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QUANTITATIVE RESEARCH REPORT

AUDIENCE RESEARCH PROJECT

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NATIONAL FILM AND VIDEO FOUNDATION AUDIENCE RESEARCH PROJECT (NFVF ARF)

QUANTITATIVE RESEARCH REPORT

MARCH 2015

PROJECT FACT SHEET

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ADS	Audience Development Strategy
BFI	British Film Institute
CAA	Cinema Advertising Association
CEO	Chief Executive Officer
CIGS	Cultural Industries Growth Strategy
CNC	Centre National du Cinema et de l'Image
DACST	Department of Arts, Culture, Science and Technology
DSTV	Digital Satellite Television
DTI	Department of Trade and Industry
DVD	Digital video discs
FGD	Focus-group discussion
FTA	Free-to-air
GDP	Gross Domestic Product
UNESCO	United Nations Educational, Scientific and Cultural Organisation
ISP	Internet Service Provider
KOFIC	Korean Film Council
LSM	Living Standards Measure
MPAA	Motion Picture Association of America
NFVCB	Nigerian Film and Video Censors Board
NFVF	National Film and Video Foundation
NPO	Non-profit Organisations
PC	Personal computer
PDI	Previously Disadvantaged Individual
PwC	PricewaterhouseCoopers
SA	South Africa

SABC	South African Broadcasting Corporation
SAFI	South African Film Industry or South African Film and Video Industry
SAWA	Screen Advertising World Association
TV	Television
UK	United Kingdom
US	United States of America
VCD	Video compact disc
VHS	Video home system
VoD	Video on demand

DEFINITIONS

2D Film:	Refers to objects that are rendered in two planes representing width and height.
3D Film:	A system or effect used in a movie to include three dimensions – width, length and depth.
Access to cinema:	The available resources an individual has at their disposal to be able to attend cinema. Factors include: income, expenses and infrastructure. It also refers to the ability, right, permission, means or opportunity to reach cinemas.
Adult:	A person of 18 years and older.
Animation:	The process of creating the illusion of motion by creating individual frames, as opposed to filming naturally-occurring action at a regular frame rate.
Attitude:	A preconceived held notion by which audiences (in this case) respond – in varying degrees of favour, disfavour or indifference.
Audience development:	Includes any activity which is undertaken specifically to meet the needs of existing and potential audiences, and to help the film and video industry develop on-going relationships with audiences. It can include aspects related to marketing, commissioning, programming, education, customer-care and distribution (Arts Council England, 2011).
Audience:	The assembled spectators at a screening/showing at an event such as a film, play, concert or meeting. The part of the general public exposed to a source of information or entertainment.
Audience profile:	The demographic, behavioural and attitudinal characteristics, including social and economic characteristics of individuals who make up the intended target audience.
Audience research:	Any communication research that is conducted on specific audience segments to gather information about their attitudes, knowledge, interests, preferences and behaviours with respect to market research. Segments may be based on various demographics such as race, ethnicity, age, education, and income.
Audience segment:	A subgroup of people within the target audience who have a similar set of characteristics such as current behaviours, attitudes, beliefs, demographics, and behavioural determinants such that one can develop strategies and interventions that are likely to be equally successful with all members of the segment.
Audience segmentation:	The process of dividing a broad target audience into more homogeneous subgroups.

Blockbuster: A film which is a huge financial success. In common usage, a film that has a Box Office score exceeding a set standard upon release.

Bollywood: The Hindi film industry based in Mumbai (Bombay), Maharashtra, India. Bollywood is in fact, only a single part of the Indian film industry, which includes other multiple language film production studios.

Bootleg (Piracy): An unofficial and illegally copied or distributed version of a movie, often of a substandard quality. Bootleg videos are often available for films that have yet to be released in a particular country, or have been banned.

Box Office: Generally refers to an office or booth where tickets are sold to the public for admission to the cinema, play or event. It's also defined as a measurement of the number of tickets sold or the amount of money raised by ticket sales.

Broadcaster: Refers to a broadcasting organisation that's responsible for audio and video content and/or their transmission.

Bubblegum (movies): Original, self-contained stories inspired by the realities and living conditions of ordinary South Africans. Movies that serve as an entertaining 'snapshot' of the achievements, challenges, hopes, despairs and dreams of ordinary South Africans, with a strong comedic element. These stories are written with the conviction to entertain, inform and educate viewers, as well as trigger public debates, and to earn public attention. The genre is one that adds no particular value to education or one's well-being, its sole purpose being commercial and for entertainment only.

Child: A person under the age of 18 years.

Cinema experience: Refers to the total experience of cinema goers when attending the cinema, this includes all components of cinema-going such as expenses (for example transportation cost, ticket and refreshments) with the spectacle, scale and traits of the cinema theatre (enhanced sound, public crowd and large screen, for example).

Cinematography: The art of capturing images either electronically or on film stock through the application of visual recording devices and the selection and arrangement of lighting.

Community cinema: A venue attended or place visited by a group of people – either living in the same area or who have certain characteristics or common interests – who gather to view the art of moving images: a visual medium that tells stories and exposes reality.

Community TV: A form of mass media in which a TV station is owned, operated and/or programmed by a community group to provide TV programmes of local interest known as local programming.

Consumer attitude: The way in which audiences respond to a film – either with a degree of favour, disfavour or indifference.

Consumer perception:	Refers to what audiences believe about films and videos and what feelings and attitudes are evoked.
Content:	Refers to something that is expressed through a medium such as writing, speech or other arts.
Content preference:	Refers to individual preferred interests, talents or tastes with regard to some medium, either as speech, writing, or any other art.
Culture:	The ideas, customs and social behaviour of a particular people or society. General beliefs and values that bring social solidarity in a particular society.
Diasporas:	Populations of persons temporarily or permanently residing in countries other than that of their upbringing. Referred particularly to involuntary mass dispersions due to political issues in the country of origin.
Directors:	The principal creative artist on a film set. A director is usually (but not always) the driving artistic source behind the filming process, and communicates to actors the way that they would like a particular scene played out. A director's duties might also include casting, script editing, shot selection, shot composition, and editing. Typically, a director has complete artistic control over all aspects of film making, but it's not uncommon that they be bound by agreements with either a producer or a studio.
Disposable income:	The propensity to spend. This refers to funds available after deductions and financial commitments are met.
Distribution channels:	The chain of businesses or intermediaries through which goods or services pass until it reaches the end consumer. A distribution channel can include wholesalers, retailers, distributors, broadcasters and the internet.
Distribution of income:	The distribution of wages earned across a company, industry, or country. Income distribution reveals what percentage of individuals are at various wage levels; information that can reveal more about overall wage patterns than average income.
Distributor:	The organisation responsible for co-ordinating the distribution of the finished movie to exhibitors, as well as the sale of videos, DVD/Blu-ray discs, and other media versions of movies.
Documentary:	A non-fiction narrative usually without trained actors. Typically a documentary is a journalistic record of an event, person, or place.
Education level:	The highest level of schooling that a person attains.
Exhibitor:	A person who displays works of art or other items of interest at an exhibition.
Expatriate:	A person temporarily or permanently residing in countries other than that of their upbringing.

Feature film: A movie long enough to fill a program intended for theatrical release. The length of such films have varied over time.

Festival: An event at which films can often premiere. Festivals can be used by studios to show their wares and sell rights to distributors, or to officially mark a film's release, so as to make it eligible for award ceremonies before general release. Some festivals are competitive, providing awards from a jury or audience selection.

Film buyer: A person who arranges to purchase films from a distributor on behalf of an exhibitor.

Film distribution: The medium through which films and TV programmes are viewed is integral to any audience consumption pattern study, and the prediction of future trends within the industry, in general. Currently, TV films and programs reaches a far greater audience, compared to cinema or theatre productions than ever before. TV has become an international standard, and represents a major vehicle for documentaries in particular. TV broadcasters increasingly commission short fiction and full-length features. However, film production and distribution models are changing rapidly across the globe due to several factors, including digital technology which has revolutionised the landscape of the industry.

Film entertainment industry: This segment of the entertainment industry consists of both out-of-home and at-home components. At-home filmed entertainment refers to videos and TV programming. Home video includes rentals and the purchase of videos and DVDs, as well as paid TV subscriptions such as DSTV Box Office and access to films/video content via the internet, also accessible through PCs and mobile devices.

Film streaming: Accessing films directly via Smart TV, laptops and handheld devices, for example.

Film: Referred to interchangeably as movie. A movie or motion picture. It can be described as a series of still images which, when shown on a screen, creates the illusion of moving images (Geoff, 2002).

Filmmakers: A collective term used to refer to people who have a significant degree of control over the creation of a film: directors, producers, screenwriters, and editors.

Focus group: A focus group is a form of qualitative research in which a group of people are asked about their perceptions, opinions, beliefs, and attitudes on an issue of interest.

Foreign film: Films from countries other than one's own, regardless of native language.

Free-to-air: Denoting or relating to TV programmes broadcast on standard public or commercial networks, as opposed to satellite, cable, or digital programmes available only to subscription viewers.

Genre:	Denoting or relating to a style or category. This is largely determined by subject, setting or plot.
Global masala:	Indian slang for privately made films which infuse song, romance and dance.
Hartiwood:	Made for a local audience in Afrikaans, featuring middle-class stories shot around Hartbeesport and are screened in cinemas in the area.
Hollywood:	Is a small community in the city of Los Angeles; more commonly though it refers to the US cinema industry, generally referred to as Hollywood. Its history is sometimes separated into four main periods: the silent film era, classical Hollywood cinema, New Hollywood, and the contemporary period.
Home entertainment:	Systems that seek to reproduce a movie theatre experience and mood, with the help of video and audio equipment in, or outside, a private home.
Independent film:	A movie not produced by a major studio, featuring unknown, lesser known and/or popular actors branching out from their mainstream careers.
In-depth interview:	Extensive probing and open-ended questioning in the form of dialogue between a skilled interviewer and an interviewee.
Indigenous language:	A language native to a region and spoken by indigenous people, often reduced to the status of a minority language.
Internet video sites:	Popular examples are YouTube, Vimeo, Netflix and Vidi.
Interview guide:	A list of topics, themes, or areas to be covered in a semi-structured format. The guide is constructed in such a way as to allow flexibility and fluidity in the topics and areas that are to be covered, the way they are to be approached with the interviewee/s, and their sequence.
Key-informant interview:	This is a qualitative, in-depth interview with people who have first-hand and in-depth knowledge of the subject of enquiry. Persons designated as key-informants normally have knowledge, opinions and perspectives on the subject of enquiry not readily available.
Living Standard Measures:	Comprise various components that help determine the living standards of households.
Local film:	Films that originate and are produced within one's own country. In this context, it refers to SA produced films and movies.
Low-budget film:	A motion picture shot with little or no funding from a major film studio, producer and/or private investor. Often, independent films are made on low budgets, but even films made for the mainstream circuit can be low budget.
Market intelligence:	Information relevant to a company's markets gathered and analysed specifically for the purpose of accurate and confident decision making in

determining strategy in areas such as market opportunity, penetration, and development.

Media economics: The field of study that is concerned with how media operators meet the informational and entertainment wants and needs of audiences, advertisers and society.

Medium: A channelled signal of communication, information or media entertainment, displayed on a platform/device.

Movie goer: A person who attends cinema in varying degrees of frequency.

Movie: Used interchangeably with 'film'. Although can also be defined as a lower form of film, for instance, made-for-TV movie, where the production values and/or art form related to films and film making are not always present.

Multimedia: Content that uses a combination of different forms to reach the end-user.

Nollywood: The Nigerian film industry which became the 2nd largest film industry in the world for the number of annual movie productions, placing it ahead of the US and behind only Indian cinema. Their success is largely due to the high production rate of their made-for-satellite movies.

Online sharing: An online file sharing service is a way to store and access information, such as documents/media: data, photos and video, rather than storing the information locally, on a device such as a hard drive or USB flash drive.

Online streaming: Media streaming is a technique for transferring data, delivered as a steady and continuous 'stream' via an internet connection to the end-user.

Perception: The way in which a product or service, in this case, is subjectively regarded, understood or interpreted.

Piracy: See bootleg.

Platform: May refer to physical objects, space, features and technology through which artwork and/or other objects of interest are displayed or consumed. In terms of this study, platforms refers to the different types of media people use for viewing purposes, namely, TV, DVD, social media, and so on.

Preference: A predilection a person has towards something, based on one's personality. Refers to interests, talents or tastes; that which 'hits the spot', 'does the trick', or suits one's fancy.

Producer: The chief of staff of a movie production in all matters save the creative efforts of the director, who is head of the line. They are responsible for raising funding, hiring key personnel and arranging for distributors, among others things.

Production company:	A general term for a company that is associated with the making of a film.
Production:	In the movie industry, this term refers to the phase of movie making during which principal photography occurs. Popularly, 'production' means the entire movie project.
Release:	When a film is shipped to exhibitors by the distributor, it is deemed to have been released for public viewing.
Rentatainment:	The practice of paying a fixed amount of money for an agreed duration of time to have access to the means of providing amusement or enjoyment.
Selfie:	A self-portrait photo usually taken with a cellphone, camera or tablet, which is then shared on social networks such as Facebook, Twitter, Tumbler, Instagram and so on.
Screen density:	The ratio of commercial film screening facilities to population.
Screen:	Refers to big screen cinema, unless otherwise stated.
Screening:	An exhibition of a movie, typically at a cinema.
Screenplay:	A script written to be produced as a movie.
Screenwriter:	A writer who either adapts an existing work for production into a film, or creates an entirely new screenplay.
Script:	A general term for a written work detailing story, setting, and dialogue.
Social networks:	Facebook, LinkedIn, Instagram, Tumbler, Twitter and so on.
Spending patterns:	This refers to the behaviour or way in which different groups of consumers spend money, based on their preference profile.
Stakeholder:	A person with an interest or concern in something, especially a business.
Trend:	A general direction, in which something is developing or changing, based on popularity (fashion, for example).
TV movie:	A feature-length movie usually funded by a TV network, intended to be premiered on TV.
Vendawood:	Refers to movies made by a group of filmmakers from The Hills of Venda in Limpopo. These films are usually made for the DVD market and tend to be shown by volunteer-led and non-profit organisations (NPOs) in its local area.
Video:	An electronic medium for recording, copying, playback, broadcasting, and display of moving visual and audio media.

Viewing platform: The device/screen, by which films and videos are consumed, for example, TV, PC, tablets, and phones, as well as cinema.

Youth: Any persons between the ages of 14 and 35 years.

1. EXECUTIVE SUMMARY

1.1 Introduction

The National Film and Video Foundation (NFVF) is a statutory body created in terms of the National Film and Video Foundation Act 73 of '97 to develop and promote South Africa's (SAs) film and video industry. Section 4 (1) (d) of the NFVF Act, mandates the NFVF to conduct research into any field of the film and video industry. It's under the premise of this mandate that the NFVF commissioned this research, hereinafter referred to as Audience Research. Devnomics undertook the research on behalf of the NFVF.

1.2 Objective

The overarching aim for conducting the research was to gain a better understanding of the South African audience and as such better inform SA film and video production to ensure that SA films are successful. Specific attention was given to local content (SA produced films and videos). In order to gain an understanding of audience trends, the research covered and addressed the main research questions and sub-research questions listed below:

I. Profile of the respondent

- Living standard measures (gender, age, economic status, education status, and so on)
- Where they live

II. Content preferences

- Preferred formats and languages (animation, action, sci-fi, romance, for example)
- Preferred platform for film consumption (DVD, TV, cinema, video-on-demand, Netflix and YouTube) and what informs the choice of platforms as well as order of preference
- What informs your choice of films at a cinema (local vs international productions)?
- When do you prefer to go to the cinema?
- What else do you do when you go to the cinema?

III. Spending pattern

- How much are you willing to pay to watch a film in a cinema?
- How much are you willing to watch a SA film?
- Total cost associated with a full cinema experience (transport, cinema ticket and refreshments)
- Besides movies, what other entertainment do you spend your pocket money or disposable income on?

IV. General perception and attitude toward SA movies

- Visual, story and performance
- What's unique about local movies?
- Likes and dislikes

V. Access to cinemas

- Availability of cinemas in patrons' surrounding area
- Proximity to cinema (distance and choice)

1.3 Methodology

Broadly, the research was undertaken in two main phases.

In Phase 1, that is the qualitative phase, we explored the broad issues of consumption patterns and habits and to gain a deeper understanding of consumer perceptions and attitudes towards SA film and video industry products among the internal and external stakeholders. The qualitative techniques that were used included: in-depth interviews, telephonic interviews and a focus group discussion.

The qualitative phase research took place between October 2, 2014 and December 4, 2014. As a precursor to the collection of primary research data at the quantitative research phase, an extensive literature and document review was undertaken. This enabled the research team to obtain deep knowledge and harvest previous research literature available globally, with particular attention to its implications for SA audience, and use the materials so harvested to inform the trajectory of our research. In total, 160 hours of interviews were conducted across the country. One focus group discussion and 27 face-to-face interviews were conducted with the following:

- Eight internal NFVF interviews
- 17 external external stakeholders interviews which includes one with a CEO; and
- Two NFVF council members.

Phase 2, which was the quantitative research involved collection of data using questionnaires. The data collection techniques deployed included face-to-face interviews, telephonic interviews and online surveys. A total of 2 911 surveys were successfully completed across the country.

The SA audience (the largest stakeholder category with an achieved sample of 2 753 surveys) was broken down further into various age categories and genders within each of the provinces to ensure as broad a spectrum of opinions and attitudes as possible. To allow for the various differences in age categories and accompanying movie preferences, three separate questionnaires were devised for each sample age category. These are:

- Children questionnaire – Ages 0 to 4 years
- Youth questionnaire – Ages 5 to 16 years
- Adult questionnaire – Ages 17 to +65 years

Surveys were also conducted with the following stakeholders:

- Strategic stakeholders (internal);
- Strategic stakeholders (government)
- Strategic stakeholders (external industry associations and key informants)
- Distribution channels; and
- International stakeholders.

The surveys were conducted between November 27, 2014 and December 19, 2014.

1.4 Major findings and conclusions

1.4.1 Profile of respondents

1.4.1.1 Living standard measure

- The profile of respondents discerned from this research closely reflects the profile of the national population. For example, the survey findings showed that 47% of the respondents were male and 53% female. The male-to-female proportion observed is consistent with the gender distribution of the SA population where, on average, the population consists of 48.2% males and 51.8% females. Gaining insights into female-to-male proportions provides valuable information that can be utilised in segmentation of film and video audiences. The general anecdotal perception is that females watch more soapies, drama, and so on, than males, and are thereby more likely to provide greater insights on films and videos than their male counterparts.
- Most of the respondents (80%) who took part in the survey were black African, followed by coloured (10%) white (6%) and Indian/Asian (4%). This distribution reflects the national distribution of population groups in SA. According to StatsSA's 2013 mid-year population estimates for SA by population group, black Africans constituted 79.8%, followed by coloured (9.0%) white (8.7%) and Indian/Asian (2.5%).
- Most of the respondents (64%) indicated that they were single; 24% said they were married and 5% said they were co-habiting. Around 4% said they were widowed, and the least (3%) said there were divorced.
- Most of the respondents were economically active, as the findings showed that most (44%) were employed, followed by 21% who were unemployed. The proportion who were studying as full-time students was 20% followed by those who were employed and studying 8%. Some 4% said they were studying and seeking employment, while another 4% were pensioners.
- Most respondents (66%) said they earned up to R5000, followed by 16% who said R5001-R10000. Around 9% indicated R10001-R15000, while 5% said R15001-R25000 and around 4% indicated that their monthly income was R25001 and above per month. Most of the adults (52%) said they completed high school, followed by 43% who indicated that they had attained a post high school qualification such as certificate, diploma, degree, masters, and so on. Some 4% had attained primary school level and 1% gave other answers such as IT certification, never attended school and withdrew from school.

1.4.1.2 Where do they live?

- The findings obtained regarding respondents' province of residents reflect the distribution of the SA population by provinces. Most of the respondents surveyed indicated Gauteng as their province of residence, followed by KZN, Eastern Cape, Western Cape, Limpopo, Mpumalanga, North West, Free State and Northern Cape. These findings were consistent with StatSA's mid-year population estimates by provinces, 2013, which showed that Gauteng had the highest percentage of total population and Northern Cape had the lowest percentage of total population.
- Most of the respondents surveyed (69%) indicated that they live in urban areas and 31% said they reside in rural areas.

Demographic profile of cinema-goers
In this research, the demographic profile of cinema-goers was used as a proxy for an audience profile.

- In summary, the findings showed that a typical SA film audience constituted of:
  - Adult female
  - Single

- Economically active
- Highest educational attainment of a certificate, diploma, degree, Masters and/or PHD
- Urban dweller
- Typically, children below four years and youth aged 5-12 are accompanied by parents or guardians and/or siblings when they visit the cinema.
- Youth aged between 13 and 16 years mostly attend the cinema with their friends.

Below is an elaboration of the profile of the SA film audience, that is, respondents who indicated that they attend cinemas to watch films. For the purposes of this research, **adults** refer to any persons 17 years and more of age, **youth** refer to any persons between five and 16 years of age and **children** refer to any persons between zero and four years of age.

- Most (53%) who said they visit the cinema were adults, followed by youth (39%) and children (8%);
- Across the adults and youth cinema-goers, more females than males indicated they attend cinemas;
- Across all provinces, people attend the cinema to watch films;
- In all provinces, adults and youth indicated that they visit the cinema. Children aged below 16 years said they are usually accompanied by their parents or siblings when going;
- Adults, youth and children who indicated that they are cinema-goers, cut across all the population groups in the country;
- Most adults who said they attend cinemas indicated that their place of residence can be classified as urban;
- Most (45%) cinema-goers (adults) were employed, followed by students (24%), unemployed (15%), employed and studying (10%) and studying and seeking employment (5%). Few (1%) were pensioners;
- Most (61%) of the adults who said they visit cinemas, indicated their monthly income range as up to R5000, followed by 17% who indicated R5 001-R10 000 and 11% who indicated R10 001-R15 000. Few cinema-goers indicated their monthly income as R15 001 or more. The incongruence observed here can in part be explained by the observations that, generally, in surveys of this nature, people overstate or understate their monthly incomes or others simply refuse to answer. Typically, one would expect most cinema-goers to be high-income earners;
- Most (49%) of the adult cinema-goers indicated their educational status as higher education (certificate, diploma, degree, masters, PHD, and/or professional qualification) while 48% indicated their educational status as high school only. Few indicated only primary school; and
- Most (70%) who attend cinema were single, followed by 22% who were married and 4% who were co-habiting. Few of the adults said they were either divorced or widowed.

1.4.2 Content preferences

1.4.2.1 Preferred formats

A catalogue of film formats are available to audiences. The findings reveal that a greater proportion of the respondents prefer action films, followed by comedy, drama, romance, musicals, cartoons/animations, horror/thriller/adventure and documentaries, in that order. The least preferred film types were Western, war, science fiction, political/historical/cultural/epic, crime/gangster, animation and adult films, in that order.

From the survey findings, it was noted that choice of film viewership is associated to variables such as age, social class, language, lifestyle, and so on. For instance, the most preferred film genres for children are cartoons and animations, with adults choosing action followed by comedy and drama, while the youth prefer comedy and adventures.

1.4.2.2 Preferred language

Given a choice in terms of language preferred to watch films, besides English, it was noted that most respondents said they prefer isiZulu as a language to watch films in, followed by Afrikaans, isiXhosa, Sepedi, Setswana and Sesotho, in that order. The least preferred languages were XiTsonga, Tshivenda SiSwati and IsiNdebele.

1.4.2.3 Preferred platforms for film consumption

Most respondents indicated they prefer to consume films on DVD, followed by Free-to-air TV, Pay TV and cinema, in that order. The least preferred film consumption platform indicated by respondents was online streaming (Vidi, DSTV Box Office, You Tube, internet downloads on PCs, laptops, smartphones and tablets, for example).

On being asked what informs the choice of platforms, the findings revealed that most respondents said they prefer to watch films on DVDs because they are 'just used to it' – watching DVDs provides an opportunity to choose whatever they want to watch and it's cheaper to do so. Most respondents also said they prefer to watch films on Free-to-air TV because they are used to it and they can choose what they want to watch. Most respondents also indicated that the cinema provides a relaxing atmosphere and they prefer watching films on the internet because it offers the opportunity of choosing what to watch.

1.4.2.4 Factors informing choice of film at the cinema

The findings revealed that there are a number of factors that inform audiences' choice. A larger proportion of respondents said the type of the film influences their choice of film, followed by their mood, award nominations, word-of-mouth/recommendations, specific actors/actresses, media reviews, and Box Office success in that order.

Fewer respondents indicated they are influenced by factors such as special occasions and country of origin/location of the production. The issue of the country of origin was corroborated when respondents were asked to indicate which films they generally prefer to watch, between SA and foreign-produced ones. The findings reveal that most respondents (55%) have no preferences, but do watch films as long as the storyline is interesting to them. Around 19% said they prefer to watch SA films, 18% prefer to watch foreign films and around 6% indicated that there are just not enough SA films to watch.

Respondents were further asked how heavily film adverts/previews will influence their decision to watch films in future.

The findings show that a larger proportion of the respondents (34%) said they are significantly influenced, followed by 29% who stated they're heavily influenced; 23% said they're slightly influenced and 5% said they're very slightly influenced. Almost 1-in-10 respondents (9%) said they're not at all influenced by film adverts and previews of films.

1.4.2.5 Preferred day to go to the cinema

Most respondents (54%) indicated that they prefer visiting the cinema on Saturdays, followed by those who prefer to attend the cinema any day if there's something good to watch. Fewer respondents said they prefer weekdays, public holidays and Sundays.

1.4.2.6 Other activities done upon visiting a cinema

People don't only visit a cinema to just watch films, they engage in other activities as well. Most respondents said they go to a restaurant, have a drink somewhere and do some shopping. Few of the respondents said they play games at an arcade, or go to a *Shisanyama.* Gaining insights of what people do as cinema-goers provides a platform for identification of the scope which exists in terms of providing a total entertainment package.

1.4.3 Spending pattern

1.4.3.1 Willing price to watch a film in cinema

A larger proportion (44%) of respondents indicated they are willing to pay less than R50, followed by 24% who indicated that they're willing to pay between R50-R100; around 15% said they aren't willing to pay anything and 10% said they are willing to pay 'whatever it costs, as long as they like the film'. Some 7% said R100-R200 and 2% provided other answers such as R15-R25.

1.4.3.2 Willing price to watch a SA film

The findings reveal that a larger proportion (45%) of respondents said they're willing to pay less than R50, followed by 24% who indicated that they're willing to pay between R50-R100; around 12% said they aren't willing to pay anything and 11% said they are willing to pay 'whatever it costs as long as they like the film'. About 7% said R100-R200 and 1% said they're willing to pay between R15-R25.

1.4.3.3 Costs associated with watching a film at the cinema

A larger proportion of respondents (34%) said it costs them between R50-R100 for the full experience to watch a film, followed by 28% who said they don't know, and 22% who indicated that it costs them between R20-R50. A small proportion of 16% said R100-R150.

1.4.3.4 Other entertainment activities

Besides spending their money on movies, most respondents said they spent their pocket money or disposable income on music, having a braai, socialising with friends and family at home, attending social gatherings (weddings, birthdays and baby showers, for example), books, magazines, journals, going to the beach, visit restaurants/coffee shops, attend live performances (music concerts, theatres, comedy shows, and so on), drinking alcoholic or non-alcoholic beverages, and going to the gym.

Consumers have a tendency to rank their needs and wants and spend their disposable income on products and/or services they perceive to be providing them the most utility. It's imperative that film and video products meet the expectations of the audiences, in terms of utility, to enable consumers to continue spending their disposable income on them.

1.4.4 General perceptions and attitude towards SA films

1.4.4.1 Visual story and performance

The findings show that, generally, SA films were viewed favourably by the respondents. The overall ratings encompassing 'excellent', 'very good' and 'good' on a number of contexts, were as follows:

- Actors and actresses performance – 75%
- Entertainment value – 72%
- Film characters – 71%
- Local content representative of SA languages and culture – 71%
- Storylines – 70%
- Visuals/Cinematography – 70%
- Historical and political content – 66%
- Availability in other official languages besides English – 65%
- Technical production quality – 65%; and
- Local content representative of SA Natural Environment and Wildlife – 63%.

1.4.4.2 Uniqueness of SA films

To gain further insights on the general perceptions and attitude towards SA film and video products, respondents were asked to indicate what they think are the unique elements they contain. This question was put to distribution channels and international stakeholders to uncover a sense of what is unique about South African movies. Social commentary, followed by cultural content, characters they can relate to, images and landscapes, content, general production and actors/actresses, was identified as the factors that make SA films unique.

1.4.4.3 Likable attributes of SA films

In terms of what's likeable about SA films, a large proportion of respondents (19%) said they like the actors/actresses, followed by 18% who said they like the cultural content of SA films; 17% said they like characters they can relate to and 12% said they like everything about SA films. About 11% of respondents said images and landscapes, while 7% said social commentary, with another 7% liking the content in general. These findings substantiate the observations that were noted when stakeholders were asked to identify the unique attributes of SA films.

1.4.4.4 Unlikable attributes of SA films

Interestingly, a large proportion of respondents (27%) said there's nothing they don't like about SA films. However, around 14% indicated that they don't like the general production, followed by 11% who said they can't relate to the characters; 10% don't like the content, 8% don't like the social commentary, while another 8% said they dislike the images and landscapes; 4% indicated all of the above and 3% of respondents had other reasons.

1.4.5 Access to cinema

1.4.5.1 Availability of cinemas in surrounding areas

Cinema-going consumer behaviour seems to be mostly an urban phenomenon with a large portion of the rural populace settling for other film viewing platforms, such as TV and DVDs. The findings revealed that most cinemas are situated in urban areas, usually in shopping malls.

Most respondents in urban areas indicated that the nearest available cinema is between 10 to 30 minutes driving distance, while only a few respondents in rural areas said the cinema is that distance from them. This reflects that cinemas are not readily available in rural areas compared to urban areas. It's also interesting that almost half the respondents in urban areas said that cinemas aren't easily accessible. Not surprising, as a small proportion (19%) in the rural areas indicated the cinema is walking distance away. In contrast, most of the respondents (81%) in urban areas indicated that cinemas are within walking distance.

These findings were upheld by distribution channels and international stakeholders who affirmed that there are some factors which largely constrain attempts to make cinemas easily available and accessible to the majority, irrespective of being in rural or urban areas. The most limiting factor identified by most respondents was the socio-economic factors (household income and employment, for example) which limit the proclivity to go cinemas. It becomes a challenge, economic-wise, to make cinemas widely available when there are high chances that those cinemas will attract a small audience.

1.4.5.2 Proximity to cinema

The proximity to a cinema is a key determinant of whether one visits it to watch a film; this predisposes audiences to forego cinema in favour of alternative film viewing platforms like home entertainment.

While most respondents (68%) indicated that they are located within 10-30 minutes driving distance from cinemas, followed by 17% who said they don't have easy access, 12% indicated that they're within walking distance, but still maintain they don't go because it's too expensive (transport-wise and prices, for instance) with others maintaining that the physical distance makes it inaccessible, while some pointed out there are no cinemas in their communities. It was found that if one wants to visit a cinema, one would have to go a shopping mall.

1.5 Recommendations

1.5.1 Enhance distribution and production value chain

New initiatives based on consultation with industry stakeholders could be developed to improve the effectiveness of the distribution of SA films. This research found that inadequate distribution was considered as the most important factor limiting the SA audience's access to local film and video content, followed by insufficient supply of local productions. An all-encompassing stakeholder approach should be adopted, given an array of stakeholders involved in production and distribution of films and video content. The preferences of the audience should also be taken into cognisance; for example this study showed that TV is still the most widely utilised platform for watching films, followed by DVDs and VoD. It's also important to engage multiple distribution channels in the industry through interactive forums.

1.5.2 Propagate film education

Film education can assist in growing the audiences of today and tomorrow, ensuring that more people have an improved understanding and appreciation of the value of different kinds of film. The young generation can be encouraged to learn through and about film, providing them with a wide range of activities to encourage watching, understanding and making films. The starting point should be schools throughout SA, where film should become part of the cultural education of children in their school syllabus. Such initiatives require funding.

1.5.3 Enhance awareness of SA films

This study showed that most people indicated that they are prepared to go out of their way to watch SA films in future, and on the other hand, also noted that SA films should be advertised in order to create awareness about them. An all-encompassing stakeholder approach can be used as a vehicle to create an integrated communications strategy, designed to create awareness of SA film and video content. There are a number of media platforms that are available and can be used to further awareness of SA films in both urban and rural areas. Such platforms include, but aren't limited to: TV, radio, outdoor (billboards, video billboards, posters and bus shelters, for instance) events or exhibitions, online, mail, magazines, newspapers, SMS' and press releases. It's crucial to create awareness of SA films that promote local content and add value to the viewer's life.

1.5.4 Secure continued government support

The pillars of government support to the film industry should be strengthened. Information on funding schemes can be widely distributed to film producers or film makers. Support mechanisms for production, development and distribution have an impact on the structures and practices of the industry and on the type and quality of films produced and distributed. The strengthening of government support mechanisms will ensure that emphasis is placed on the following:

- Development phase to enhance quality of films;
- Production, distribution and promotion; and
- Accessibility by a wide audience of government-supported films.

1.5.5 Accessibility of cinemas

It's important to explore the feasibility of bringing the cinemas closer to the audiences, for example bringing state-of-the-art cinemas to townships, semi-urban areas, even rural areas. This research showed that people who said they won't be visiting in future, cited reasons like distance to the cinema and costs involved. Better proximity to cinemas can attract more audiences constrained by distance.

1.5.6 Talent and skills development

This research showed that most people indicated that they're prepared to watch a SA movie 'as long as it is any good one' in terms of visuals/cinematography, storyline, actors/actresses performance, film characters technical production quality, historical and political content, entertainment value, and so on. All these factors are a product of talent, skills, innovativeness and professionalism of all individuals involved in film production. It's thereby important to strengthen the creative environment and develop professional skills in the SA film industry. The talents, skills and needs of the industry should be clearly identified and delineated, developed and balanced with other skills such as entrepreneurial abilities, ICT, and marketing know-how. It's through talent and skills development that filmmakers can fully engage audiences through telling stories that relate to the audience.

1.5.7 Stakeholder engagements

In order to further create an enabling environment, there's a need to mobilise all the key stakeholders involved in the SA film industry. A forum can be created that discusses issues affecting the industry and the strategies that can be adopted to further grow and sustain it. The initial stage is to conduct thorough-bred and detailed stakeholder identification and mapping exercises in order to fully delineate the interests, needs and influences of the host of stakeholders.

1.5.8 Strengthen the branding of SA films

The feasibility of branding SA films should be explored in order to build a stronger and more compelling SA film brand. The findings have shown that most stakeholders have indicated that they think the Nelson Mandela Bridge in Newton, or SA flag or Table Mountain can be used as iconic symbols, landmarks or artefacts that will distinguish SA films and serve to endear local films to audiences. SA films should be treated, managed and celebrated as a brand availed and accessed by all audiences. Films festivals can be further strengthened to propagate the SA film brand.

1.5.9 Continued role of NFVF

The NFVF should remain at the apex of the film industry, allowing provincial and regional film structures to offer funding for the films that satisfy the general guideline provided by the NFVF. To develop, grow and sustain the SA film and video industry, the NFVF should further strengthen the following strategy prisms:

- Conduct good research and due diligence on all funded film and video products, to ensure that these funded films and videos have above-average chances of success;
- Spread the available funding support to as many previously disadvantaged film and video producers as possible, to ensure more SA film and video products are made;
- The NFVF should offer support, as it deems necessary, based on how aspects evolve in the industry;
- Fund as many big ticket SA film and video products, and see how many succeed; and
- Fund film and video producers who have a history of success, to replicate successes.

2. RESEARCH METHODOLOGY

2.1 Introduction

This section provides an outline of the research method as well as the sampling technique utilised during the quantitative phase of the study.

2.2 Global research design

Overall, the research adopted a mixed-methods design by employing an integrated qualitative and quantitative approach. The quantitative phase involved the use of interviews using pre-coded questionnaires that were administered through the use of survey techniques (face-to-face, online, telephonic and a guided focus group observations, for example) responding to the study objectives.

In addition, qualitative methodologies that were deployed during the qualitative phase of the research were designed to gain a rich, in-depth understanding with regard to the perceptions and attitudes of the SA audience, in general, and the SAFI stakeholders focusing specifically on their expert knowledge relating to the consumption of SA produced films and videos.

2.3 Sampling

The NFVF stakeholder universe was conceptualised to be comprised of four main categories:

- The SA Audience;
- NFVFs Internal and External Strategic stakeholders;
- National film and video distribution channels; and
- International stakeholders.

The population of SA that needs to be represented is large. In that case, the sample size should be adequate to provide an estimate with sufficiently high precision. In other words, the sample should be representative, comprehensive, correct, reliable and appropriate. For populations that are large, Cochran (1963:75) developed the following equation to yield a representative sample for proportions. Cochran's formula is for the calculation of the minimum sample size.

$$n_0 = \frac{Z^2 * p * q}{e^2}$$

n_0 – Required sample size.
p – True proportion of factor in the population, or the expected frequency value; for instance, all persons within the 26.1m population are equally likely to be interviewed. ***q* is simply 1-*p*.**
e –The margin of error, usually 5% since preferred confidence level in sampling is 95%. This is the risk the researcher is willing to accept in the study. In general, for categorical data, a 5% margin of error is acceptable.
Z – The standard variant for the desired confidence level will be 1.96.

Therefore the minimum sample required is: $n_0 = \frac{(1.96)^2 \times 0.5 \times 0.5}{(0.05)^2} = 384$

This figure characterises a sample that will be optimum to meet efficiency (cost) and reliability (precision).

This value represents the minimum sample size that should be used to attain representativeness and thereby gain reliable results. Anything below would not be representative of the population under study (stakeholders) and so, would lead to incorrect results. To increase the accuracy of the estimates (in order to gain more reliable results) this value should be increased, if possible (depending on the time required to accomplish the task or the funds available to collect more data). The larger the sample size, the more accurate and reliable the results are. The table presents the samples that were achieved during the quantitative phase of the research.

Table 1: Achieved sample sizes

ID.	Stakeholder Bloc	Target Sample Size	Achieved
1.	**SA Audience**		
	▪ Adult Questionnaire	1 640	1 706
	▪ Youth Questionnaire	566	795
	▪ Children Questionnaire	244	252
	Sub total	**2 450**	**2 753**
2.	Distribution Channels Questionnaire	250	49
3.	International Stakeholders Questionnaire	15	3
4.	**NFVF Strategic Stakeholders:**		
	▪ Internal Questionnaire	30	21
	▪ Government Questionnaire	70	35
	▪ External Questionnaire	300	50
	Sub total	**400**	**106**
	Grand Total	**3 115**	**2 911**

2.4 Data collection techniques

2.4.1 Face-to-face interviews

Conducting face-to-face questionnaire administration guaranteed that the questionnaires were delivered to the intended recipients. Face-to-face questionnaire administration also allowed easy clarification of complex issues of the questionnaire, as well as allowing for probing and verification of responses. Face-to-face interviews were conducted with respondents from the NVFV stakeholder blocs. Specifically, the face-to-face interviews involved the use of a pre-coded questionnaire being administered to the general SA audiences and stakeholders (internal and external). In other words, the procedure involved administering a structured questionnaire to the respective sample blocs to elicit primary data.

The survey questionnaire contained both closed and open-ended questions which were deliberately designed to generate more detailed responses from respondents that address the objectives of the research. The design of the survey questionnaire was informed by the scope and objectives of the research project. The survey questionnaire were interrogated and approved by the NFVF before commencement of the fieldwork. The purpose of this protocol was aimed at ensuring that the questionnaire was in-line with addressing the key objectives.

2.4.2 Online survey

The online survey as a medium of data collection was also utilised in the data collection process for this research. Generally, the use of online questionnaires has expanded world over, given the plethora of technological advances. It offers a faster way of collecting data from respondents and provides easy access for participations. The survey questionnaire was made available online so that those respondents who weren't available, or accessible for face-to-face interviews, and/or those that preferred or elected to participate through an online survey, were afforded an opportunity to participate. Online links to the survey questionnaire were generated and sent to respondents via email. The use of this platform deepened the data gathering process and data base, and allowed for many potential respondents with email addresses to be reached within a short period of time.

2.4.3 Telephonic survey

In the field of research there's a general consensus that telephone surveys are the fastest method of gathering information from a relatively large sample. It was for this reason that the data collection process adopted telephonic surveys. Telephone administration of questionnaires allowed for many potential respondents to be reached within a short period of time.

2.4.4 Focus-group discussion

Strictly speaking, a focus group discussion is considered a qualitative method. However, in this research some elements of the focus group session were adopted to administer a quantitative questionnaire to the 0 to 4-year-old group. Sessions were held with the 0 to 4-year-old group in order to generate the respondents' insights, attitudes, awareness and knowledge that would be unlikely to have emerged without the interaction found in this group dynamic. The aim was to find out consuming trends/patterns and awareness of SA locally produced film/video products within this age group. Generally, colour is an element of visual language that people process before they are consciously aware of it, and as such, children are known to be fascinated by colour, and this method facilitated the visual search.

Audio-recording equipment was utilised to record the focus-group discussion, while fieldworkers in attendance physically filled in the questionnaires.

2.5 Fieldwork procedure

The fieldwork was conducted from November 27 to December 15, 2014 by a team of about 40 fieldworkers across the nine Provinces. Primary data was collected from what was operationalised as the NFVF Stakeholder Universe comprised of four main categories:

Fieldworkers were assigned to conduct face-to-face interviews with respondents (SA audience) at cinemas, shopping malls, urban, rural and peri-urban areas. These respondents were randomly selected using a simple random sampling technique. Data collectors avoided expressions of approval or disapproval and refrained from offering personal opinions. Whenever possible, they were encouraged to try to conduct the survey in the language in which the respondents would feel most comfortable with.

2.6 Data analysis

The data was thereafter analysed. Descriptive statistics analysis was used to describe, show and summarise the data into meaningful ways, which allowed a simpler interpretation of the data. Descriptive statistics was useful to summarise the data using a combination of tabulated description (tables) graphical description (graphs and figures) and statistical commentary (a discussion of the results). Frequencies and cross tabulations were also generated for the analysis.

2.7 Presentation of findings

Results were presented using figures, charts and tables, and narratives.

3. OVERVIEW OF KEY FINDINGS

3.1 Introduction

The research questions the client wanted us to answer are as follows:

I. Profile of the respondents
II. Content preferences
III. Spending patterns
IV. General perceptions and attitudes towards SA movies
V. Access to cinemas

We have obtained the answers from the representative designated sample of stakeholders agreed on. Later on, we will be examining the different stakeholder categories and how they specifically answered the research questions.

3.2 Profile of respondents

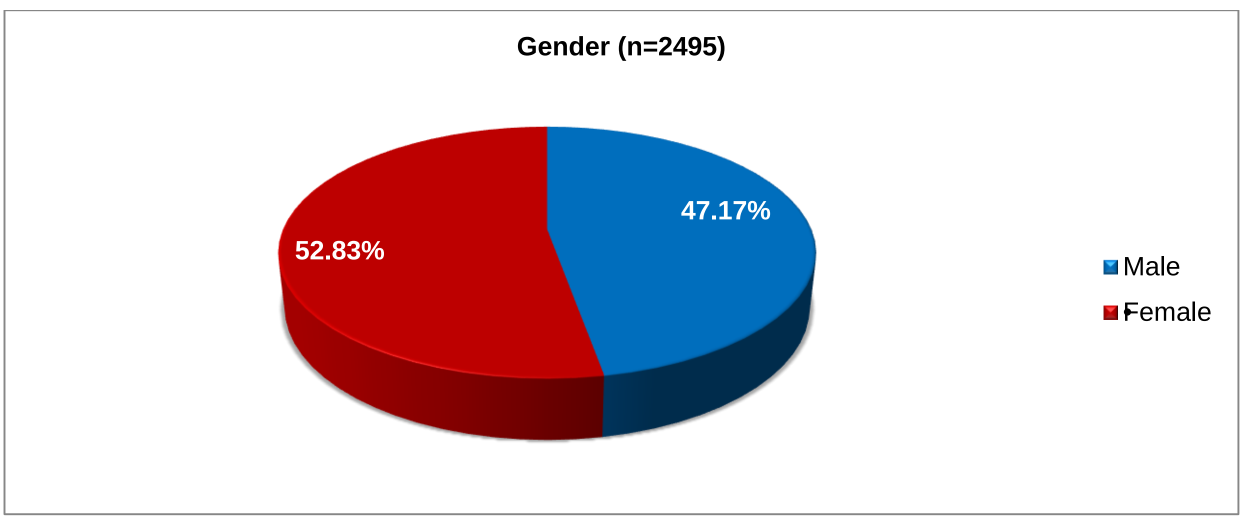
In this research, the findings on profile of the respondents focussed on living standard measure and where the respondents live.

3.2.1 Living standard measure

3.2.1.1 Gender

Respondents were asked to indicate their gender. The findings are presented in figure 1, below.

Figure 1: Gender



The findings revealed that more than half the respondents were female (53%) while 47% were male. The male-to-female proportion observed is consistent with the gender distribution of the SA population where, on average, the population consists of 48.2% males and 51.8% females. The distribution of respondents by gender is noteworthy as the audiences are composed of different individuals with various needs.

Generally, it's believed that within the household, females consume more soapies and drama content than males, and so, more likely to provide greater insights on the subject than males. While this is only an assumption and a perception, it's nonetheless noteworthy.

Providing in-depth insights of female-to-male proportions assists in segmentation of the audience. For example, in China, a study by China Connect (2014) revealed that males account for 50.2% of movie-goers while females accounted for 49.8%; the gender breakdown of moviegoers was males (50.2%) who account for slightly more than females (49.8%). In the US, more recent studies have shown that women and men attend the movies in equal numbers. In 2012 women bought 50% of the tickets and men bought the same amount.

3.2.1.2 Age

The respondents were asked to indicate their age groups. The findings are shown in Table 2, below.

Table 2: Age group

Age group	Count	Percentages (%)
5-7	168	6.73
8-9	155	6.21
10-12	228	9.13
13-14	142	5.69
15-16	100	4.01
16-20	287	11.50
21-24	305	12.22
25-29	306	12.26
30–34	218	8.73
35-39	155	6.21
40-44	130	5.21
45-49	93	3.73
50-54	72	2.88
55-59	43	1.72
60-64	35	1.40
65+	59	2.36
Total	**2496**	**100%**

The findings displayed in table 1 shows that, though the age group of the respondents varied, respondents between 25-34 and 25-29 years accounted for most (12%) of the sample. Analysis of age reveals how different age groups are actively involved in the consumption of film and video products (viewership patterns, for example)

Vast literature exists with regards to how age plays a crucial role in the consumption patterns of film and video products. Some media theorists have sought to understand why and how people actively seek out specific media to satisfy certain needs based on age. According to the Cibber 2014 (Conference International Broadcasters Audience Research Services), in a recent study titled Media Research in Africa (2014), it found that age pre-determines viewership trends, as preference complexities exist for different age groups; for instance, older people's viewership trends/patterns have been attributed to lack of time or interest. The research also found out that, generally, children (0-4 years) consume more animated content, while the youth like musicals and romance genres.

