT etc
2. Cinema
3. Festival
4. Video Rentals
5. TV
6. Social media

B3. If you do not watch [Insert B1] **films in cinemas, why not? (if not selected 2 in B2). MA**

1. The cost of the tickets is high/expensive
2. There is no cinema near me
3. I prefer waiting and watching on other platforms at my convenience
4. Poor cinema quality *(e.g., low-quality projection, poor sound, uncomfortable seating, or an overall unsatisfactory cinema environment)*
5. I am not interested in watching [B1] films in cinemas
6. I can get pirated versions at a cheaper or more affordable rate
7. I am never aware of [B1] films being shown in cinemas (Please specify why)?
8. No time to go to the cinema
9. Other (specify)

SECTION C: PLATFORM SPECIFIC MODULES

C1. VOD / STREAMING PLATFORMS

(ASK IF B2 = 1)

C1.1 Which streaming platforms do you regularly use to watch films? MA

ONLY SHOW COUNTRY OPTIONS AS CODED IN A.1

Kenya	Nigeria	Rwanda	South Africa	Egypt	Senegal
1. Netflix 2. Showmax 3. YouTube 4. Viusasa 5. MyMovies Africa / Yakwetu Tv 6. Amazon 7. Prime Video 8. AfriFlix 9. DStv Stream 10. Digital Pirated Websites 11. Other (specify)	1. Netflix 2. Showmax 3. YouTube 4. Amazon Prime Video 5. DStv Stream 6. Kava TV 7. Digital Pirated Websites 8. Circuit TV 9. Other (specify)	1. Netflix 2. Showmax 3. YouTube 4. Canal+ Online 5. Amazon Prime Video 6. Digital Pirated Websites 7. Other (specify)	1. Netflix 2. Showmax 3. YouTube 4. Amazon Prime Video 5. DStv Stream 6. Disney+ 7. Apple TV+ 8. Digital Pirated Websites 9. Other (specify)	1. Netflix 2. Shahid 3. YouTube 4. Watch iT 5. StarzPlay 6. Disney+ 7. OSN 8. Digital Pirated Websites 9. Other (specify)	1. Netflix 2. Canal+ Online 3. YouTube 4. StarzPlay 5. Shahid 6. Amazon Prime Video 7. Digital Pirated Websites 8. Other (specify)

C1.2 Which types of films do you watch on (C1.1)? MA
(Ask for ones coded in B1)

1. Local Films (Produced by filmmakers from [Insert Country])
2. African Films (Produced in African countries other than your own)
3. American Films
4. European Films
5. Indian Bollywood/Tollywood Films
6. Chinese Films
7. Japanese Films
8. Korean Drama (South Korea)
9. Latin American Films
10. Turkish Films
11. Other (Specify)

C1.3. How often do you watch [Insert **C1.2.**] **films on streaming platforms? SA**

1. Daily
2. Weekly

3. Monthly
4. Rarely

C1.4. Which device(s) do you use to stream [Insert **C1.2.**] **films? MA**

1. Smartphone / Tablet
2. Laptop
3. Smart TV
4. Pay TV (e.g., DStv, StarSat, Canal+)
5. Other (Specify)

C1.5. Why do you prefer watching [Insert **C1.2.**] films through **streaming platforms?**

Type in_____

C1.6. In total, how much do you spend on streaming platforms in a month? (If you do not spend, why?)

Type in_____

C1.7. How many paid streaming services are you subscribed to or regularly use

Type in _____

Piracy Frequency (If selected pirated websites in C1

C1.8. How often do you use unofficial or pirated websites/apps to watch [Insert **C1.2.**] **films? SA**

1. Rarely (Only when I cannot find it anywhere else legally)
2. Sometimes (For a significant portion of films I watch)
3. Often (It's my primary method for watching films)

C1.9. What are the main reasons you might use unofficial or pirated sources to watch an [Insert C1.2.] film? *MA*

1. Poor variety of films on mainstream platforms
2. Expensive subscription costs
3. Ability to watch films not shown in the Africa region
4. Able to watch recent films not on mainstream platforms
5. Able to access sport content
6. Other Specify

C2. CINEMA (MAINSTREAM & MAKESHIFT)

(ASK IF B2 = 2)

C2.1 What type of cinemas do you watch films in: MA

1. Mainstream Cinema/Box Office
2. Makeshift estate cinema rooms

C2.3. How many times have you been to the cinema in the past 12 months:

Type in_____

C2.4 On average how much do you spend per visit to the cinema either alone, with family or with friends? -Per person **(If you do not spend, why?)**

Type in_____

C2.5 Who do you usually go to the cinema with? MA

1. Alone

2. Partner
3. Family
4. Friends/ colleagues
5. Other specify

C2.6 Why do you prefer to go to the cinemas to watch [Insert B1] films?