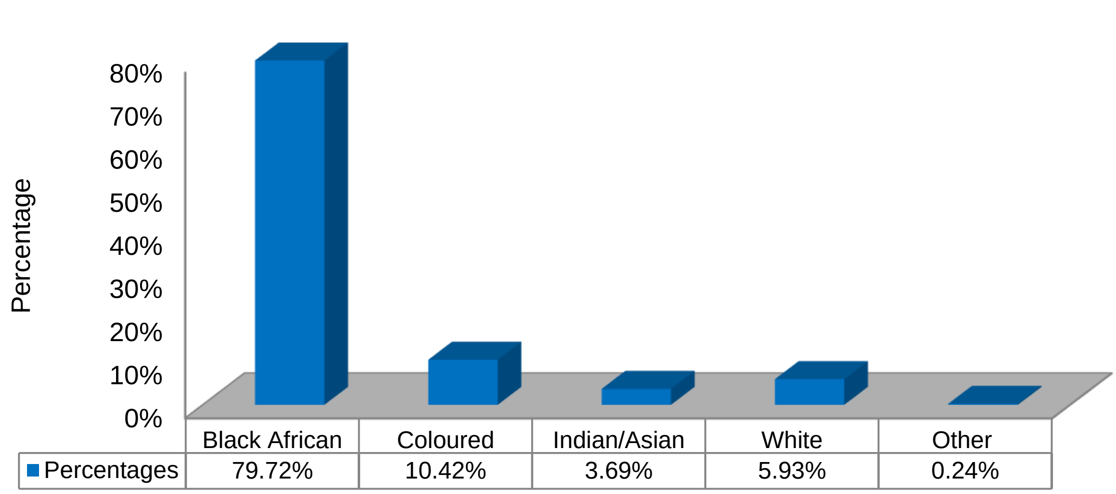
Interestingly, in the US, a quiet revolution is afoot. Older people are flocking to the cinemas, but they don't care much for special effects, preferring popular actors, mature dramas and tales of late blooming love. Hollywood's also changing its game. Older people want something different and the industry is trying to provide it for them. Mature audiences also tend to recognise quickly made, poorer quality films quicker than their young counterparts, so it's thereby important that richer, more thought-provoking productions are made to cater for their discerning taste.

Social networking, gaming and other electronic competitors distract young film-goers. In the US, attendance in films slumped by 12% in 2010 alone.

3.2.1.3 Population group

Respondents were asked to indicate their population group.

Figure 2: Population group



The findings revealed that most of the respondents (80%) who took part in the survey were black African, followed by coloured (10%) white (6%) and Indian/Asian (4%). This distribution reflects the national distribution of population groups in SA. According to StatsSA's 2013 mid-year population estimates for SA by population group, black African constituted 79.8%, followed by coloured (9.0%), white (8.7%) and Indian/Asian (2.5%). The population group profile can thereby be used a reliable base for segmenting the SA audience in terms of the population groups.

3.2.1.4 Marital status

The findings on respondents' marital status are shown in table 3.

Table 3: Marital status

Marital status	Count	Percentage (%)
Co-habiting	79	4.72
Divorced	54	3.22

Marital status	Count	Percentage (%)
Married	408	24.36
Single	1 074	64.12
Widow/Widower	60	3.58
Total	**1 675**	**100%**

Most of the respondents (64%) indicated that they were single, 24% said they were married and 5% said they were co-habiting. About 4% said widowed and the least, 3% were divorced.

Understanding marital status of the audience is very important. Generally, there's a tendency that married couples collectively spend more on certain products or services than their single counterparts. However, single individuals may become more consistent in purchasing products or services, and make purchases more frequently than married couples.

3.2.1.5 Occupational status

The occupational status of the respondents is shown in the table 4.

Table 4: Occupational status

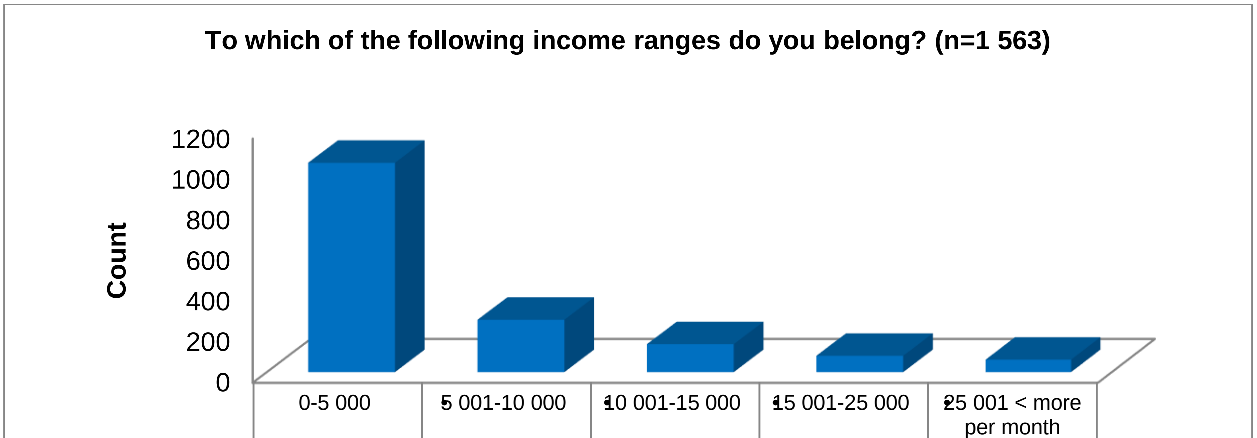
Occupation status	Count	Percentage (%)
Employed	740	43.89
Employed and studying	128	7.59
Pensioner	72	4.27
Student	331	19.63
Studying and seeking employment	68	4.03
Unemployed	347	20.58
Total	**1 686**	**100%**

Almost half the respondents (44%) were employed, followed by 21% who were unemployed; 20% were studying fulltime and 8% were studying and working simultaneously. The findings showed that 4% of respondents stated that they were studying and seeking employment, while another 4% were pensioners. In terms of occupation status, the above results show that most respondents are economically active, and so, the chances are high that they have vested interest in film and video products.

3.2.1.6 Level of income per month

Respondents were asked to indicate their income ranges. The findings are illustrated in figure 3.

Figure 3 : Level of income per month



	0-5 000	5 001-10 000	10 001-15 000	15 001-25 000	25 001 < more per month
Percentage	65.77%	16.44%	8.77%	5.12%	3.90%
Count	1028	257	137	80	61

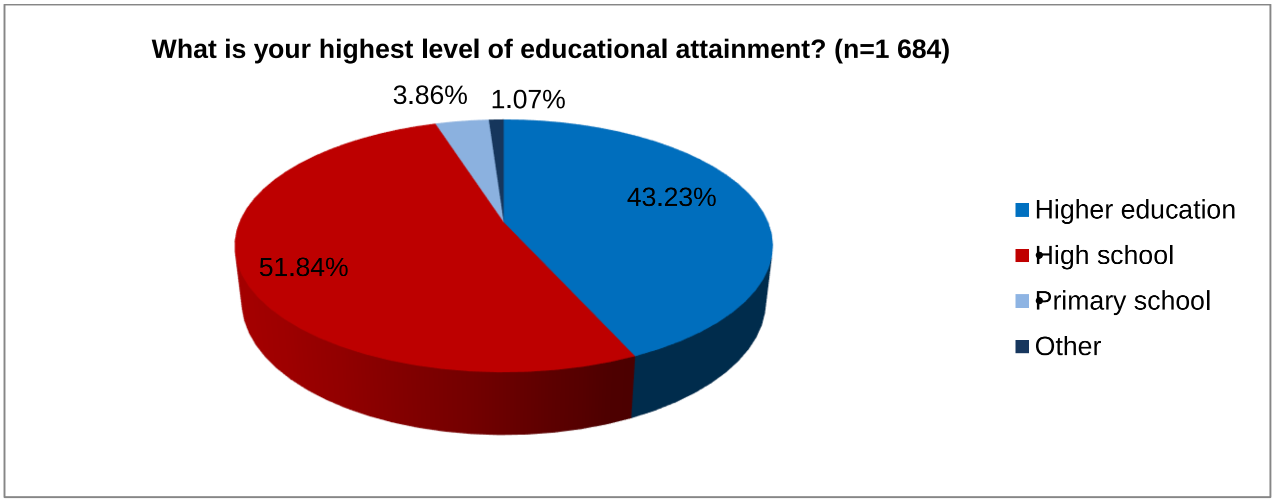
Most of the respondents (66%) said they earned up to R5000, followed by 16% who said they were earning between R5001-R10000. Around 9% indicated they earned between R10001-R15000, while 5% said R15001-R25000 and about 4% of respondents indicated that their monthly income was R25001 and above per month. However, as in most surveys where respondents are asked to indicate their income levels, these results should be interpreted with caution, as generally, there's a tendency for some to overstate or understate their monthly income levels. Some simply refused to answer the question.

Understanding the income status of audiences assists in developing a suitable pricing strategy. Income levels generally define lifestyle and spending habits.

3.2.1.7 Educational level attained

The figure below presents the findings on the level of education attained by the respondents.

Figure 4: Level of education attained



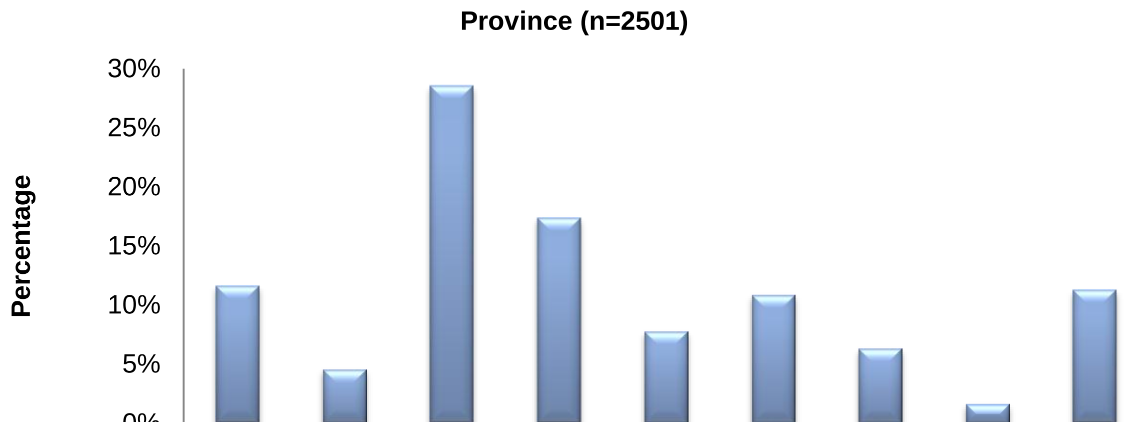
More than half the respondents (52%) said they completed high school, followed by 43% who indicated that they had attained post high school qualifications such as certificates, diploma, degree, masters, and so on. Around 4% had attained primary school level and the remaining 1% indicated either IT certification, never went to school or hadn't completed their schooling.

3.2.2 Where they live

3.2.2.1 Province of residence

Figure 5 below presents the provinces of the respondents.

Figure 5: Province of residence



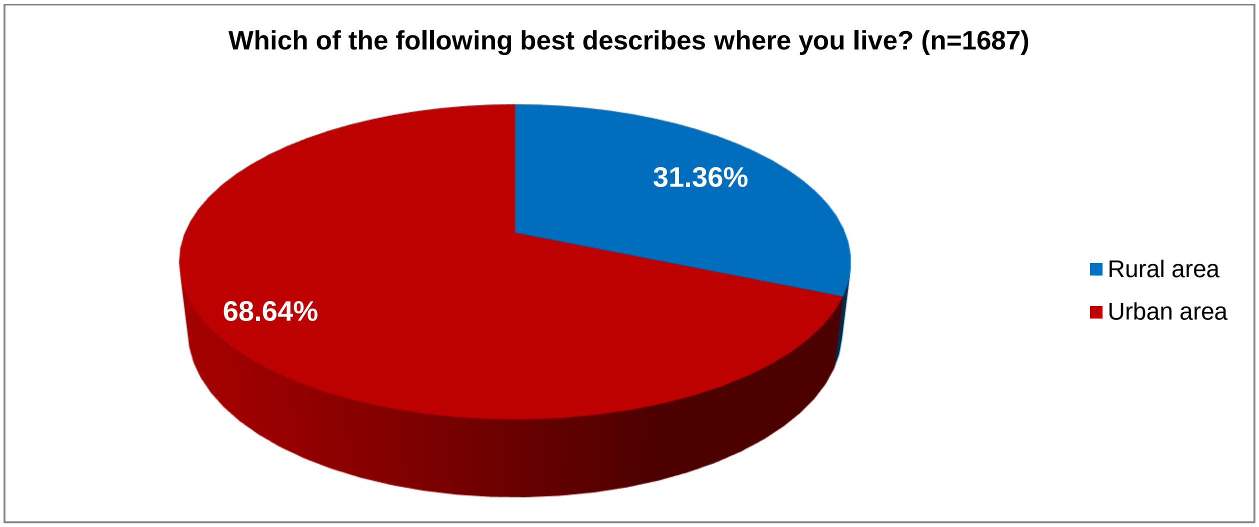
	EC	FS	GP	KZN	MP	LP	NW	NC	WC
Percentages	11.60%	4.56%	28.55%	17.39%	7.80%	10.88%	6.32%	1.64%	11.28%

The findings show that a large proportion of respondents reside in Gauteng (29%) followed by Kwazulu-Natal (17%), Eastern Cape (12%), Western Cape (11%), Limpopo (11%), Mpumalanga (8%), North West Province (6%), Free State (5%) and Northern Cape (2%).

3.2.2.2 Rural vs Urban

Respondents were asked to indicate where they reside.

Figure 6: Description of the place where respondents live



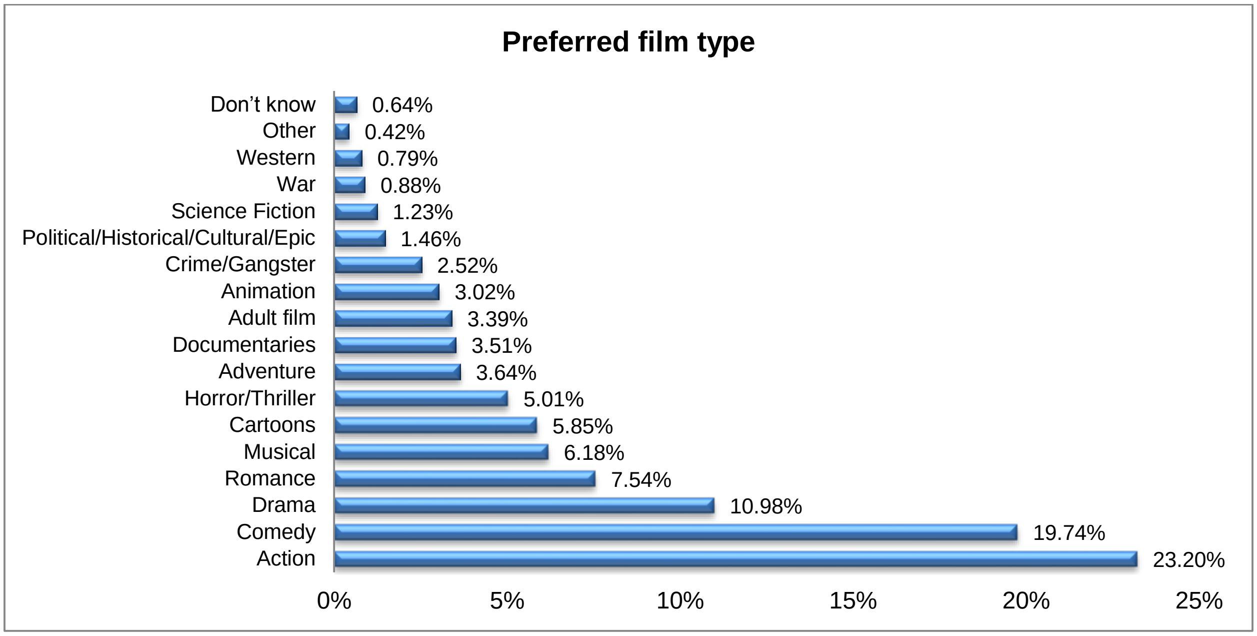
When asked where they reside, most respondents (69%) lived in urban areas and 31% in rural areas. These results are important as lifestyle also impacts on film and video consumption. Generally, consumers in urban areas have more access to film/video products and the availability of distribution channels and technology are more favourably tilted in urban areas' favour.

3.3 Content preferences

3.3.1 Preferred formats

Respondents were asked to indicate their most preferred film genres.

Figure 7: Preferred film types

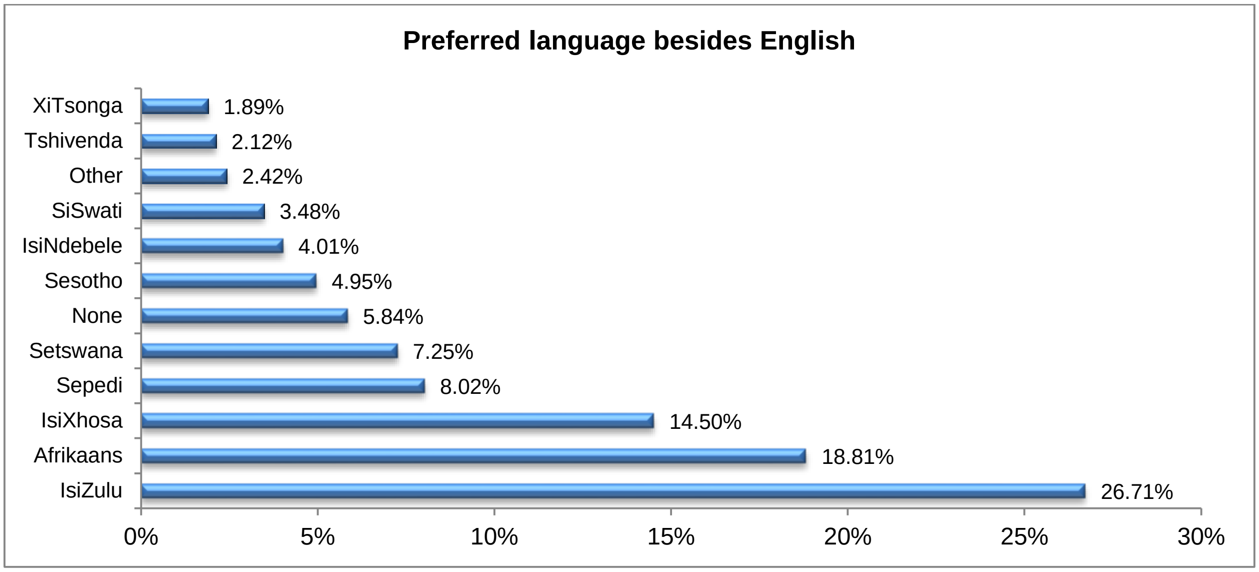


In terms of genres preferences, the findings revealed that out of a number of film types, a greater proportion of the respondents prefer action films, followed by comedy, drama, romance, musicals, cartoons, horror/thriller/ adventure and documentaries, in that order. The least preferred film types were Western, war, sci-fi, political/historical/cultural/epic, crime/gangster, animation and adult films, in that order.

3.3.2 Preferred languages

Respondents were also asked to indicate any other language, besides English, which they would prefer to watch films in. The findings are presented in figure 8, below.

Figure 8: Preferred language besides English

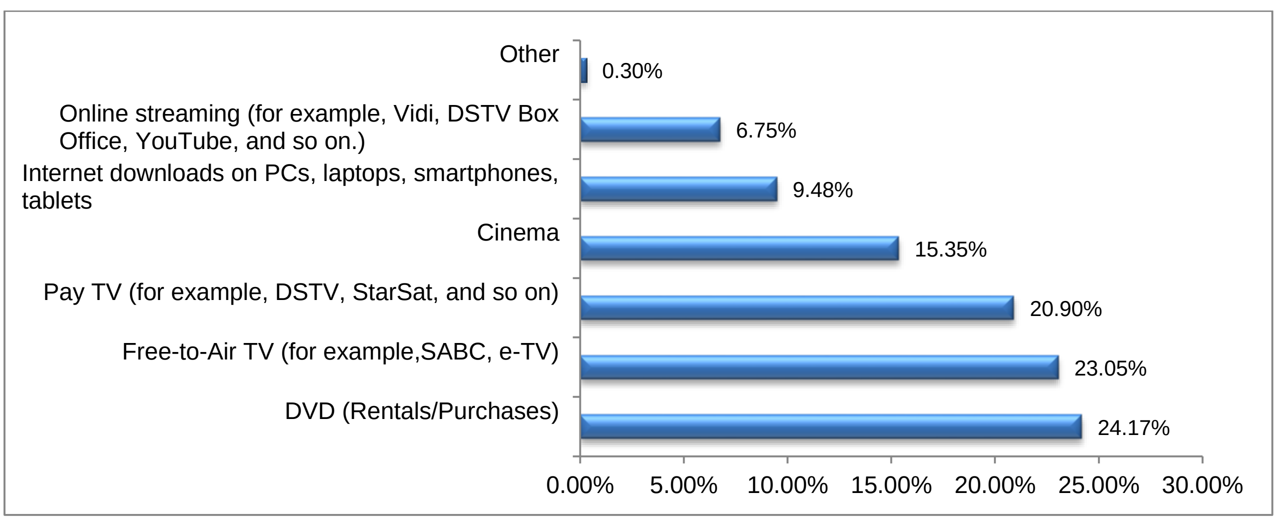


The findings revealed that besides English, a greater proportion of the respondents indicated that they prefer isiZulu as a language to watch films in, followed by Afrikaans, IsiXhosa, Sepedi, Setswana and Sesotho, in that order. The least preferred languages were XiTsonga, Tshivenda, SiSwati and IsiNdebele.

3.3.3 Preferred platforms for film consumption

To fully understand viewing platform preferences, the respondents were further asked to indicate their most preferred viewing platform. The findings are illustrated in figure 9.

Figure 9: Preferred film viewing platform



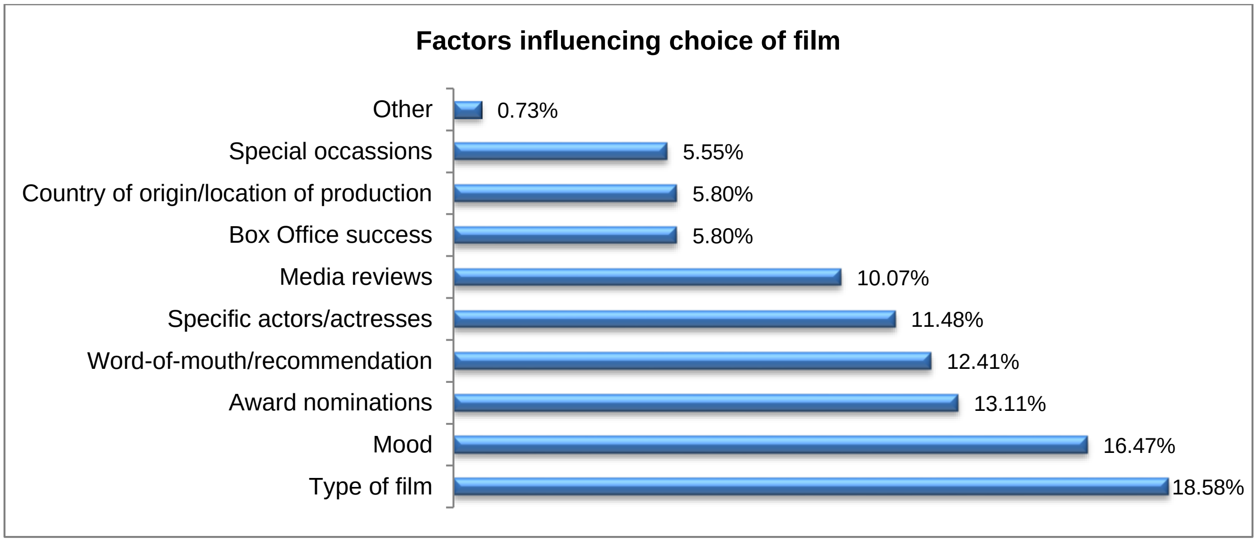
The findings revealed that most respondents prefer to consume films on DVD, Free-to-Air TV, Pay TV and cinema. The least preferred film consumption platforms indicated was online streaming (Vidi, DSTV Box Office, You Tube, for example) and internet downloads on PCs, laptops, smartphones and tablets.

Upon being asked what informs the choice of platforms, the findings revealed that most say they prefer to watch films on DVDs because they are 'just used to it' – watching DVDs provides an opportunity to choose whatever they want to watch and it's cheaper to do so. Most respondents also said they prefer to watch films on Free-to-air TV because they are used to it and they can choose what they want to watch. Most respondents also indicated that the cinema provides a relaxing atmosphere and they prefer watching films on the internet because it offers an opportunity of choosing what to watch.

3.3.4 What informs the choice of film at cinema

To explore audiences' content preferences, the respondents were asked to indicate what informs their choice of film and video products at the cinema. The findings are shown in figure 10.

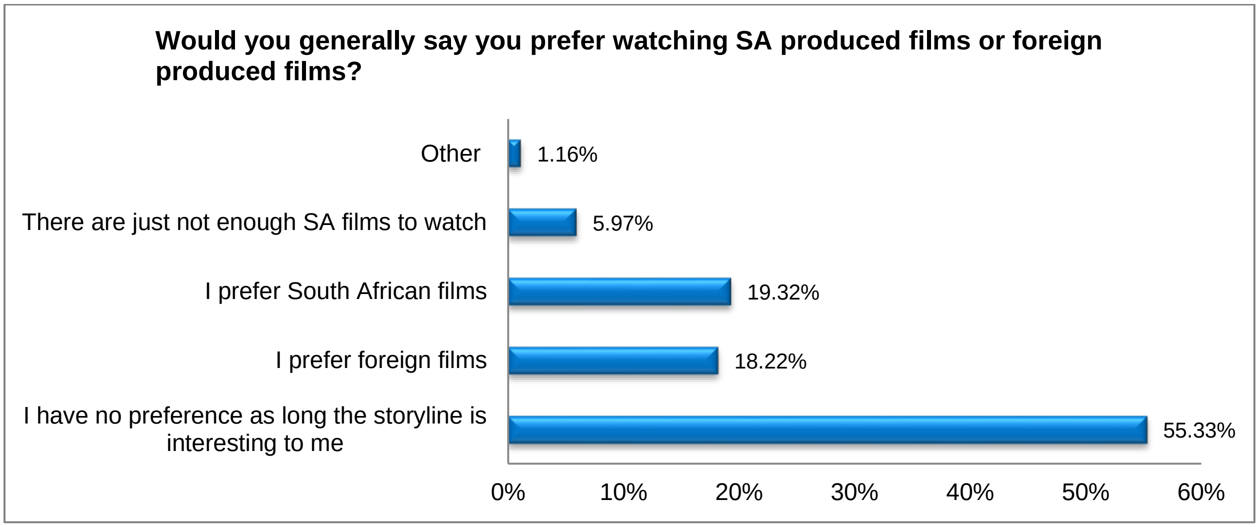
Figure 10: Factors influencing choice of film



The findings revealed that there are a number of factors that inform audiences' choice. A larger proportion of respondents said the type of the film influences their choice, followed by their mood, award nominations, word-of-mouth/recommendation, specific actors/actresses, media reviews and Box Office success, in that order. Fewer respondents indicated they're influenced by factors such as special occasions and country of origin/location of production. What these results clearly show is that there are several factors that inform audiences in making film choices. Knowing these factors is key in an audience development strategy.

To obtain a further understanding of whether country of origin or location of production (local vs international films) inform their choice, respondents were asked to indicate which films they generally prefer to watch, between SA and foreign-produced films.

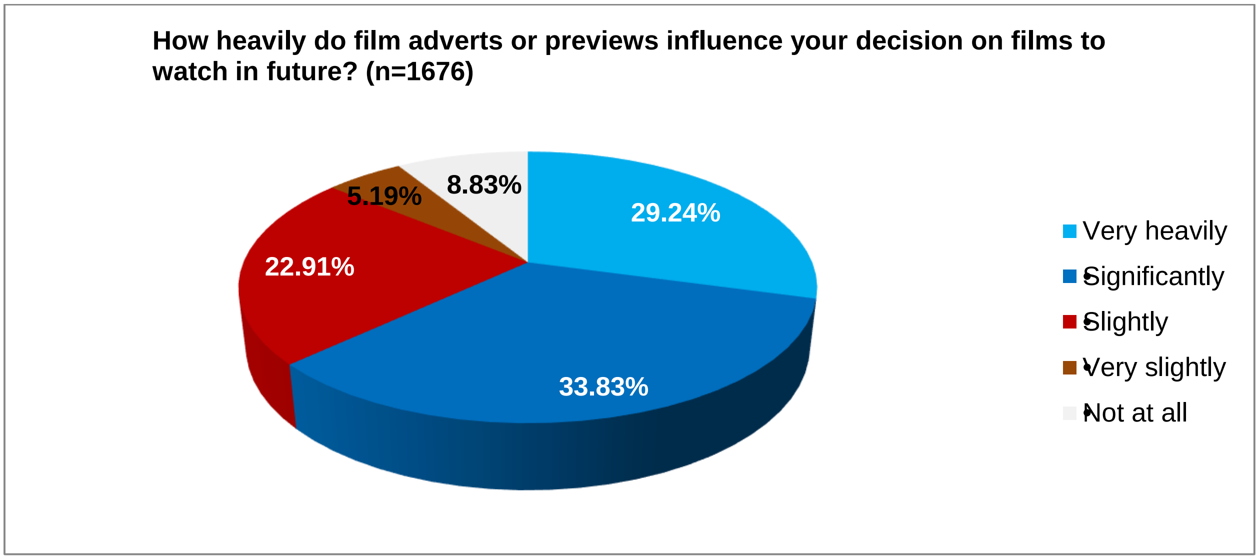
Figure 11: Preference of films – local vs international



The findings reveal that most respondents (55%) have no preferences, but do watch film as long as the storyline is interesting to them. Around 19% said they prefer to watch SA films, 18% prefer to watch foreign films and around 6% indicated that there are just not enough SA films to watch.

Respondents were further asked how heavily film adverts influence their decision to watch films in future.

Figure 12: Influence of film adverts or previews

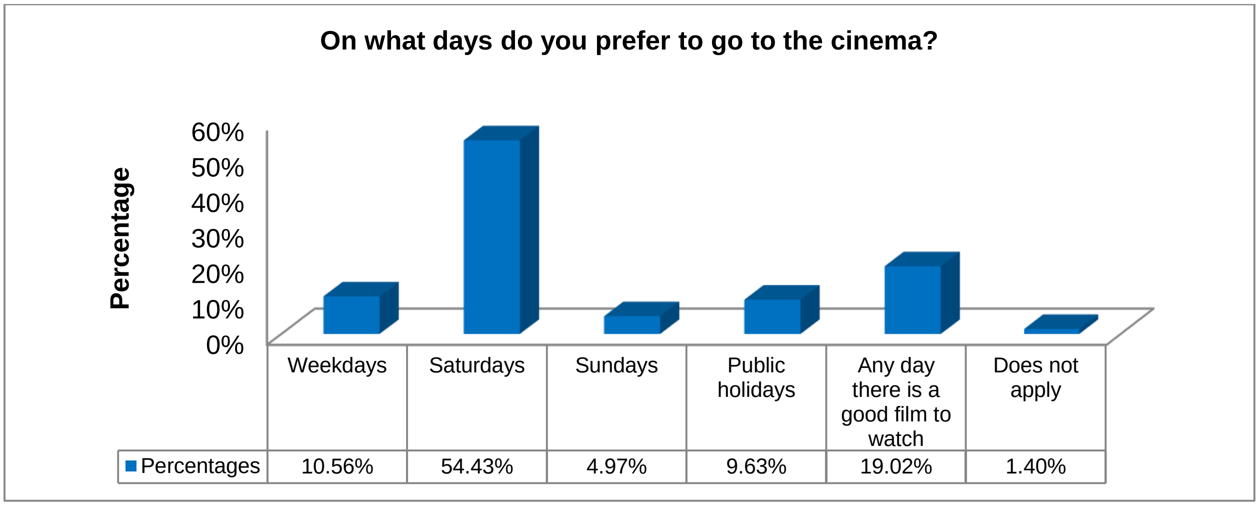


The findings show that a larger proportion of the respondents (34%) said they are significantly influenced by film adverts and previews, followed by 29% who stated they're heavily influenced; 23% said they're slightly influenced and 5% said they're very slightly influenced. Almost 1-in-10 respondents (9%) said they're not at all influenced by film adverts and previews of films.

3.3.5 Preferred day to go to the cinema

The respondents were also asked to indicate the days they prefer attend the cinema.

Figure 13: Preferred day to visit the cinema



The findings reveal that most respondents (54%) prefer attending the cinema on Saturdays and 19% said they prefer any day 'if there's something good to watch'. Some 11% said they prefer weekdays, while 10% prefer public holidays and 5% like going on Sundays.

3.3.6 Other activities done upon visiting a cinema

Adults were asked to mention other activities they participate in when they visit the cinema.

Table 5: Other activities done upon visiting cinemas

Other activities participated in upon visiting the cinema	Percentage (%)
Eat at a restaurant	33.90
Go for a drink	22.08
Go shopping	17.74
Go to *Shisanyama*	3.21
I only go to watch films	9.12
Play games at an arcade	11.25
All of the above	1.92
Other	0.78

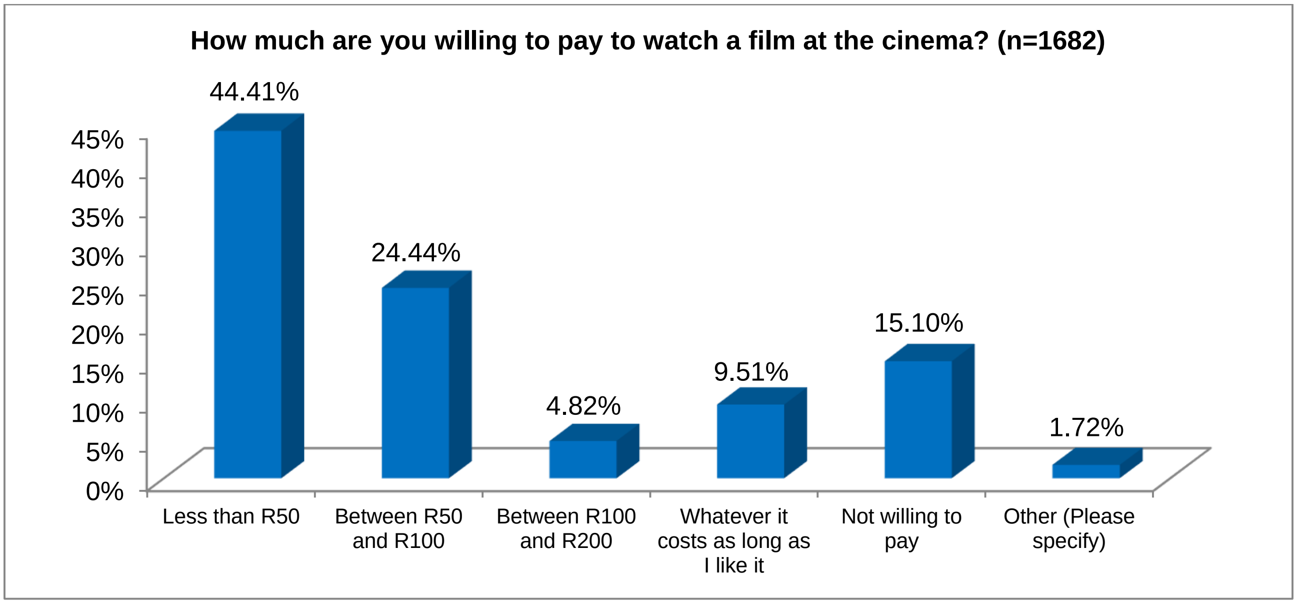
A larger proportion of respondents (34%) said they visit a restaurant followed by 22% who said they go for a drink, while 18% indicated going shopping. Around 11% specified playing games at an arcade and 9% indicated going to watch films and doing nothing else. A smaller portion revealed going to *Shisanyama*, and doing every activity on the list (3% and 2%, respectively). Understanding other activities participated in upon visiting the cinema provides insights into the opportunities available in terms of providing film-goers a full entertainment package.

3.4 Spending pattern

3.4.1 Willing price to watch a film at the cinema

Respondents were asked to indicate the price they are willing to pay to view a film at the cinema.

Figure 14: Willing price to watch a film at a cinema

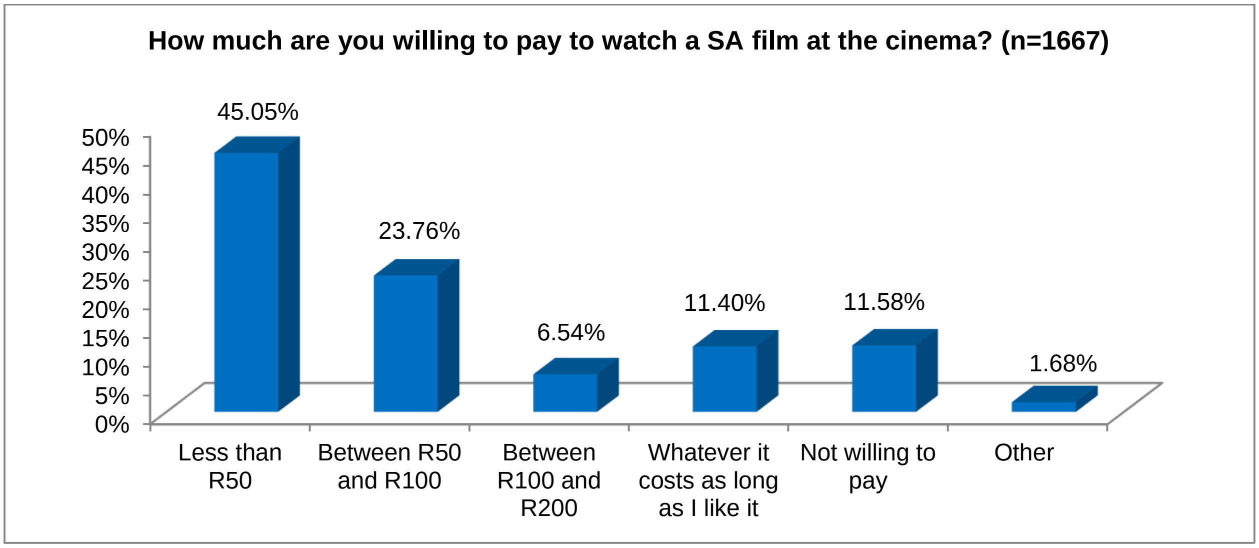


The findings reveal that a larger proportion (44%) of respondents are willing to pay less than R50, followed by 24% who indicated R50-R100; around 15% said they aren't willing to pay anything and 10% said 'whatever it costs as long as they like the film'. About 7% said R100-R200 and 2% provided other answers such as they are willing to pay between R15-R25.

3.4.2 Willing price to watch a SA film

Respondents were asked to indicate how much they are willing to pay for a SA film. The findings are presented in figure 15, below.

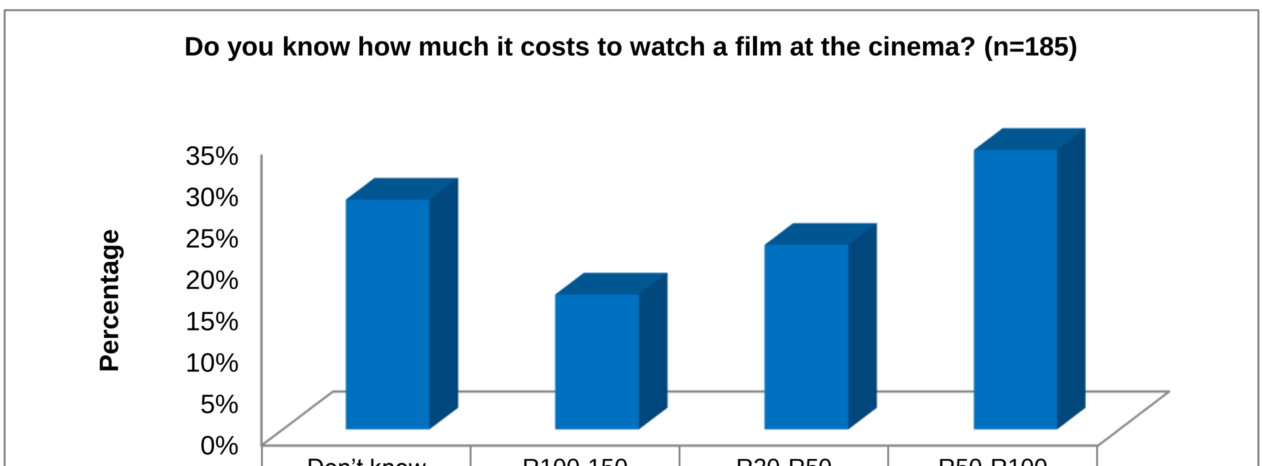
Figure 15: Willing price to watch a SA film



The findings reveal that a larger proportion (45%) of respondents are willing to pay less than R50, followed by 24% who indicated R50-R100; around 12% said they aren't willing to pay anything and 11% said they are willing to pay 'whatever it costs as long as they like the film'. About 7% said R100-R200 and 1% provided other answers such as they are willing to pay between R15-R25.

3.4.3 Costs associated with watching a film at the cinema

Figure 16: Costs associated with a full cinema experience



	Don't know	R100-150	R20-R50	R50-R100
Percentage	27.72%	16.30%	22.28%	33.70%

A larger proportion of the respondents (34%) said it costs them between R50-R100 for the full film experience watch a film, followed by 28% who said they don't know, and 22% who indicated R20-R50. A small proportion of 16% said it costs them between R100-R150.

3.4.4 Other entertainment activities of enjoyment

Respondents were asked to indicate other entertainment activities they engage in and spend their disposable income. Multiple entries were possible with this question.

Table 6: Other entertainment activities where money is spent

Other entertainment activities where pocket money or disposable income is spent	Count	Percentage (%)
Attending social gatherings (Weddings, birthdays, baby showers, and so on)	734	8.01
Drinking alcoholic or non-alcoholic beverages at home	473	5.16
Drinking alcoholic beverages at *Shebeens*, taverns, bars and pubs	260	2.84
Clubbing	329	3.59
Going to a *Shisanyama*	408	4.45
Going to live performances (music concerts, theatres, comedy shows, for example)	482	5.26
Going to restaurants/coffee shops	523	5.71
Going to the beach	613	6.69
Going to the gym	470	5.13
Going to special events (Wine tasting and racing events, for instance)	238	2.60
Going to sporting events	407	4.44
Having a braai	814	8.88
Music	1050	11.46
Outdoor exercising (Walking, running, cycling and hiking, for exmaple)	454	4.95
Books, magazines, journals, and so on	724	7.90
Socialising with friends and family at home	799	8.72
Travelling (touring SA and/or abroad)	364	3.97
Other	22	0.24
Total	**9164**	**100.00**

Besides movies, most respondents said they spent their pocket money or disposable income on music, having a braai, socialising with friends and family at home, attending social gatherings (weddings, birthdays and baby showers, for example), books, magazines, journals, going to the beach, going to restaurants/coffee shops, attending live performances (music concerts, theatres, comedy shows), drinking alcoholic or non-alcoholic beverages, and going to gym.

3.5 General perception and attitude towards SA movies

3.5.1 Visual, story and performance

Respondents were asked to rate SA films in a number of contexts.

Table 7: Rating of SA films

	RATING							
Context of SA films	**Excellent %**	**Very Good %**	**Good %**	**Fair %**	**Bad %**	**Very Bad %**	**Don't know %**	**Total**
Visuals/Cinematography	12.32	22.69	34.68	18.71	2.18	1.12	8.29	100%
Storylines	11.85	23.03	35.39	19.80	3.91	0.79	5.22	100%
Actors/Actresses Performances	16.79	24.99	33.63	16.17	2.86	1.12	4.44	100%
Film characters	13.30	24.19	33.73	20.20	3.20	0.67	4.71	100%
Technical production quality	10.65	19.67	34.61	22.60	4.96	1.30	6.20	100%
Historical and political content	14.91	19.00	31.89	22.20	4.48	1.63	5.89	100%
Local content: Languages & culture	18.06	21.99	30.64	18.28	4.82	1.39	4.82	100%
Local content: Natural Environment & Wildlife	14.80	18.59	29.48	22.84	5.70	1.95	6.64	100%
Availability in other official languages beside English	15.08	20.20	29.94	18.92	7.01	2.78	6.07	100%
Entertainment Value	17.43	22.29	32.46	17.60	4.19	1.40	4.64	100%

Upon aggregating the 'excellent', 'very good' and 'good' ratings, the ratings of the context of SA films were as follows:

- Actors and actresses performance – 75%
- Entertainment value – 72%
- Film characters – 71%
- Local content representative of SA languages and culture – 71%
- Storylines – 70%
- Visuals/Cinematography – 70%
- Historical and political content – 66%
- Availability in other official languages beside English – 65%
- Technical production quality – 65%; and
- Local content representative of SA Natural Environment and Wildlife – 63%.

The aggregated scores illustrates that, generally, SA films are viewed favourably by respondents.

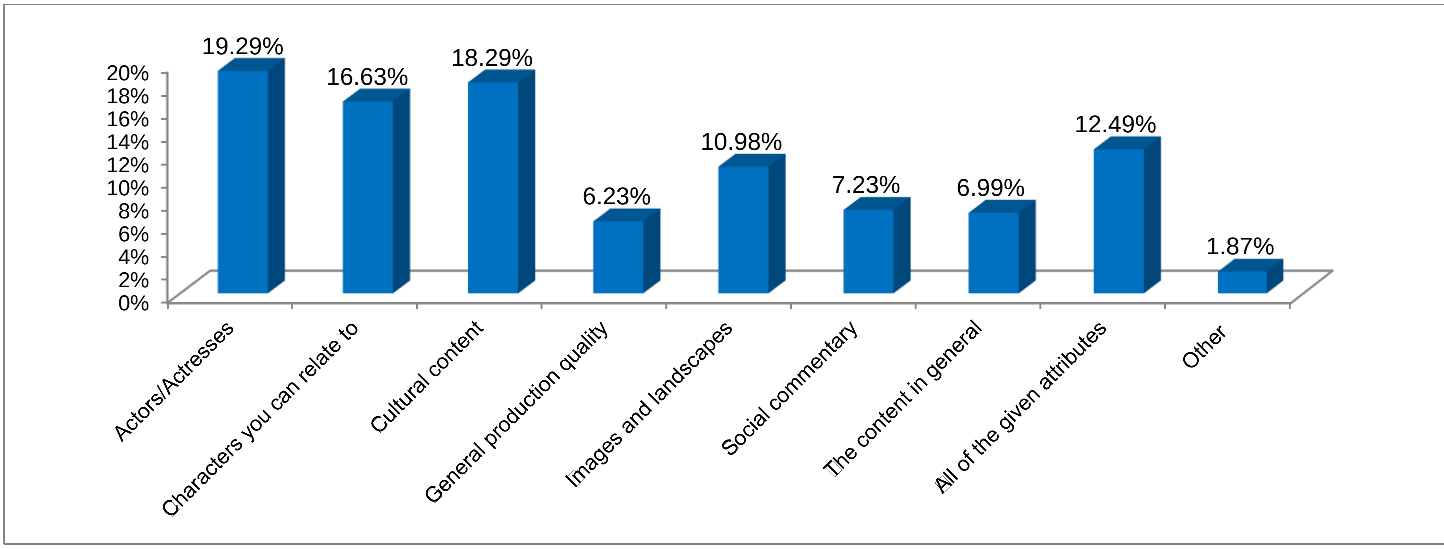
3.5.2 Uniqueness of SA films

To gain an in-depth understanding on the general perceptions and attitude towards SA film and video products, respondents were asked to indicate what they think are unique elements of SA films. This question was put to distribution channels and international stakeholders to obtain a sense of what's unique about South African movies. In the opinion of the respondents, the uniqueness of SA films are social commentary, followed by cultural content, characters they can be related to, images and landscapes, content, general production and actors/actresses.

3.5.3 Likable attributes of SA films

Respondents were asked to indicate what they find most likable about SA films.

Figure 17: Most likable attributes of SA films

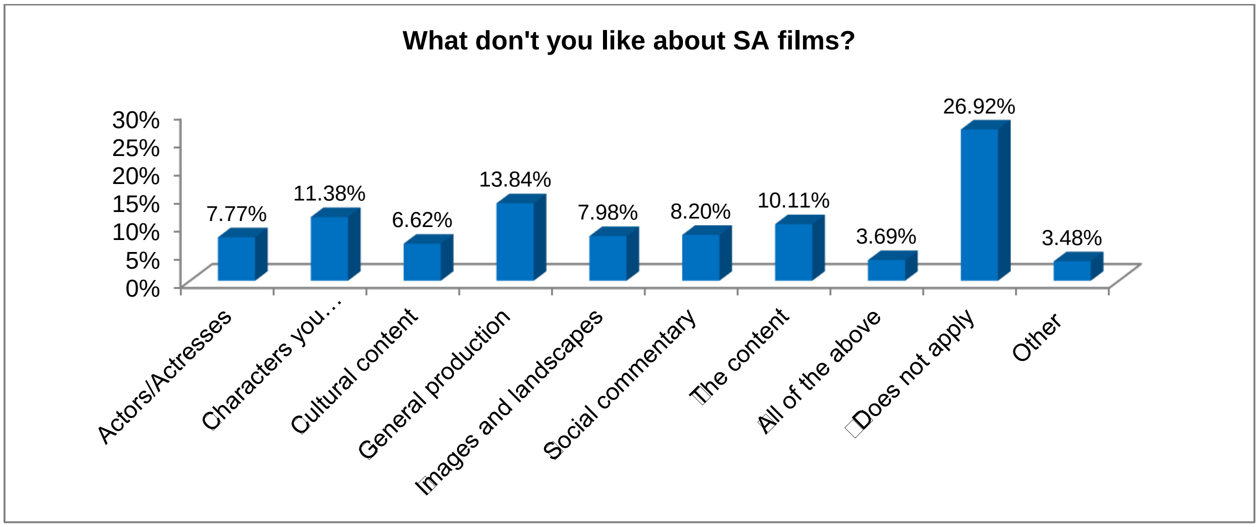


In terms of what's likeable about SA films, a large proportion of respondents (19%) said they like the actors/actresses, followed by 18% who said they prefer the cultural content of SA films; 17% said they enjoy characters they can relate to and 12% said they like everything about SA films. About 11% of the respondents said images and landscapes, 7% said social commentary and another 7% said content, in general. A small proportion (2%) provided other reasons, such as not wanting to comment because they don't watch SA films, while others said they don't like anything about SA films.

3.5.4 Unlikable factors about SA films

Respondents were asked to indicate what they don't like about SA films.

Figure 18: Unlikable attributes of SA films



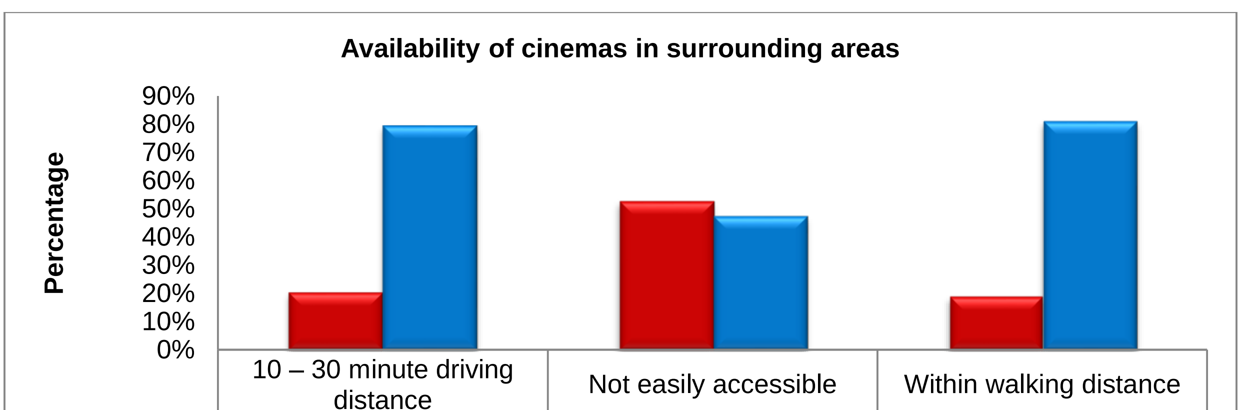
The results show that a larger proportion of the respondents (27%) said the question didn't apply to them, in other words they like SA films. Around 14% indicated that they don't like the general production, followed by 11% who said they can't relate to the characters; 10% said they don't like the content, 8% said they don't like the social commentary, while another 8% said they dislike the images and landscapes; 4% indicated all of the above and 3% of respondents had other reasons.

3.6 Access to cinemas

3.6.1 Availability of cinemas in surrounding areas

Availability of cinemas in surrounding areas was determined by considering a number of determinants (contributing factors).

Figure 19: Availability of cinemas in surrounding areas



	10 – 30 minute driving distance	Not easily accessible	Within walking distance
Rural area	20.44%	52.55%	18.95%
Urban area	79.56%	47.45%	81.05%

Most respondents in urban areas indicated that the nearest available cinema is between 10 to 30 minutes driving distance, while only a few respondents in rural areas said the cinema is that driving distance away. This reflects that cinemas aren't readily available in rural areas compared to urban areas. It's also interesting that almost half the respondents in urban areas said that cinemas aren't easily accessible. Not surprising, a small proportion (19%) in the rural areas indicated the cinema is walking distance away. In contrast, most of the respondents (81%) in urban areas indicated that the cinemas are within walking distance.

These findings were corroborated by distribution channels and international stakeholders who asserted that there are some factors which largely constrain attempts to make cinemas easily available and accessible. The most limiting factor identified by most respondents was the socio-economic factors (household income and employment, for example) which limit the inclination to attend cinemas. It becomes a challenge, economic-wise, to make cinemas widely available when there are high chances that those cinemas will attract a small audience.

3.6.2 Proximity to cinema

To gain an understanding of audiences' access to cinema, the respondents were asked to indicate how accessible the nearest cinema is from their place of residence.

Table 8: Proximity to cinema

Accessibility of nearest cinema	Count	Percentage (%)
Within walking distance	98	12.22
10-30 minutes driving distance	549	68.45
Not easily accessible	137	17.08
Other	18	2.24
Total	**802**	**100%**

The findings reveal that most respondents (68%) said they are located within 10-30 minutes driving distance, followed by 17% who don't have easy access; 12% are within walking distance and 2% indicated other reasons.

4. CATALOGUE OF DETAILED FINDINGS – ADULTS

4.1 Introduction

This section presents a catalogue of findings obtained from the analysis of adult respondents' results. The findings are divided into the following main themes:

- Profile of respondents;
- Content preferences;
- Spending patterns;
- General perceptions and attitude toward SA films and video; and
- Access to cinemas

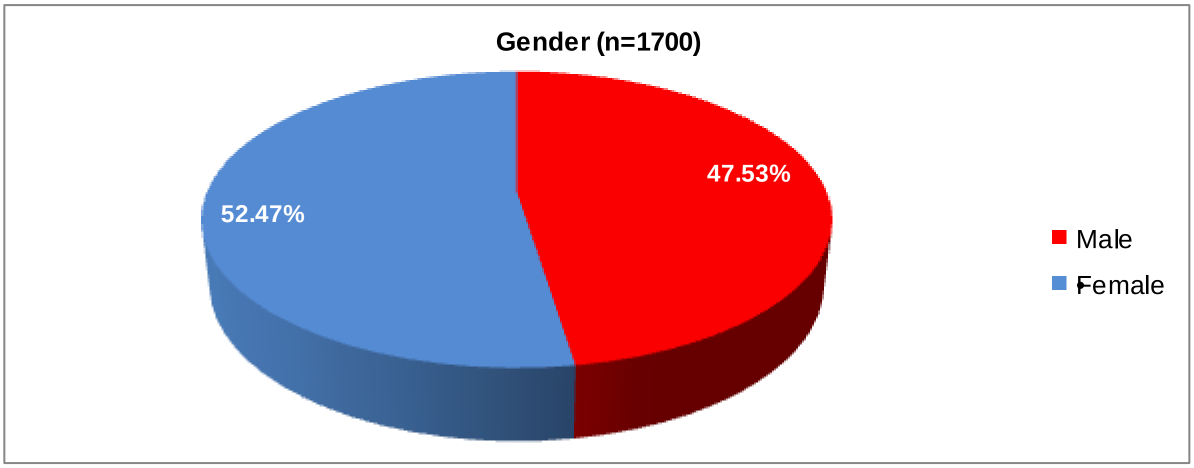
4.2 Profile of respondents

Respondents classified as adults were asked a series of questions to profile them in terms of their demographic and socio economic characteristics. An understanding of the profile of respondents is a critical initial step if the NFVF is to have an in-depth understanding of the SA film and video audience. An Audience Development Strategy (ADS) can only be developed if there's a clear understanding of the demographic characteristics and socio-economic status of the audience that consumes films and videos.

4.2.1 Gender

Respondents were asked to indicate their gender.

Figure 20: Gender



The findings show that 48% of the adults were male and 52% were female. The distribution of respondents by gender is noteworthy, as traditionally, it's believed that within households, females consume more film and video content than males, and are more likely to provide greater insights into the subject than males. While this is only an assumption and perception, it's nonetheless noteworthy. The male-to-female proportion observed in the respondents is consistent with the gender distribution of the population of SA where, on average, the population consists of 48.2% male and 51.8% female.

4.2.2 Age group

The findings obtained when the respondents were asked to indicate their age categories are shown in the table below.

Table 9: Age groups

Age category	Count	Percentage (%)
16-20	287	16.85
21-24	305	17.91
25-29	306	17.97
30–34	218	12.80
35-39	155	9.10
40-44	130	7.63
45-49	93	5.46
50-54	72	4.23
55-59	43	2.52
60-64	35	2.06
65+	59	3.46
Total	**1 703**	**100%**

The table illustrates the highest distribution of adults (36%) were between 21 and 29-years-old followed by 17% between 16-20 and 13% between 30-34 years of age. These results were confirmed by the Conference International Broadcasters Audience Research Studies' Media Research in Africa (2014) which found that age pre-determines viewership trends, as preference complexities exist for different age groups. For instance, older people viewership trends have been attributed to lack of time or interest. The research also uncovered that, generally, children consume more animated content, whereas the youth are more amenable to musical and romantic genres.

4.2.3 Province of residence

The table below shows respondents' province of residence.

Table 10: Province of residence

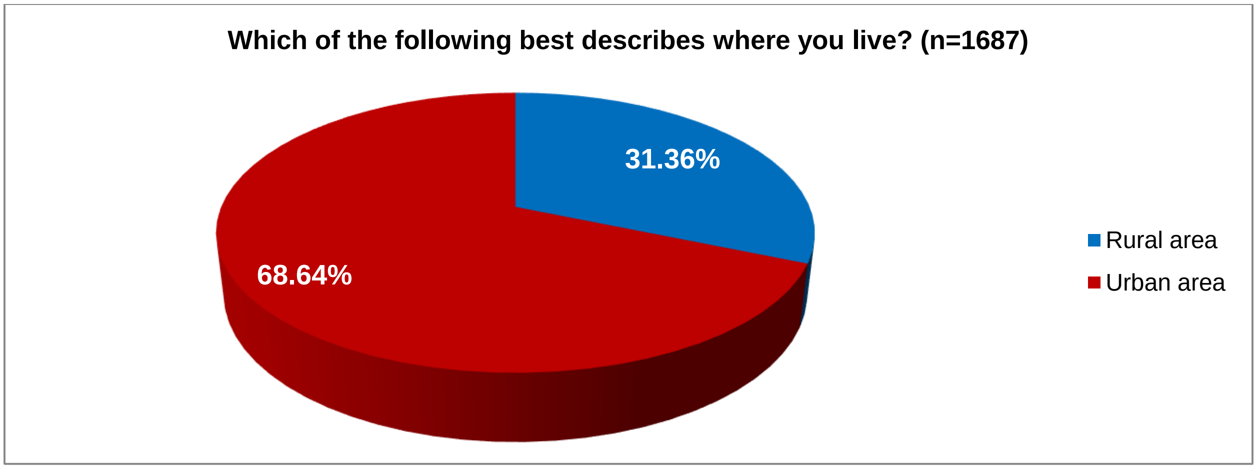
Province	Count	Percentage (%)
Eastern Cape	204	11.96
Free State	78	4.57
Gauteng	439	25.73
Kwazulu-Natal	317	18.58
Mpumalanga	131	7.68
Limpopo	196	11.49
North West Province	116	6.80
Northern Cape	34	1.99

Province	Count	Percentage (%)
Western Cape	191	11.20
Total	**1 706**	**100%**

The table above indicates that a greater proportion of respondents were from the Gauteng and Western Cape province, followed by respondents from KwaZulu-Natal (18.58%), Eastern Cape (11.96%) and Limpopo (11.49%).

Furthermore, respondents were asked to indicate where they reside.

Figure 21: Urban and Rural areas

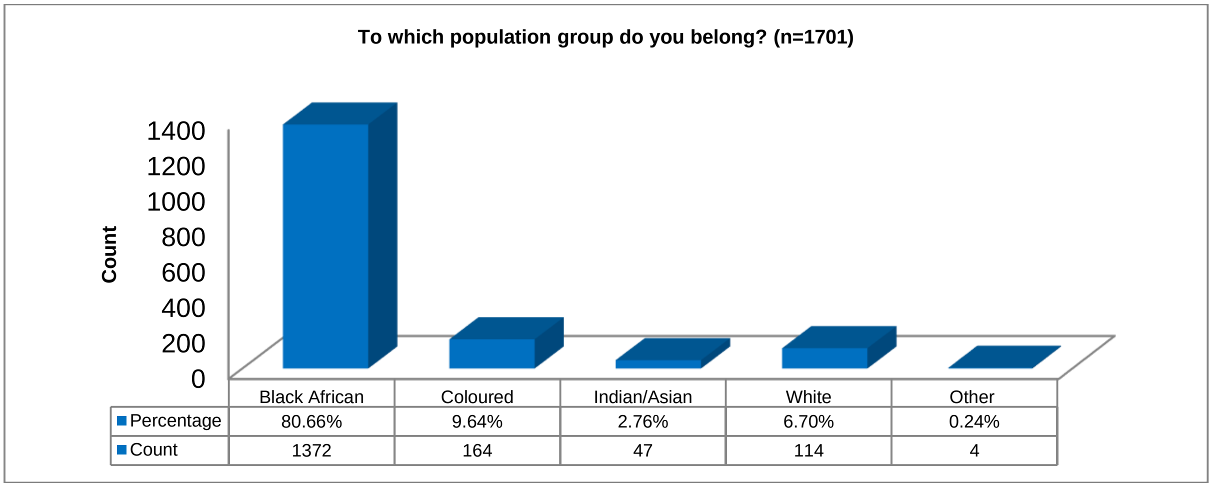


When asked where they reside, almost three quarters of the respondents (69%) lived in urban areas and 31% in rural areas. These results are important as lifestyle also impacts on film and video consumption. For example, consumers in urban areas have more access to film/video products and the availability of distribution channels and technology are more favorably tilted in urban areas' favour.

4.2.4 Population group

Respondents were asked to indicate their population group and the findings are shown in figure 22 below.

Figure 22: Population group



The findings revealed that most of the respondents (81%) who took part in the survey were Black Africans, followed by Coloured (9.6%), White (7%) and Indian/Asian (3%). This distribution is consistent with the national distribution of population groups in SA. According to StatsSA's 2013 mid-year population estimates for SA by population group, Black African constitute 79.8%, followed by Coloured (9.0%), White (8.7%) and Indian/Asian (2.5%).

4.2.5 Marital status

The findings on respondents' marital status are shown in table 11.

Table 11: Marital status

Marital status	Count	Percentage (%)
Co-habiting	79	4.72
Divorced	54	3.22
Married	408	24.36
Single	1 074	64.12
Widow/Widower	60	3.58
Total	**1 675**	**100%**

Most of the adults (64%) indicated that they were single, 24% said they were married and 5% said they were co-habiting. About 4% said there were widowed and the least, 3% said there were divorced.

4.2.6 Occupational and income status

The occupational status of the respondents is shown in table 12 below:

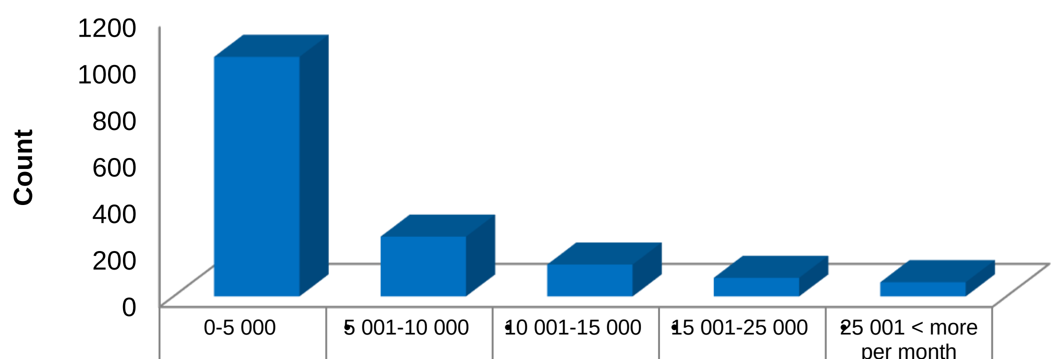
Table 12: Occupational status

Occupation status	Count	Percentage (%)
Employed	740	43.89
Employed and studying	128	7.59
Pensioner	72	4.27
Student	331	19.63
Studying and seeking employment	68	4.03
Unemployed	347	20.58
Total	**1 686**	**100%**

Almost half of the respondents (44%) were employed, followed by 21% who were unemployed; 20% were studying fulltime and 8% were studying and working simultaneously. The findings showed that 4% of respondents stated that they were studying and seeking employment, while a similar proportion was pensioners (4%). In terms of occupation status, the above results show that most respondents are economically active, and so, the chances are high that they have vested interest in film and video products.

The findings on the monthly income range are shown in the next figure. Most of the adults (66%) said they earned up to R5000, followed by 16% who said they were earning between R5001-R10000. Around 9% indicated they earned between R10001-R15000, while 5% said they were earning between R15001-R25000 and about 4% of respondents indicated that their monthly income was R25001 and above per month.

Figure 23: Income ranges



	0-5 000	5 001-10 000	10 001-15 000	15 001-25 000	25 001 < more per month
Percentage	65.77%	16.44%	8.77%	5.12%	3.90%
Count	1028	257	137	80	61

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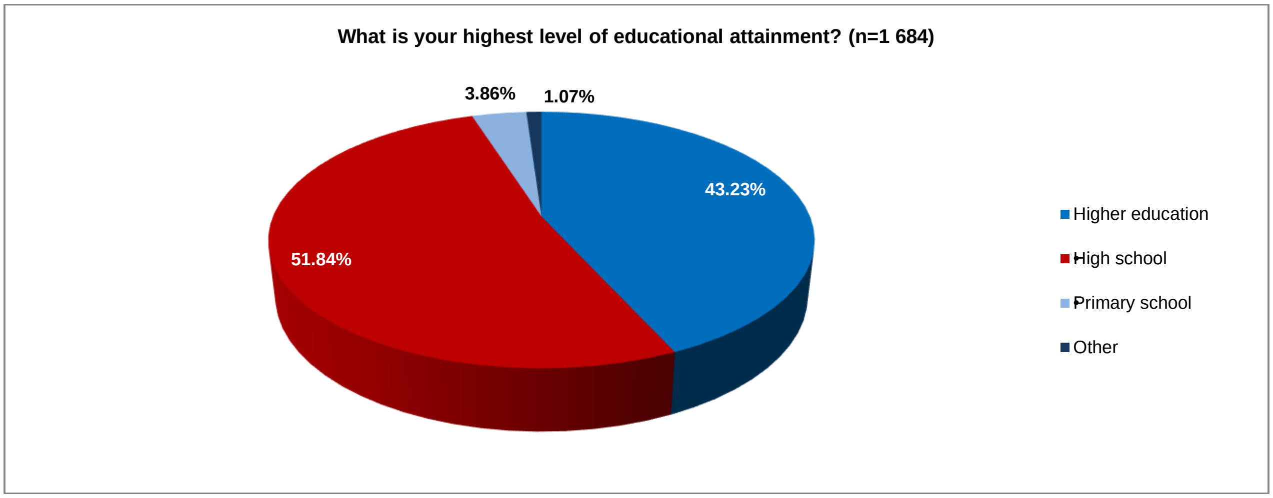
4.2.7 Level of education attained

The table below indicates the level of education attained by the respondents.

Figure 24: Level of education attained



More than half of the adults (52%) said they completed high school, followed by 43% who indicated that they had attained post high school qualifications such as certificates, diploma, degree, masters, and so on. About 4% had attained primary school level and the remaining 1% of the respondents indicated either IT certification, never went to school or that they hadn't completed their schooling.

4.2.8 Entertainment activities of enjoyment

For this question, respondents were asked to indicate entertainment activities they enjoy. Multiple entries were possible with this question.

Table 13: Entertainment activities of enjoyment

Entertainment activities enjoyed by respondents	Count	Percentage (%)
Attending social gatherings (e.g. Weddings, birthdays, baby showers, etc.)	734	5.35%
Drinking alcoholic or non-alcoholic beverages at home	473	3.45%
Drinking alcoholic beverages at *Shebeens*, taverns, bars and pubs	260	1.90%
Engaging in religious, faith-based/spiritual activities	563	4.11%
Clubbing	329	2.40%
Going to a *Shisanyama*	408	2.98%
Going to live performances (music concerts, theatres, comedy shows, etc.)	482	3.52%
Going to restaurants/coffee shops	523	3.82%
Going to the beach	613	4.47%
Going to cinemas	552	4.03%
Going to the gym	470	3.43%
Going to special events (e.g. Wine tasting, racing events, etc.)	238	1.74%
Watching soapies (e.g. Scandal, Isidingo, Muvhango, 7de Laan, Generations)	652	4.76%
Going to sporting events	407	2.97%

Entertainment activities enjoyed by respondents	Count	Percentage (%)
Having a braai	814	5.94%
Listening to music at home	1050	7.66%
Outdoor exercising (Walking, running, cycling, hiking, etc.)	454	3.31%
Reading (Books, magazines, journals, etc.)	724	5.28%
Socialising with friends and family at home	799	5.83%
Travelling (touring SA and/or abroad)	364	2.66%
Watching movies at home	735	5.36%
Watching News and current affair programmes	435	3.17%
Watching series (Grey• 's anatomy, Tropical Island of Treasure, Rhythm City)	412	3.01%
Watching sports on TV	519	3.79%
Watching religious/spiritual programmes on TV	370	2.70%
Watching whatever is on TV	306	2.23%
Other	22	0.16%
Total	**13 708**	**100%**

Considering the top five activities of entertainment enjoyment, the findings show that most of the respondents said they enjoy mostly listening to music at home, followed by having a braai, socialising with friends and family at home, attending social gatherings (for example weddings and birthdays) and watching movies at home.

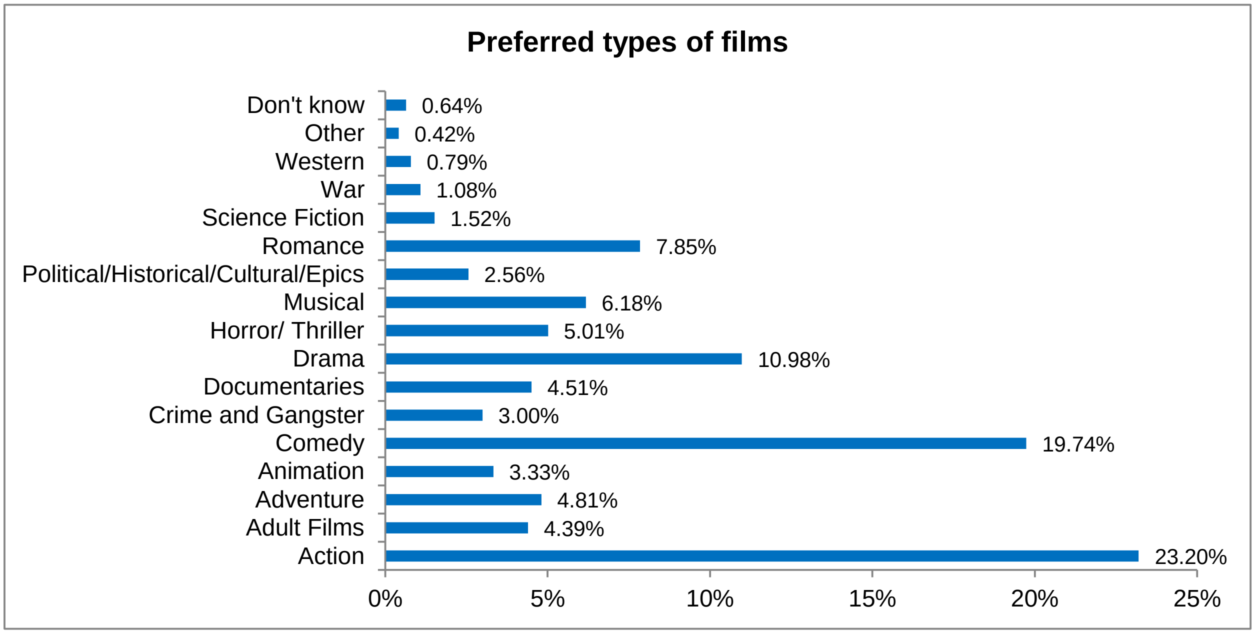
4.3 Content preferences

Respondents were asked a series of questions to investigate and gain insight into the audiences' habits on film and video viewership in relation to frequency of viewership, choice of content and how they watch. It's clear, both from the consumers and film industry players that audience insight is important in developing film products for the SA population. The questions were aimed to explore what influences audience choices of content to consume film and video products. This was done through investigating various aspects like preferred formats/genre, language, viewing platforms, and so on.

4.3.1 Preferred film types

Respondents were asked to indicate any three genres of their choice, ranking them in order of preferences.

Figure 25: Preferred types of films

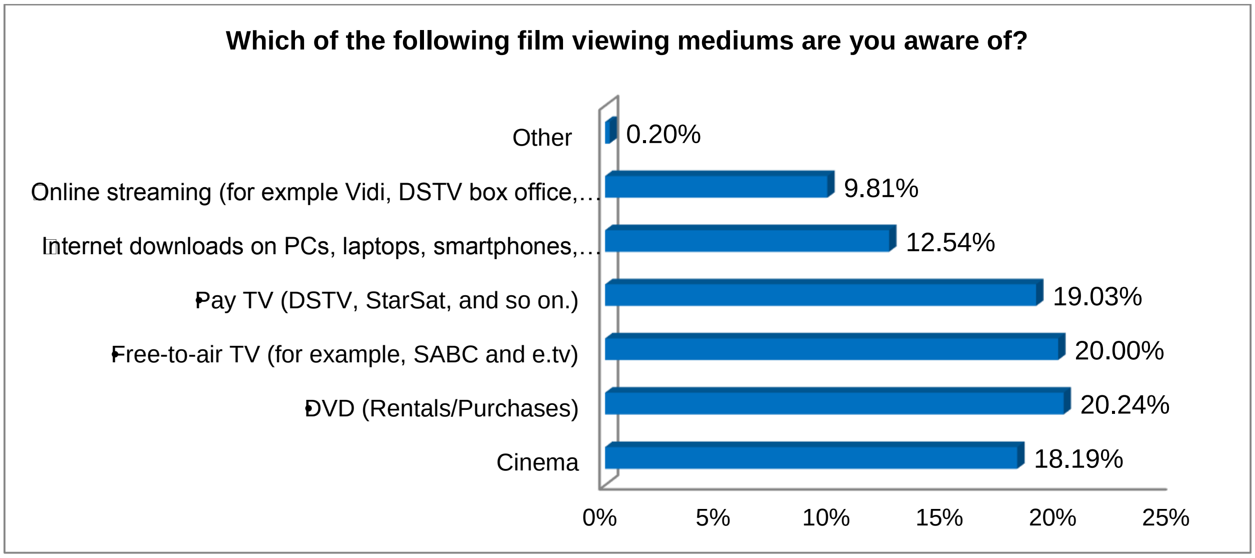


In terms of the top three preferred genres, the findings revealed that out of a number of film types, a greater proportion of adults preferred action, comedy, drama, followed by romance films.

4.3.2 Awareness of film viewing platforms

Respondents were asked to indicate the film and video viewing mediums they're aware of.

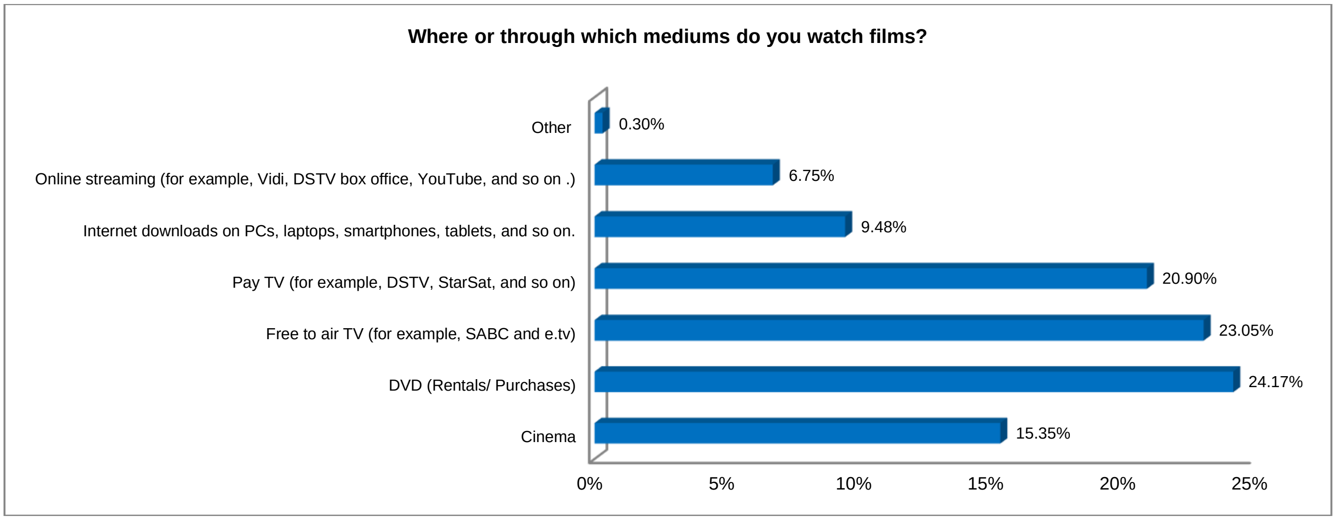
Figure 26: Awareness of film viewing platforms



The findings revealed that a larger proportion of adults (20%) were aware of DVD (rentals and/or purchases) and Free-to-air TV (20%) followed by adults who were aware of Pay TV and cinema (19% and 18% respectively). Fewer adults were aware of online streaming (10%) and internet downloads on PCs, laptops, smartphones and/or tablets (13%).

Respondents were further asked to indicate where or through which mediums they watch films.

Figure 27: Medium to watch films



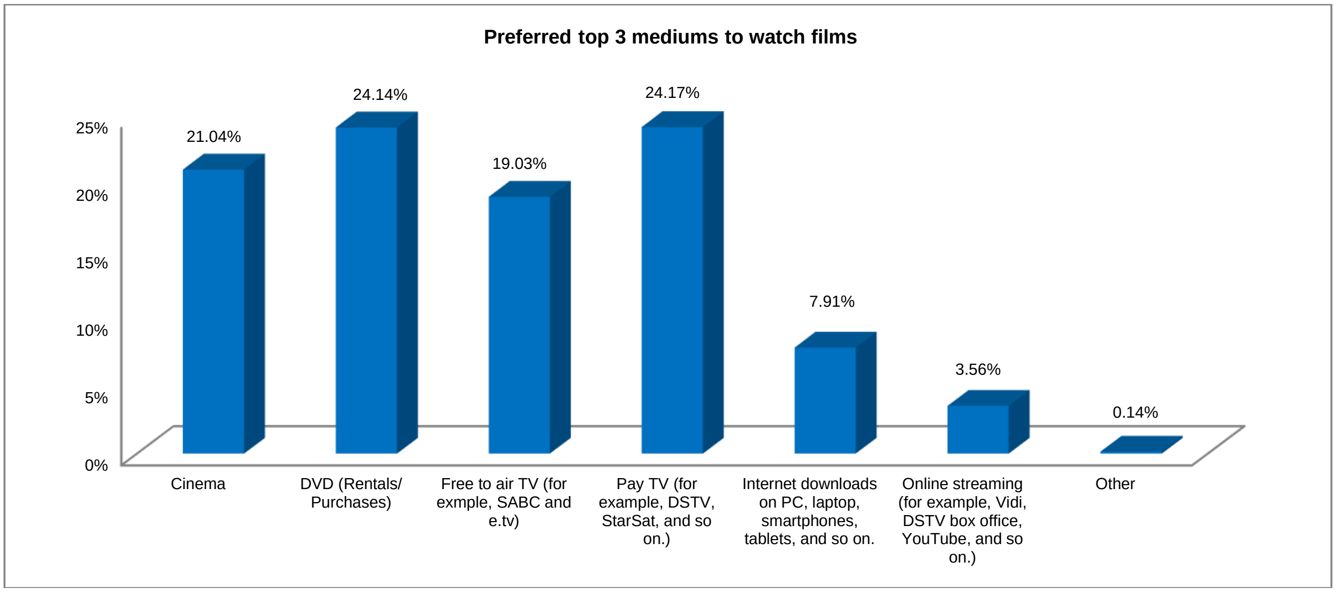
A large portion of adults watch films on DVDs, followed by Free-to-air TV, Pay TV and Cinema. The least well known film viewing platforms are online streaming and internet downloads on PCs, laptops, smartphones.

4.3.3 Most preferred medium

To fully understand viewing platform preferences, the respondents were further asked to indicate their most preferred viewing platform. The findings are illustrated in the next figure.

A larger proportion of adults (24%) indicated Pay TV and DVDs as the most preferred medium to watch films, followed by 21% who prefer cinema and 19% who prefer Free-to-air TV. Smaller proportions of about 4% and 8% said they prefer online streaming and internet downloading, respectively.

Figure 28: Preferred top three mediums to watch films



4.3.4 Preferred language

Respondents were also asked to indicate any other language, besides English, which they would prefer to watch films.

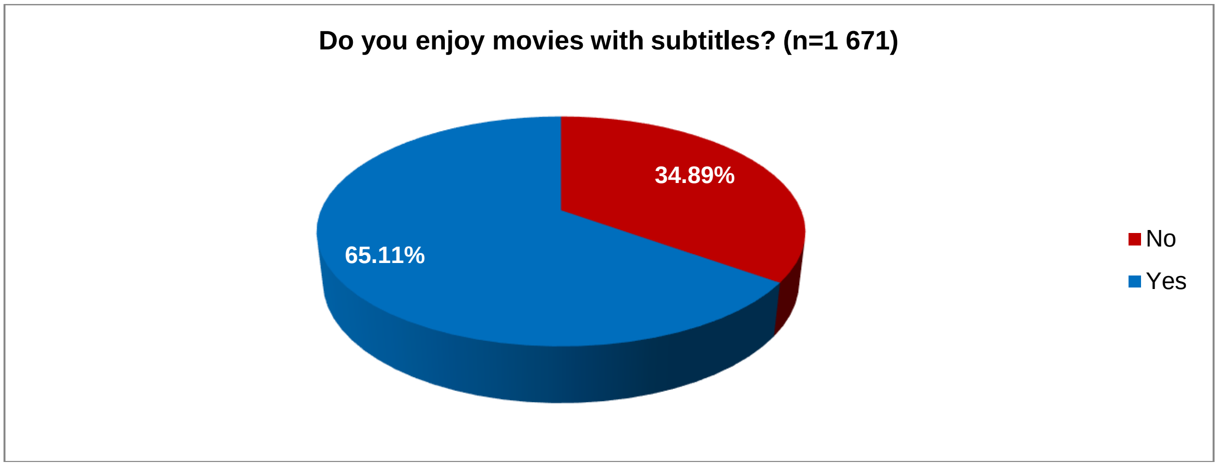
Table 14: Preferred language

Language	Count	Percentage (%)
Afrikaans	319	18.81
Isindebele	68	4.01
IsiXhosa	246	14.50
IsiZulu	453	26.71
Sesotho	84	4.95
Sepedi	136	8.02
Setswana	123	7.25
SiSwati	59	3.48
Tshivenda	36	2.12
XiTsonga	32	1.89
None	99	5.84
Other	41	2.42
Total	**1 696**	**100%**

The findings revealed that a greater proportion of the adults (27%) indicated that they prefer isiZulu as a language to watch films, besides English, followed by Afrikaans (19%) and isiXhosa (14%). Other languages preferred are Sepedi (8%) and Setswana (7%) with around 5% indicating none of the languages listed.

Respondents were further asked if they would enjoy movies with subtitles. The findings are shown in the next figure.

Figure 29: Enjoyment of films with subtitles



The findings revealed that most of the adults (65%) said they enjoy films with subtitles while 35% said they don't. Technological advancement has made films more accessible through a number of media and from various locations. For example, subtitles can assist people to follow, comprehend and enjoy a film even in loud public spaces, such as while travelling by bus, taxi or train.

4.3.5 Iconic symbols to endear SA films

For the purposes of distinguishing SA films from Hollywood films, for example, respondents were asked to indicate any artifacts, symbols/iconic symbols, popular phrases and landmarks that can serve to endear SA film audiences. The findings are shown in following table.

Table 15: Iconic symbols to endear SA films

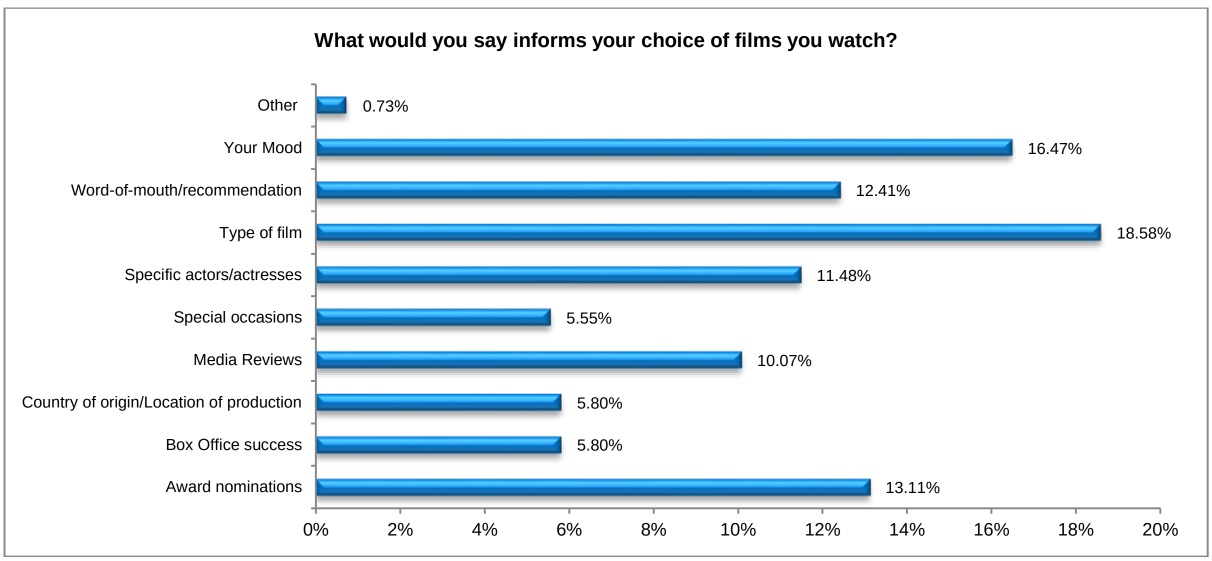
Iconic symbols, landmarks, artefacts or popular phrases	Count	Percentage (%)
Brightly-coloured Bo-Kaap houses	59	3.51
Cape Minstrels	18	1.07
Cape Point	76	4.52
Cape Sightseeing Bus	9	0.54
Gumboot dance	103	6.12
Hector Peterson photo	60	3.57
Images of Soweto	90	5.35
Images of the 'Big Five'	127	7.55
Nelson Mandela Bridge in Newtown	218	12.96
Pantsula dance	60	3.57
Phrases like *lekker, eish, wena*	74	4.40
SA currency	75	4.46
SA musical icons – Hugh Masekela, Miriam Makeba & Brenda Fassie	76	4.52
Statue of Nelson Mandela at the Union Building	144	8.56

Iconic symbols, landmarks, artefacts or popular phrases	Count	Percentage (%)
Table Mountain	161	9.57
The 'Cape Flats smile'	15	0.89
The SA flag	180	10.70
The SA National Anthem	52	3.09
Vuvuzela	38	2.26
Wine estates	16	0.95
Other	31	1.84
Total	**1 682**	**100%**

The findings revealed that a larger proportion of adults (13%) indicated that the Nelson Mandela Bridge in Newton can be used to distinguish films and serve to endear SA films to the audience, followed by 11% who said the SA flag and 10% who said Table Mountain. Smaller proportions of adults mentioned other iconic symbols, landmarks, artefacts and phrases as shown in the table.

To explore audiences' content preferences, the respondents were asked to indicate what informs their choice of film and video products.

Figure 30: Factors informing choice of films



The findings revealed that there are a number of factors that inform audiences' choice. A bigger proportion of the adults (19%) said that it's the type of the film (for example the genre, format, quality and storylines that impact their choice. On the other hand, 17% of adults indicated that their mood informs their choice, and 13% said award nominations. What these results clearly show is there are several factors that inform audiences in making film choices. Knowing these factors is key in an audience development strategy.

4.3.6 Other activities done while watching films

Respondents were asked to indicate other activities they enjoy doing while watching films. The findings are presented in the next table.

Table 16: Other activities enjoyed while watching films

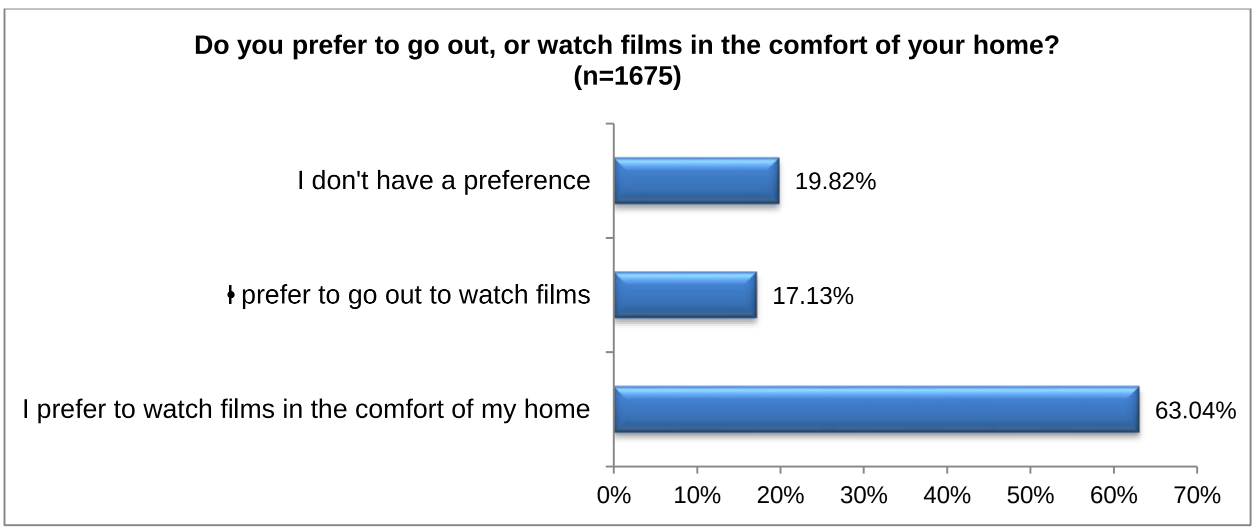
Other activities enjoyed while watching films	Count	Percentage (%)
Eating	829	30.66%
Having drinks	899	33.25%
Nothing	310	11.46%
Socialise with family/friends	641	23.71%
Other	25	0.92%

Most adults said they enjoy eating and having drinks while watching films, while others enjoy films as a socialising tool with family and friends. These dynamics are worth consideration when designing ADS. For example Ster-Kinekor and Hunters have launched an on-screen and real time activation for Hunters fans at cinemas featuring films with an age restriction of over 18. As such, this partnership integrates social activities like drinking alcohol and film consumption.

4.3.7 Preferred place of viewing films

Respondents were asked to indicate their preferred place of film consumption.

Figure 31: Preferred place for watching films



The findings show that most adults (63%) said they prefer watching films in the comfort of their homes while 20% didn't have a preference, meaning to say that they can watch films anywhere. A portion of 17% said they prefer to go out to watch films.

Respondents were further asked to indicate how they usually learn or hear about films.

Table 17: Means of learning or hearing about films

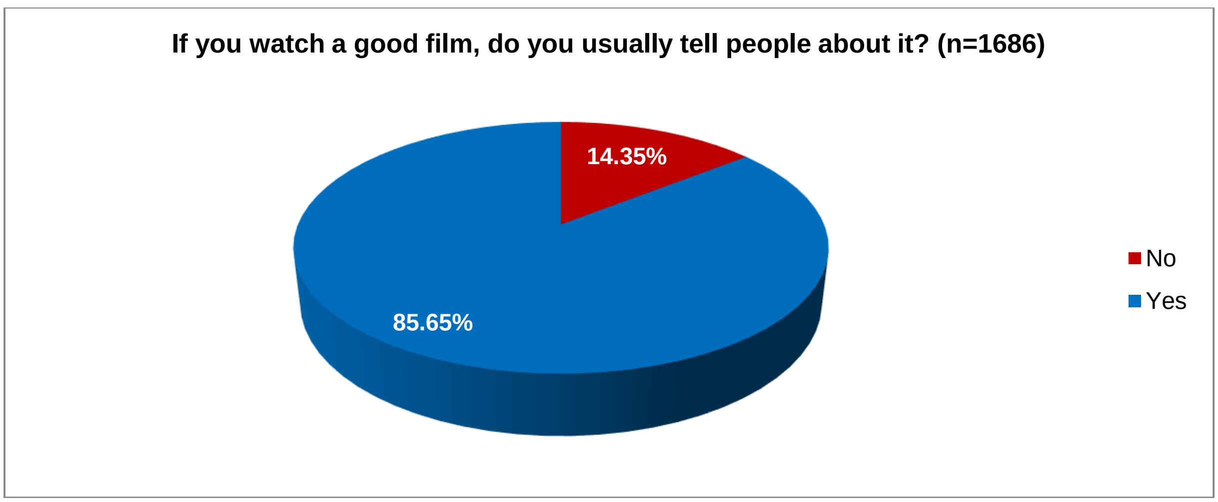
Means of learning or hearing about a films	Count	Percentage (%)
Through internet reviews	461	13.21
Press reviews (Newspapers/Magazines)	539	15.44
Advertisement on billboards	371	10.63
Advertisement on radio	403	11.55
Through social media (Twitter & Facebook, for example)	530	15.19
Advertisements on TV	1125	32.23
Other	61	1.75
Total	**3 490**	**100%**

A larger proportion of the adults (32%) said that they learn about a movie from advertisements on TV, followed by 15% who said from press reviews and an equal proportion of 15% who said they were exposed to them through social media. Other proportions of adults indicated Internet reviews (13%) advertisement on radio (12%) and billboards (11%). These findings can help film proprietors to identify the effective channels through which they can reach a larger population and promote the consumption of locally produced films.

4.3.8 Telling other people

Respondents were further asked whether they inform others about the films they watch.

Figure 32: Telling others about a film



The findings show that the majority (86%) of the adults said they tell other people if they learn or watch a good film and 14% don't. It's noteworthy to identify the networking of audiences to promote film consumption. The adults who said they inform others after learning or hearing about a good film, were further asked to indicate what means they use to do so. The findings revealed that most (65%) use word of mouth, followed by 25% who said they place a note/update about the movie on social networks and 9% said they post a review online.