Type in_____

C3. FILM FESTIVALS & COMMUNITY SCREENINGS

(ASK IF B2 = 3)

C3.1 What kind of screening events do you attend: MA

1. Film festivals
2. Community screenings/ viewing

C3.3. How many times have you attended film festivals or community screenings in the last 12 months?

1. Type in _____

C3.4 Why do you attend film festivals or community screenings to watch [Insert **B1**] **films? MA**

1. Access to films not available elsewhere
2. Lower or no cost
3. Community experience
4. Support [B1] filmmakers
5. Other (Specify)

C3.5 How much on average do you usually spend/pay to attend a film festival or community screening? (If you do not spend, why?)

Type in_____

C4. VIDEO RENTALS

(ASK IF B2 = 4)

C4.1. Where do you usually rent or buy films? MA

1. Local video shops
2. Street vendors
3. Friends or informal sellers
4. Digital Video Rentals
5. Other (Specify)

C4.2 Why do you use video rentals instead of cinemas or streaming? MA

1. More affordable
2. Internet access issues
3. Content availability
4. Convenience
5. Other (Specify)

C4.4. How frequently do you rent/purchase videos in a month

Type in_____

C4.5 How much do you usually spend on video rentals for [Insert **B1**] ilms per video**? (If you do not spend, why?)**

Type in_____

C5. TV/Broadcasting Stations

(ASK IF B2 = 5)

C5.1 What type of TV films do you watch MA

1. TV (Free-to-air)
2. Pay TV (e.g., DStv, Canal+, StarTimes, Go Tv)

C5.3 How often do you watch films on TV? MA

1. Daily
2. Weekly
3. Monthly

C5.4 Which device(s) do you use to watch [Insert **B1**] **films on TV? MA**

6. Smartphone / Tablet
7. Laptop
8. Smart TV
9. Pay TV (e.g., DStv, StarSat, Canal+)
10. Other (Specify)

C5.5 Why do you prefer watching [Insert **B1**] **films on TV? MA**

1. Convenience
2. Affordable cost
3. Wide film selection
4. Ability to watch anytime
5. Better video quality
6. Other (Specify)

C5.6 In total, how much do you spend on TV subscription in a month? (If you do not spend, why?)

(Ask only if coded 2 in C5.1)

Type in_____

C6. SOCIAL MEDIA

C6.1. Which social media platforms do you use most often to watch films or series? MA

1. TikTok
2. Facebook
3. Instagram
4. X (formerly Twitter)
5. Telegram
6. Other (specify

C6.3. How often do you watch [Insert **B1**] **films on social media? SA**

1. Daily
2. Weekly
3. Monthly

C6.4. Which device(s) do you use social media to watch [Insert **B1**] **films? MA**

1. Smartphone / Tablet
2. Laptop
3. Other (Specify)

C6.5 Why do you prefer social media for watching [Insert **B1**] films**?**

Type in_____

Preferred Alternative

C7. In the absence of streaming platforms and cinemas, which of this option would you ideally revert to? (Select only ONE)

1. Community screenings or mobile cinemas
2. Free-to-air TV broadcast of films
3. Making films available on affordable DVDs/USB sticks
4. Extremely low-cost Pay TV tiers
5. Other Specify

SECTION D : CONTENT PREFERENCES & PERCEPTIONS

D1. What genre of [Insert B1a.] films do you watch? MA

D2. And which ones would you like to see [insert B1a.] films focus on? MA

Genre	D.1	D.2
Sci-Fi	1	1
Drama	2	2
Documentary	3	3
Horror	4	4
Mystical/ Fantasy World	5	5
Animation/ Cartoons	6	6
Comedy	7	7
Action	8	8
Romantic Comedy	9	9
Others _____	10	10

D3. What type of storytelling do you prefer? MA

1. Fast-paced and exciting
2. Slow-burn and deep
3. Humorous and uplifting
4. Dark and gritty
5. Light, warm, feel good
6. High drama and emotional intensity
7. Very real and relatable
8. Escapist stories that take me into another world

D4. How important is it for you that a film is "locally made/ produced"? SA

1. Very Important
2. Somewhat Important
3. Neutral
4. Not Very Important
5. Not Important at All

D5. How important are the following factors when choosing a [insert B1a.] film to watch? SA

Use D4 options	Not Important				Very Important
Acting quality	1	2	3	4	5
Genre	1	2	3	4	5

Plot/Theme	1	2	3	4	5
Technical quality (sound, visuals, editing)	1	2	3	4	5
Language/subtitles	1	2	3	4	5
Representation of African cultures / Cultural Relevance	1	2	3	4	5
Producing Director	1	2	3	4	5
Actors	1	2	3	4	5
Reviews and Rating	1	2	3	4	5
Popularity/ Trending Film	1	2	3	4	5
Movie type - Series or Movie	1	2	3	4	5
Awards and Recognition	1	2	3	4	5
Peer recommendation / word of mouth	1	2	3	4	5
Marketing Campaign like Ads, social media posts, influencer promotions	1	2	3	4	5

D6. How do you usually hear/know about new [insert B1a.] films? MA

1. Social media (Specify)
2. Friends/family
3. Film festivals (Please specify)
4. Influencers/bloggers (Please specify)
5. streaming platform recommendations – Both international and local
6. OOH Advertisements like Billboards
7. Cinemas Advertisements (Please specify)
8. Media advertisement e.g Radio, Newspaper, Magazines, Blogs (Please specify)

D7. What are your PRIMARY motivations for watching [insert B1a] films? MA

1. Cultural Connection / Identity
2. Entertainment / Relaxation
3. Family friendly and for kids
4. High-Quality Storytelling
5. To see and support my country/region represented
6. Educational / Learning about social issues
7. The actors or director
8. Affordability / Accessibility
9. Recommendation from friends/family
10. Controversial / Much discussed movie
11. Good soundtrack and style
12. Others specify

D8. Which of the following social impact themes would you be MOST interested in watching a film for? MA

1. Strong women overcoming challenges and changing their lives
2. Young people chasing opportunities, education, or a better future
3. Stories about protecting nature, land, or dealing with climate changes
4. Stories about power, politics, corruption, or standing up to injustice
5. Love, relationships, and health challenges around sex or family life
6. Personal struggles with stress, trauma, or mental well-being
7. Stories about love, identity, and belonging that challenge social norms
8. Stories about different cultures or religions learning to live together
9. Stories about money, business, survival, or building a better livelihood
10. I prefer films mainly for entertainment, not social issues

D9. Compared to 5 years ago, how has the quality of Local/African films changed? SA

1. Much improved
2. Slightly improved
3. Stayed the same
4. Declined
5. Don't know

SECTION E: DRIVERS & BARRIERS

E1. How do you AGREE or DISAGREE with the following statements about Local /African films? (Scale: 1=Strongly Disagree, 2=Disagree, 3=Neutral, 4=Agree, 5=Strongly Agree) SA

Note to scripting: Please randomize

1. The production quality of **Local** /African films has improved significantly in the last 5 years.
2. It is easy to find **Local** /African films I want to watch.
3. **Local** /African films tell authentic and relatable stories.
4. There is a good variety of genres and themes available.
5. I am willing to pay for high-quality **Local** /African film content.
6. Many African films still have poor sound or visual quality.
7. It is difficult to find **Local** /African films on mainstream platforms.
8. **Local** /African films often repeat the same stories.
9. **Local** /African films lack creativity
10. **Local** /African films are not promoted or marketed.
11. I feel **Local** /African films are released on platforms that are easy for me to access
12. I don't think **Local** /African films can compete with international films in quality.