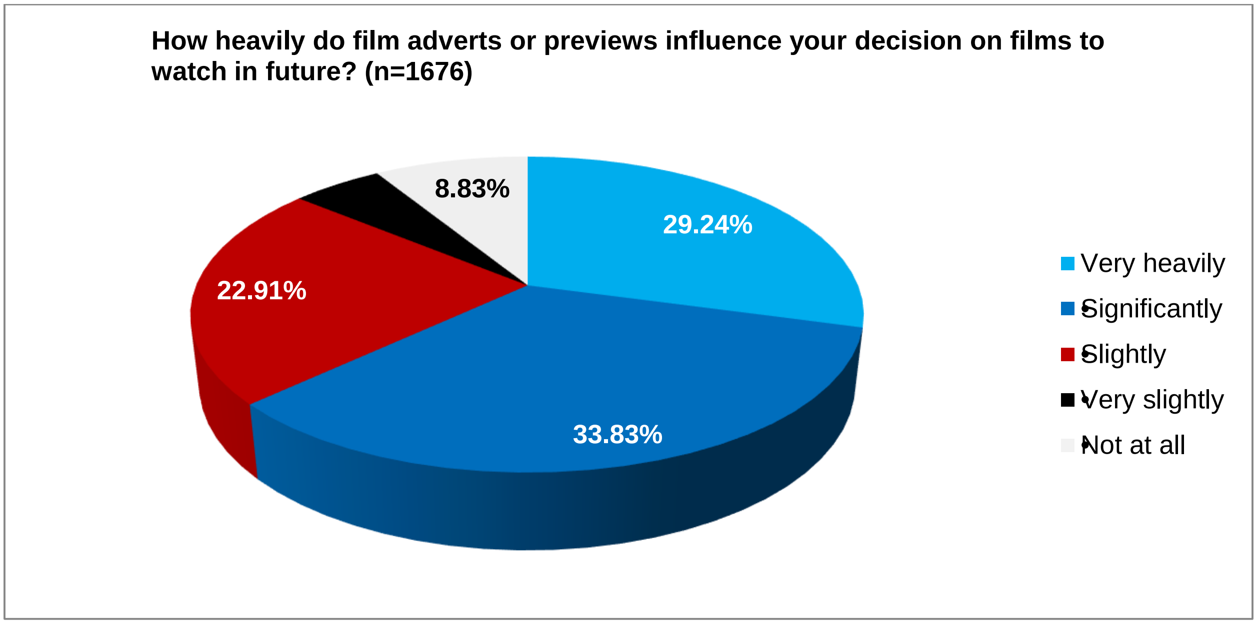
Table 18: Means of telling other people about a good film

Means of telling other people about a good film	Count	Percentage
By word of mouth	1 305	65.15%
Place a note about the movie on social media	501	25.01%
Post a review online	175	8.74%
Does not apply	11	0.55%
Other	11	0.55%

4.3.9 Influence of advertisements or previews

Furthermore, respondents were asked to indicate how heavily film adverts or previews influence their decision on films to watch in the future.

Figure 33: Influence of adverts or previews



The findings show that a larger proportion of the adults (34%) said they are significantly influenced by film adverts and previews, followed by 29% who stated they're heavily influenced; 23% said they're slightly influenced and 5% said they're very slightly influenced. Almost 1-in-10 respondents (9%) said they're not at all influenced by film adverts nor previews of films.

Moreover, respondents were probed where SA films should be advertised/publicised to reach the largest audience. The results are shown in table 10.

Table 19: Place or medium to advertise or publicise SA films

Place or medium to advertise or publicise SA films	Count	Percentage (%)
At sport events (soccer matches – especially Soweto derbies, rugby matches, cricket matches, and so on)	146	8.64
On billboards – especially on highways leading to townships	118	6.99
On radio	141	8.35
On TV	619	36.65
Advertise on street poles	36	2.13
All of the above mentioned places/media	629	37.24
Total	**1 689**	**100**

The findings revealed that a bigger proportion of adults (37%) indicated that all mediums should be utilised to advertise SA films, and an equal proportion of 37% said TV should be used, followed by 9% who opted for sports events. The results also revealed that 8% of respondents indicated radio as the medium to be utilised while 7% believed billboards should be the medium. Thereby, the findings illustrate that it's important to consider different channels of advertising to reach and access different targets or intended audiences.

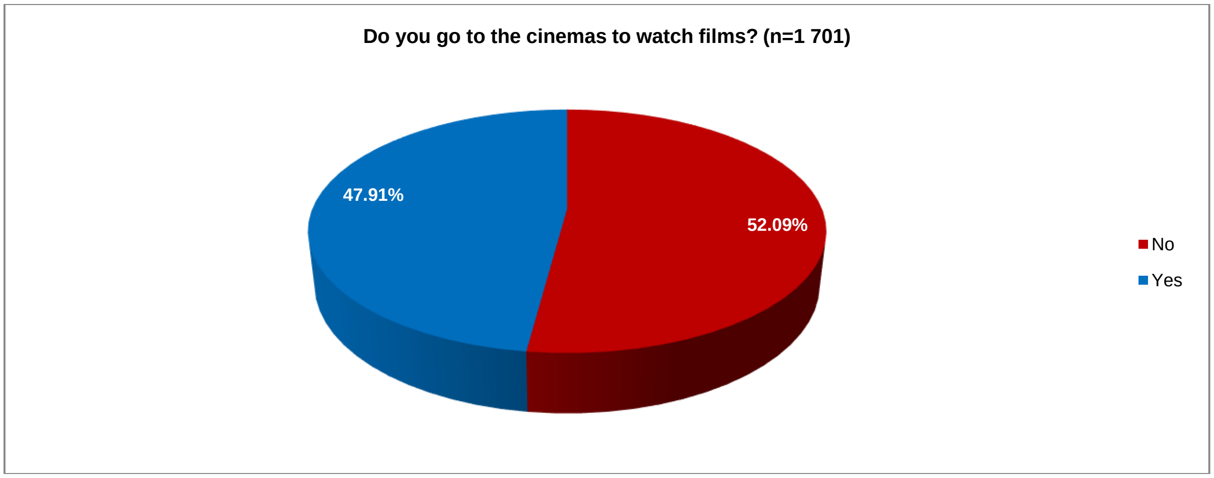
4.4 Cinema

The primary objective of this section is to explore viewing platforms, gain knowledge on audience preferences, analyse cinema going behaviour and consumption patterns. It seeks to provide insights about cinemagoers and what motivates them to watch a film.

4.4.1 Cinema going

Respondents were asked whether they watch films at the cinema.

Figure 34: Cinema going

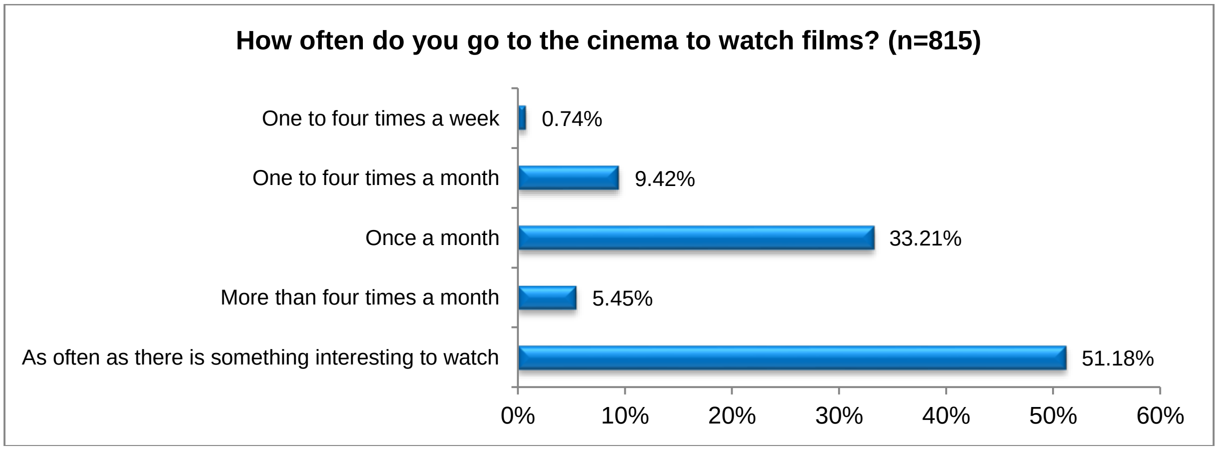


The results demonstrated that the majority of adults in the sample (52%) don't go the cinemas to watch films, while 48% of adults indicated that they do. This illustrates that there's large scope in terms of stimulating consumers to go to cinemas to watch films.

4.4.2 Frequency of cinema going

Adults who responded to going to the cinema were asked to indicate the frequency with which they do.

Figure 35: Frequency of going to a cinema



The findings show that most of the adults (51%) said they visit the cinema as often as there's something interesting to watch, followed by 33% who said they go once a month; 9% said they go one to four times a month, where 6% said they visit more than five times a month; a small proportion (1%) said they go to a cinema one to four times a week. It's important to identify the frequency at which adults visit the cinema as it helps in identifying the engaged audiences and assists in developing an audience research strategy.

4.4.3 Other activities done upon visiting a cinema

Adults were asked to mention other activities they do when they visit the cinema.

Table 20: Other activities done upon visiting cinemas

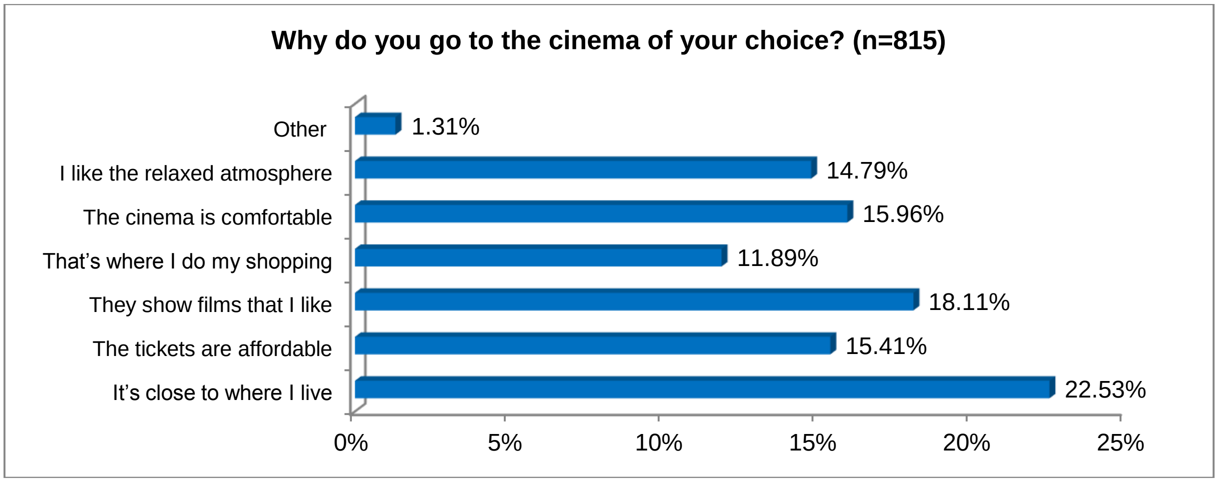
Other activities done upon visiting the cinema	Percentage (%)
Eat at a restaurant	33.90
Go for a drink	22.08
Go shopping	17.74
Go to Shisanyama	3.21
I only go to watch films	9.12
Play games at an arcade	11.25
All of the above	1.92
Other	0.78

A larger proportion of the respondents (34%) said they eat at a restaurant followed by 22% who said they would go for a drink, while 18% indicated going shopping. About 11% specified playing games at an arcade and 9% indicated going to watch films and doing nothing else. A smaller portion revealed going to *Shisanyama*, and doing every activity on the list (3% and 2%, respectively).

4.4.4 Reason for going to a cinema

The respondents were asked to indicate the reasons why they go to the cinema of their choice.

Figure 36: Reasons for going to a cinema



The findings revealed that a greater proportion of adults (23%) said they go to the cinema of their choice because it's close to where they live, followed by 18% who said go because they show the films they like, while 16% said it's because of the comfort and 15% expressed the relaxing atmosphere at the cinema.

4.4.5 Accessibility of nearest cinema from residence

Respondents were asked how accessible the nearest cinema is from their residence.

Table 21: Accessibility of cinema

Accessibility of nearest cinema	Count	Percentage (%)
Within walking distance	98	12.22
10-30 minute driving distance	549	68.45
Not easily accessible	137	17.08
Other	18	2.24
Total	**802**	**100%**

The findings reveal that most adults (69%) said they are located within 10-30 minutes driving distance, followed by 17% who said they don't have easy access; 12% indicated that they're within walking distance and 2% indicated other reasons.

The respondents were also asked to indicate the days they prefer to go to the cinema.

Table 22: Preferred days of going to cinema

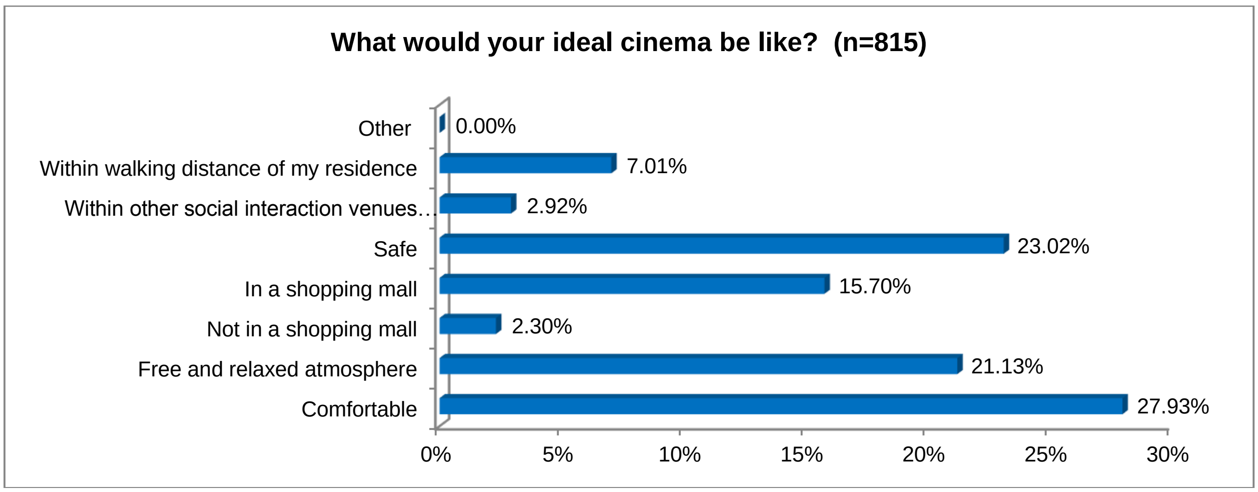
Days preferred going to the cinema	Count	Percentage (%)
Weekdays	109	13.51
Saturdays	461	57.13
Sundays	31	3.84
Public holidays	43	5.33
Any day there's a good film to watch	145	17.97
Doesn't apply	18	2.23
Total	**807**	**100%**

The findings reveal that most adults (57%) prefer going to the cinema on Saturdays and 18% said they prefer to go to the cinema any day if there's a good film to watch. About 14% of respondents said they prefer weekdays, while 5% prefer public holidays and 4% prefer Sundays.

4.4.6 Ideal cinema

Respondents were asked what they would view as an ideal cinema.

Figure 37: Ideal cinema

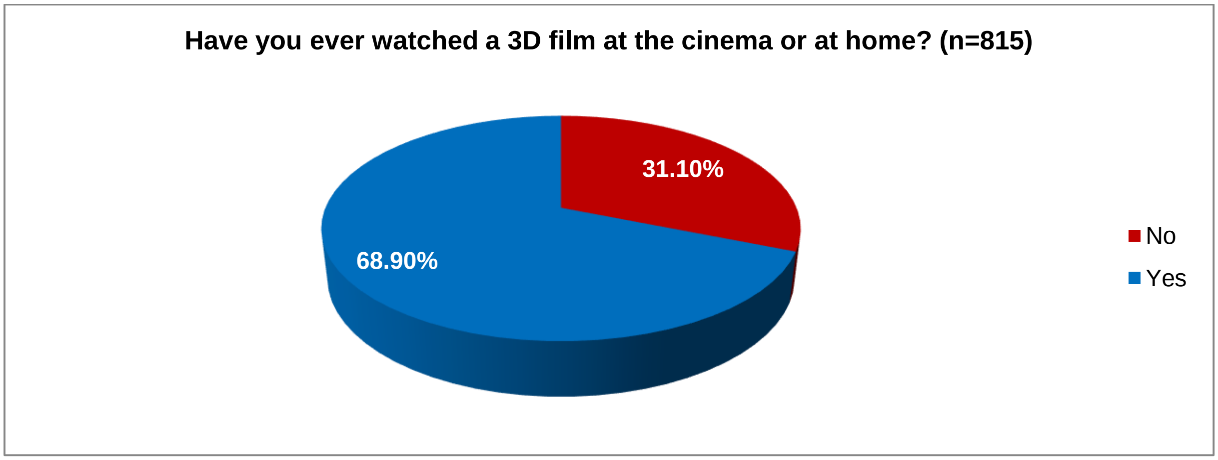


The findings show that a larger proportion of adults (28%) said an ideal cinema should be comfortable, followed by 23.02% who said it should be safe and 21% who said it should be free and have a relaxed atmosphere. This provides an insight into audiences' needs and is significant to consider when developing an ADS.

4.4.7 3D experience

The respondents were asked whether or not they had watched a 3D film at the cinema or at home.

Figure 38: Watching of 3D films



The findings show that majority of the adults (69%) said they are familiar with a 3D experience while 31% aren't. Respondents were further asked how they rate 3D compared to the usual standard (2D) display. The findings in the next table shows that most (55%) of the respondents rated 3D as excellent, followed by 34% who rated 3D as better compared to 2D. On the other hand, about 7% of adults had no opinion and some (3%) rated 3D as poor.

Table 23: Rating of 3D experience

Rating of 3D experience	Count	Percentage (%)
Better	188	34.06
Excellent	306	55.43
Poor	18	3.26
No Opinion	40	7.25
Total	**552**	**100%**

4.4.8 Affordability of 3D

Respondents were asked for their opinions on affordability of 3D films.

Table 24: Opinions on 3D affordability

Opinions on affordability of 3D	Count	Percentage (%)
No opinion	87	15.93
Not worth paying extra	49	8.97
Price is just right	263	46.34
Too expensive	150	27.47
Other	7	1.28
Total	**556**	**100%**

A greater proportion of adults (46%) rated 3D prices as being 'just right' followed by 27% who said it's too expensive, and 16% indicated that they had no opinion. Conversely, about 9% of the respondents said 3D films were not worth paying for.

Upon being probed whether they would recommend that, in future, films be made in 3D, most of the adults (67%) said yes, 8% said no, and 25% were undecided. A number of reasons were offered in terms of whether respondents would recommend 3D in future.

Table 25: Opinions on 3D regarding its full adoption in future

Opinions on 3D regarding its adoption in future	Count	Percentage (%)
It's cheaper to watch films in the standard (2D) format	47	8.77
The movie content remains the same whether you're watching on 3D or 2D formats	97	18.10
I am just so used to the standard (2D) format	39	7.28
The experience of watching a 3D movie is more exciting than that of the standard 2D	232	43.28
To keep up with the world's evolving technology	108	20.15
Other	13	2.43
Total	**536**	**100%**

A greater proportion of adults (43%) said that:

'The experience of watching a 3D film is more exciting than that of the standard (2D) format'.
'To keep up with the world's evolving technology', elicited an average response of 20%, followed by 18% who indicated that:
'The movie content remains the same, whether you're watching it on 3D or 2D formats'.
Findings also showed that 9% indicated that it's cheaper to watch films in 2D, while 7% indicated that they're:
'*Just used to 2D'* and 2% of the adults indicated other reasons such as:
'I always have a headache after watching a film in 3D', and:
'3D isn't good for my eye sight'.

There's significant room for films to be made in 3D in the future, with respondents rating the experience as more exciting; other factors such as technological advancement shall, most likely, make the 3D format a standardised requirement.

4.4.9 Likelihood of visiting cinemas

Respondents were asked whether they would continue to attend cinemas in the next six months.

Table 26: Likelihood of continuing to go to cinemas

Likelihood of continuing watching films at cinemas in the next six months	Count	Percentage (%)
Extremely likely	223	27.50
Likely	354	43.65
I don't know	163	20.10
Unlikely	32	3.95
Very Unlikely	39	4.81
Total	**811**	**100%**

A larger proportion of adults (44%) indicated that they're likely to continue attending the cinema, followed by 28% who said they were extremely likely to do so, and 20% said they weren't sure or didn't know. On the other hand, 4% said that they were unlikely to and 5% said that they were very unlikely to visit the cinema in the next six months.

The respondents were further asked to indicate the reasons for the likelihood of going or not visiting the cinema.

Table 27: Reasons for likelihood of going to cinemas

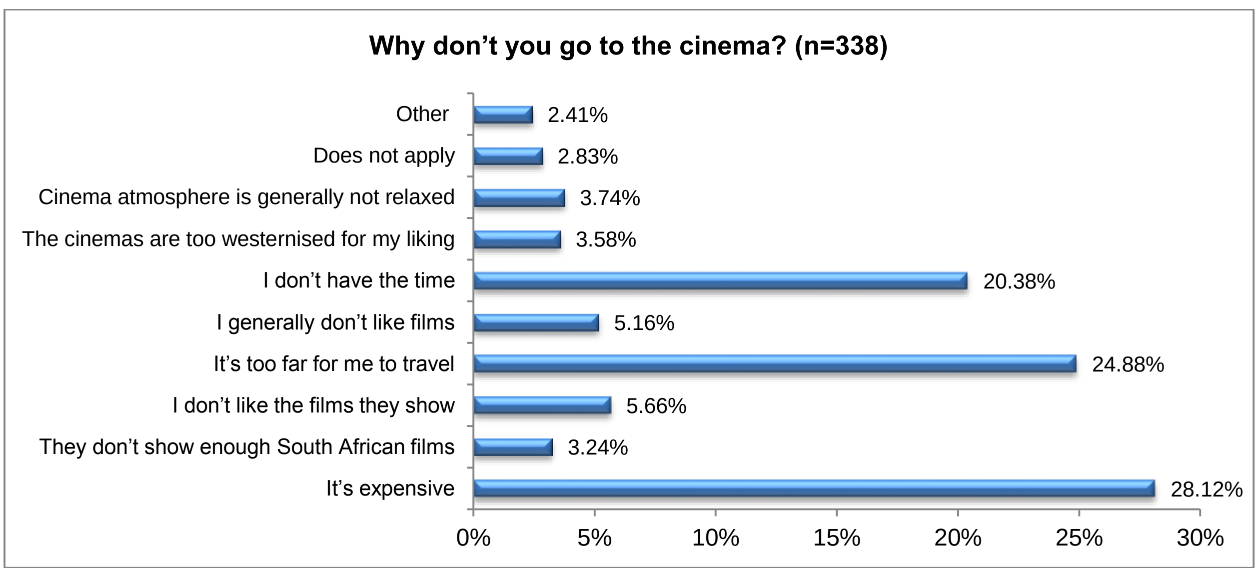
Reasons for going or not going to the cinema in the next six month	Count	Percentage (%)
Cannot say, as technology is evolving fast	149	18.96
I am just so used to it	208	26.46
I can choose what I want to watch	161	20.48
It's cheaper	35	4.45
It's more difficult to leave the house to watch films	40	5.09
No need to change	45	5.73
There are other technological platforms that better suit my lifestyle	49	6.23
Don't apply	91	11.58
Other	8	1.02
Total	**786**	**100%**

The responses illustrate that most adults would continue attend the cinema because they're just used to it, in other words, something they're highly familiar with.

4.4.10 Reasons for not going to cinemas

Respondents were asked to indicate the reasons for not going to the cinema.

Figure 39: Reasons for not going to cinemas



A larger proportion of adults (28%) said they don't go to the cinema because it's too expensive, 25% highlighted issues of access, saying the cinema is located far away from where they reside, followed by

21% who said they don't have time. About 6% mentioned they dislike the content while 5% said they generally dislike films; the responses highlight various reasons for not going to the cinema, where the main themes appear to revolve around the monetary value of films, having the time to go, and the distance to the cinema.

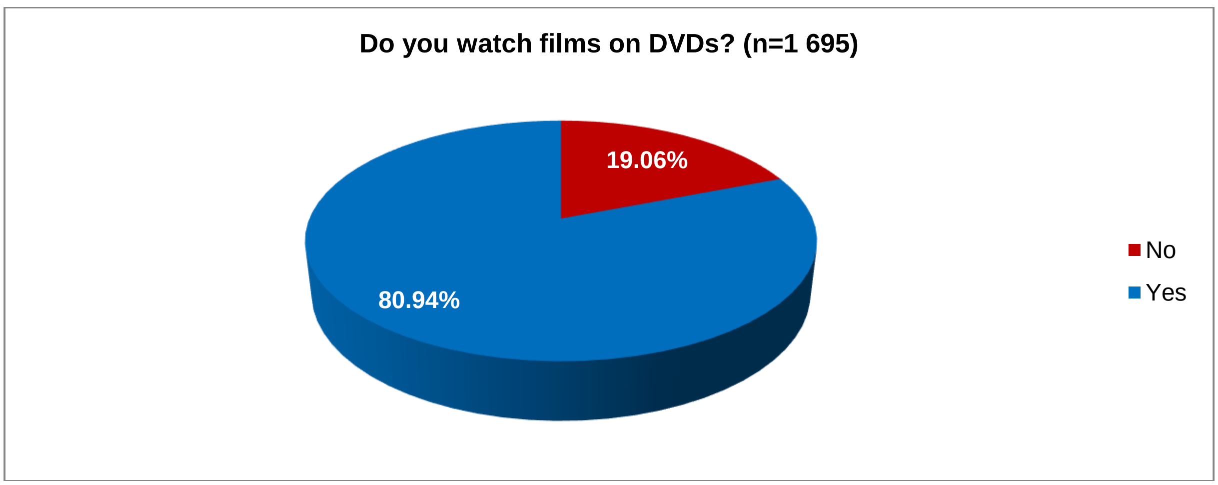
4.5 Digital Video Discs (DVDs)

SA has made significant strides in terms of film and video consumption – the industry has evolved from the use of VHS, with DVD arriving with its larger data capacity and better quality picture. Respondents were asked a number of questions in order to unearth their behaviours, feelings and perceptions regarding DVDs.

4.5.1 DVD viewership

Respondents were asked if they watch films on DVDs.

Figure 40: Viewership of films on DVDs



The survey revealed that most adults (81%) said they watch films on DVDs and 19% said they don't. Those who said they watch films on DVDs were further asked how they source DVDs.

Table 28: Means of accessing DVDs

How do you get the DVDs?	Count	Percentage (%)
Borrow from friends and family	627	33.73
Buy	569	30.61
Rent	295	15.87
All of the above	368	19.80
Total	**1 859**	**100%**

The findings reveal that a larger proportion of adults (34%) said they acquire DVDs from friends and family, followed by 31% who said they buy or purchase them from a video shop, while 16% said they rent from rental shops. The findings also reveal that 19% of the adults said they either borrow from friends and family, or buy or rent.

4.5.2 Likelihood of watching DVDs

Respondents were asked how likely they are going to watch DVDs in the next six months.

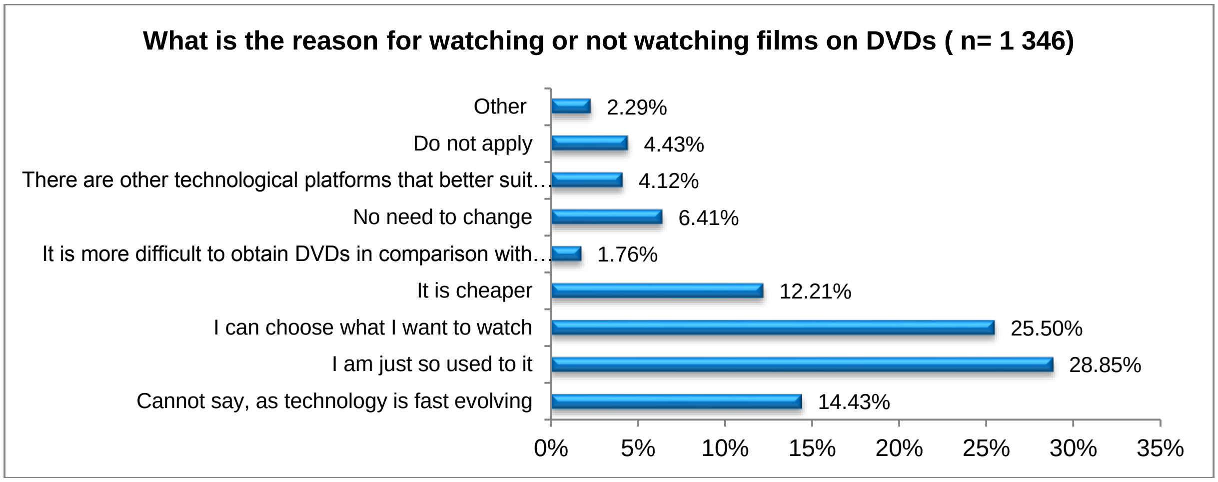
Table 29: Likelihood of watching DVDs

Likelihood of watching DVDs in the next six month	Count	Percentage (%)
Extremely likely	345	25.63
Likely	664	49.33
I don't know	236	17.53
Unlikely	61	4.53
Very Unlikely	40	2.97
Total	**1 346**	**100**

The table illustrates almost half the adults (49%) said they're likely to watch DVDs in the next six months, followed by 26% who said they're extremely likely, and 17% who said they weren't sure whether or not they will watch DVDs. Moreover, 5% said they're unlikely to watch DVDs and 3% said they're very unlikely to watch DVDs.

The respondents were further asked to provide reasons for the likelihood or unlikelihood of watching DVDs in the next six months.

Figure 41: Reasons for watching or not watching films on DVDs



The findings demonstrate that a larger proportion of adults (29%) said they're likely to watch DVDs because they're:

'*Just used to it*', followed by 26% who said:
'*Watching DVDs provides an opportunity to choose whatever they want to watch*', with 14% saying:
'*They cannot say as technology is fast evolving*', where 12% indicated that:
'They watch DVDs simply because it's cheap'.

It can be noted from these findings that platform preferences are motivated by the incentives that are embedded in a specific medium. DVD's are said to be convenient because audiences can watch a particular movie numerous times in the comfort of their homes, rent from a rental shop, buy, or even swap with family/friends.

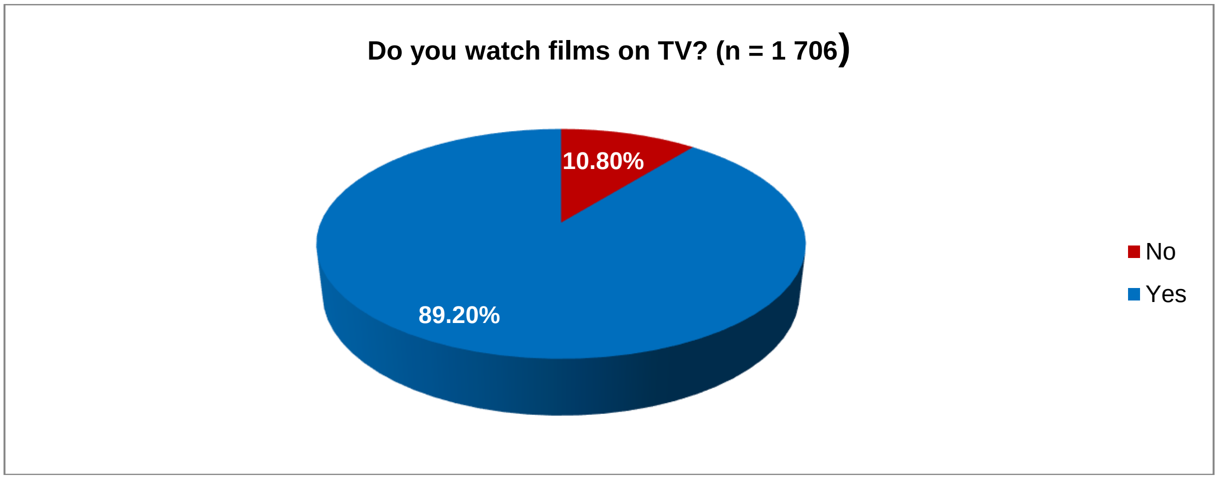
4.6 TV

To understand viewership habits and trends of audiences on a platform basis, this section deals with TV audiences. Traditionally, in history of viewership, TV has been identified as the most frequently chosen medium. However, with the advent of new technology, world trends have noticed a drastic change in the patterns of TV viewership. As such, it's against this backdrop that the research sought to find out audiences perceptions of TV, consumption patterns, frequency of viewership, choice of programs and reception.

4.6.1 Watching of films on TV

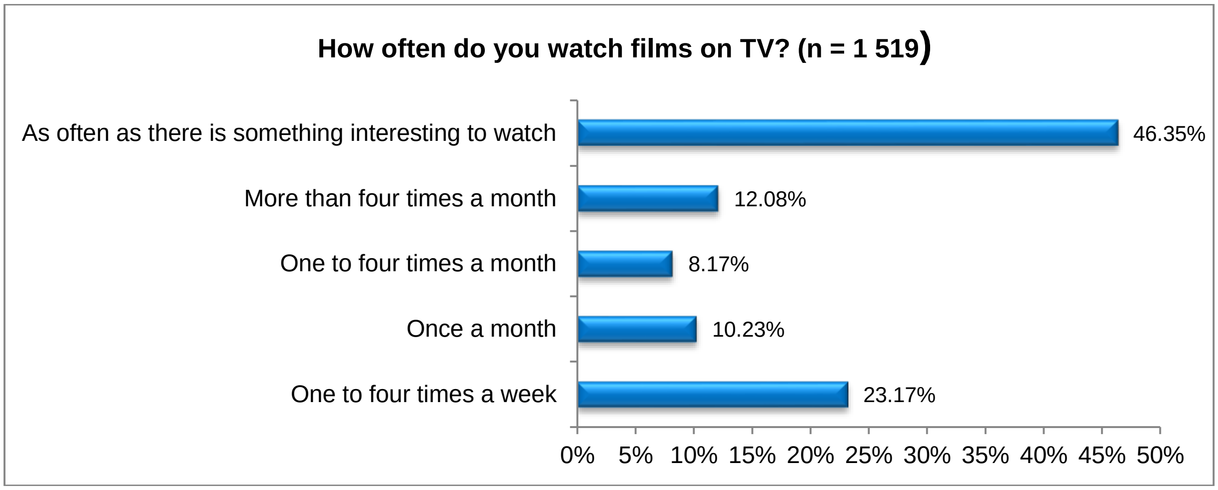
Respondents were asked to indicate if they watch films on TV or not.

Figure 42: Viewership of films on TV



The findings illustrate that the majority of adults (89%) said they watch films on TV while 11% said they don't. Respondents were further probed on how often they watched films on TV.

Figure 43: Frequency of watching films on TV



The findings revealed that most adults (46%) said they watch films on TV as often as there's something that interest them, followed by 23% who said they watch TV one to four times a week, with 12% who said they watch films on TV more than four times a month. The findings revealed that 10% said they watch films on TV once a month while 8% watch one to four times a month. Knowing the frequency of TV viewing can help identify audience dynamics of viewership, the time they watch, and this can also assist in the segmentation of audiences.

4.6.2 Days of enjoyment of watching films on TV

Respondents were asked to indicate when they enjoy watching films on TV. The findings are presented in the following table.

Table 30: Times when films on TV are generally watched

When do you generally enjoy watching films on TV	Count	Percentage (%)
All through the weekend	274	18.24%
Any time I have free time	837	55.73%
During the day on weekdays	65	4.33%
During the day on weekends	79	5.26%
Evenings during weekdays	153	10.19%
Evenings during weekends	94	6.26%
Total	**1 502**	**100%**

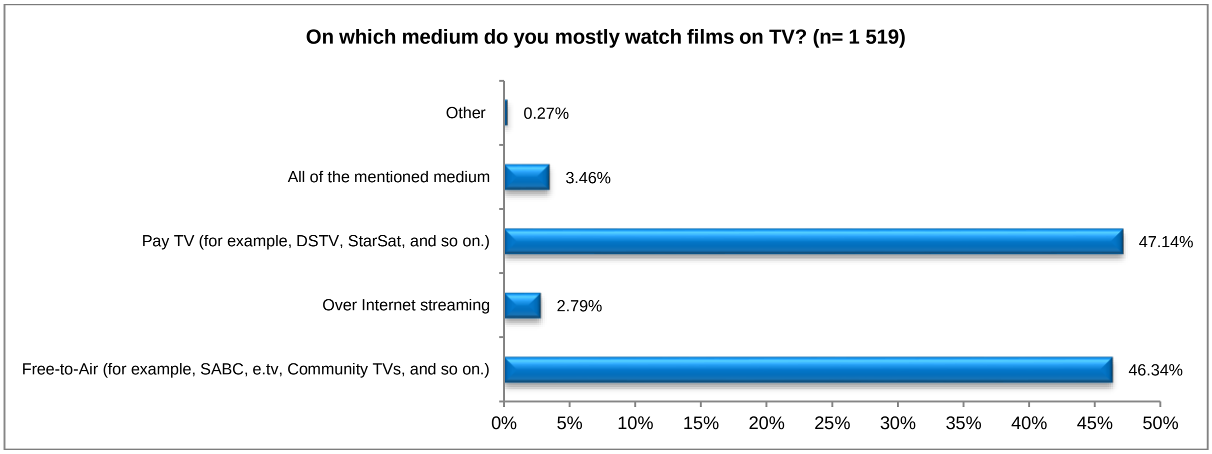
Most adults (56%) indicated that they watch films on TV as long as there's something interesting, followed by 18% who said all through the weekend, and 10% who said evenings during weekdays.

It can be noted that TV viewership, based on day preference, is a matter of personal convenience; thereby people watch films on TV of their own will and at a particular time, which is flexible with their socio-economic status.

4.6.3 Favourite medium

Respondents were further asked to indicate the medium on which they mostly watch films on TV.

Figure 44: Medium of watching films



A larger proportion of adults (47%) indicated that they mostly watch films on TV through Pay TV and a similar proportion of 46.34% said they watch films mostly on Free-to-air (FTA). Some 3% of the adults said they use all the mentioned mediums to watch films on TV, while 3% said they do so over internet streaming.

4.6.4 Likelihood of watching films on TV

Respondents were asked how likely they are to continue watching films on TV in the next six months. The findings are shown in the next table.

Table 31: Likelihood of watching films on TV

Likelihood of watching films on TV in the next six month	Count	Percentage (%)
Extremely likely	442	29.68
Likely	756	50.77
I don't know	228	15.31
Unlikely	34	2.28
Very Unlikely	29	1.95
Total	**1 489**	**100%**

Most adults (51%) said they're 'likely' and 'very likely' to watch films on TV in the next six months (51% and 30%, respectively). Around 15% of respondents said they 'weren't sure', 2% said they are 'unlikely to watch films on TV' and an equal proportion of 2% said they are 'very unlikely to watch films on TV'.

Respondents were further asked to provide reasons why they were likely or unlikely to watch films on TV in the next six months.

Table 32: Reasons for the likelihood or unlikelihood of watching films on TV

Responses	Count	Percentage (%)
Cannot say, as technology is fast evolving	201	13.61
I'm just so used to it	465	31.48
I can choose what I want to watch	257	17.40
It's cheaper	168	11.37
It's easier to watch films on TV	184	12.46
It's more difficult to leave the house to watch films	27	1.83
No need to change	102	6.91
There are other technological platforms that better suit my lifestyle	42	2.84
Other	31	2.10
Total	**1 477**	**100%**

The responses showed that most adults said they are likely to watch films on TV because they are 'just used to it'.

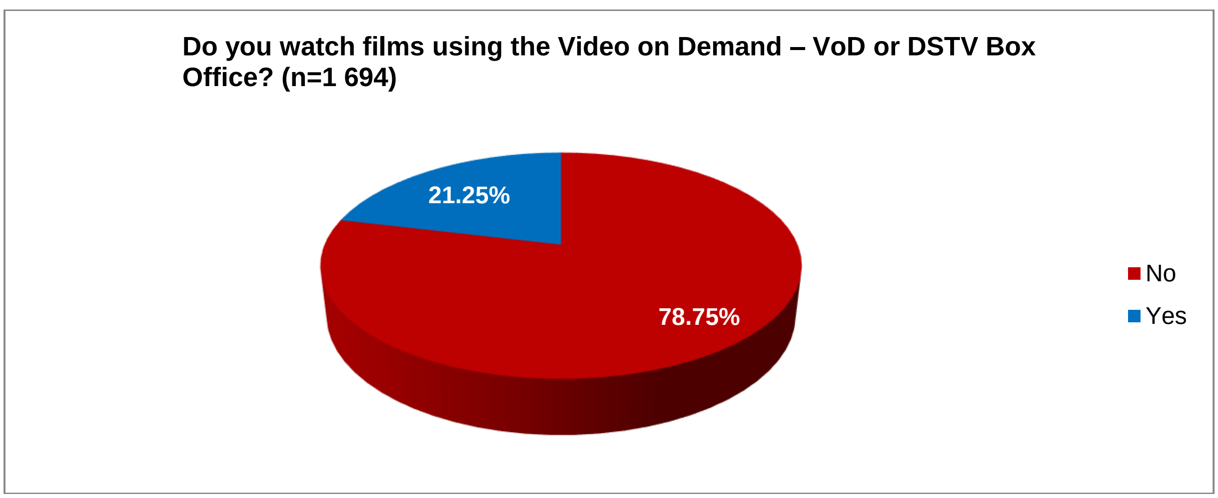
4.7 Video on Demand (VoD)

When it comes to viewing film content, today's digitally connected environment is driving profound changes in the way audiences rent, purchase and watch films. This section seeks to gain respondents' directional insights on audience attitudes and behaviour in the rapidly changing media environment.

4.7.1 Viewership of films on VoD

Respondents were asked to indicate if they watch films on VoD or DSTV Box Office and the findings are shown in the next figure.

Figure 45: Viewership of films using VoD or DSTV Box Office



A majority of adults (79%) said they don't watch films on VoD, while 21% of the respondents said that they use Video on Demand or DSTV Box Office. It's noteworthy to mention that determinants of this behaviour could be linked to respondents' social class, lifestyle, disposable income, and so on.

Respondents were asked to indicate how often they watch films on VoD or DSTV Box Office services.

Table 33: watching films on VoD or DSTV Box Office services

Watching of films on VoD or DSTV Box Office services	Count	Percentage (%)
As often as I find something interesting to watch	201	57.10
One to four times a year	29	8.24
Once a month	57	16.19
One to four times a month	27	7.67
More than four times a month	35	9.94
Never	3	0.85
Total	**352**	**100%**

The findings show that most adults (57%) said they watch films on VoD or DSTV Box Office as often as there's something interesting to watch, followed by 16% who said they watch films on VoD or DSTV Box Office once a month; 10% watch more than four times a month, 8% said they watch films on VoD or DSTV Box Office one to four times a year, and 8% said they watch films on VoD or DSTV Box Office one to four times a month.

4.7.2 Likelihood of viewing films on VoD or DSTV Box Office

Respondents were asked to indicate how likely they are to continue watching films using VoD. Their responses are shown in the next figure.

Table 34: Likelihood of watching films on VoD or DSTV Box Office

Likelihood of watching films on VoD or DSTV Box Office service	Count	Percentage (%)
Extremely likely	94	26.78
Likely	170	48.43
Unlikely	25	7.12
Very Unlikely	13	3.70
I do not know	49	13.96
Total	**351**	**100%**

Most of the respondents (48%) indicated that they are likely to continue watching films on VoD, followed by 27% who said they are 'extremely likely to watch'; 14% stated that they don't know and 7% said that they are unlikely to do so. About 4% said that they were 'very unlikely' to watch films on VoD in the next six months.

Respondents were further asked to indicate the reason for their response on the likelihood of watching a film on VoD in the next six months.

Table 35: Reason for the likelihood of watching film on VoD

Reason	Count	Percentage (%)
It's easier to watch films on the Box Office service (Video on demand)	85	24.85
It's cheaper	35	10.23
I'm just so used to it	88	25.73
There are other technological platforms that better suit my lifestyle	27	7.89
No need to change	20	5.85
Cannot say, as technology is fast evolving	24	7.02
I can choose what I want to watch	53	15.50
Other	10	2.92
Total	**342**	**100%**

The findings show that most adults are likely to watch films on VoD because they are just used to it and because it is easier to watch films on VoD.

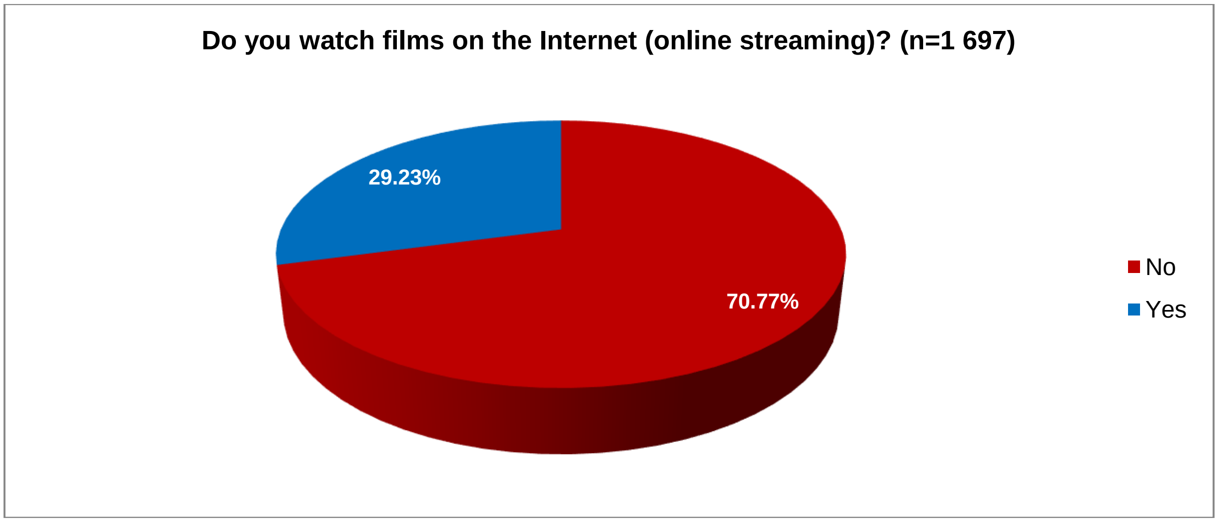
4.8 Internet (online streaming)

Today's technology provides a wide range of channels through which films and video products can be accessed: from PCs, to iPods, to smart phones, and so on. The internet provides not only a means of distribution, but also a channel through which film/video content can be accessed without necessarily going to the cinema. With this in mind, it became imperative to gain insights on utilisation of online streaming as a means to gain access to films.

4.8.1 Viewership of films on the internet

Respondents were asked if they watch films on the internet.

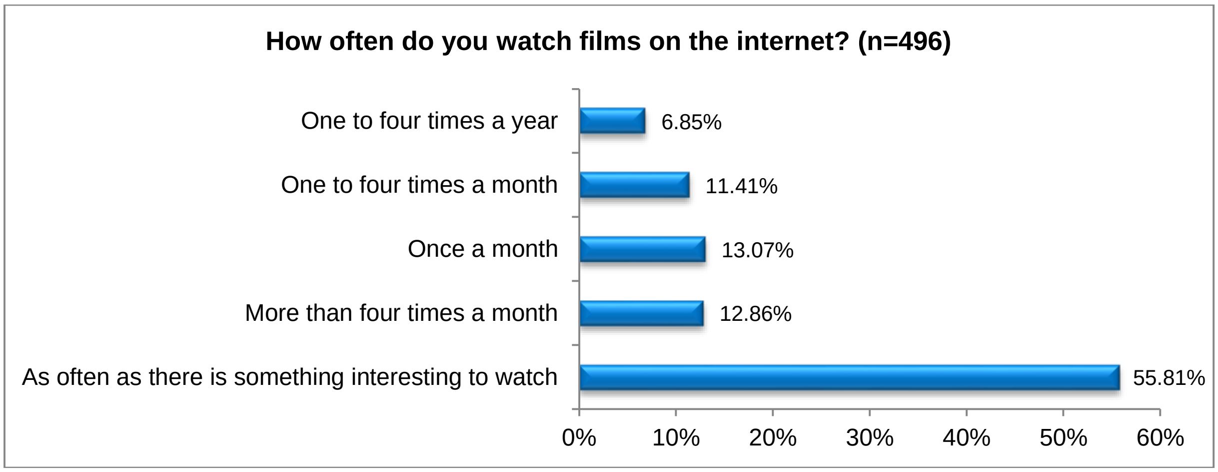
Figure 46: Viewership of films on Internet



The results revealed that the majority of the adults (71%) said they don't watch film on the internet and only 29% said they do. These results seem to confirm that TV and DVDs are still the main methods of viewing film and video content. It's important to note that in as much as it's assumed that technological advancements are seemingly overthrowing the traditional platforms, it's nonetheless evident from the findings that only a few individuals have access to VoD.

Respondents were asked to indicate how often they watch films on the internet.