E2. What are the BIGGEST barriers that limit how often you watch Local /African films? MA

1. High cost of subscriptions or pay-per-view
2. Poor internet connectivity / High data costs
3. Difficulty in finding where to watch them
4. Low production quality (e.g., picture, sound)
5. Storylines are not original.
6. Storylines are not engaging
7. Prefer international (Hollywood, Bollywood, etc.) content
8. Lack of awareness about new releases
9. Limited availability of films from other African countries
10. There are no significant barriers for me
11. Other specify

SECTION F: BEHAVIOURAL ENGAGEMENT WITH FILMS

F1. Thinking about the last 3 [Insert B1a.] films you watched, what did you do immediately AFTER watching? MA

1. Searched for the actor/director online
2. Looked for more films from the same country
3. Recommended it to someone in person
4. Shared about it on social media (e.g., posted, tweeted, shared a clip)
5. Read reviews or articles about it
6. Looked up the social issue discussed in the film
7. Nothing specific

8. Other (Specify)

F2. Which of these activities have you done in the PAST 3 MONTHS specifically for [Insert B1a.] film? MA

1. Paid for/ buy an [Insert Country] film on a digital platform (e.g. Kenya: Phil-it tv, My movies Africa or Ya Kwetu etc)
2. Purposely went to a cinema to watch a specific [Insert Country] film
3. Watched an [Insert Country] film at a community screening or film festival
4. Actively searched for and downloaded an [Insert Country] film
5. Followed an [Insert Country] film director or actor on social media
6. Joined an online group or forum dedicated to [Insert Country] cinema
7. None of the above

F3. On a scale of 0-10 -If a friend asked you for a film recommendation TODAY, how likely would you be to recommend an [Insert Country] film? (*Where 0 is Very unlikely and 10 is very likely.) SA*

Very Unlikely										Very Likely
0	1	2	3	4	5	6	7	8	9	10

F4. Imagine a new [Insert Country] film that is released. Which viewing option are you MOST LIKELY to choose? SA

1. Go to the cinema in the first week
2. Go to the cinema after the first week, if reviews are good
3. Wait for it to be released on a streaming service I already subscribe to
4. Wait for it to be released and rent it on a digital platform (e.g., YouTube, iTunes)
5. Actively look for a free (and potentially pirated) copy online
6. I would probably not watch it

SECTION G: CINEMA vs. HOME VIEWERING & SPENDING

G1. When you think of watching films, where do you prefer to watch?

(Ask if 2 in B2)

1. Home / A friend's House
2. Cinema

G2. What are the PRIMARY reasons you PREFER watching films at HOME rather than in the cinema?

(Ask If G1 = 2 is not coded)

1. Cost (it's cheaper or free to watch at home)
2. Comfort and Convenience
3. Ability to pause and resume
4. Poor cinema experience in my area (e.g., quality, maintenance)
5. Safety and Security concerns
6. I can watch a wider variety of [Insert Country] films at home
7. Distance
8. Other (Specify)

G3,1. What is the AVERAGE price you currently pay for a single ticket to watch a highly anticipated film in the cinema

(Type in local currency) _____

G3.2. What is the MAXIMUM amount you would be willing to pay for a single ticket to watch a *highly anticipated* film in the cinema?

(Type in local currency) _____

G4. On average, how many films do you watch in a month?

Type in_____

G5. And out of those, how many are [insert country] films?

Type in_____

G6. Which of the following would motivate you to watch MORE [Insert Country] films? MA (Top 3)

1. Lower subscription prices for streaming services
2. "Free with ads" tiers on major platforms
3. Better personalization and recommendations
4. More high-quality original African films
5. Availability of films from different African countries
6. More reliable offline download features
7. Pay-per-film/view option
8. Pay-to-own/Rent
9. Nothing, I already stream as much as I want

SECTION H: RECOMMENDATIONS FOR THE AFRICAN FILM INDUSTRY

We value your opinion on how to improve the [Insert Country] film experience. Please tell us what you think should be prioritized.

H1. To make [Insert Country] films more enjoyable, which of the following should be the HIGHEST priority for filmmakers and producers? SA

1. Improving overall production quality (picture, sound, editing)
2. Investing in more original and creative storytelling
3. Exploring new and diverse genres (e.g., sci-fi, fantasy, thriller)
4. Working with bigger-name actors
5. Focusing on more relatable, everyday stories
6. Increasing the quantity of films released
7. More female-led stories
8. More films for family and kids

H2. Which of the following would make you MORE WILLING TO PAY to watch [Insert Country] films? MA

1. Lower prices (e.g., $2-$3 per film): Specify
2. Lesser number of platforms and payment models
3. More affordable monthly subscription plans
4. "Free with ads" options on major platforms
5. Higher quality and more reliable content (no buffering, high definition)
6. Exclusive early access to new films before free platforms
7. Bundled offers (e.g., film subscription with mobile data or music service)

H3. How can streaming platforms (like Netflix, Showmax, etc.) IMPROVE how they showcase Local/African films? MA