Figure 47: Frequency of watching films on the internet

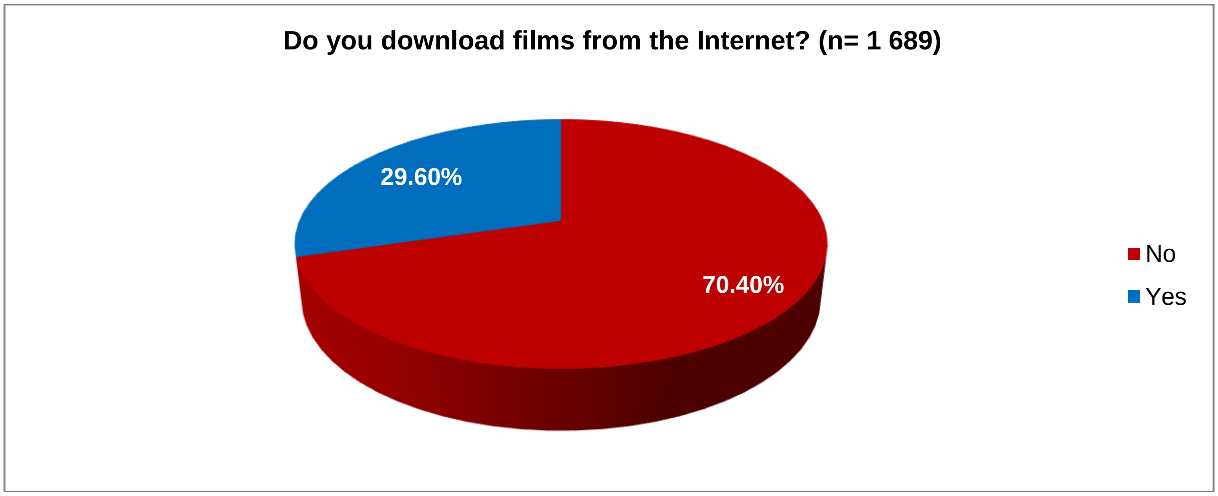


The majority of the adults (56%) watch films online:

'*As often as there's something interesting to watch*', 13% said:
'Once a month', and a similar proportion of 13% said they watch films online:
'M*ore than four times a month'.* The findings further showed that 11% said they watch films online:
'*One to four times a month'* and 7% said they watch films online:
'One to four times a year.'

Respondents were asked if they download films and videos from the internet.

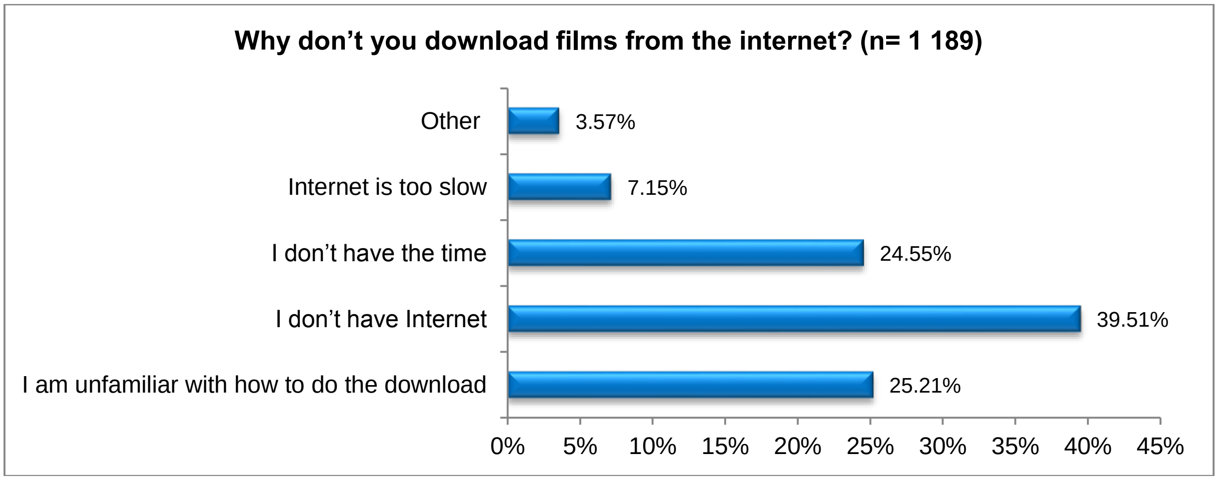
Figure 48: Internet downloading of films and videos



The findings revealed that most of the adults (70%) indicated that they don't download films from the internet while 30% said they do. Nonetheless, this may not be a true reflection of reality as piracy is a criminal offense and, normally, most respondents in similar researches shy away from providing a true account.

Respondents who indicated that they don't download were asked to give the reason why they didn't.

Figure 49: Reasons provided for not downloading

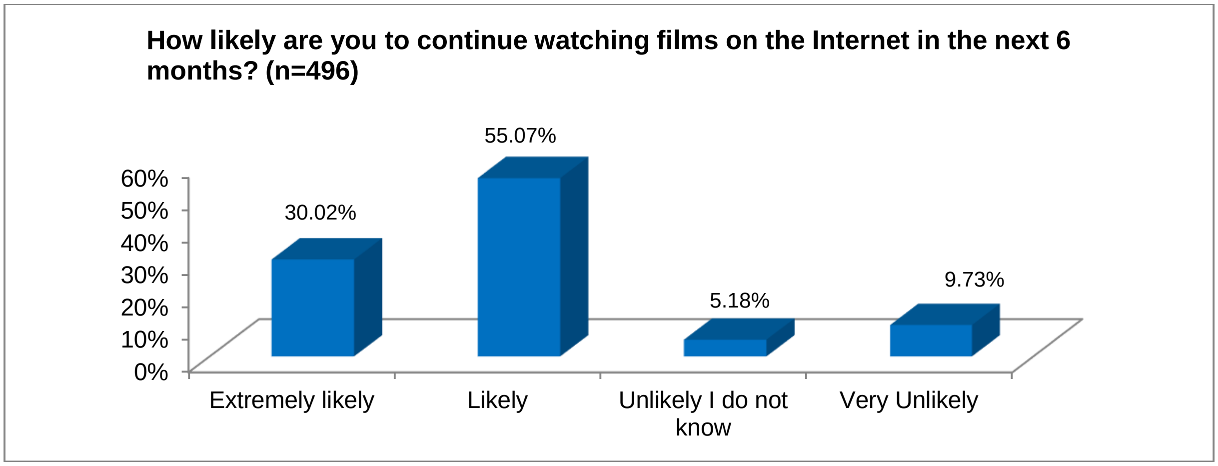


A larger proportion of the adults (40%) indicated that the reason they don't downloads films off the internet is lack of access to Internet, followed by 25% who said that they don't know how to download and a similar proportion of 25% who said that they don't have the time to download. About 7% of the adults indicated that they have slow internet, while the remaining 3% of the respondents indicated other reasons.

4.8.2 Likelihood of watching films on the Internet

Respondents were asked to indicate how likely they are to continue watching films on the internet. Their responses are shown in the figure below.

Figure 50: Likelihood of watching films on Internet



Most of the adults (55%) indicated that they are likely to continue watching films online, followed by 30% who indicated that they are extremely likely to do so in the next six months. About 5% of respondents said they are unlikely, and 10% said they are 'very unlikely' to do so.

Respondents were further asked to indicate the reason for their response on the likelihood of watching a film on the internet in the next six months. The findings are illustrated in the table below.

Table 36: Reasons for likelihood of watching films on Internet

Responses	Count	Percentage (%)
Cannot say, as technology is fast evolving	75	15.79
I'm just so used to it	118	24.84
I can choose what I want to watch	133	28.00
It's cheaper	34	7.16
It's easier to watch films on the internet	47	9.89
It's more difficult to leave the house to watch films	12	2.53
No need to change	20	4.21
Other	15	3.16
There are other technological platforms that better suit my lifestyle	21	4.42
Total	**475**	**100%**

It can be noted that most adults are likely to watch films on the internet because they are just used to it, and because they find it's easier to watch films online as one's able to choose what to watch. Online streaming is highly appealing because of its flexibility, yet, from an economic perspective, this platform has been identified as the breeding ground for piracy.

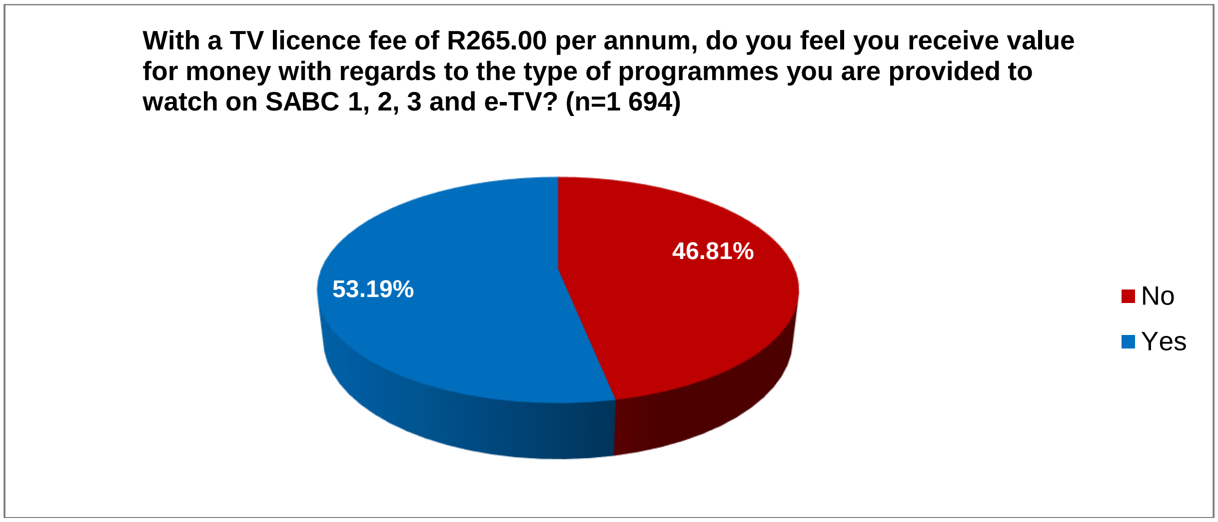
4.9 Spending patterns

This section is designed to explore the spending habits of consumers in relation to film and video products. It provides a measure of how much consumers channel their disposable income into film/video products. This is key, given that, in general, price is recognised as a significant factor in consumer decision making.

4.9.1 Value for money

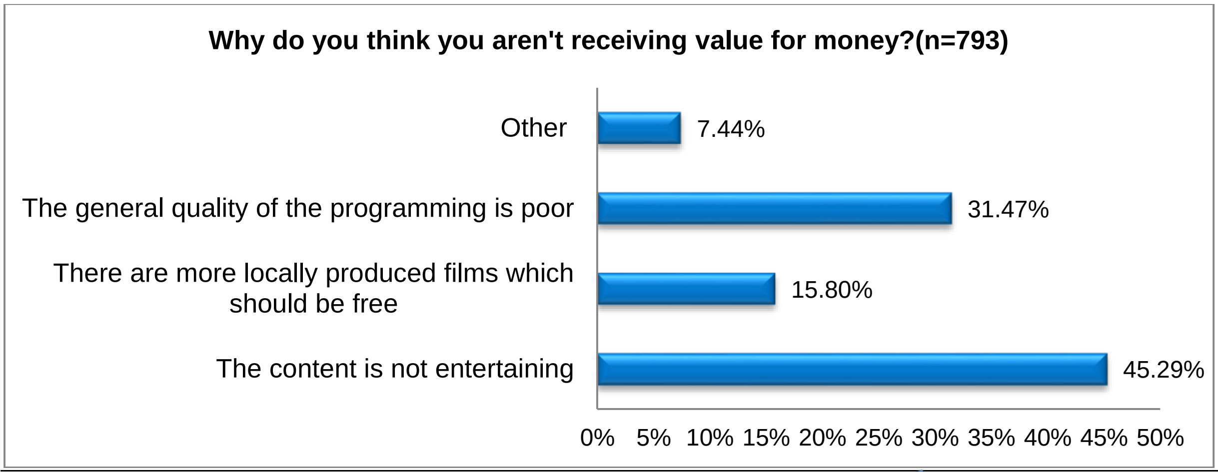
The respondents were asked if they feel they receive value for their money by paying the (Gazzeted) TV license fee of R265.00 per annum for the programs they are shown.

Figure 51: Value for money regarding programmes



Most adults (53%) indicated that they receive value for money, while 47% indicated otherwise. Those respondents who indicated that they feel they weren't receiving value were asked to provide the reasons why. Their responses are provided in the next figure.

Figure 52: Reasons for not receiving value for money

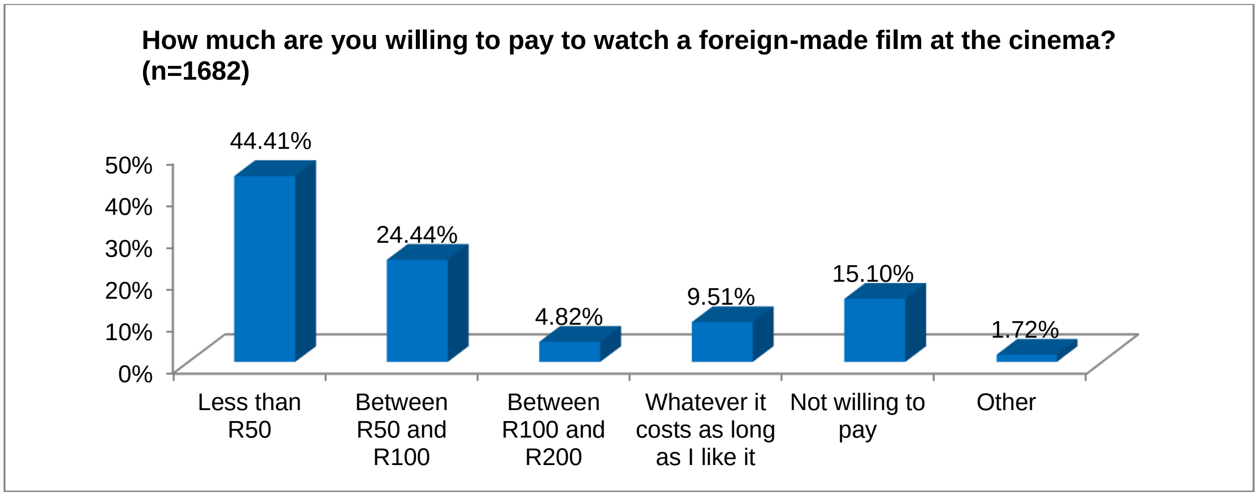


The findings revealed that a larger proportion (45%) feel they don't receive value for money, because the content isn't entertaining, followed by 32% who pin-pointed that the quality of programming is poor, while 16% said local content should be free. Around 7% provided other reasons such as 'too many advertisements in between films', 'too many old films' and 'many films are repeated'.

4.9.2 Willing price to watch a foreign-made film at the cinema

Respondents were asked to indicate the price they are willing to pay to view a foreign-made film at the cinema.

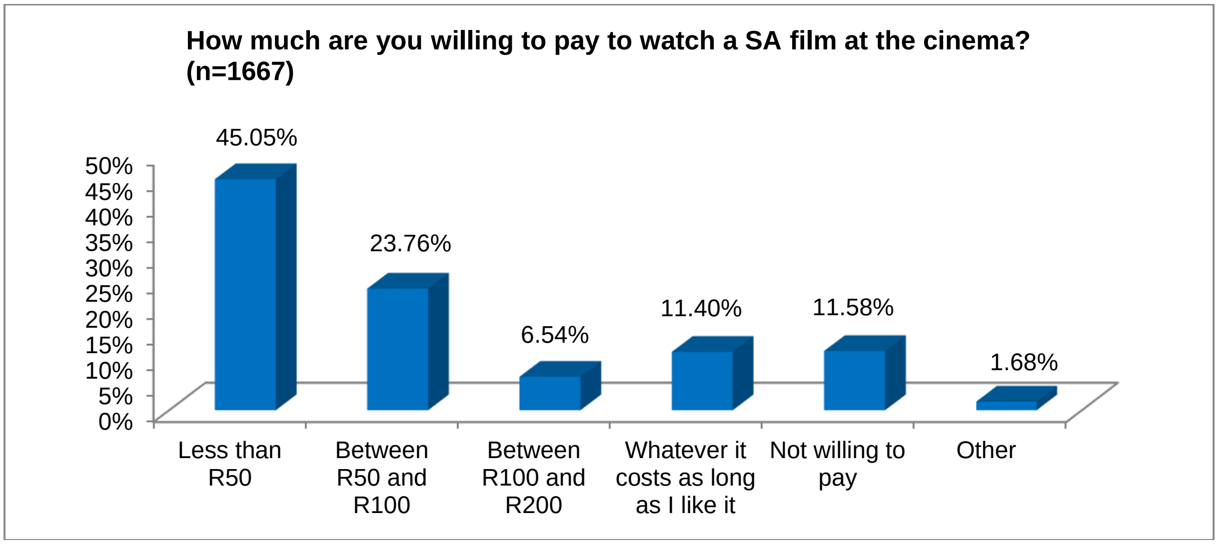
Figure 53: Willing price to watch a foreign-made film



A larger proportion of the adults (44%) indicated that they're willing to pay less than R50, followed by 24% who are willing to pay between R50 and R100; 15% indicated not being willing to pay any amount and 10% said they're willing to pay 'whatever it costs as long as they like it'. The findings also show that about 5% indicated that they're willing to pay between R100-R200 and 2% provided other answers such as 'the price they'll be willing to pay depends on the film'; others said they're willing to pay even more if the film is worth watching.

Respondents were asked to indicate an amount they are willing to pay to view a SA film at the cinema.

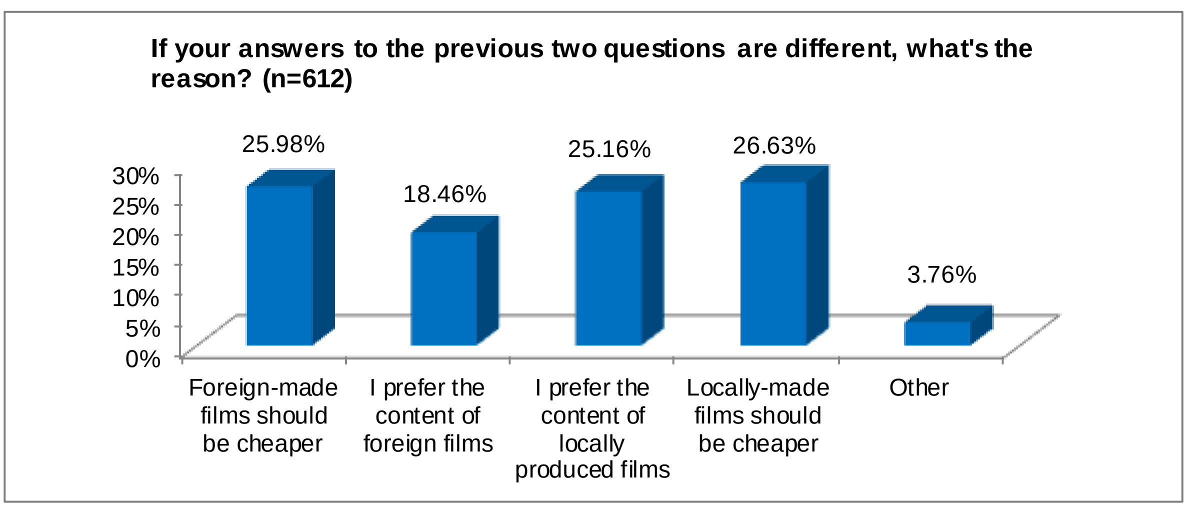
Figure 54: Willing price to watch a SA film



The findings reveal that a larger proportion (45%) of the respondents are willing to pay less than R50, followed by 24% who indicated that they're willing to pay between R50-R100; around 12% said they aren't willing to pay anything and 11% said they are willing to pay 'whatever it costs as long as they like the film'. About 7% said they are willing to pay between R100-R200 and 1% provided other answers such as they are willing to pay between R15-R25.

Adults who had provided different answers in terms of what they were willing to pay to watch foreign-made and SA films were asked to provide reasons for their dissimilar answers.

Figure 55: Reasons for willing to pay different prices



A greater proportion of adults (27%) said that locally-made films should be cheaper, followed by 26% who said that foreign-made films should be cheaper; 25% were of the opinion that they prefer the content of locally produced films, and 18% said they prefer the content of foreign films. A smaller proportion of the respondents (4%) indicated other reasons such as:

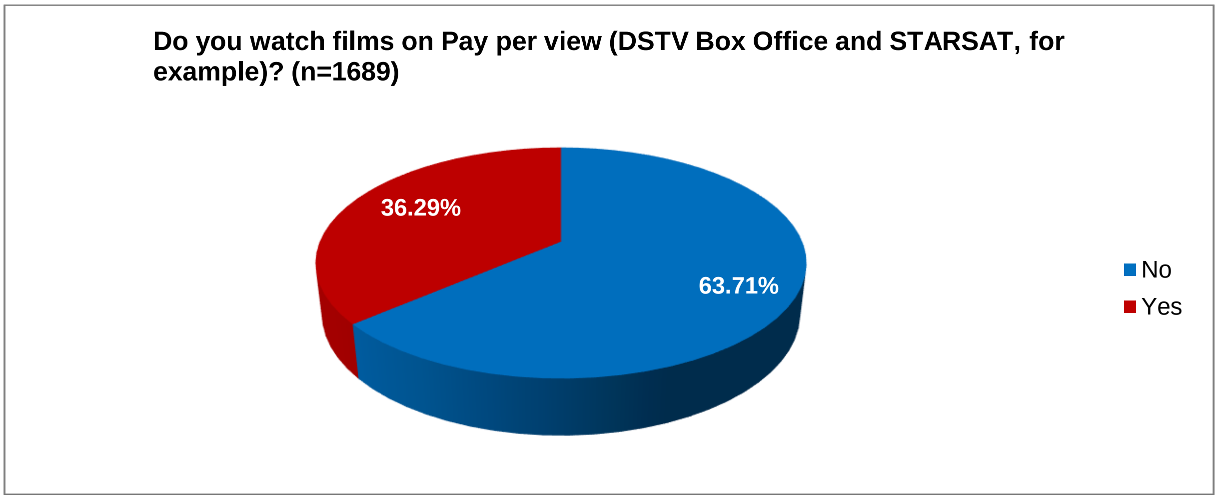
'*I would pay more for SA-produced films because they should be supported'* and others said:
'*I prefer local because I understand the language*'.

These findings reveal that a number of elements come into play when it comes to decision making with regards to the price one is prepared to pay, for either foreign-made films or SA-produced films. These elements should be considered in ADS.

4.9.3 Pay per view

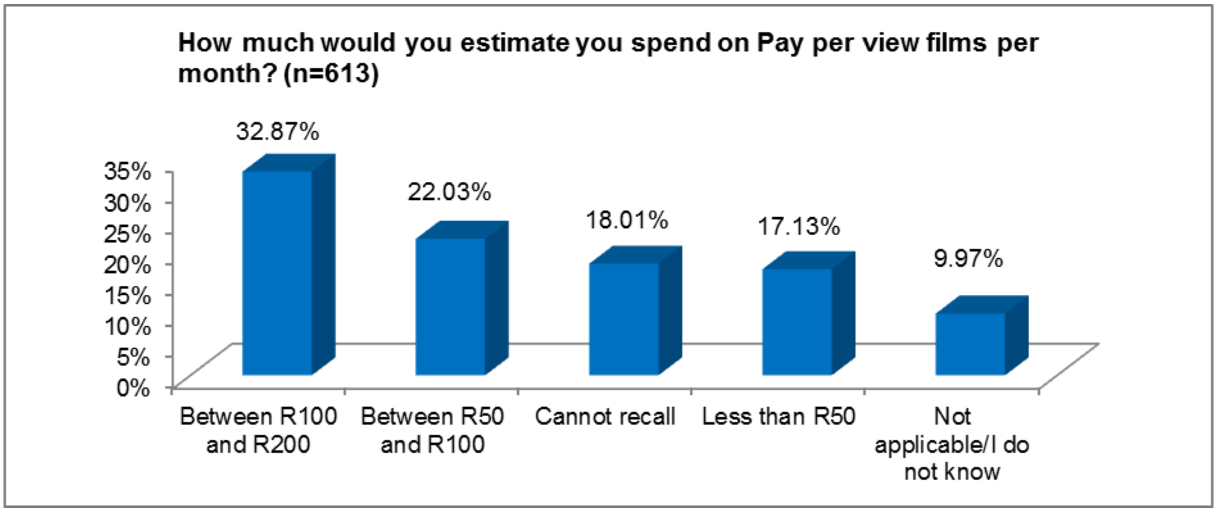
Respondents were asked to indicate whether they do or don't watch films on pay per view. The findings are shown in the figure below.

Figure 56: Watching films on pay-per-view



The findings showed that the most adults (64%) said they don't watch films on Pay per view, while only 36% of respondents said they do. In addition, adults were asked to indicate an estimated amount of how much they can spend monthly on Pay per view.

Figure 57: Money spent on Pay-per view



The findings show that a larger proportion of the adults (33%) estimated that they spend between R100-R200 per month, followed by 22% who estimated between R50-R100 and 18% indicated that they cannot recall. About 17% of the adults estimated that they pay less than R50, and 10% indicated not knowing how much they pay.

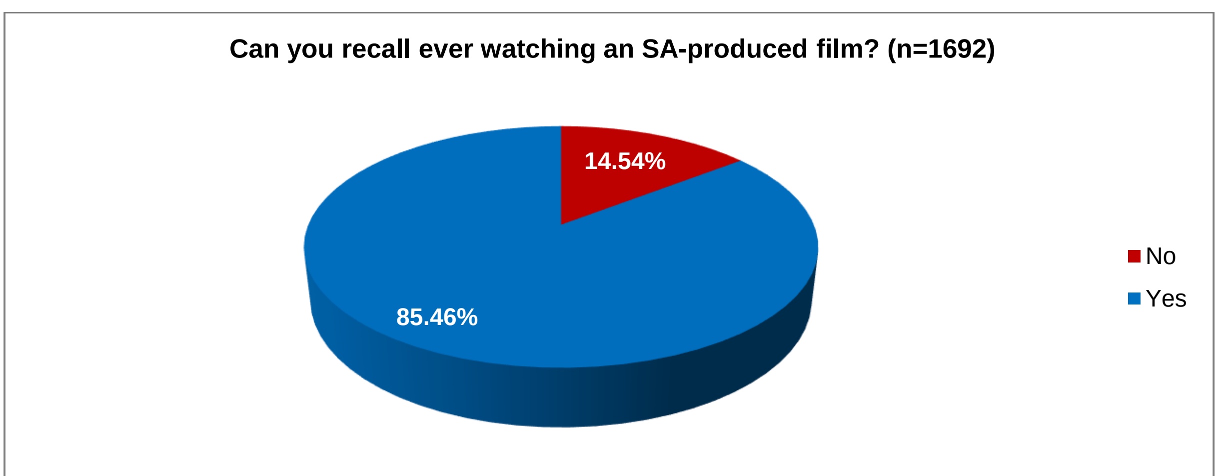
4.10 Perception and attitude toward SA films

The questions were aimed at gaining insights into adult respondents' perception and attitude toward SA films. A robust ADS can only be realised if there's an understanding of the consumers perceptions and attitudes toward the products that they are supposed to consume.

4.10.1 Recalling watching a SA film

Respondents were asked if they recall ever watching a SA film.

Figure 58: Recalling watching an SA produced film



The majority of the adults (85%) recalled that they watched SA-produced films and 15% didn't. These results reveal that there's great scope for expansion in terms of developing an audience for SA-produced films.

Respondents were asked to recall where they watched a SA film. The findings are shown in the next table.

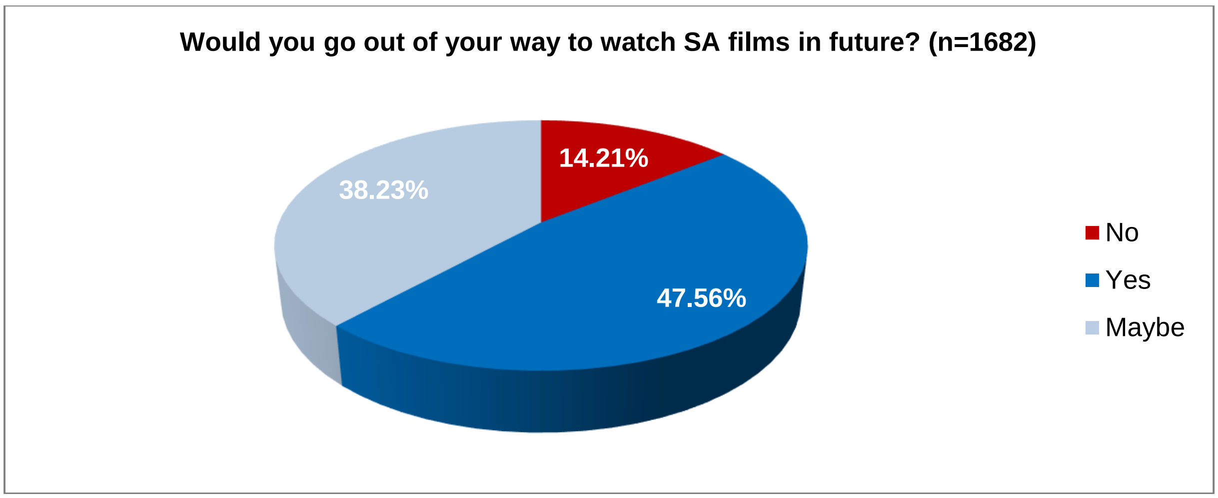
Table 37: Where an SA-produced film was watched

Where the SA-produced film was watched	Count	Percentage
Cinema	270	15.05
TV	860	47.86
DVD	578	32.37
Internet	52	2.89
Public viewing venue	26	1.44
Doesn't apply	6	0.39
Total	1 792	100%

Almost half of the adults (48%) had watched an SA film on TV, followed by 32% who had watched SA film on DVD and 15% had watched an SA film at the cinema. Around 3% had watched a SA film on the internet, 1% said in a public viewing venue and less than 1% indicated they hadn't watched a SA film anywhere. TV and DVD's are thereby the most widely used platforms used to watch SA produced films.

Respondents were asked if they would go out of their way to watch a SA film in future.

Figure 59: Likelihood of watching SA films

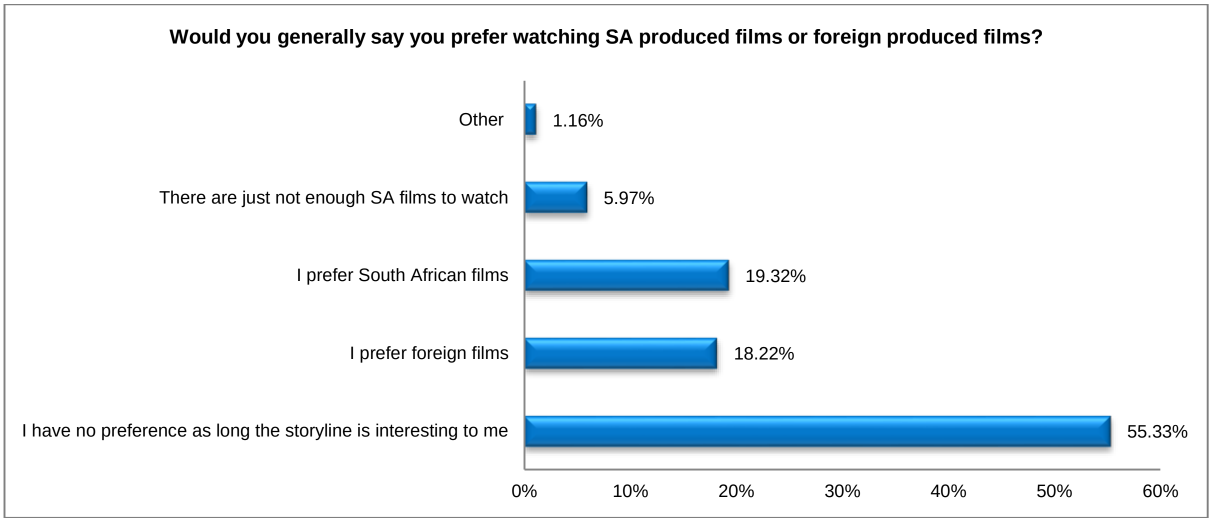


The figure shows the highest proportion of the adults (48%) said they would go out of their way to watch an SA film in the future, followed by 38% who said 'maybe', and 14% said they wouldn't go out of their way to watch a SA film. These findings seem to suggest that there's great scope for stimulating further demand for SA films.

4.10.2 Preference of films

Respondents were asked whether they prefer watching SA produced films or foreign produced films.

Figure 60: Preference of films

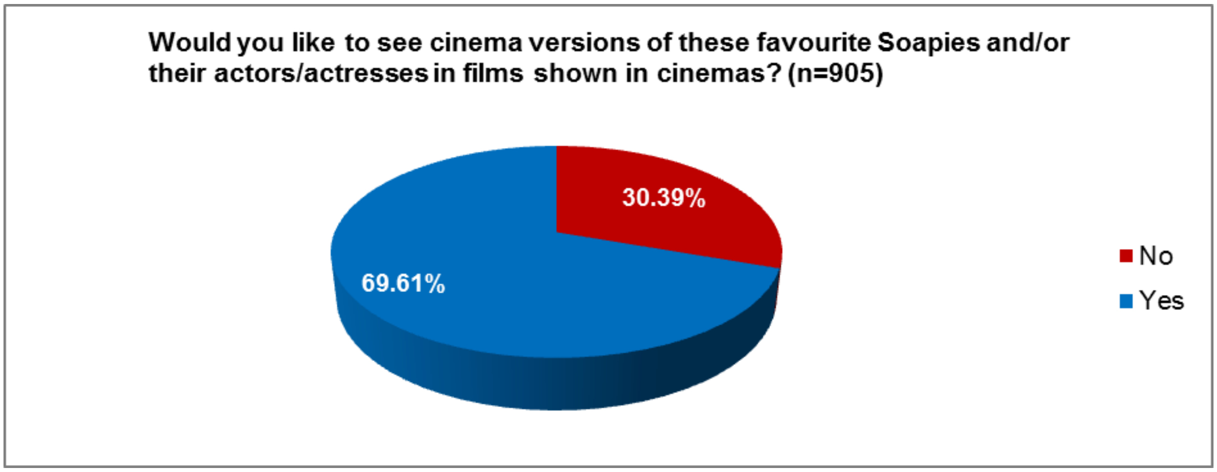


The findings reveal that most adults (55%) have no preferences, but do watch film as long as the storyline is interesting to them. Around 19% said they prefer to watch SA films, 18% prefer to watch foreign films and around 6% indicated that there are just not enough SA films to watch.

4.10.3 Three favourite Soap Operas (Soapies)

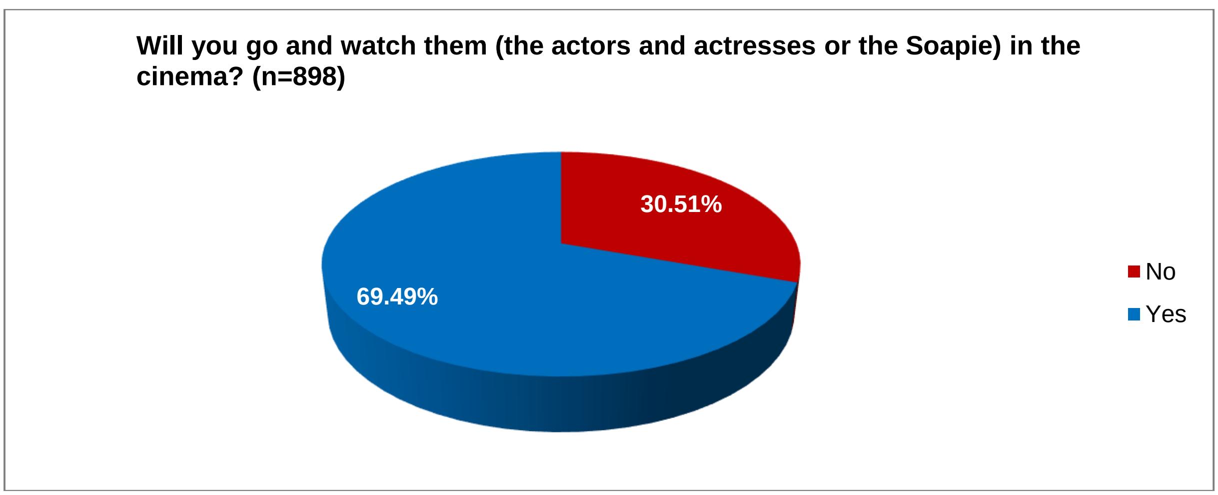
Respondents were asked if they have any favourite soapies. Most of the respondents (55%) indicated that they do watch soapies and they have three favourites; on the other hand, 45% indicated they don't watch any soapies. Respondents who indicated that they do watch were asked if they would want to see a cinema version of their favourite soapies and/or their actors/ actresses in cinema feature films.

Figure 61: Willingness to see cinema versions of favourite soapies



Most of the adults (70%) said they would like to see a cinema version of their favourite soapies and their casts; conversely 30% disagreed, saying they don't want to see a cinema version of their soapie. The adults were further asked if they would attend the cinema to watch these cinema versions of their favourite soapies and their casts.

Figure 62: Odds of watching actors/actresses in the cinema

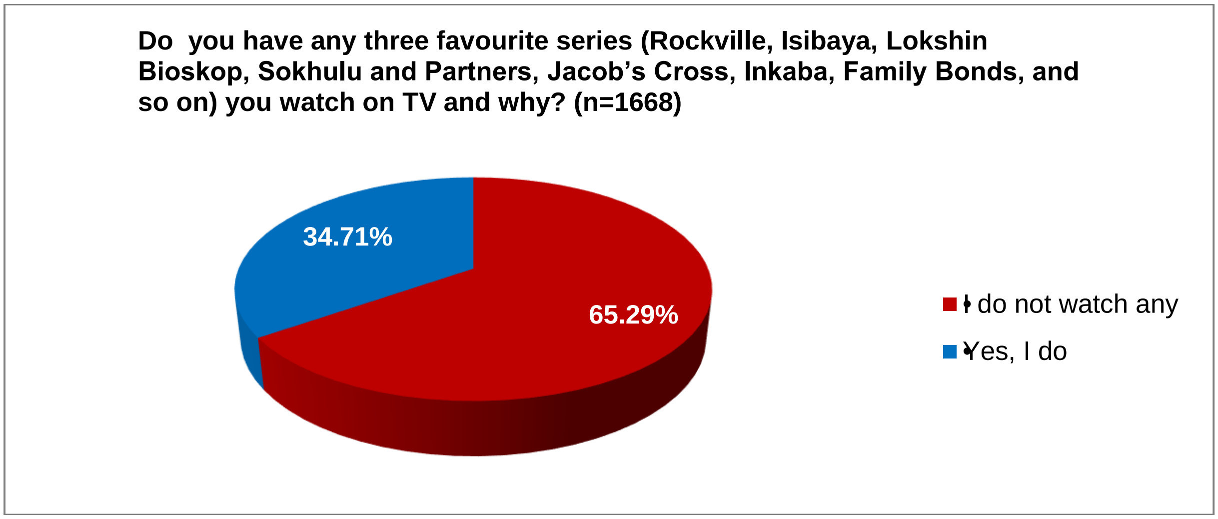


The findings showed that most of the adults (70%) said they would go to the cinema and 30% indicated they wouldn't.

4.10.4 Favourite Series

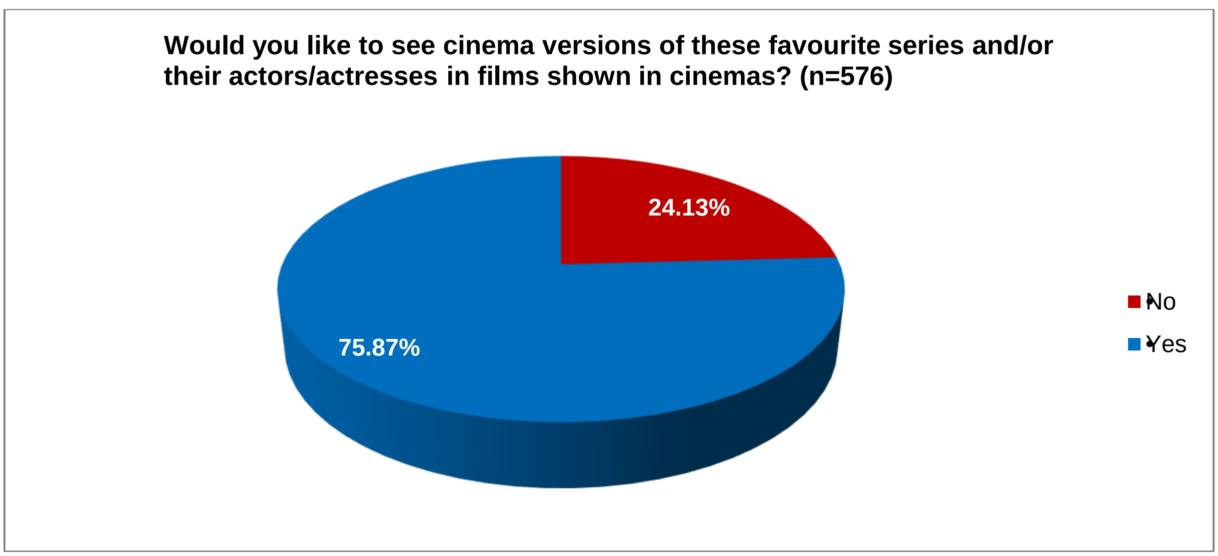
Respondents were asked if they have any favourite TV series.

Figure 63: Three favourite series



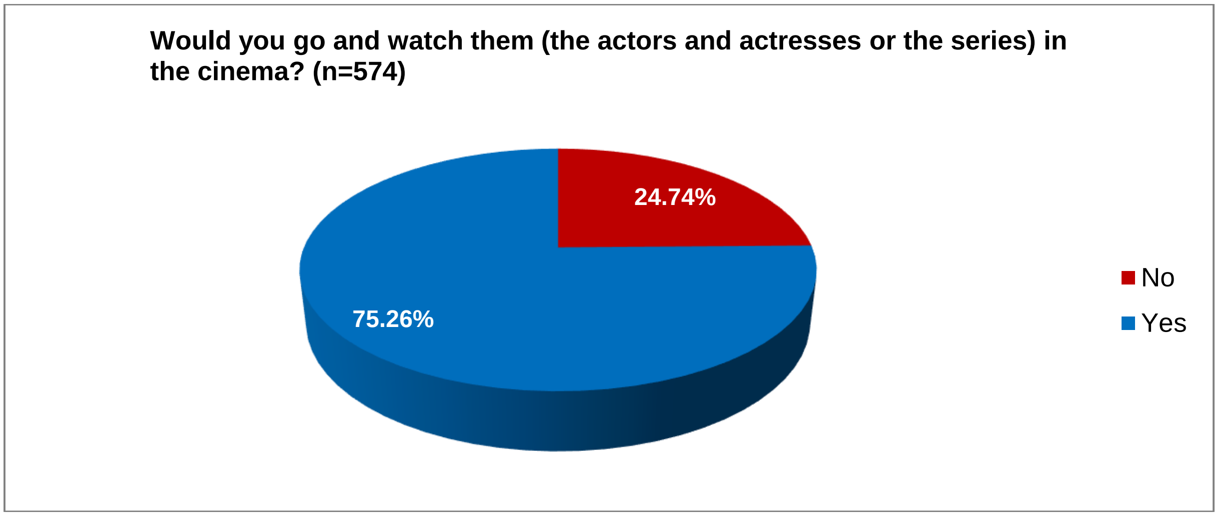
Most of the adults (65%) said they don't watch any series and 35% said they do. Respondents who indicated that they do, were further asked if they would want to see a cinema version of their favourite series and/or their actors/actresses in films shown in cinemas.

Figure 64: Willingness to see cinema versions of series



Most of the respondents (76%) reported that they would like to see a cinema version of their favourite series and their casts, while 24% didn't see a need. The respondents were further asked whether they would attend the cinema to watch these cinema versions of their favourite series and their casts. The findings are shown in the next figure.

Figure 65: Odds of watching actors and actresses

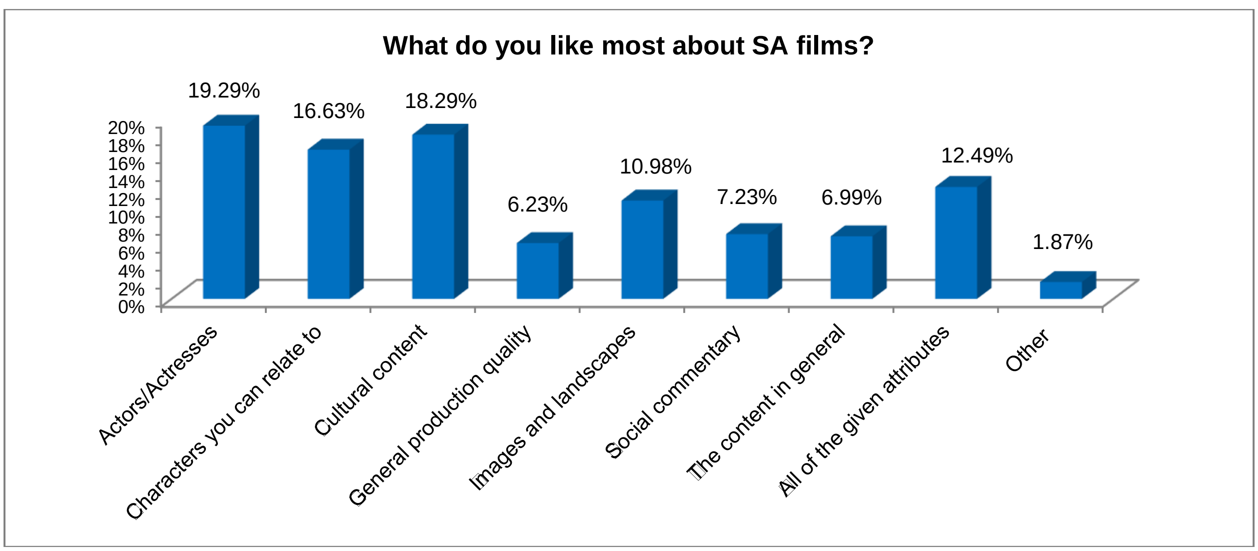


It can be observed that most of the adults (75%) said they would go to the cinema to watch the actors and actresses of their favourite series, while 25% said they wouldn't.

4.10.5 Likeable attributes of SA films

Respondents were asked to indicate what they find most likable about SA films.

Figure 66: Most likeable attributes of SA films

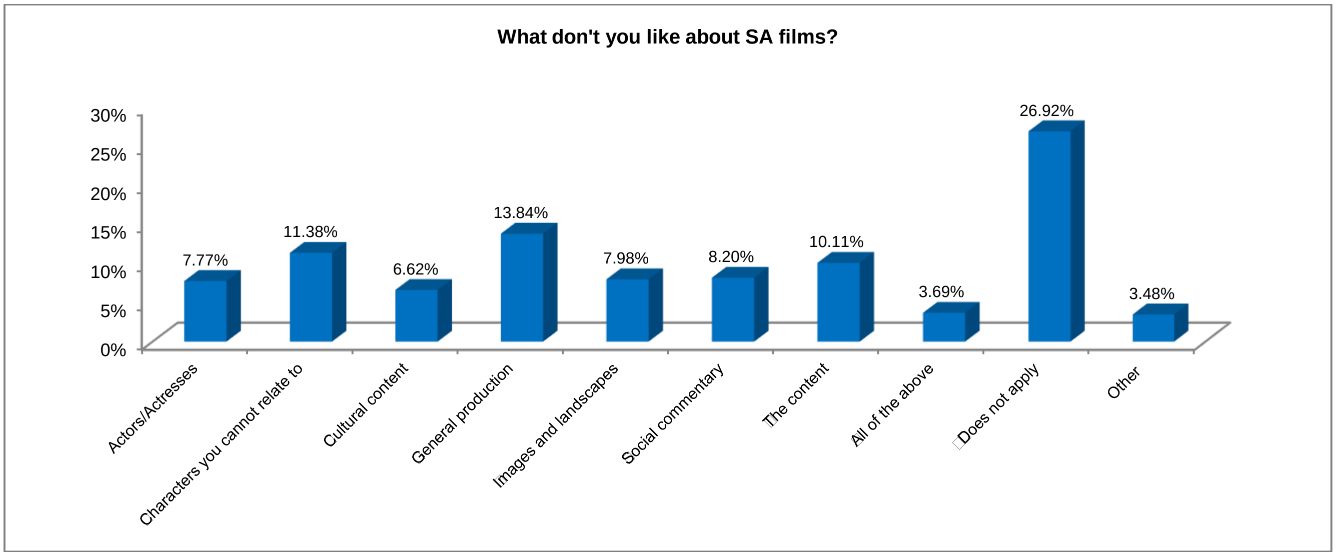


In terms of what's likeable about SA films, a large proportion of adults (19%) said they like the actors/actresses, followed by 18% who said they like the cultural content of SA films; 17% said they like characters they can relate to and 12% said they like everything about SA films. About 11% of adults said they like the images and landscapes, 7% said they like the social commentary and a similar proportion of 7% said they like the content, in general. A small proportion of the adults (2%) provided other reasons, such as not wanting to comment because they don't watch SA films, while others responded by saying they like nothing about SA films.

4.10.6 Unlikeable factors about SA films

Respondents were asked to indicate what they don't like about SA films.

Figure 67: Unlikeable attributes of SA films



The results show that a larger proportion of the adults (27%) said the question didn't apply to them, in other words they like SA films. About 14% of respondents indicated that they don't like the general production, followed by 11% who said they can't relate to the characters; 10% said they don't like the content, 8% said they don't like the social commentary, while a similar proportion (8%) said they dislike the images and landscapes; 4% indicated all of the above and 3% of respondents had other reasons.

4.10.7 Rating contexts of SA films

Respondents were asked to rate SA films in a number of contexts. The findings are shown in the table below.

Table 38: Rating of SA films

	RATING							
Context of SA films	**Excellent**	**Very Good**	**Good**	**Fair**	**Bad**	**Very Bad**	**Don't know**	**Total**
Visuals/Cinematography	12.92%	21.92%	34.78%	18.25%	2.08%	1.10%	8.94%	**100%**

	RATING							
Context of SA films	**Excellent**	**Very Good**	**Good**	**Fair**	**Bad**	**Very Bad**	**Don't know**	**Total**
Storylines	12.34%	23.62%	35.28%	19.16%	3.29%	0.68%	5.64%	**100%**
Actors or Actresses Performances	17.71%	25.61%	33.09%	15.44%	2.27%	1.10%	4.78%	**100%**
Film characters	13.99%	24.85%	33.13%	19.45%	2.76%	0.67%	5.15%	**100%**
Technical production quality	10.92%	19.56%	33.81%	23.01%	4.75%	1.17%	6.79%	**100%**
Historical and political content	15.31%	18.92%	31.72%	21.80%	4.65%	1.41%	6.18%	**100%**
Local content representative of SA languages and culture	19.13%	22.58%	30.63%	17.19%	4.12%	1.21%	5.15%	**100%**
Local content representative of SA Natural Environment and Wildlife	15.31%	18.85%	29.29%	22.94%	4.94%	1.71%	6.96%	**100%**
Availability in other official languages beside English	15.80%	20.96%	30.19%	18.53%	5.83%	2.37%	6.32%	**100%**
Entertainment Value	18.49%	22.94%	32.28%	16.11%	3.90%	1.22%	5.06%	**100%**

Upon aggregating the excellent, very good and good ratings, the ratings of the context of SA films were as follows:

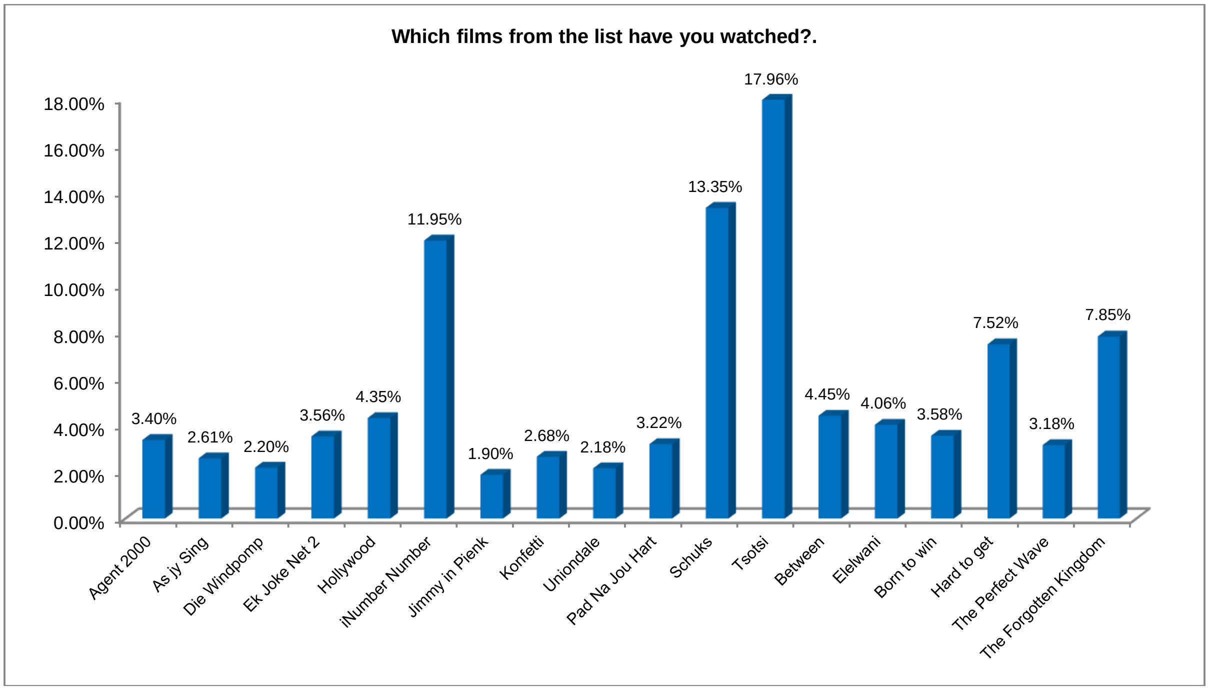
- Actors and actresses – 76%
- Entertainment value – 74%
- Film characters – 72%
- Local content representative of SA languages and culture – 72%
- Storylines – 71%
- Visuals/Cinematography – 69%
- Availability in other official languages beside English – 67%
- Historical and political content – 66%
- Technical production quality – 64%; and
- Local content representative of SA Natural Environment and Wildlife – 63.45%.

The aggregates illustrates that, generally, SA films are viewed favourably by adults.

4.10.8 Recent SA film releases 2013-2014

Respondents were provided with a number of images of film covers and were asked to indicate which ones they have watched.

Figure 68: Recent SA film releases watched



The findings revealed that the most watched SA film by adults was **Tsotsi**, followed by **Schucks** and **iNumber Number**. The least watched film was **Jimmy in Pienk**.

4.11 Covariates

4.11.1 Awareness of viewing mediums by population groups

Table 39: Awareness of film viewing mediums by population group

Film viewing platforms	Black African	Coloured	Indian/Asian	White
Cinema	18.21%	19.57%	18.63%	18.30%
DVD	20.69%	18.15%	17.39%	18.52%
Free-to-air TV (SABC & e-TV, for example)	20.69%	16.73%	18.63%	16.12%
Pay TV (DSTV & StarSat, for instance)	19.42%	18.33%	20.50%	18.52%
Internet downloads	12.06%	14.23%	13.04%	15.90%
Online streaming	8.94%	12.99%	11.80%	12.64%
Total	**100.00%**	**100.00%**	**100.00%**	**100.00%**

Across all population groups, the film viewing medium which the adults said they were most aware of was DVDs, followed by Free-to-air TV, Pay TV and Cinema. The least well known film viewing platforms were online streaming (Vidi, DSTV Box Office, You Tube, and so on) and internet downloads on PCs, laptops, smartphones, for example.

4.11.2 Awareness of film viewing mediums by age

Table 40: Awareness of film viewing mediums by age

Age group	Cinema	• DVD	Free to air TV	Pay TV	Internet downloads	• Online streaming	Total
16-20	17.15%	17.54%	16.35%	15.06%	12.29%	9.32%	**100%**
21-24	16.40%	16.48%	15.56%	15.81%	12.95%	9.84%	**100%**
25-29	16.02%	17.87%	17.39%	16.43%	11.43%	9.42%	**100%**
30-34	16.76%	17.68%	16.99%	18.25%	10.79%	8.73%	**100%**
35-39	16.38%	18.43%	17.58%	17.41%	11.09%	8.02%	**100%**
40-44	16.33%	18.92%	20.32%	18.33%	9.56%	6.97%	**100%**
45-49	15.38%	17.85%	19.69%	18.77%	10.77%	6.77%	**100%**
50-54	15.83%	19.42%	19.06%	18.35%	9.71%	7.91%	**100%**
55-59	16.20%	20.42%	19.72%	19.72%	8.45%	7.04%	**100%**
60-64	13.68%	20.51%	21.37%	21.37%	8.55%	5.98%	**100%**
65+	14.93%	20.15%	29.10%	23.88%	4.48%	2.99%	**100%**

The findings show that, generally, across all the age groups, the most known film viewing platform were DVDs followed by Free to Air TV and Pay TV. The least well known film viewing platforms across the age groups is online streaming and internet downloads. The findings also show that the 16 to 39-year-olds were more aware of film viewing platforms such as internet downloads and online streaming than the 40 to +65-year-olds.

4.11.3 Utilised film viewing mediums by income

Table 41: Utilised film viewing mediums by income level

Income level per month	Cinema	• DVD	Free-to-air TV	Pay TV	• Internet downloads	• Online streaming	Total
R10 001 to R15 000	18.33%	22.86%	19.05%	23.10%	10.24%	6.43%	100%
R15 001 to R25 000	19.15%	21.28%	17.02%	25.11%	9.79%	7.66%	100%
R25 001< more	17.77%	20.81%	19.29%	22.34%	10.15%	9.64%	100%
R5 001 to R10 000	14.93%	23.07%	19.95%	24.02%	10.58%	7.46%	100%
R0 to R5 000	14.65%	25.38%	24.89%	19.67%	9.06%	6.35%	100%

The findings show that across all income level groups, the film viewing mediums most utilised were DVDs, Free-to-air TV, Pay TV and Cinema and the least utilised are internet downloads and online streaming. As expected, the low-income groups mostly utilise Free-to-air TV and DVDs and the higher income groups mostly utilise Pay TV.

4.11.4 Utilised film viewing mediums by age

Table 42: Utilised film viewing mediums by age

Age group	Cinema	DVD	Free-to-air TV	Pay TV	Internet downloads	Online streaming	Total
16-20	17.62%	24.15%	20.89%	18.67%	10.31%	8.36%	100%
21-24	17.16%	22.44%	20.33%	19.51%	12.34%	8.23%	100%
25-29	16.30%	24.28%	21.62%	20.07%	10.53%	7.21%	100%
30-34	16.31%	24.88%	22.24%	19.93%	8.73%	7.91%	100%
35-39	14.95%	25.52%	25.77%	21.65%	7.73%	4.38%	100%
40-44	13.48%	25.34%	26.15%	23.45%	6.74%	4.85%	100%
45-49	11.35%	25.33%	23.58%	25.33%	9.61%	4.80%	100%
50-54	8.18%	28.93%	23.90%	30.19%	5.03%	3.77%	100%
55-59	10.31%	23.71%	28.87%	25.77%	7.22%	4.12%	100%
60-64	9.46%	25.68%	29.73%	29.73%	5.41%	0%	100%
65+	9.24%	25.21%	33.61%	26.05%	3.36%	2.52%	100%

The findings show that, across all age groups, larger proportions do watch films through DVD and Free-to-air TV. In addition, to some age groups (ages 40-44, 50-54 and 60-64) DVD and Pay TV are the mostly used film viewing platforms, while internet and online streaming platforms are generally not common options, especially with the older adults age groups(50 to +65).

4.11.5 Preferred languages by province

Adults were asked to indicate the language, other than English, they would prefer to watch films in.

Table 43: Preferred language by province

Language	EC	FS	GP	KZN	LM	MP	NW	NC	WC	Total
Afrikaans	5.82%	4.36%	20.73%	6.18%	16.00%	6.18%	4.36%	8.73%	27.64%	100%
Isindebele	3.85%	0%	40.38%	9.62%	1.92%	40.38%	0%	0%	3.85%	100%
IsiXhosa	59.41%	0.99%	13.37%	10.40%	0.99%	0.99%	0.50%	0%	13.37%	100%
IsiZulu	3.58%	0.26%	32.99%	50.64%	4.09%	4.09%	2.81%	0%	1.53%	100%
None	5.41%	10.81%	27.03%	4.05%	14.86%	12.16%	1.35%	0%	24.32%	100%
Other	6.06%	0%	39.39%	12.12%	24.24%	0%	6.06%	3.03%	9.09%	100%
Sepedi	0.84%	1.68%	31.09%	0%	50.42%	2.52%	10.92%	0.84%	1.68%	100%
Sesotho	7.04%	19.72%	32.39%	7.04%	8.45%	0%	19.72%	0%	5.63%	100%
Setswana	1.80%	28.83%	21.62%	0.90%	0.90%	0.90%	36.94%	5.41%	2.70%	100%
SiSwati	3.85%	0%	23.08%	3.85%	1.92%	61.54%	5.77%	0%	0%	100%
Tshivenda	0%	0%	53.13%	3.13%	34.38%	6.25%	3.13%	0%	0%	100%

Language	EC	FS	GP	KZN	LM	MP	NW	NC	WC	Total
XiTsonga	0%	0%	33.33%	0%	37.04%	18.52%	11.11%	0%	0%	100%

The findings revealed that, beside English, a larger proportion rated Afrikaans as the most preferred language in Western Cape when watching films. Isindebele was more preferred in Mpumalanga while IsiZulu was the language of choice in in Kwa-Zulu Natal. In Gauteng, much preference was given to Sepedi, Sesotho, Tshivenda and XiTsonga. For the Free State, the most preferred language was Setswana, IsiXhosa in Eastern Cape, Sepedi in Limpopo, Setswana in North West and Afrikaans in the Northern Cape.

4.11.6 Enjoyment of subtitled movies by age

Table 44: Enjoyment of subtitles by age group

Age group	No	Yes	Total
16-20	27.68%	72.32%	**100%**
21-24	29.34%	70.66%	**100%**
25-29	31.80%	68.20%	**100%**
30-34	34.24%	65.76%	**100%**
35-39	36.22%	63.78%	**100%**
40-44	25%	75%	**100%**
45-49	37.50%	62.50%	**100%**
50-54	45.76%	54.24%	**100%**
55-59	62.50%	37.50%	**100%**
60-64	57.14%	42.86%	**100%**
65+	50%	50%	**100%**

The findings illustrates that across all age groups, most adults said they enjoy movies with subtitles. Most of the 40 to 44-year-olds (75%) said they enjoy subtitled movies, followed by 16 to 20-year olds (72%) 21 to 24-year-olds (71%) and 25 to 29-year olds. Most of the 55 to 59-year-olds (61%) said they don't like subtitled movies, followed by 60 to 64-year olds (57%) and +65-year olds (50%).

4.11.7 Subtitled movies enjoyment by population group

Table 45: Enjoyment of subtitled movies by population group

Population group	No	Yes	Total
Black African	30.16%	69.84%	100%
Coloured	43.90%	56.10%	100%
Indian/Asian	30%	70%	100%
White	60.87%	39.13%	100%

The findings show that across the Black African, Coloured and Indian/Asian population groups, most of the adults indicated that they enjoy subtitled movies. On the other hand, among the White population, most of the adults (61%) said they don't enjoy subtitles.

4.11.8 Preferred place to watch films by income

Table 46: Income level versus preference

Income level per month	Prefer to go out to watch films	Don't have a preference	Prefer to watch films in the comfort of my home	Total
R10 001 to R15 000	16.91%	20.59%	62.50%	**100%**
R15 001 to R25 000	12.66%	17.72%	69.62%	**100%**
R25 001< more	16.95%	22.03%	61.02%	**100%**
R5 001 to R10 000	14.23%	20.16%	65.61%	**100%**
R0 to R5 000	18.31%	18.71%	62.99%	**100%**

The findings indicate that most adults prefer to watch films in the comfort of their homes regardless of their income level.

4.11.9 Preferred place to watch films by population group

Table 47: Race versus preference

Race	I prefer to go out to watch films	I don't have a preference	I prefer to watch films in the comfort of my home	Total
Black African	17.47%	18.88%	63.64%	100%
Coloured	18.52%	21.60%	59.88%	100%
Indian/Asian	6.67%	15.56%	77.78%	100%
White	14.04%	29.82%	56.14%	100%

Most of the adults across all the racial groups prefer to watch films in the comfort of their homes. Comparatively, most Indian/Asians (78%) said they prefer to watch films in the comfort of their homes, followed by Black Africans (64%) and Coloureds (60%).

4.11.10 Source of awareness of films by age group

Table 48: Sources of awareness of films by age

Age group	Internet reviews	Press reviews	Billboards ads	Radio ads	Social media	TV ads	Other	Total
16-20	17.30%	13.67%	9.88%	8.24%	19.60%	30.31%	0.99%	**100%**
21-24	16.56%	15.10%	9.74%	12.01%	16.23%	28.90%	1.46%	**100%**
25-29	15.75%	13.91%	12.39%	10.24%	17.43%	28.90%	1.38%	**100%**
30-34	12.26%	16.28%	11.84%	11.21%	15.64%	30.66%	2.11%	**100%**
35-39	9.61%	15.32%	11.41%	13.21%	13.81%	34.83%	1.80%	**100%**
40-44	9.80%	16.47%	9.02%	13.73%	10.98%	38.04%	1.96%	**100%**
45-49	7.03%	19.46%	11.89%	15.14%	11.89%	32.97%	1.62%	**100%**
50-54	6.72%	20.90%	11.19%	11.19%	7.46%	39.55%	2.99%	**100%**
55-59	5.19%	19.48%	5.19%	18.18%	7.79%	41.56%	2.60%	**100%**
60-64	6.90%	13.79%	6.90%	13.79%	5.17%	50%	3.45%	**100%**
65+	6.38%	15.96%	8.51%	15.96%	6.38%	42.55%	4.26%	**100%**

Across all the age groups, ads on TV was the most rated source of awareness of films that are watched, followed by social media and press reviews.

4.11.11 Influence of film adverts/previews by age

Respondents were asked to indicate how heavily they are influenced by film adverts or previews in terms of decisions on films to watch in future.

Table 49: Influence of film adverts/previews by age

Age group	Not at all	• Significantly	• Slightly	Very slightly	Very heavily	Total
16-20	7.12%	34.16%	19.22%	4.98%	34.52%	**100%**
21-24	6.04%	35.57%	21.14%	5.70%	31.54%	**100%**
25-29	7.59%	29.70%	24.75%	6.27%	31.68%	**100%**
30-34	8.33%	36.11%	25%	2.78%	27.78%	**100%**
35-39	8.61%	38.41%	21.19%	5.96%	25.83%	**100%**
40-44	6.25%	32.03%	31.25%	3.91%	26.56%	**100%**
45-49	7.78%	31.11%	25.56%	3.33%	32.22%	**100%**
50-54	11.27%	40.85%	16.90%	8.45%	22.54%	**100%**
55-59	20.93%	32.56%	23.26%	6.98%	16.28%	**100%**
60-64	21.21%	39.39%	15.15%	0.00%	24.24%	**100%**
65+	25.42%	23.73%	27.12%	8.47%	15.25%	**100%**

The findings show that, generally, most age groups are either significantly influenced or very heavily influenced by the film adverts. Conversely, the older age groups (ages 55 to 65+) have a sizeable proportion of adults that aren't influenced by the film adverts or previews on their choice of films to watch.

4.11.12 Influence of film adverts/previews by population group

Table 50: Influence of film adverts/previews by population group

	Black African	Coloured	Indian/Asian	White
Not at all	8.84%	5.56%	6.52%	13.16%
Significantly	32.32%	45.06%	36.96%	33.33%
Slightly	22.51%	22.84%	28.26%	26.32%
Very slightly	4.98%	3.70%	8.70%	8.77%
Very heavily	31.35%	22.84%	19.57%	18.42%
Grand Total	**100%**	**100%**	**100%**	**100%**

The findings show that, generally, across all the population groups, the decisions regarding the choice of upcoming films to watch, are greatly influenced by film adverts or previews. This is evident as the majority of each racial group are significantly and very heavily influenced by film adverts or previews. Only a small proportion claimed to be very slightly influenced.

4.11.13 Frequency of cinema going by income

Table 51: Visit to cinema versus income

	R10 001-R15 000	R15 001-R25 000	R25 001< more	R5 001-R10 000	R0-R5 000
As often as there's something interesting to watch	51.85	37.78	60.53	55.04	50.88
More than four times/month	3.70	2.22	5.26	2.33	6.58
Once a month	30.86	42.22	26.32	29.46	35.31
One to four times a month	13.58	15.56	5.26	11.63	7.02
One to four times a week	0.00	2.22	2.63	1.55	0.22
Total	**100%**	**100%**	**100%**	**100%**	**100%**

Across all income levels, except the R15 001 to R25 000 group, most adults said they go to the cinema as often as there's something to watch. For the R15 001 to R25 000 group, a greater proportion said they attend the cinema once a month, followed by adults who stated that they go as often as there's something interesting to watch.

4.11.14 Willing price to watch foreign-made films by income level

Table 52: Willing price to watch foreign-made films by income level

Movie rates	R10 001-R15 000	R15 001-R25 000	R25 001< more	R5 001-R10 000	R0-R5 000
Between R100 and R200	4.41	6.25	3.39	3.15	5.43
Between R50 and R100	25	25	25.42	31.89	23
Less than R50	41.91	40	42.37	38.58	46.99
Not willing to pay	17.65	15	13.56	18.11	13.62
Other	0.74	1.25	5.08	1.18	1.88
Whatever it costs as long as I like it	10.29	12.5	10.17	7.09	9.08
Total	**100%**	**100%**	**100%**	**100%**	**100%**

The findings show across all income levels that most adults are willing to pay less than R50 to watch a foreign-made film at the cinema. In addition, sizeable proportions across all the income categories also said they are willing to pay between R50 and R100 to watch a foreign-made film at the cinema.

4.11.15 Willing price to watch SA films by income level

Table 53: Willing price to watch SA-made films by income

Movie rates	R10 001-R15 000	R15 001-R 25 000	R25 001< more	R5 001 – R10 000	R0 – R5 000
Between R100 and R200	5.84%	11.39%	1.67%	6.72%	6.18%
Between R50 and R100	22.63%	24.05%	30.00%	26.48%	22.91%
Less than R50	48.91%	43.04%	31.67%	41.90%	47.61%
Not willing to pay	8.03%	8.86%	13.33%	16.21%	10.66%
Other	2.19%	1.27%	3.33%	1.58%	1.59%
Whatever it costs as long as I like it	12.41%	11.39%	20.00%	7.11%	11.06%
Total	**100.00%**	**100.00%**	**100.00%**	**100.00%**	**100.00%**

The findings show across all income levels that most adults are much willing to pay less than R50 to watch SA-made films at the cinema. In addition, sizeable proportions across all the income categories also said they are willing to pay between R50 and R100 to watch SA-made films at the cinema.

4.11.16 Willing price to watch SA films by population group

Table 54: Suggested cinema rates for SA movie versus race

Movie rates	Black African	Coloured	Indian/Asian	White
Between R100 and R200	6.82	5.56	8.51	4.39
Between R50 and R100	24.72	20.99	23.40	16.67
Less than R50	44.04	48.77	40.43	53.51
Not willing to pay	12.13	10.49	8.51	7.02
Other	1.57	0	0	5.26
Whatever it costs as long as I like it	10.71	14.20	19.15	13.16
Total	**100%**	**100%**	**100%**	**100%**

The findings show that a greater proportion of adults, across all the population groups, were willing to pay less than R50 to watch SA-made films at the cinema. Comparatively, more Whites (54%) said they are willing to pay less than R50, followed by Coloureds (49%), Black Africans (44%) and Indian/Asians (40%). In addition, considerable proportions of each racial group also said they are willing to pay between R50 and R100.

4.11.17 Watching of SA produced film by age group

Respondents were asked whether they could recall watching an SA-produced film.

Table 55: Watching SA-produced film by age group

Age group	No	Yes	Total
16-20	19.01%	80.99%	**100%**
21-24	13.04%	86.96%	**100%**
25-29	12.79%	87.21%	**100%**
30-34	12.04%	87.96%	**100%**
35-39	13.73%	86.27%	**100%**
40-44	6.15%	93.85%	**100%**
45-49	18.28%	81.72%	**100%**
50-54	16.67%	83.33%	**100%**
55-59	20.93%	79.07%	**100%**
60-64	20%	80%	**100.%**
65+	22.03%	77.97%	**100%**

Across all age groups, most of the adults recalled watching an SA-produced film. The 40 to 44 age group had the most (94%) followed by the 30 to 34 age group (88%) and the 21 to 24 age group (87%).

4.11.18 Watching of SA-made film by population group

Table 56: Watching SA-produced films by population group

	Black African	Coloured	Indian/Asian	White
No	13.25%	22.56%	12.77%	16.81%
Yes	86.75%	77.44%	87.23%	83.19%
Total	**100%**	**100%**	**100%**	**100%**

The findings show that, across all population groups, most of the adults recalled watching an SA-produced film.

4.11.19 Watching of SA produced films by province

Table 57: Watching SA-produced films by province

	No	Yes	Total
Eastern Cape	15.92%	84.08%	**100%**
Free State	7.79%	92.21%	**100%**
Gauteng	10.53%	89.47%	**100%**
Kwazulu-Natal	17.83%	82.17%	**100%**
Limpopo	11.86%	88.14%	**100%**
Mpumalanga	15.50%	84.50%	**100%**
North West	11.21	88.79%	**100%**
Northern Cape	5.88%	94.12%	**100%**
Western Cape	25.26%	74.74%	**100%**

Across all provinces, most of the adults recalled watching an SA-produced film. Northern Cape had the most (94%) followed by Free State (92%), Gauteng (90%) and North West (89%).

4.11.20 Watching of SA films in future by age group

Table 58: Watching SA films in future by age group

Age group	Maybe	No	Yes	Total
16-20	36.04%	18.02%	45.94%	100%
21-24	38.46%	8.70%	52.84%	100%
25-29	34.44%	12.91%	52.65%	100%
30-34	33.49%	11.16%	55.35%	100%
35-39	42.11%	13.82%	44.08%	100%
40-44	40.77%	13.08%	46.15%	100%
45-49	37.36%	17.58%	45.05%	100%
50-54	52.78%	16.67%	30.56%	100%

Age group	Maybe	No	Yes	Total
55-59	38.10%	16.67%	45.24%	100%
60-64	40%	22.86%	37.14%	100%
65+	50%	31.03%	18.97%	100%

The findings show that a larger proportion of all the age groups indicated that they would go out of their way to watch SA films in future while a sizeable proportion of the older adults (ages 65+) are uncertain if they would.

Table 59: Watching SA films in future by population group

Race	Maybe	No	Yes	Total
Black African	36.93%	12.56%	50.52%	100%
Coloured	38.51%	26.09%	35.40%	100%
Indian/Asian	40.43%	17.02%	42.55%	100%
White	51.79%	14.29%	33.93%	100%

With respect to watching SA films in future, 51% said they will go out of their way to watch SA films in future. For Whites, 52% said maybe they will go out of their way to watch SA films in future while a sizeable proportion of the Coloured population group (39%) were undecided.

Table 60: Watching SA films in future by province

Province	Maybe	No	Yes	Total
Eastern Cape	29.50%	11.50%	59%	**100%**
Free State	46.75%	7.79%	45.45%	**100%**
Gauteng	41.40%	16.05%	42.56%	**100%**
Kwazulu-Natal	37.62%	12.86%	49.52%	**100%**
Limpopo	36.27%	10.88%	52.85%	**100%**
Mpumalanga	49.62%	16.03%	34.35%	**100%**
North West	34.48%	10.34%	55.17%	**100%**
Northern Cape	44.12%	0%	55.88%	**100%**
Western Cape	33.16%	24.74%	42.11%	**100%**

Generally most respondents in all provinces showed interest to watching South African films in future.

5. CATALOGUE OF FINDINGS – CHILDREN (0-4 YEARS)

5.1 Introduction

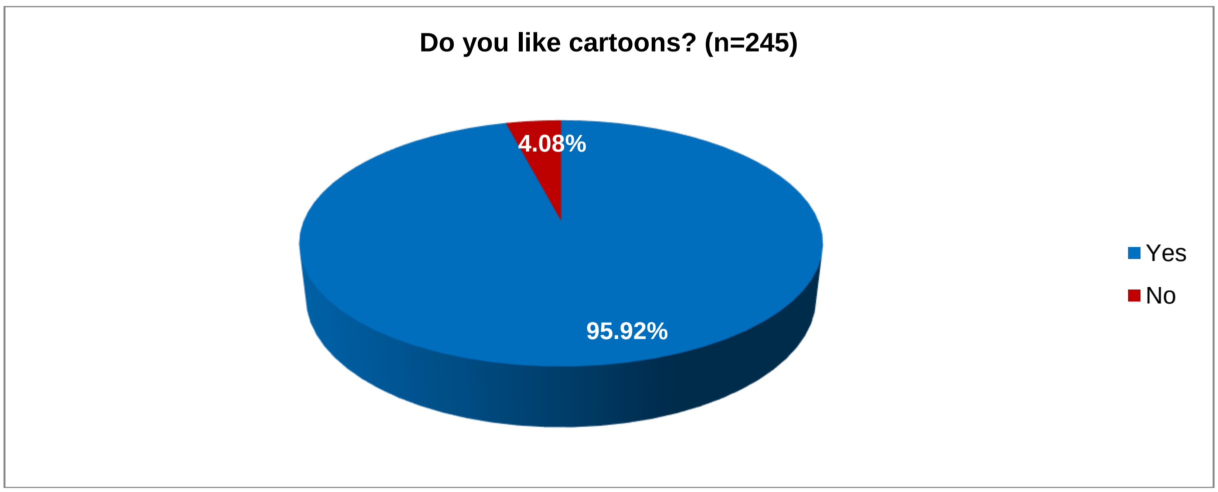
This section is a presentation and analysis of the survey results obtained from children (0 to 4 years). The survey adopted a focus group approach where the data collection instrument was administered to the respondents through a visual presentation of films/video covers. The aim was to find out consuming patterns and awareness of SA locally-produced films and video among this age group. This approach was adopted as, generally, colour is an element of visual language that young children process before they are consciously aware of it.

(Please note: The word ***movie*** *instead of film was used with children as generally they are more conscious and familiar with the word movie compared to film.)*

5.1.1 Liking of cartoon movies

The children were asked if they watch cartoons.

Figure 69: Liking of cartoon movies

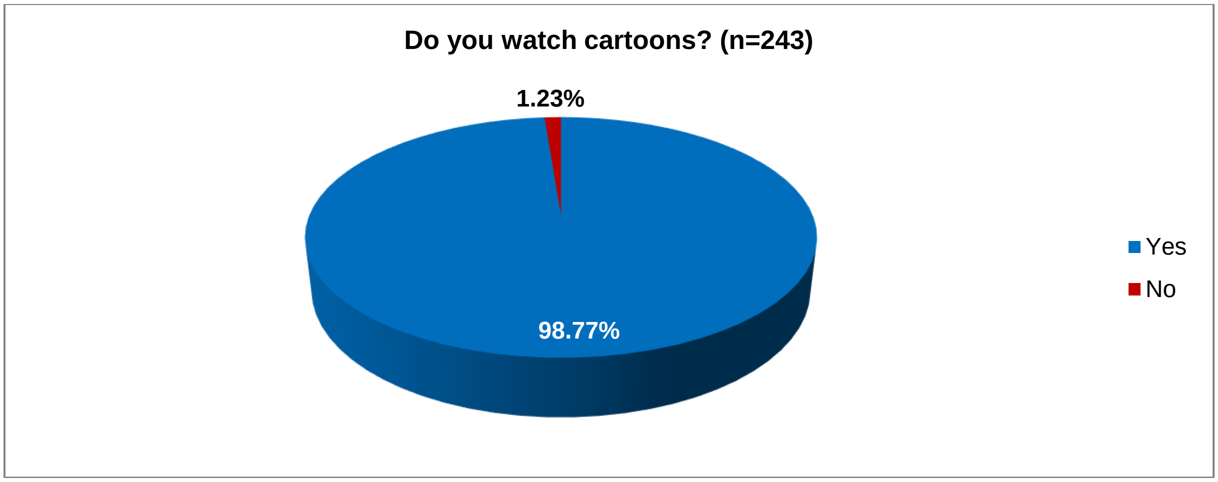


Most of the children aged between 0 to 4 years (96%) said they like cartoon movies and a small proportion of 4% said they don't.

5.1.2 Watching of cartoons

The children were further asked if they watch cartoons. The findings are presented in the figure below.

Figure 70: Watching of cartoons



The findings showed the majority (99%) of the children aged between 0 to 4 years said they do watch cartoons and only 1% of the children indicated that they don't. There are several factors that endear children to cartoons: for instance, cartoons portray (largely) innocent fantasies that are far removed from (harsh) reality, exude larger-than-life emotions, drama, fantastical facts and vivid colors as well as imagery. Subsequently, children watch more animations or cartoons than any other age group. Cartoons often create a world children can relate to.

5.1.3 Favourite cartoons

The children were shown a series of pictures and were asked to indicate their favourite cartoons. The table below illustrates the findings.

Table 61: Favourite cartoons

Movies	Number of children who mentioned the movie	Percentage (%)
Meet the Robinsons	144	4.47
Despicable Me	128	3.98
Khumba	143	4.44
Zambezia	109	3.39
Tom and Jerry	221	6.87
The Simpsons	143	4.44
Ben 10	177	5.50
Phineas and Ferb	157	4.88
Looney Tunes	207	6.43
Inside the Baobab Tree	119	3.70
Spongebob Squarepants	203	6.31
Winx Club	109	3.39
Powerpuff girls	192	5.97

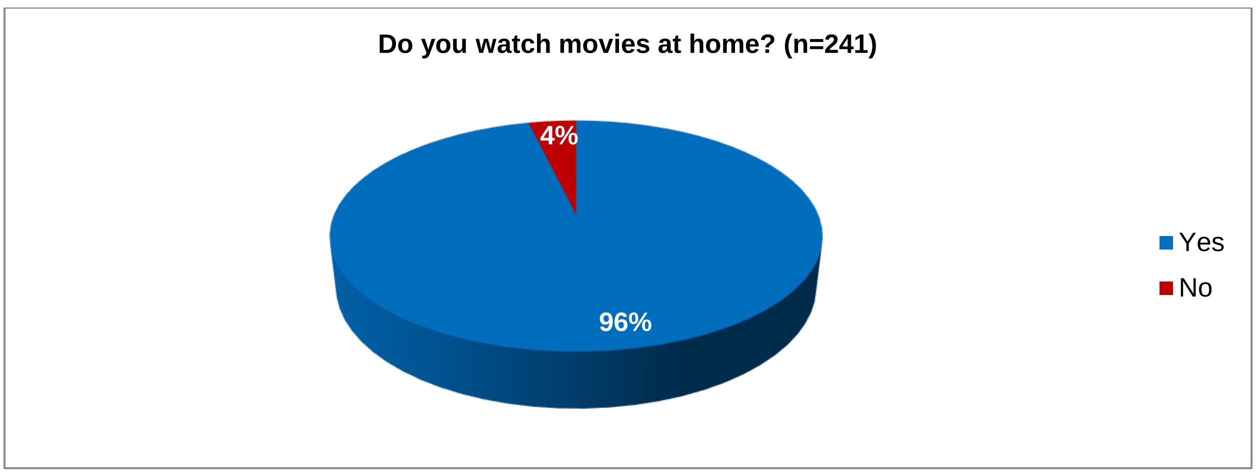
Movies	Number of children who mentioned the movie	Percentage (%)
Adventure Time	98	3.05
Mickey Mouse	214	6.65
Barney	219	6.81
Dub and Bug	135	4.20
Mickey Park	178	5.53
Takalani Sesame	165	5.13
Total	3 218	100

Most of the 0 to 4-year-olds said **Tom and Jerry** is their favourite cartoon, followed by **Barney**, **Mickey Mouse**, **Looney Tunes, Spongebob Squarepants and Powerpuff girls**. The least favoured cartoons include **Adventure Time, Winx Club, Zambezia** and **Inside the Baobab Tree**.

5.1.4 Watching movies at home

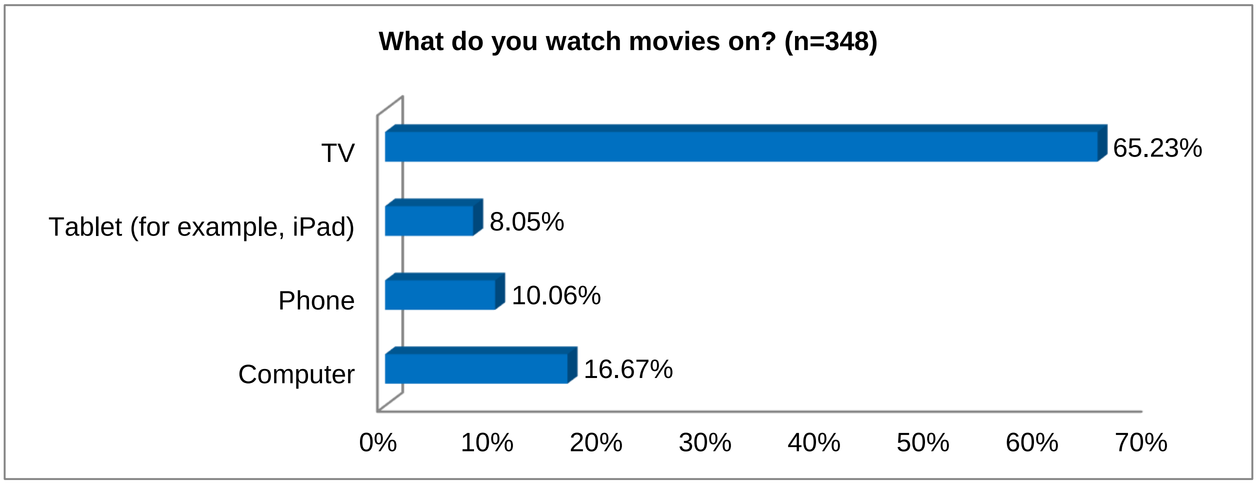
Children were asked whether or not they watch movies at home. The findings, as shown in the next figure, shows that the majority (96%) said they watch movies at home and only a small proportion (4%) said they don't. These findings also demonstrate that children constitute an integral part of the audience for films and videos.

Figure 71: Watching of movies at home



The 0 to 4-year-olds who had responded that they watch movies at home were further asked to indicate the platforms they do so from. The findings are presented in the next figure.

Figure 72: Platforms on which movies are watched



Most of the 0 to 4-year olds (65%) said they watch movies on TV, followed by 17% who said they watch movies on PCs and 10% who watch movies on phones. The least proportion of children said they watch movies on tablets. These results are a confirmation that TV is the main platform most people, both young and old, use to view films.

To explore viewership habits, the children were asked to indicate who they watch movies with. The findings are illustrated in the next table.

Table 62: Person who mostly watches movies with children

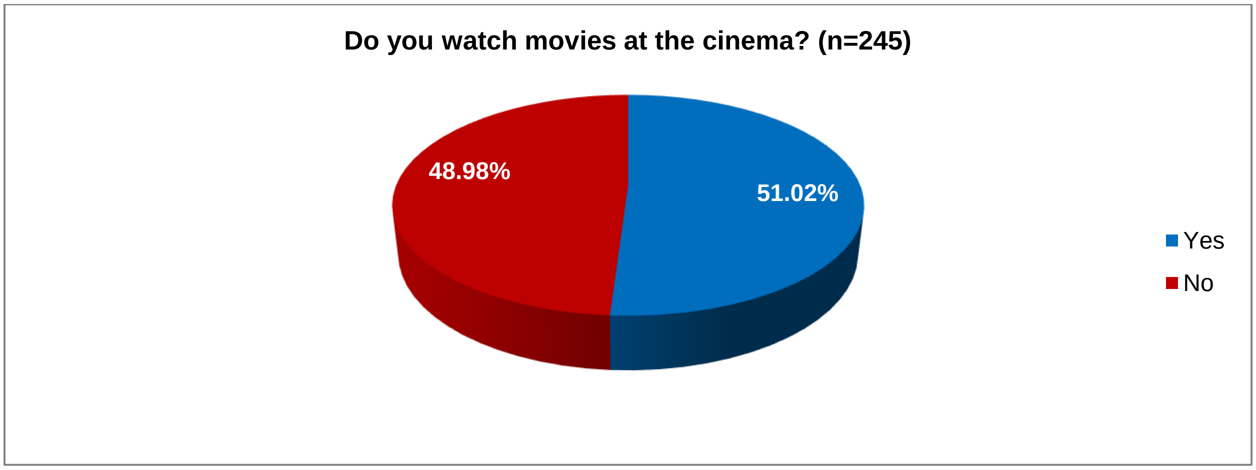
Who mostly watches movies with children	Count	Percentage (%)
Mom	87	34.94
Brother or Sister	57	22.89
Grandparents	9	3.61
Friends	13	5.22
Other	40	16.06
Dad	43	17.27
Total	**249**	**100%**

A large proportion of the 0 to 4-year-olds (35%) stated that they watch movies with their moms, followed by 23% who said they do so with either a brother or sister, and 17% do so with their dads. About 16% of the respondents selected 'Other' – when asked to specify, they said they mostly watch movies with the whole family. Smaller proportions (4%) said they mostly watch movies with their grandparents and 5% said they watch with friends. These findings reveal that most respondents in this age group normally watch films in the company of family members and friends.

5.1.5 Cinema

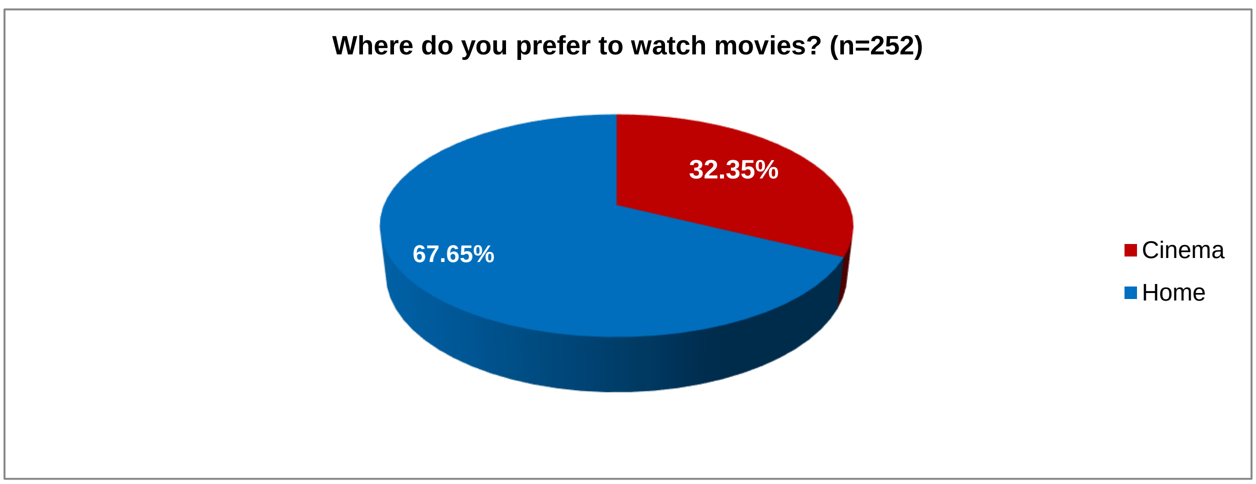
Respondents were asked to indicate with a 'yes' or 'no' if they watch films at the cinema.

Figure 73: Watching of movies



The findings revealed that 51% of the 0 to 4-year olds watch movies at the cinema and 49% indicated that they don't. Children were further asked to report on where they prefer to watch movies. The findings are shown in the next figure.

Figure 74: Preferred place to watch movies

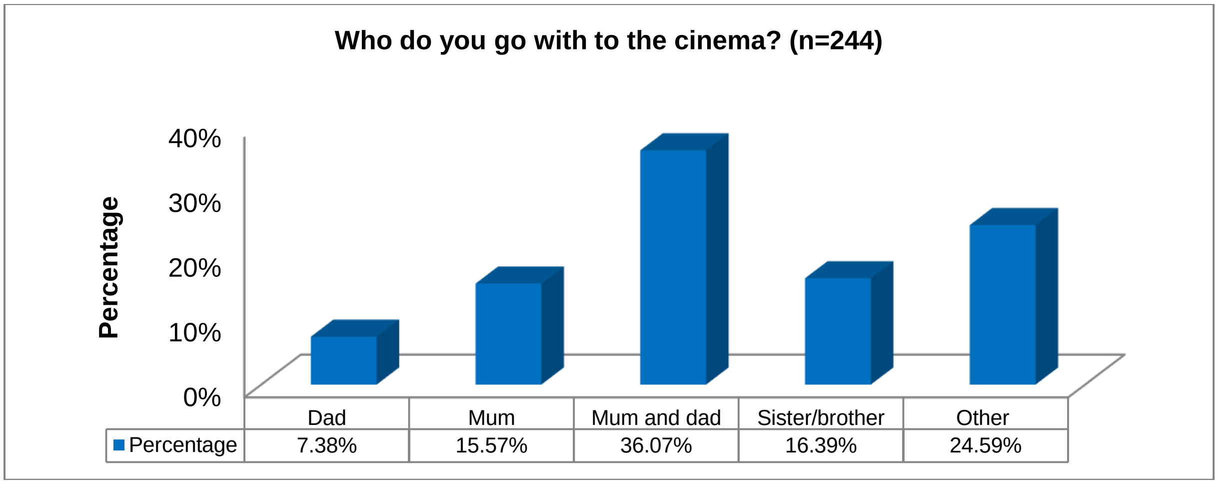


An assessment of opinions on viewing place, and platform preference for children, revealed that most of the 0 to 4-year-olds (68%) prefer to watch movies at home, while 32% said they prefer the cinema. In other words, platform preference by age, points to the fact that children prefer to watch films on TV compared to other viewing platforms.

5.1.6 Accompanying person to a movie

To explore viewership habits with regards to cinema, respondents were asked to indicate who they go with to the cinema. The findings are illustrated in the figure below.

Figure 75: Person accompanying to movies



A larger proportion of the 0 to 4-year-olds (36%) said they attend the cinema with parents, followed by 25% who selected ‘Other’ – on being probed further, they said they go to the cinema as a whole family, implying parents as well as sisters, brothers, and so on; 16% said sister/brother, and a similar proportion (16%) said mum. A lesser proportion (7%) indicated going to the movies with their dad. As expected, it can be observed that this age group mostly goes to the cinema in the company of immediate family members.

Children were shown a number of movie covers and asked to indicate which movies they have watched.
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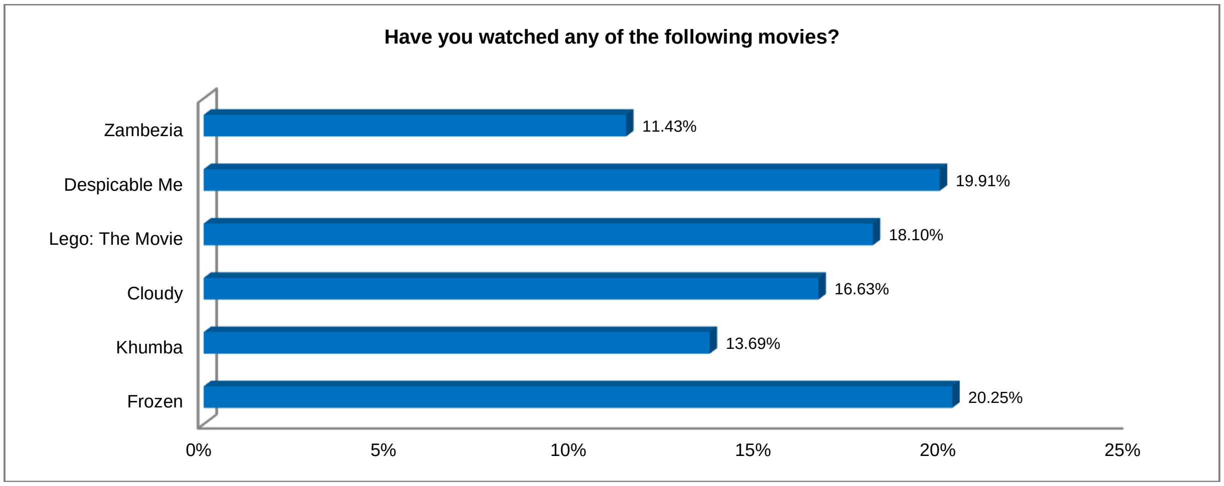
Figure 76: Movies that have been watched



The findings showed that ***Frozen*** was the most watched movie, followed by ***Despicable Me***, ***Lego: The Movie*** and ***Cloudy***. The least watched movies were **Zambesia** and **Khumba** (SA produced). These results seem to suggest that children within this age group consume more foreign-made films compared to locally-made films.