1. Creating more prominent "African Cinema" categories or hubs
2. Investing in more high-quality African Original series and films
3. Improving marketing and trailers for African content
4. Providing better information (synopsis, cast, reviews) for each film
5. Making it easier to find films from specific African countries
6. Other specify

H4. What is the MOST important thing that could be done to make it EASIER for you to discover and watch Local/African films? SA

1. A single, reliable website or app that lists all available African films and where to stream them.
2. Better use of social media and influences to promote new releases.
3. More film festivals (online or in-person) showcasing African content.
4. Streaming platforms doing a better job of suggesting African films I might like.
5. Traditional media (TV, radio) promoting African films more often.

H5. If you could send one direct message to [Insert Country] filmmakers and streaming platforms, what would it primarily be about? (Please select the ONE that best reflects your overall feeling) SA

1. Focus on Quality Over Quantity.
2. Tell More Diverse and Original Stories.
3. Make Your Films Easier to Find and Access.
4. Improve Your Marketing - We Don't Know About Your Great Films!
5. We Are Willing to Pay for Good Content if the Value is Fair.

SECTION CC: CHILDREN'S VIEWING BEHAVIOUR

(Only ask if respondents have children under 18. Otherwise skip to End. Ask Adult if option 1and/or 2 in A11, and one preteen or teenager if option 3 and/or 4 in A11)

CC1. Which types of films do you/your child watch?
(Select all that apply)

1. Local Films (Produced by filmmakers from [Insert Country])
2. African Films (Produced in African countries other than your own)
3. American Films
4. European Films
5. Indian Bollywood / Tollywood Films
6. Chinese Films
7. Japanese Films
8. Korean Drama (South Korea)
9. Latin American Films
10. Turkish Films
11. Other (Specify)
12. They/I do not watch films – (Ask CC1.1 then terminate)

CC1.1 Why don't you/your child watch films?

Type in_____

CC2. What genre of films do you/your child watch? (Select all that apply)

1. Sci-Fi
2. Drama
3. Documentary
4. Horror
5. Mystical/ Fantasy World
6. Animation/ Cartoons
7. Comedy
8. Action
9. Romantic Comedy
10. Others

CC3. Through which platforms do you/your child mostly watch films**?**
(Select all that apply)

1. YouTube
2. Streaming platforms (e.g., Philit, EbonyPlus, Netflix, Showmax, Amazon, AfriFlix)
3. Digital Pirated Websites
4. Mainstream Cinema/Box Office
5. Makeshift estate cinema rooms
6. Film festivals-
7. Community screenings/ viewing
8. Video Rentals
9. TV (Free-to-air)
10. Pay TV (e.g., DStv, Canal+, StarTimes, Go Tv)
11. Social media (e.g., TikTok, Facebook, Instagram)

CC4 Which device(s) do you/your child use to watch [Insert CC1] **films? MA**

1. Smartphone / Tablet
2. Laptop
3. Smart TV
4. Pay TV (e.g., DStv, StarSat, Canal+)
5. Free satellite TV
6. Free-to-air digital TV
7. Other (Specify)

CC5 How frequently do you/your child watch films:

1. Daily
2. At least once a week
3. 2–3 times a month
4. Once a month
5. Once every 2–3 months

CC6. Whom do you/your child watch films with?

1. Alone
2. Parents
3. Siblings/Relatives
4. Friends
5. Classmates/ Schoolmates

CC6. How do you/your child usually hear/know about new films? (Select all that apply)

1. Social media (Specify)
2. Friends/family
3. Film festivals (Please specify)
4. Influencers/bloggers (Please specify)
5. streaming platform recommendations – Both international and local
6. OOH Advertisements like Billboards
7. Cinemas Advertisements (Please specify)
8. Media advertisement e.g Radio, Newspaper, Magazines, Blogs (Please specify)

CC7. What are your/your child's PRIMARY motivations for watching films?

1. Fun, entertainment, and relaxation
2. Suitable and safe for children / family-friendly
3. Interesting stories that keep attention
4. Learning something new or educational
5. Seeing familiar places, languages, or people like us

6. Popular with friends or family
7. Favourite actors, characters, or creators
8. Easy and affordable to access
9. Music, visuals, or overall style
10. Other (please specify)

Closing Remarks

Thank you for your valuable time and input. Your responses will help in understanding and supporting the growth of the African film industry.