6. CATALOGUE OF FINDINGS – YOUTH (5-16 YEARS)

6.1 Introduction

For the purposes of this research, the term youth was taken to refer to children between 5 and 16 years. The sections of the questionnaires was further divided into age groups, namely: 5 to 7 years, 8 to 12 years and 13 to 16 years.

6.1.1 Respondents profile

Youth were asked a series of questions to profile them in terms of their demographic and socio economic characteristics. The findings are presented in the next table.

Table 63: Demographic characteristics of youth

Category	**Percentage (%)**
Gender	
Female	53.58%
Male	46.42%
Age group	
5-7 years	21.19%
8-9 years	19.55%
10-12 years	28.75%
13-14 years	17.91%
15-16 years	12.61%
Province	
Eastern Cape	10.82%
Free State	4.53%
Gauteng	34.59%
KwaZulu-Natal	14.48%
Limpopo	9.56%
Mpumalamga	8.05%
North West Province	5.28%
Northern Cape	0.88%
Western Cape	11.45%
Population Group	
Black African	77.71%
Coloured	12.09%
Indian/Asian	5.67%
White	4.28%
Other	0.25%

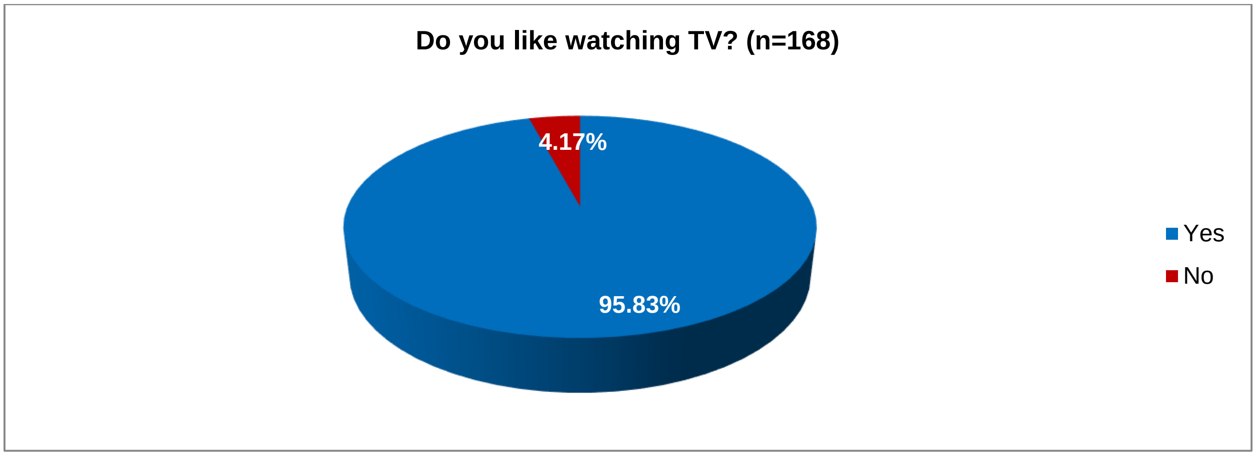
Number of siblings	Percentage (%)
1-3	59.64%
More than 3	29.76%
None	10.60%

6.2 Young children (5-7 years old)

6.2.1 Watching TV

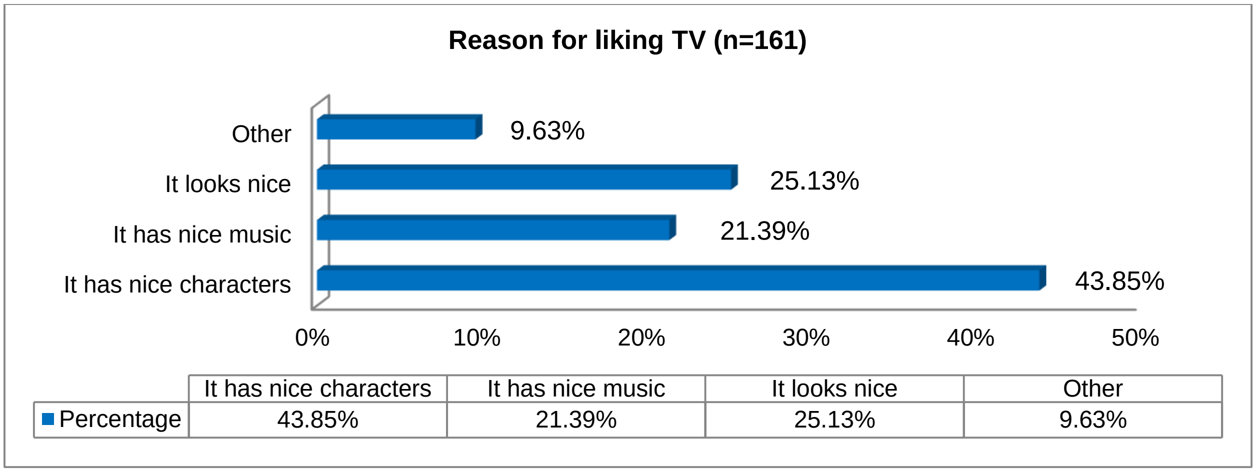
Respondents were asked to indicate with a 'yes' or 'no' if they like to watch TV.

Figure 77: Watching TV



The majority the 5 to 7-year olds (96%) said they like watching movies on TV, while 4% don't like to. The respondents who indicated that they like to watch films on TV were asked to indicate the reason why they like to watch films on TV, as shown in the next graph.

Figure 78: Reasons for liking TV



A larger proportion of the 5 to 7-year-olds (44%) indicated that they like to watch films on TV because it has nice characters, followed by 25% who said they like to so because 'it looks nice', with 21% saying it's because of the nice music. A smaller proportion of the respondents (10%) provided other reasons such as movies on TV have interesting people, and movies are always changed.

Respondents were asked to indicate their favourite type of film to watch. The findings are presented in the next table.

Table 64: Favourite types of films

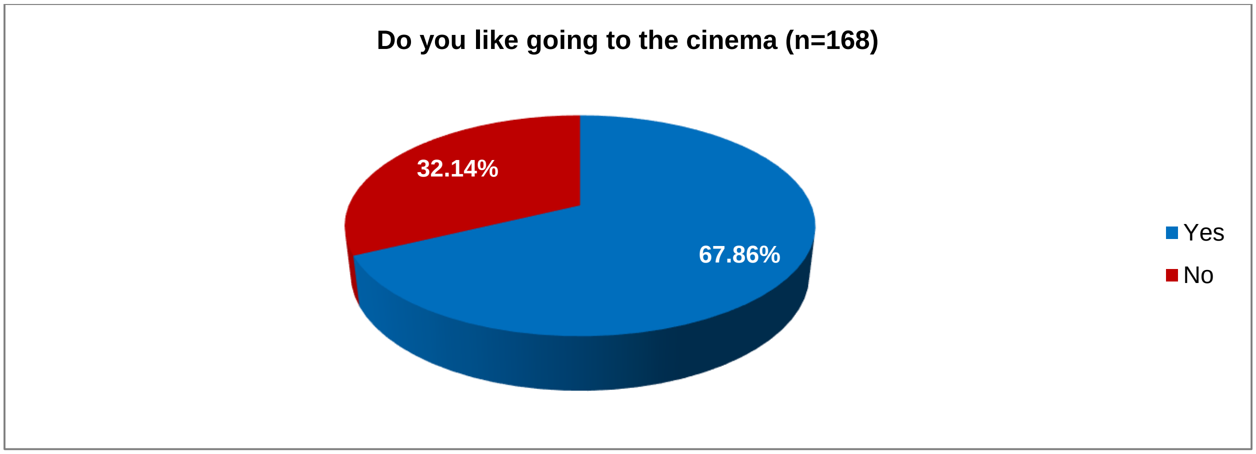
Favourite type of film	Count	Percentage (%)
Adventure films	30	18.63
Cartoons	100	62.11
Films about love	2	1.24
Films about space, robots or aliens	6	3.73
Funny films	10	6.21
Musicals	6	3.73
Real stories about people or animals	1	0.62
Sad or serious films	0	0
Scary films	6	3.73
Total	**161**	**100%**

Most of the 5 to 7-year-olds (62%) said they favour cartoons, followed 19% who said they favour adventure. The results obtained weren't a surprise, as none of the children said they favour sad or serious films. Very few of the respondents said they favour films on real stories and love.

6.2.2 Watching films at the cinema

To explore preferred platforms, respondents were asked to indicate whether they like going to the cinema.

Figure 79: Interests in going to the cinema



Most of the 5 to 7-year-olds (68%) reported that they like going to the cinema, while 32% said they don't. Respondents were further asked to reveal who they usually go with to the cinema. The findings are presented in the table below.

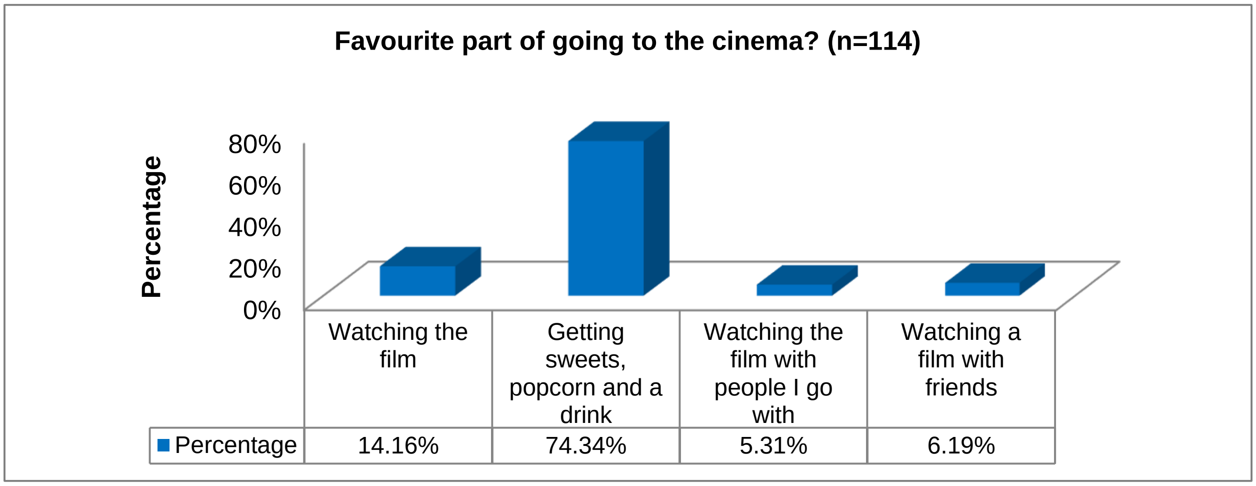
Table 65: Accompanying person to the cinema

Accompanying person to the cinema	Count	Percentage (%)
Mom or dad	79	69.91%
Brother or Sister	20	17.70%
Babysitter/nanny	4	3.54%
Ouma or Oupa (Grandma or Grandpa)	4	3.54%
Aunt or Uncle	4	3.54%
Other	2	1.77%
Total	**113**	**100%**

Most of the 5 to 7-year-olds (70%) indicated that are usually taken to the cinema by their mom or dad, followed by 18% who said they usually go with either their brother or sister. From these findings, it's clear that children aged five and seven years go to the cinema in the company of very close family members.

The children were asked to indicate what they like most about going to the cinema, revealed in the next graph.

Figure 80: Favourite part of going to the cinema

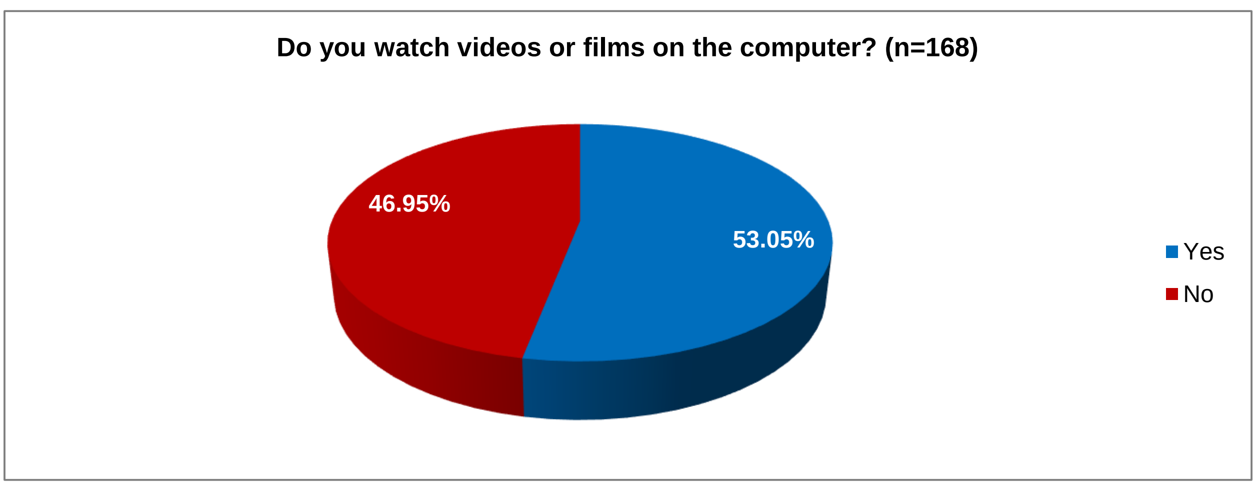


Most of the 5 to 7-year olds (74%) said what they like most about going to the cinema is having sweets, popcorn and a cooldrink, followed by 15% who said they simply like watching the film and 6% said watching a film with friends. A small proportion of the respondents (5%) said they like watching the film with the people accompanying them.

6.2.3 Watching videos or films on computer

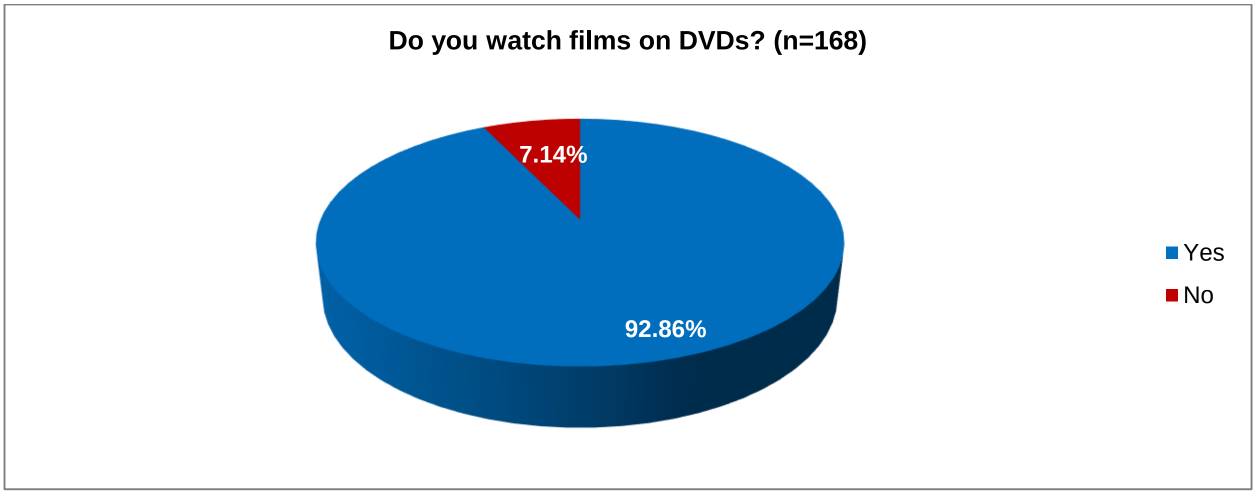
Respondents were asked to indicate if they watch films on the PC. The findings are shown in the next figure.

Figure 81: Watching videos or films on the PC



The findings show that 53% of the 5 to 7-year-olds said they watch videos or films on the computer while 47% said they don't.

6.2.4 Watching films on DVDs

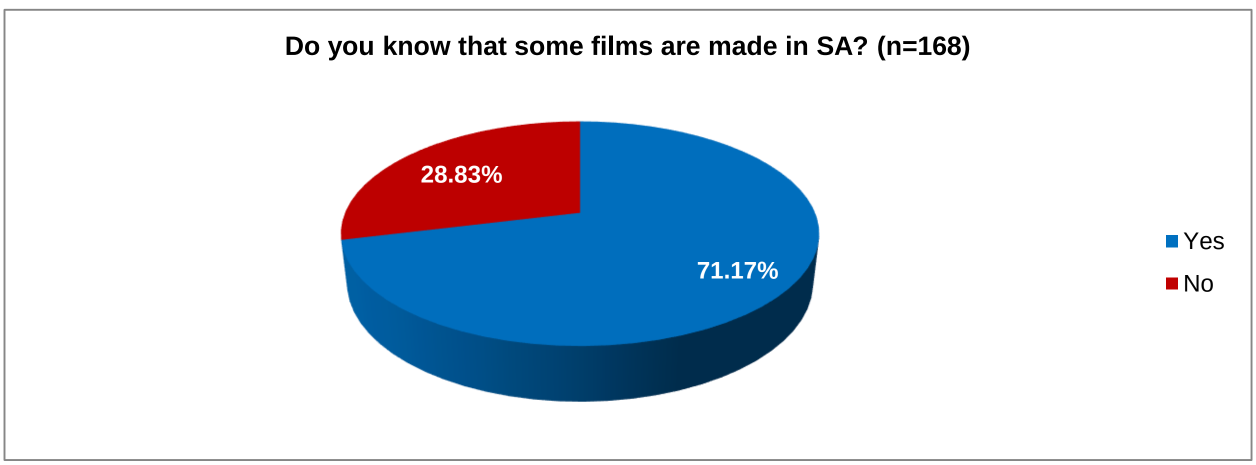


The majority of the 5 to 7-year-olds (93%) said they watch films on DVD while 7% said they don't, showing that DVDs are a significant viewing platform for this group.

6.2.5 Awareness of SA films

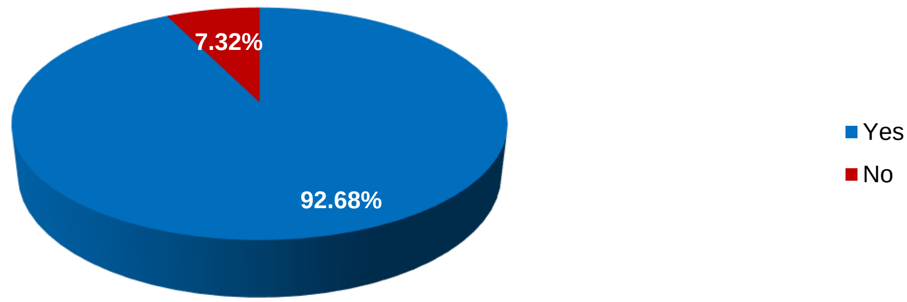
Respondents were asked if they know that some films are made in SA. The findings are shown in the figure below.

Figure 82: Knowledge that some films are made in SA



Most of the 5 to 7-year-olds (71%) said they were aware that some films are made in SA while 29% were not. In relation to the previous question, respondents were asked to indicate if they would watch films on the knowledge that some films are made locally.

If you knew that some films are produced in SA, will you still watch them? (n=168)



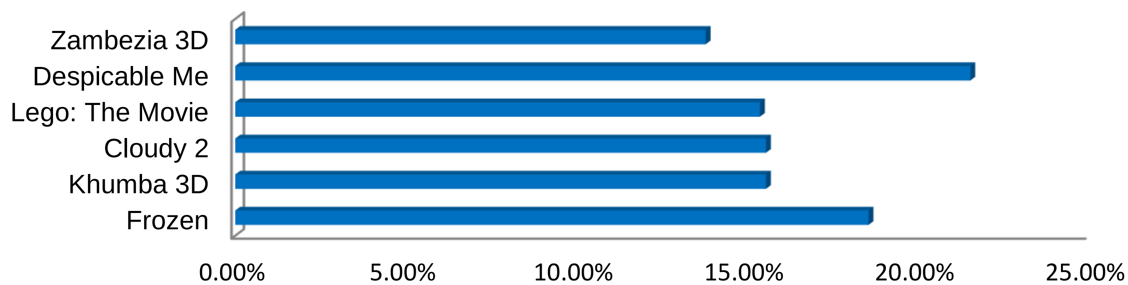
The majority of the 5 to 7-year-olds (93%) indicated that they would still watch films made in SA, while 7% said they wouldn't.

6.2.6 Films watched

Respondents were asked to indicate films they have watched. Findings are presented in the next figure.

Figure 83: Films watched

Films watched (n=168)



	Frozen	Khumba 3D	Cloudy 2	Lego: The Movie	Despicable Me	Zambezia 3D
Percentage	18.49%	15.49%	15.49%	15.32%	21.48%	13.73%

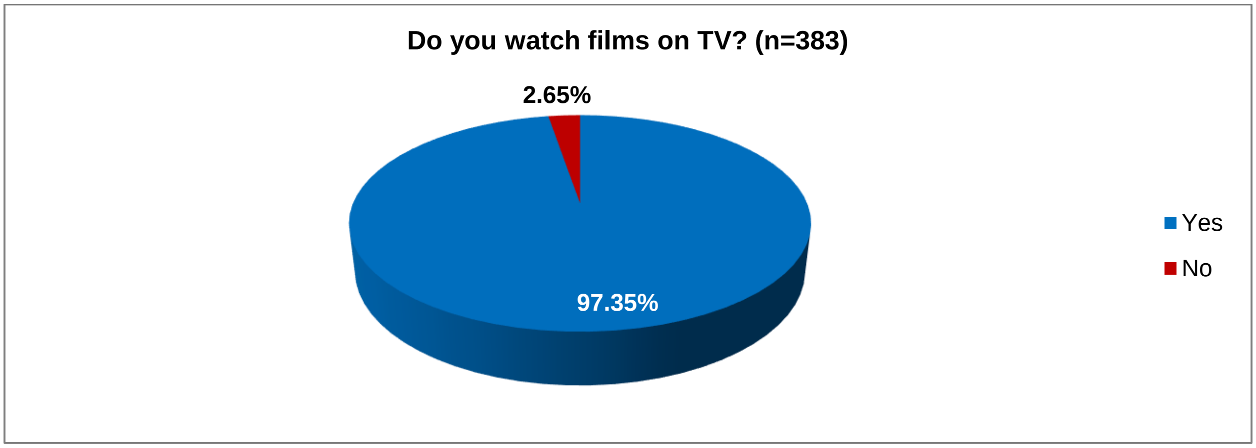
The findings show that **Despicable Me, Frozen and Cloudy** are the most watched films. It's also pertinent to note these films are foreign productions. These findings seem to suggest that 5 to 7-year-olds watch more foreign produced films.

6.3 Children (8-12 years old)

6.3.1 Watching films on TV

Respondents were asked if they watch films on TV.

Figure 84: Watching films on TV



Most of the 8 to 12-year-olds (97%) said they do watch films on TV, and a small proportion (3%) said they don't.

6.3.2 Favourite genre/type of film

Respondents were asked to indicate their favourite type or genre of film.

Table 66: Favourite type of film to watch

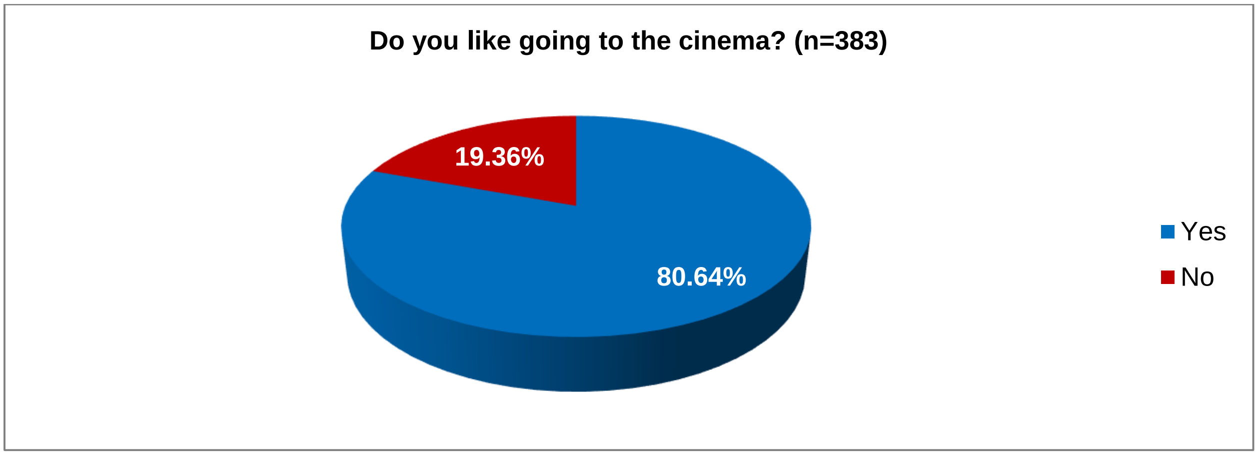
Favourite type of film to watch	Count	Percentage (%)
Adventures	83	22.25
Cartoons	113	30.29
Films about love	12	3.22
Films about space, robots or aliens	7	1.88
Funny films	57	15.28
Musicals	32	8.58
Real life films	4	1.07
Sad or serious films	7	1.88
Scary films	58	15.55
Total	**373**	**100%**

The general film genres preferred by the 8 to 12-year-olds were cartoons, followed by adventures, scary and funny films. Real life stories, space/robots/aliens, sad or serious films and films about love were reported as the least preferred.

6.3.3 Interest in going to the cinema

Respondents were asked to indicate if they go to the cinema to watch films.

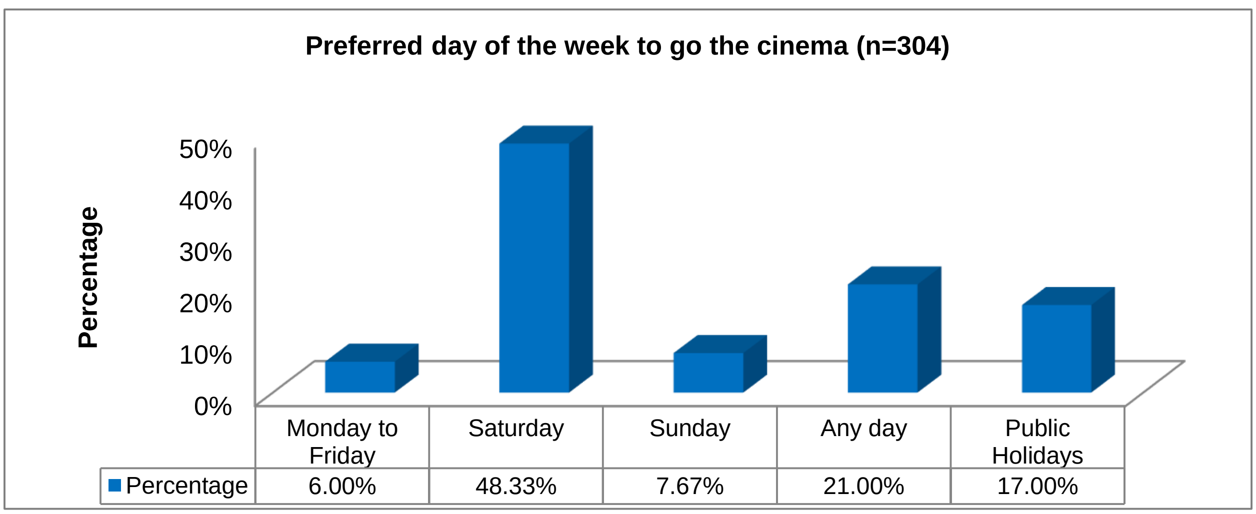
Figure 85: Interests in going to the cinema



The findings revealed that the majority of the 8 to 12-year-olds (81%) said they like going to cinemas to watch films while 19% said they dislike going.

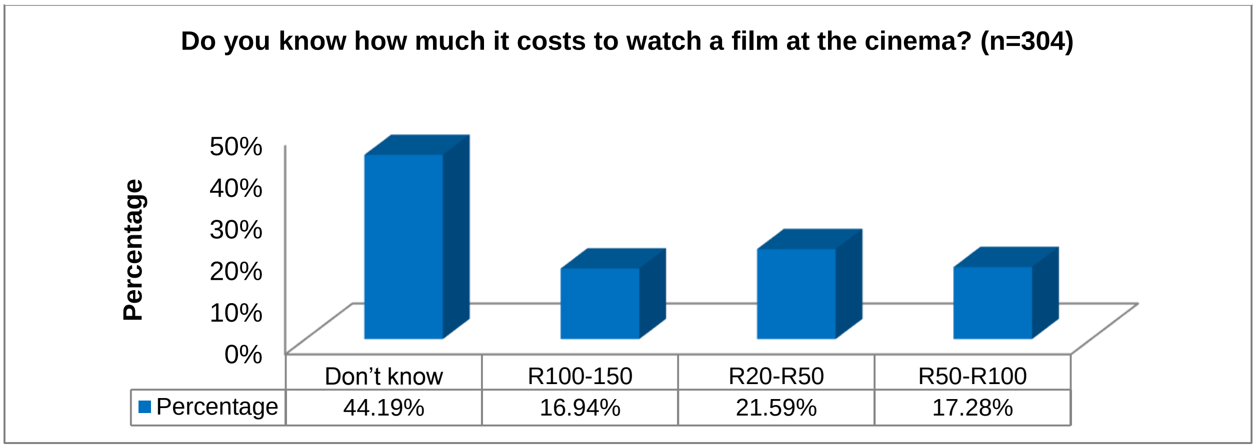
To understand viewership habits, respondents were asked to indicate their preferred days to attend the cinema. The findings are illustrated in the next figure.

Figure 86: Preferred day of going to the cinema



A larger proportion of the 8 to 12-year-olds (48%) said they prefer going to the movies on Saturdays, followed by 21% who said they prefer any day and 17% who said they like public holidays. Smaller portions of respondents said they prefer to go on Sundays (8%) and 6% indicated that they prefer to attend from Monday to Friday.

Figure 87: Cost a movie at the cinema



Respondents were further asked whether or not they know how much it costs to watch a film at the cinema.

Most of the 8 to 12-year-olds (44%) indicated they don't know the cost of watching a film at the cinema, followed by 22% who indicated that it costs between R20-R50; 17% said R50-R100 and a similar portion of 17% indicated that it cost between R100-R150.

Children between 8 and 12 years were asked to indicate who takes them to the cinema. The findings are presented in the following table.

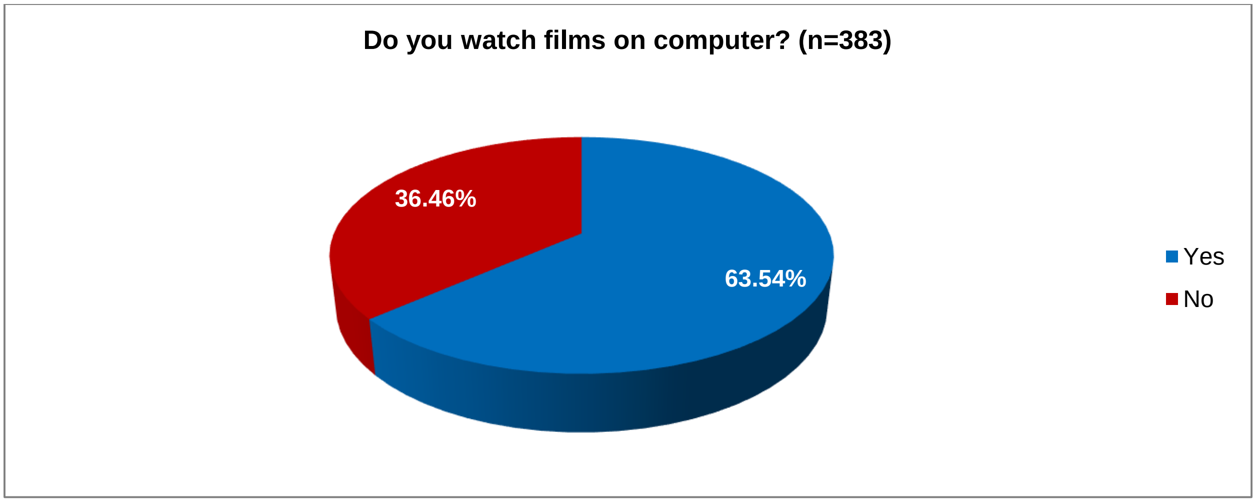
Table 67: Person accompanying children to cinema

The person who usually accompany children to the cinema	Count	Percentage (%)
Aunt or uncle	49	16.39
Babysitter/nanny	3	1
Brother or sister	74	24.75
Friends	76	25.42
Mom or dad	90	30.10
Other	7	2.34
Total	**299**	**100%**

Most of the 8 to 12-year-olds (30%) said they are usually taken to the cinema by their parents, followed by 25% who go with their friends and a similar proportion of 25% who said they go with either sibling. Smaller portions of the respondents said they go with an aunt, uncle or babysitter.

Respondents were asked to indicate if they watch films on the computer.

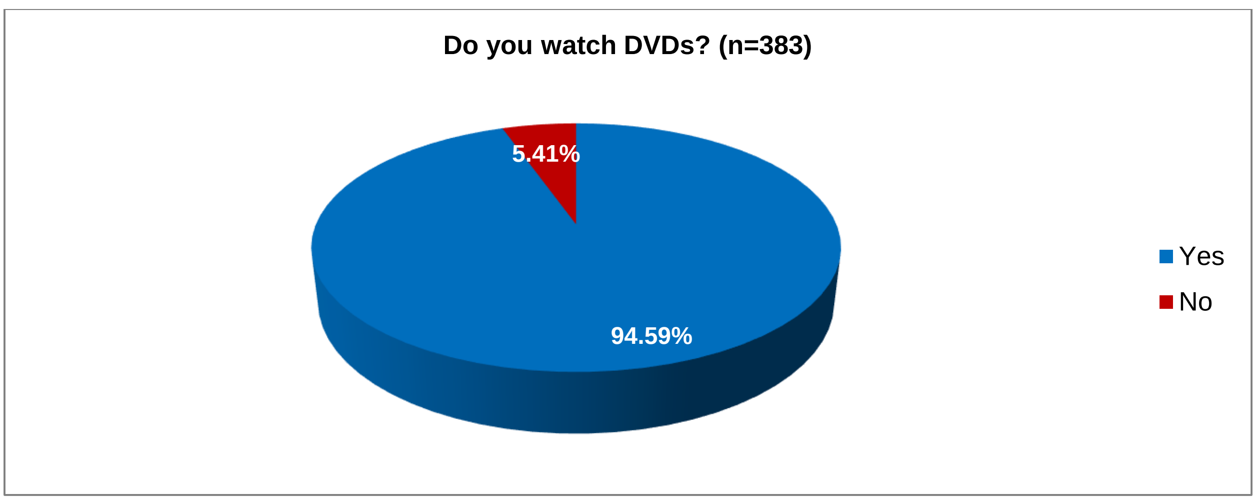
Figure 88: Watching of films on the PC



Most of the 8 to 12-year-olds (64%) said they watch films on the PC while 36% said they don't.

Respondents were asked to indicate if they watch films on DVD. The findings are shown in the following figure.

Figure 89: Watching of DVDs



The majority of the 8 to 12-year-olds (95%) said they watch films on DVD while 5% said they don't.

6.3.4 Films watched

Children aged between 8 and 12 years were shown a series of film covers and asked to indicate the films they have watched.

Table 68: Films that have been watched

Movies that have been watched	Count	Percentage (%)
Agent 2000	82	4.30
Hollywood	73	3.83
Spud	127	6.66
Konfetti	80	4.19
22	92	4.82
X-Men	245	12.84
Believe	88	4.61
Lucy	78	4.09
Tammy	99	5.19
Spiderman 2	309	16.19
Transformers	221	11.58
Maleficent	161	8.44
Guardians of the Galaxy	115	6.03
Wave	60	3.14
Suurlemoen	78	4.09
Total	**1908**	**100%**

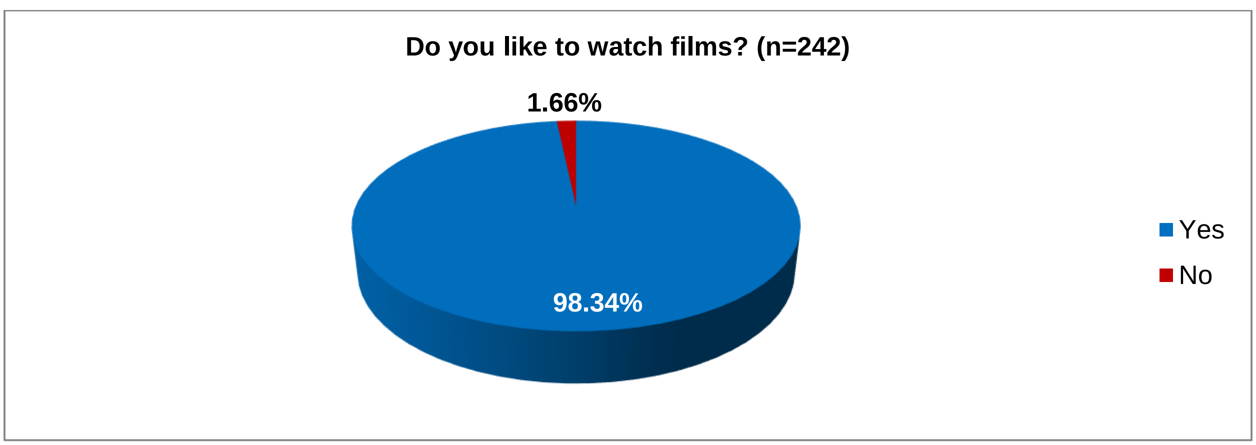
Spiderman 2, X- Men and Transformers were the most watched films by the 8 to 12-year olds. Most of the watched films are foreign productions. These findings revealed that this age category watch more foreign films compared to local ones.

6.4 Children (13-16 years old)

6.4.1 Watching of films

Children between 13 and 16 years were asked to indicate whether they like to watch films.

Figure 90: Interest in watching films



The majority of the 13 to 16-year-olds (98%) stated that they like to watch films while 2% said they don't.

6.4.2 Knowledge of new films

The children were asked to indicate through which channels they get to know about new films that they watch.

Table 69: Means of finding out about new releases

Finding out about new films to watch	Count	Percentage (%)
Ads in the cinema	37	9.69
Magazine ads	39	10.21
Newspaper ads	21	5.50
Billboard ads	20	5.24
Cinema previews	14	3.66
TV ads	95	24.87
On TV Shows	55	14.40
Online film trailers	19	4.97
Through family members	29	7.59
Through friends	53	13.87
Total	**382**	**100%**

TV ads was listed by 13 to 16-year-olds as the most popular channel through which they hear about new films, followed by TV Shows, friends, magazines and cinema ads.

Respondents were asked to indicate their favourite film type.

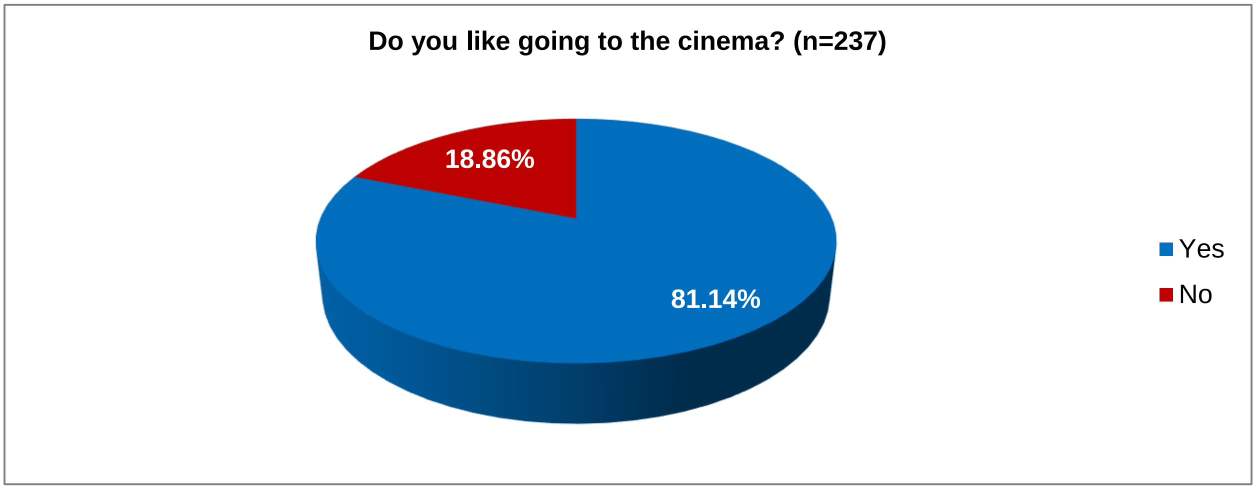
Table 70: Favourite type of film to watch

Favourite type of film	Count	Percentage (%)
Adventures	56	23.73
Cartoons	24	10.17
Films about love	19	8.05
Films about space, robots and/or aliens	12	5.08
Funny films	44	18.64
Musicals	21	8.90
Real life films	10	4.24
Sad or serious films	10	4.24
Scary films	40	16.95
Total	**236**	**100%**

The film type most preferred by 13 to-16-years olds was adventures, followed by funny, scary, cartoons, musicals and films about love. The least preferred film types were sad or serious, real life, films about space, robots or aliens.

Respondents were asked if they like going to the cinema.

Figure 91: Interests in going to a cinema

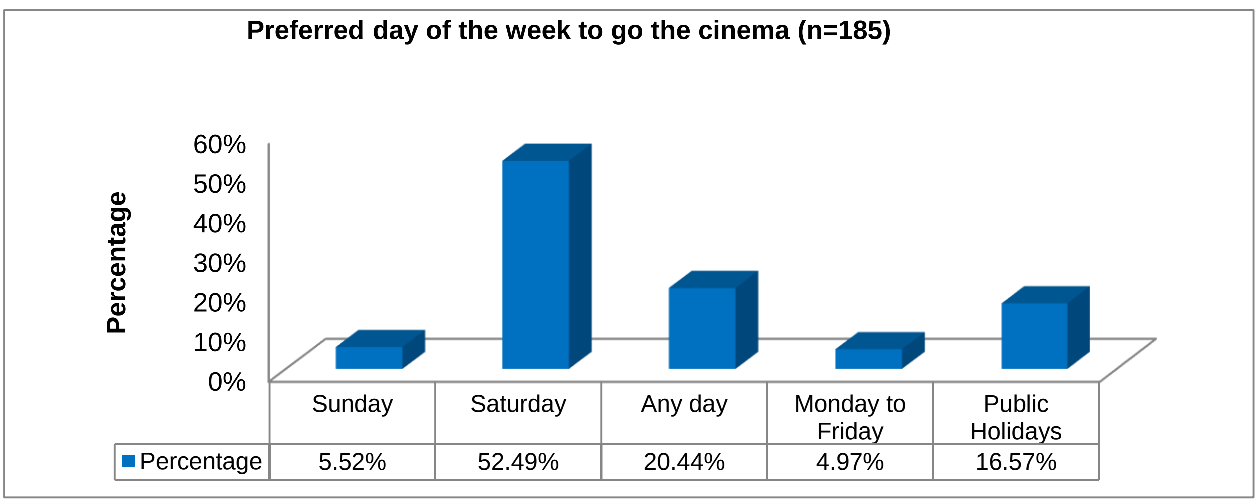


Most of the 13 to 16-year olds (81%) said they like going to the cinema and 19% said they don't.

6.4.3 Preferred day to go to the cinema

Respondents were asked to indicate their preferred day of the week to go to the cinema.

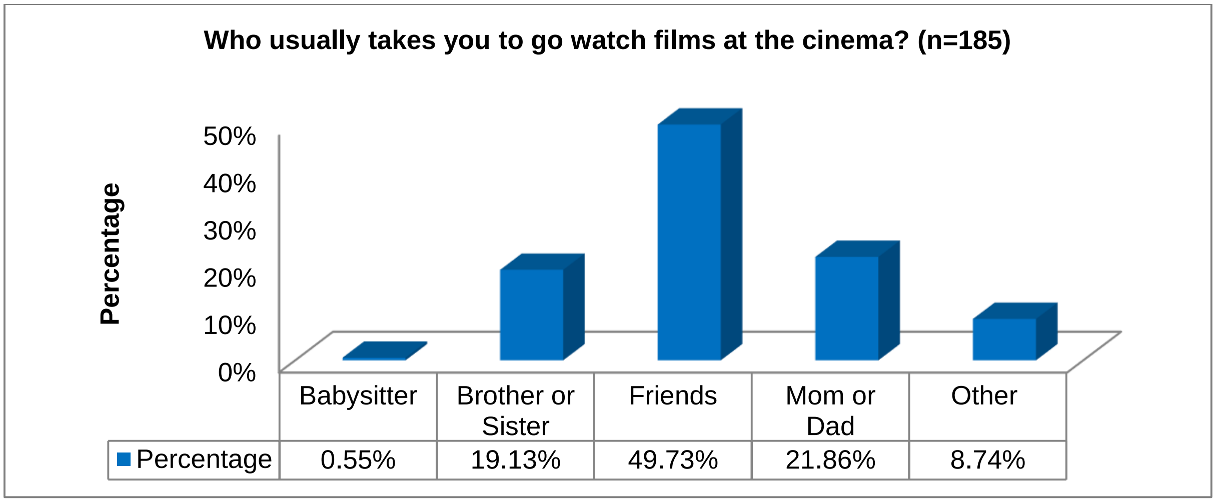
Figure 92: Preferred day of going to a cinema



Most 13 to 16-year-olds (53%) said they prefer going to the movies on Saturdays while 20% said they prefer any day, while 16% said they prefer public holidays. The least preferred days were Sundays and during the week.

Respondents were asked to indicate who takes them to the cinema.

Figure 93: Accompanying person to the cinema

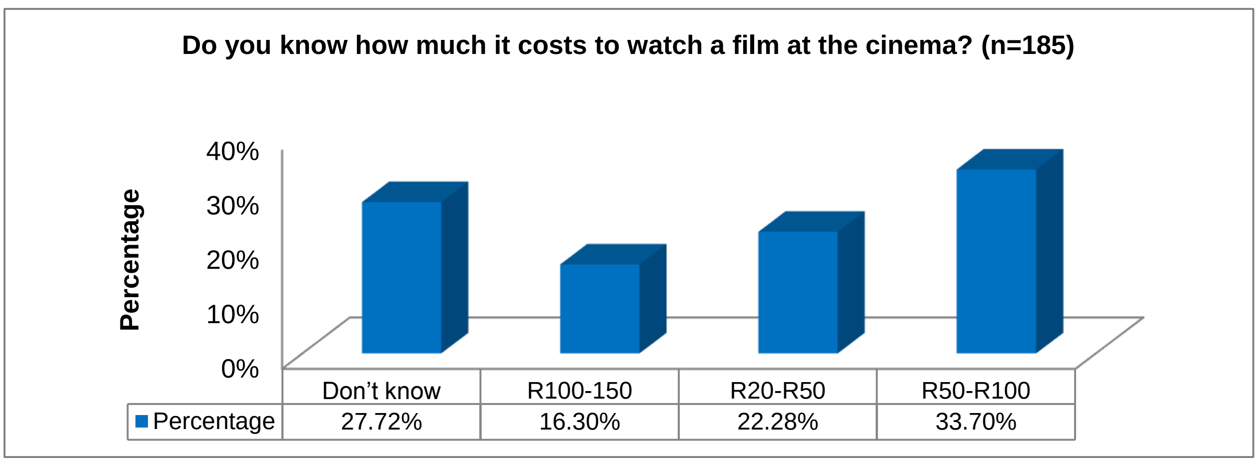


Half of the 13 to 16-year-olds (50%) said they go to the cinema with friends, followed by 22% who go with their parents, while 19% usually go with a sibling. The findings also revealed that about 9% stated the 'Other' option, and upon being probed further, they said they go as a whole family.

6.4.4 Cost of cinema ticket

Respondents were asked to indicate if they know the cost of watching a film at the cinema. The findings are presented in the figure below.

Figure 94: Knowledge of price of watching a film at the cinema

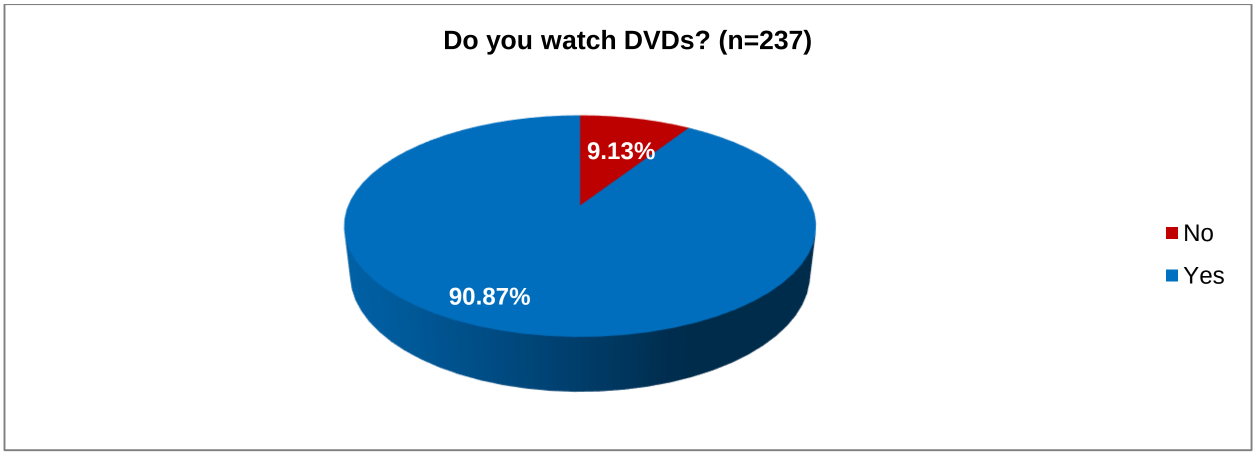


Most of the 13 to 16-year-olds (34%) said they think it costs R50-R100 to watch a film at the cinema, followed by 28% who said they do not know, and 22% who indicated that it costs between R20-R50. A small proportion of 16% said it costs between R100-R150.

6.4.5 Watching of DVDs

Respondents were asked if they watch DVDs.

Figure 95: Watching of DVDs

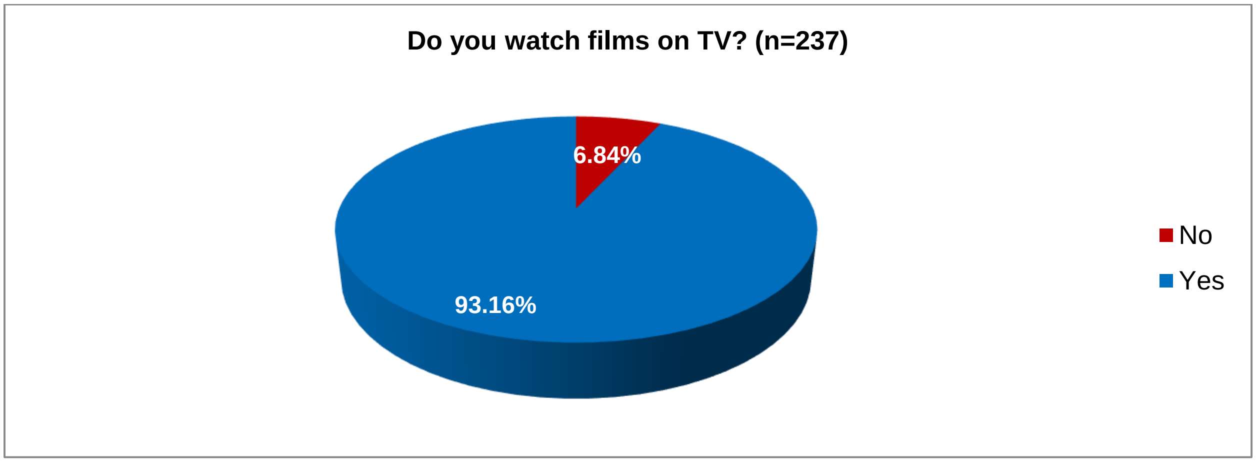


The majority of the 13 to 16-year-olds (91%) said they watch films on DVD while 9% said they don't.

6.4.6 Watching films on TV

Respondents were asked if they watch films on TV.

Figure 96: Watching of films on TV

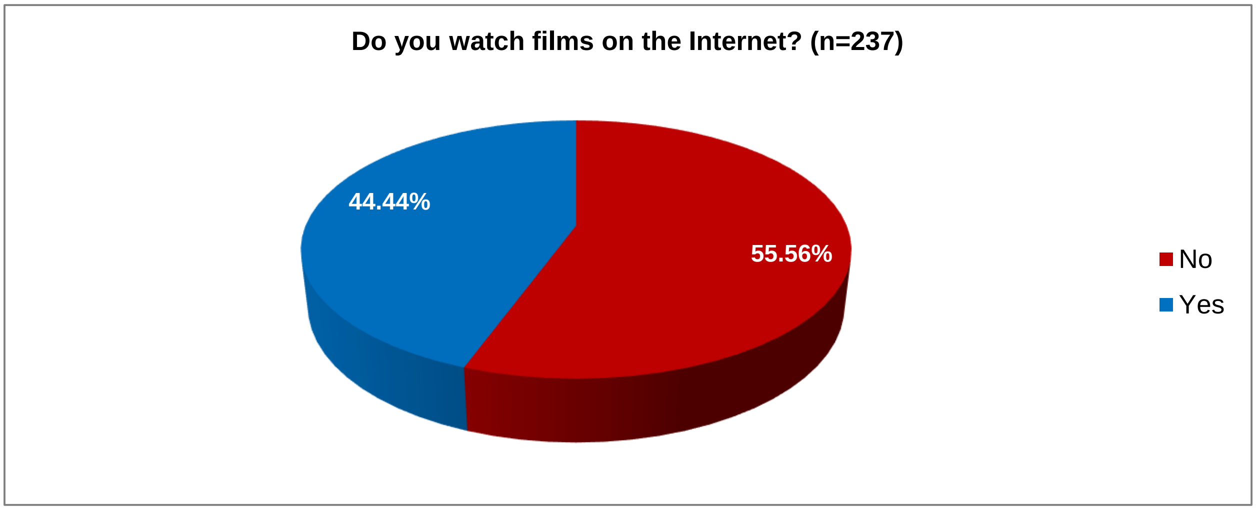


The majority of the 13 to 16-year-olds (93%) said they watch films on TV while 7% said they don't.

6.4.7 Watching films on the internet

Respondents were asked to indicate if they watch films on the internet.

Figure 97: Watching films on the Internet



Most of the 13 to 16-year olds (56%) indicated that they watch films on the internet, while 44% said they don't. The children who said they do were further asked to indicate which platforms/websites or apps they mostly use.

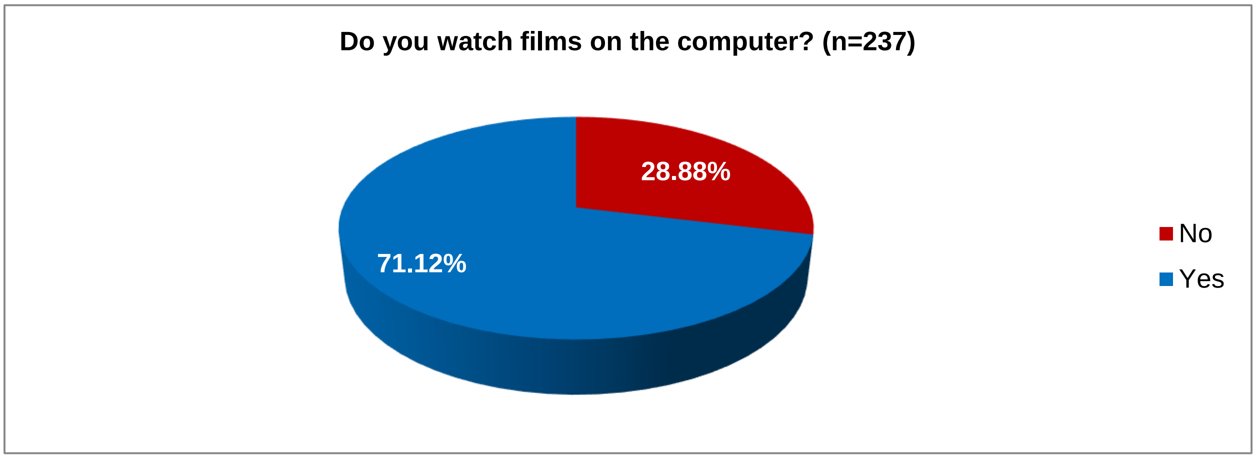
Table 71: Platforms/websites or apps mostly used

Platforms/websites or apps mostly used	Count	Percentage (%)
Amazon Prime	8	8.60
Blinkbox	2	2.15
Box Office Accounts	9	9.68
LoveFilm Instant	4	4.30
Netflix	3	3.23
Other (Please specify)	2	2.15
Vidi	2	2.15
YouTube	59	63.44
YouView	4	4.30
Total	**93**	**100%**

Most of the 13 to 16-year-olds (63%) mainly use YouTube, followed by 10% who use Box Office Accounts and 9% who use Amazon Prime.

Respondents were asked to indicate whether or not they watch films on the computer.

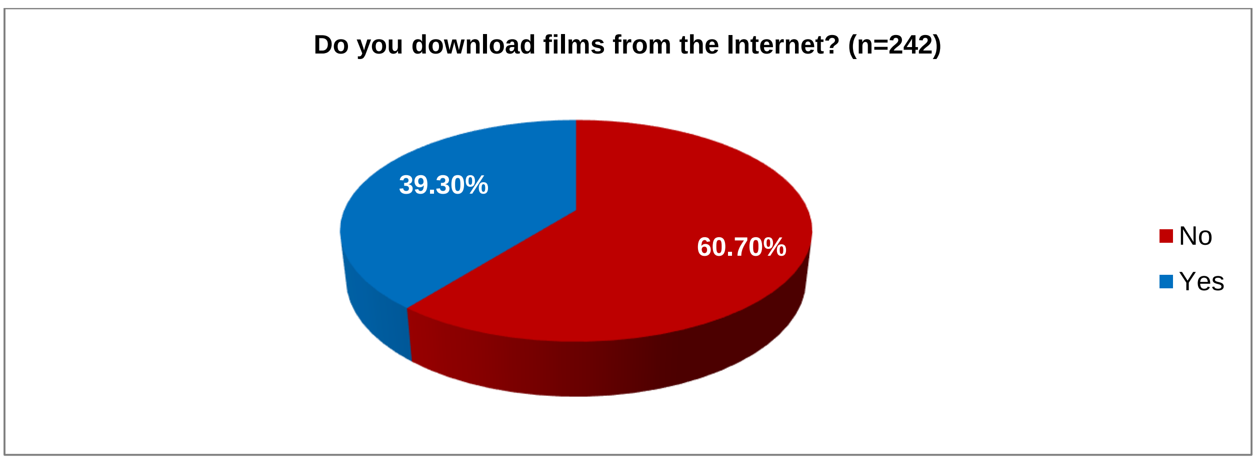
Figure 98: Watching films on the computer



The findings revealed that most of the 13 to 16-year-olds (71%) said they watch films on the PC while 29% said they don't.

Respondents were asked if they download films from the internet. The findings are shown in the following figure.

Figure 99: Downloading films from the Internet



Most of the 13 to 16-year olds (61%) said they don't. It needs to be taken into consideration that illegal downloads are punishable by law which highly likely impacts the respondents' answers.

6.4.8 Films watched

The children aged between 13 and 16 years were shown a list of films and asked to indicate the ones they had watched.

Films that have been watched	Count	Percentage (%)
Agent 200	59	3.87
Hollywood	53	3.47
Spud	91	5.96
Konfetti	59	3.87
22	89	5.83
Blended	77	5.05
Believe	78	5.11
Lucy	75	4.91
Tammy	71	4.65
Spiderman 2	200	13.11
X-Men	169	11.07
Suurlemoen	38	2.49
Anchorman 2	68	4.46
Transformers	133	8.72
Maleficent	100	6.55
Guardians of the Galaxy	97	6.36
Wave	34	2.23
Windpomp	35	2.29
Total	**1526**	**100%**

The findings revealed that the most watched film by the 13 to 16-year-olds was Spiderman 2, X-Men, and Transformers, followed my Maleficent and Guardians of the Galaxy.

7. PROFILE OF SA AUDIENCE: CIMEMA GOERS

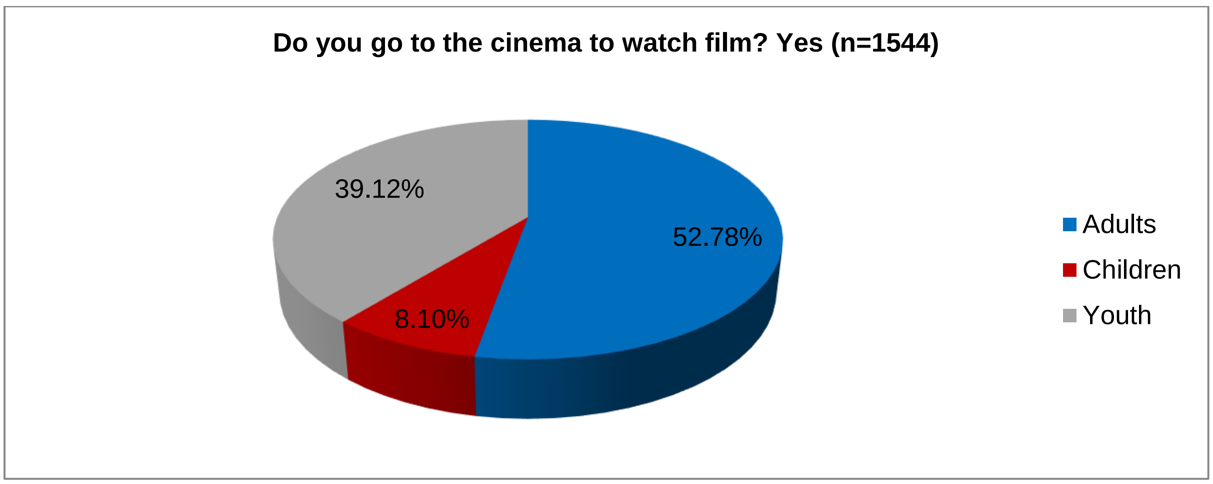
7.1 Introduction

Respondents (adults, youth and children) were asked whether they go to the cinema to watch films. Those who said they do so were they treated as a proxy of the SA audience. It was therefore important to profile these respondents who had said they go to cinemas to watch films.

7.2 Distribution of SA audience who watch films

Proportions of those who indicated that they go to the cinema to watch films are illustrated in figure below.

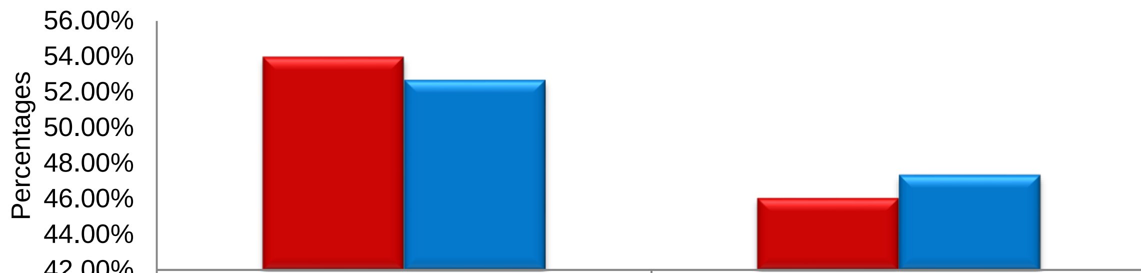
Figure 100: Distribution of cinema-goers



Most (53%) of the respondents who said they go to the cinema to watch films were adults, followed by youth (39%) and children (8%).

7.2.1 Gender

Figure 101: Gender distribution of cinema-goers

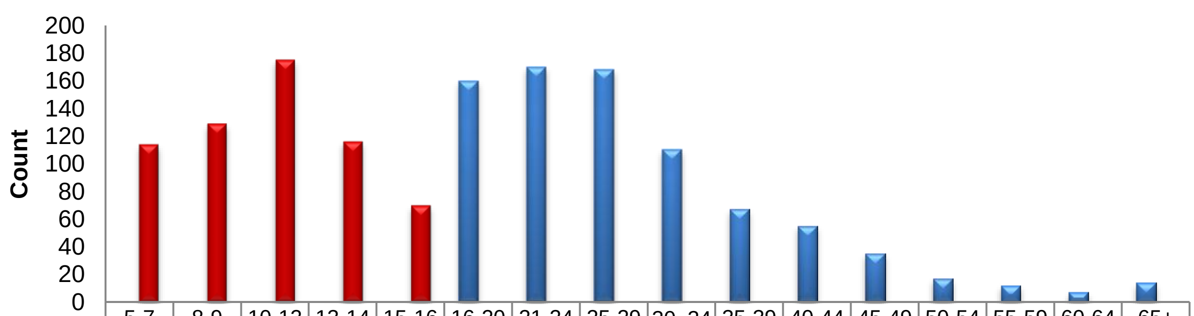


	Female	Male
Adults	53.94%	46.06%
Youth	52.65%	47.35%

Across the adults and youth cinema-goers, more females than males indicated that they go to cinemas to watch films.

7.2.2 Age distribution of cinema-goers

Figure 102: Age distribution of cinema-goers

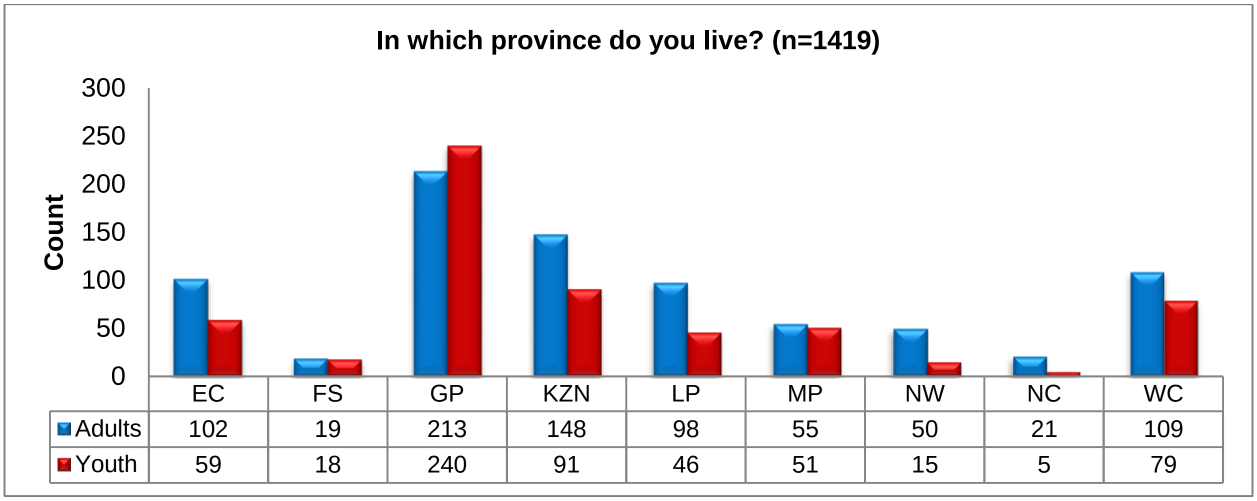


	5-7	8-9	10-12	13-14	15-16	16-20	21-24	25-29	30–34	35-39	40-44	45-49	50-54	55-59	60-64	65+
Adults	0	0	0	0	0	160	170	168	110	67	55	35	17	12	7	14
Youth	114	129	175	116	70	0	0	0	0	0	0	0	0	0	0	0

Distributionally, more 8 to 34-year olds indicated that they go to the cinema than the other age groups. Few 45 to 65+-year olds said they go the cinemas to watch films.

7.2.3 Province of residence

Figure 103: Province of residence

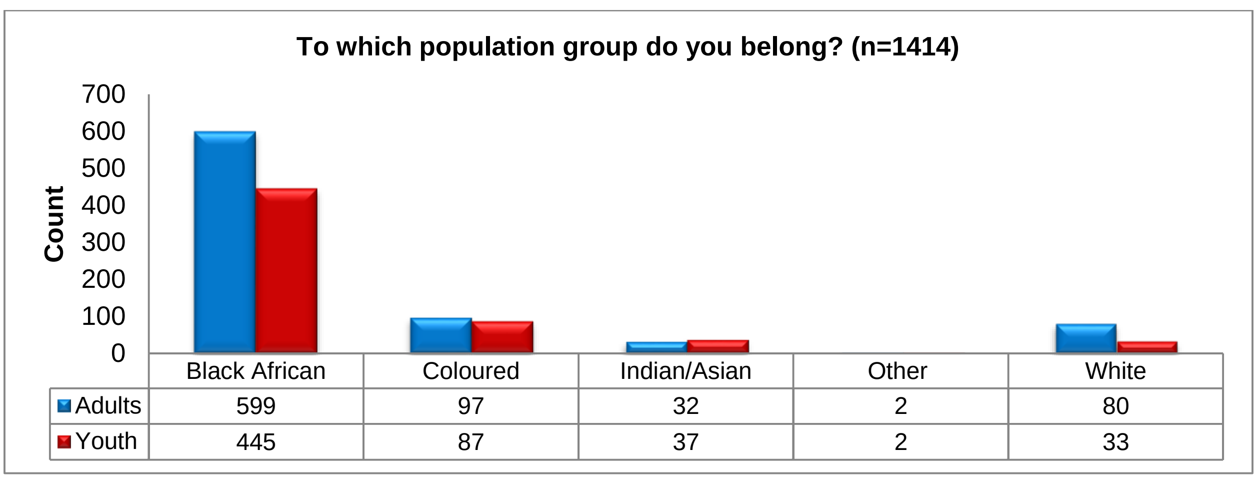


	EC	FS	GP	KZN	LP	MP	NW	NC	WC
Adults	102	19	213	148	98	55	50	21	109
Youth	59	18	240	91	46	51	15	5	79

In all provinces, adults and youth indicated that they go to the cinema to watch films.

7.2.4 Population group

Figure 104: Population group

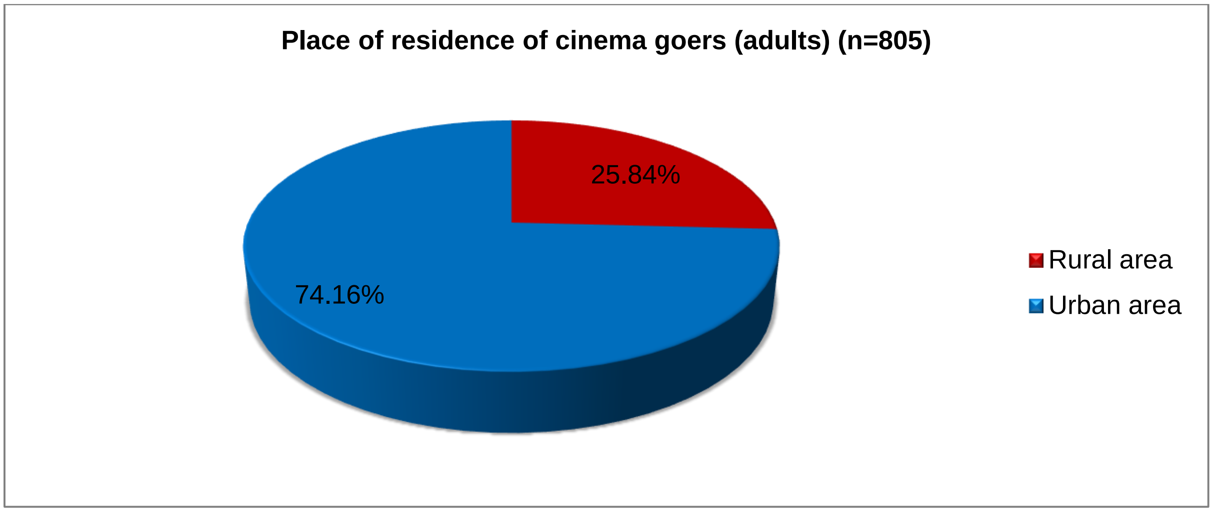


	Black African	Coloured	Indian/Asian	Other	White
Adults	599	97	32	2	80
Youth	445	87	37	2	33

Respondents (adults and youth) who indicated that they go to the cinema cut across all the population groups in the country.

7.2.5 Classification of area of residence

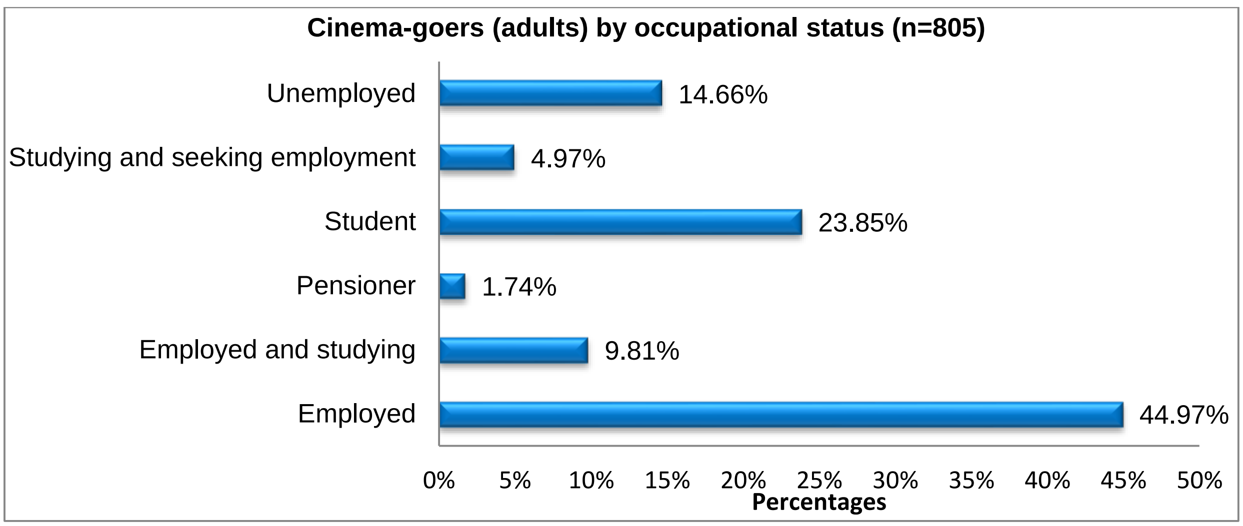
Figure 105: Area of residence of cinema-goers (adults)



Most adults who said they go to cinemas indicated that their place of residence can be classified as urban.

7.2.6 Occupational status of cinema-goers (adults)

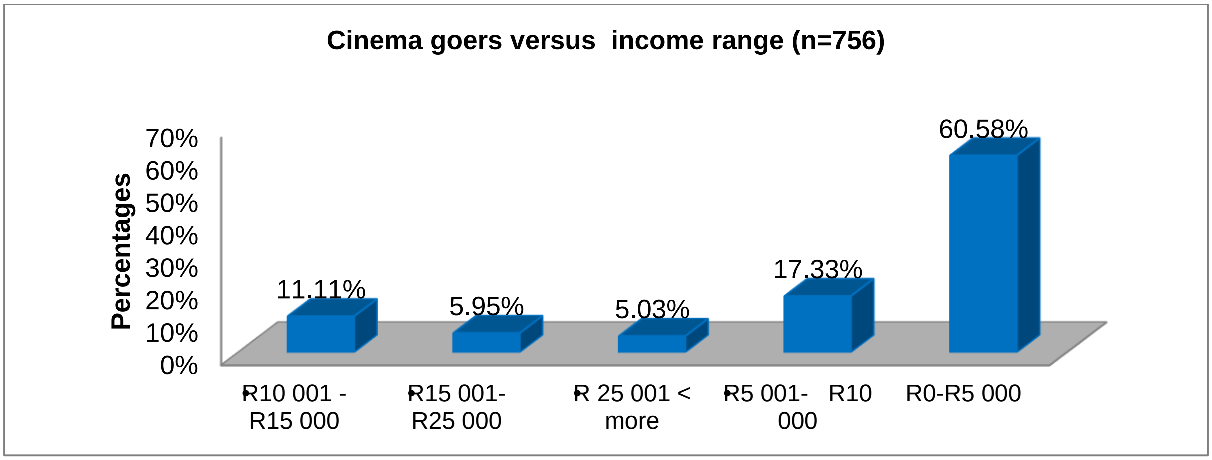
Figure 106: Occupational status of cinema-goers



Most (45%) cinema-goers (adults) were employed, followed by students (24%), unemployed (15%), employed and studying (10%) and studying and seeking employment (5%). Few (1%) of the cinema-goers were pensioners.

7.2.7 Income status of cinema-goers (adults)

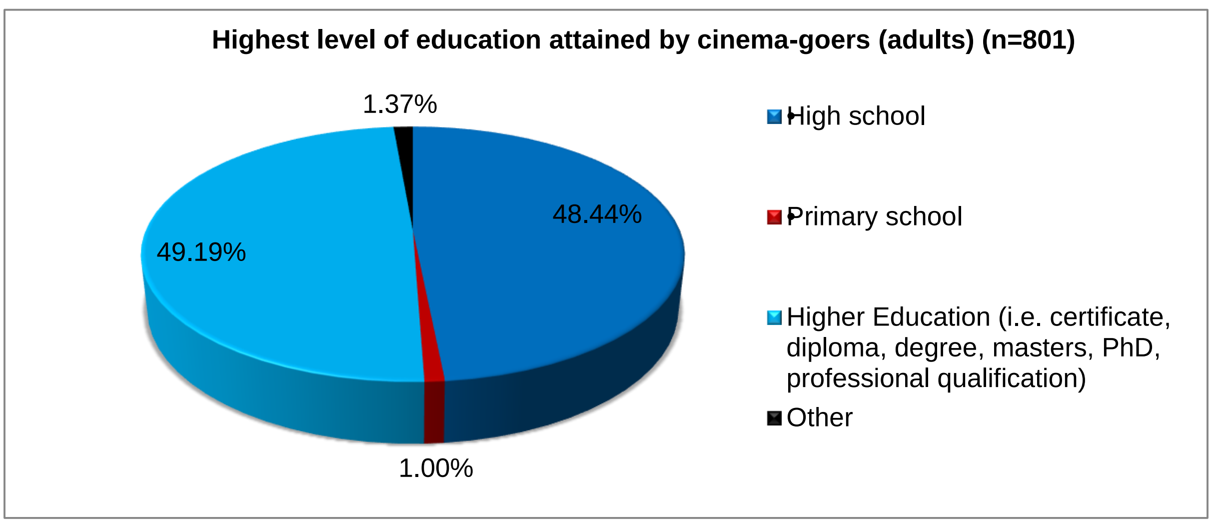
Figure 107: Cinema-goers by income range



Most (61%) of the adults who said they go to the cinema to watch films indicated their monthly income range as between R0 and R5 000, followed by 17% who indicated their income range as between R5 001 and R10 000 and 11% who indicated their income range as between R10 001 and R15 000. Few of the respondents who said they go to the cinema to watch films indicated their monthly income as R15 001 or more.

7.2.8 Educational status of cinema-goers (adults)

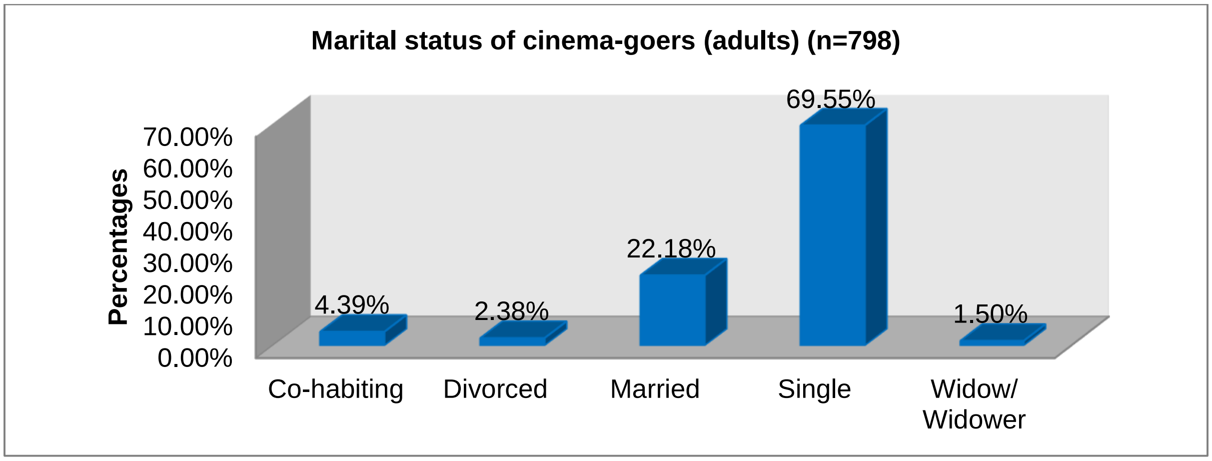
Figure 108: Cinema-goers by educational level attained



Most (49%) of the adult cinema-goers indicated their educational status as higher education (certificate, diploma, degree, masters, PHD, professional qualification) while 48% indicated their educational status as high school. Few of the adults indicated their educational status as primary school.

7.2.9 Marital status of cinema-goers (adults)

Figure 109: Marital status of adult cinema-goers



Most (70%) of the adults who said they go to the cinema to watch films were single, followed by 22% who said they were married and 4% who said they were co-habiting. Few of the adults said they were either divorced or widowed.

8 INTERNATIONAL STAKEHOLDERS

8.1 Introduction

The international stakeholders' bloc consists of international film audiences, international film festivals, co-productions, Bollywood, Nollywood and Hollywood. The questionnaire was aimed at exploring their perspectives on the SA film and video products, and in the process gaining valuable information that could be useful in the audience development strategy (ADS). However, since the questionnaire was completed on a voluntary basis, only three international respondents participated in this study. Therefore, the following findings are based on the respondents that participated in the study.

8.2 International stakeholders' profile

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8.2.1 Nature of involvement in film industry

International stakeholders were asked to indicate their nature of involvement in the film industry on the international scene. The results are presented below.

Table 72: Nature of involvement in the film industry

Area of involvement	Count
International film audience	2
International film festival organiser/participant	1
Co-producer/s	0
Indian film industry – Bollywood	0
American film industry – Hollywood	0
Nigerian film industry – Nollywood	0
Total	**3**

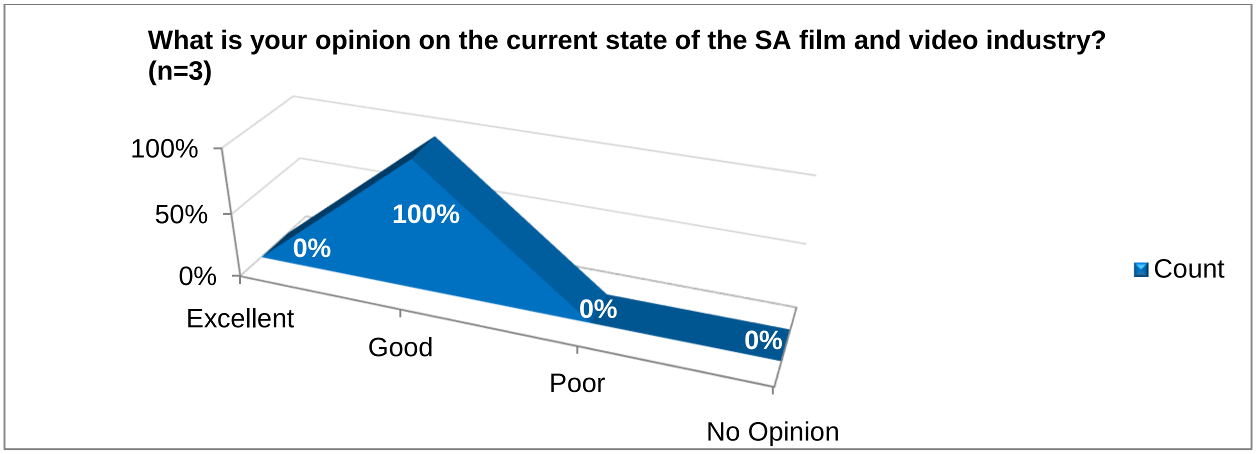
8.2.2 Country of origin

International stakeholders were asked to indicate the country in which their organisation is located. The international stakeholders were from Nigeria, SA and US.

8.2.3 Current state of SA film and video industry

The international stakeholders were asked to indicate their opinions on how they view the current state of the SA film industry.

Figure 110: Current state of SA film and video industry

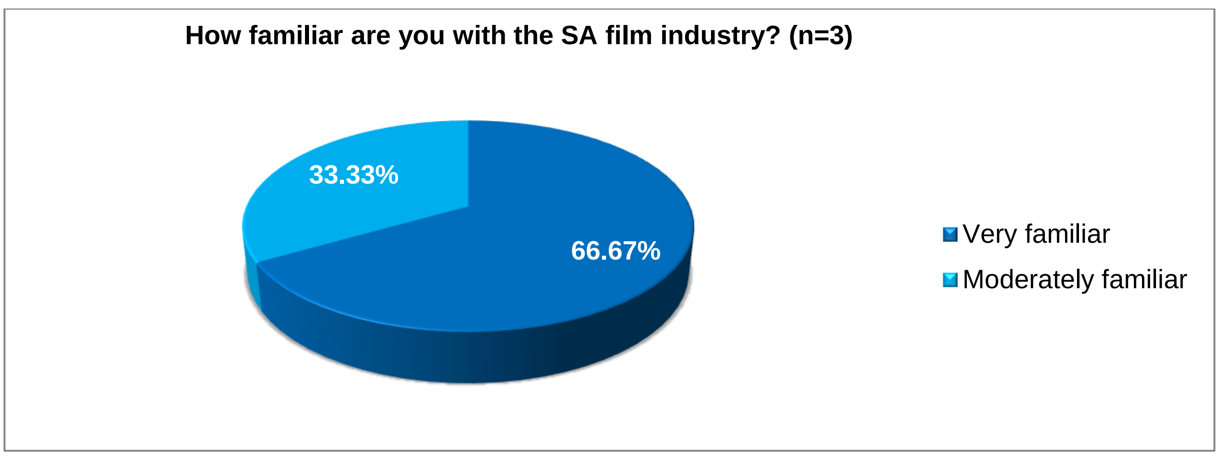


The figure above illustrates that the international stakeholders viewed the SA film industry's current state as good. These findings indicate that the strong points of the industry should be enhanced if the industry is to reach excellent status.

8.2.4 Familiarity with SA films

International stakeholders were asked to indicate how familiar they are with SA films and videos.

Figure 111: Familiarity with SA films and videos



The findings revealed that two of the international stakeholders said they are very familiar with SA film and video, while one indicated moderate familiarity.

8.2.5 Comparing SA films to the rest of the world

To gain an understanding of international stakeholders' view on SA films, they were asked to indicate their opinion on how they rate SA films compared to the rest of the world.

Table 73: Comparing SA films to the rest of the world

Comparison rate	Count
Excellent	1
Good	1
Poor	1
No Opinion	0
Total	**3**

International stakeholders gave different responses on how SA film and video compare to the rest of the world. The answers varied in degree from poor, to good, to excellent. This shows the diversity of how SA films are rated by international stakeholders.

8.3 Audience preference

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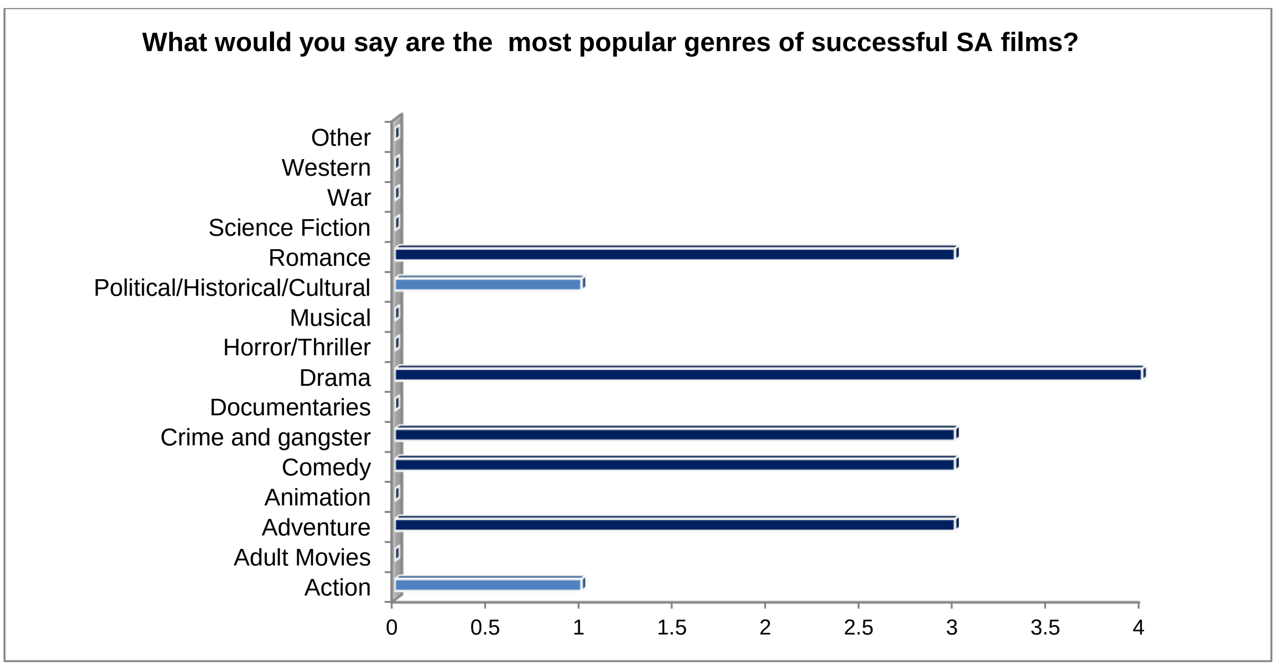
8.3.1 Most popular genres of successful SA films

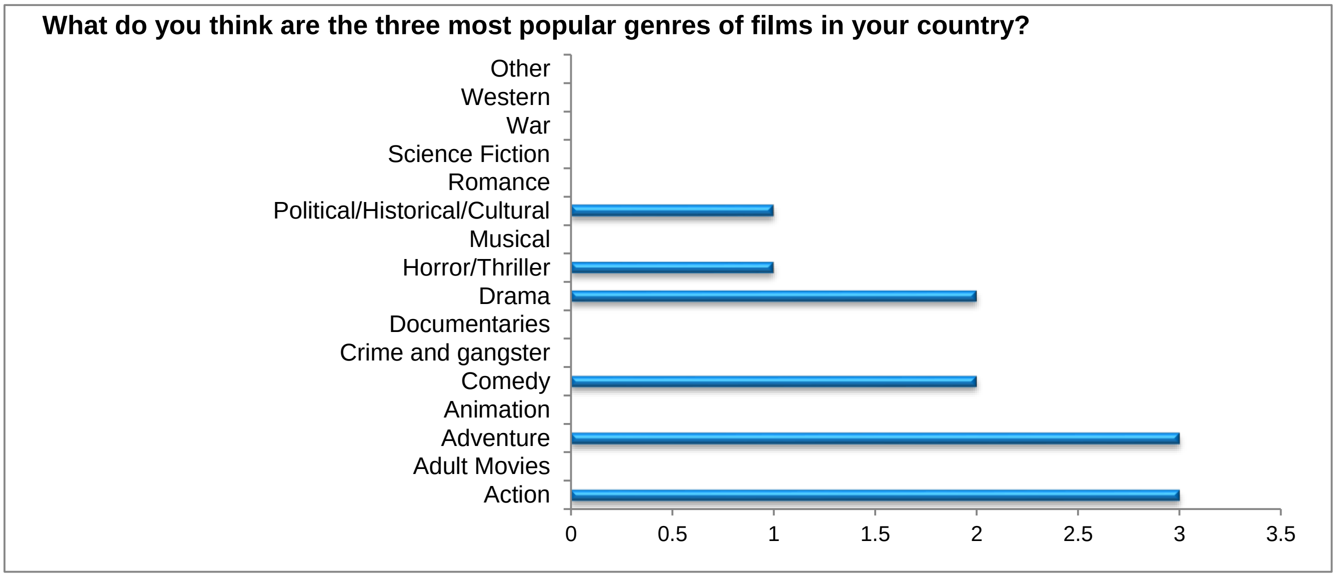
International stakeholders were asked to indicate what they consider to be the most popular genres of successful SA films.

Figure 112: Popular genres/types of SA films



The opinions of the international stakeholders were that drama, followed by romance, adventure, comedy and crime and gangster were the most popular genres of successful SA films. Respondents were also asked to indicate what they think are the most popular genres of films in their country.

Figure 113: Most popular genres of films in your country

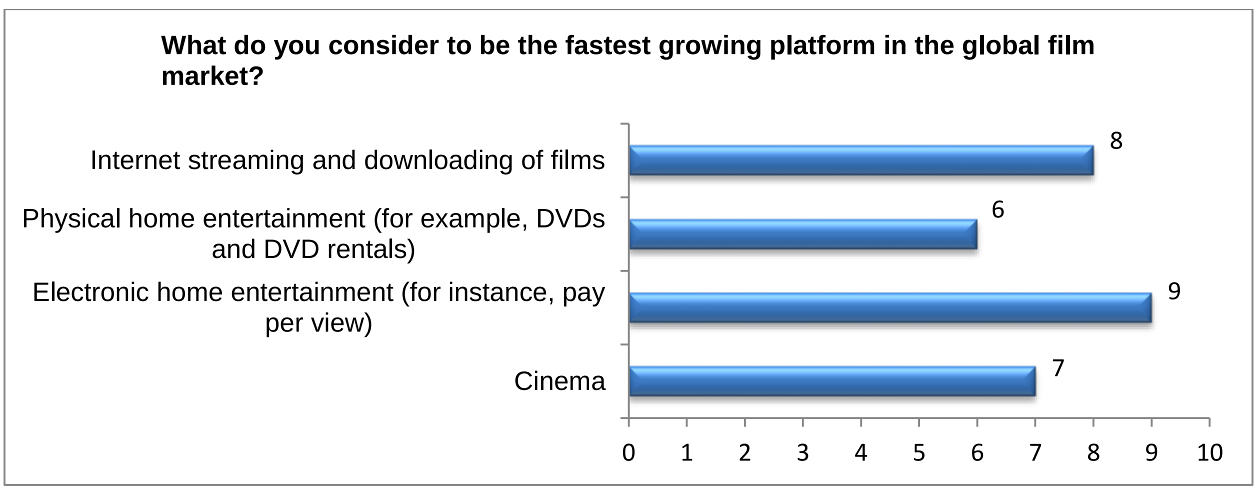


The findings revealed that the respondents viewed action, adventure, comedy and drama as the most popular genres of films in their country.

8.3.2 Fastest growing platform in the global film market

To explore platform preferences in the global market, international stakeholders were asked to indicate what they view as the fastest growing film viewing platform.

Figure 114: Fastest growing film viewing platform



The figure shows that electronic home entertainment (pay per view) was listed as the fastest growing film viewing platform, while internet streaming came in second, closely followed by cinema and physical home entertainment.

8.3.3 Rating 3D experiences

Respondents were asked to indicate how they would rate 3D compared to the usual standard 2D display.

Table 74: Rating 3D experiences

Responses	Count
Superior	1
Inferior	0
No difference	1
No opinion	1
Total	**3**

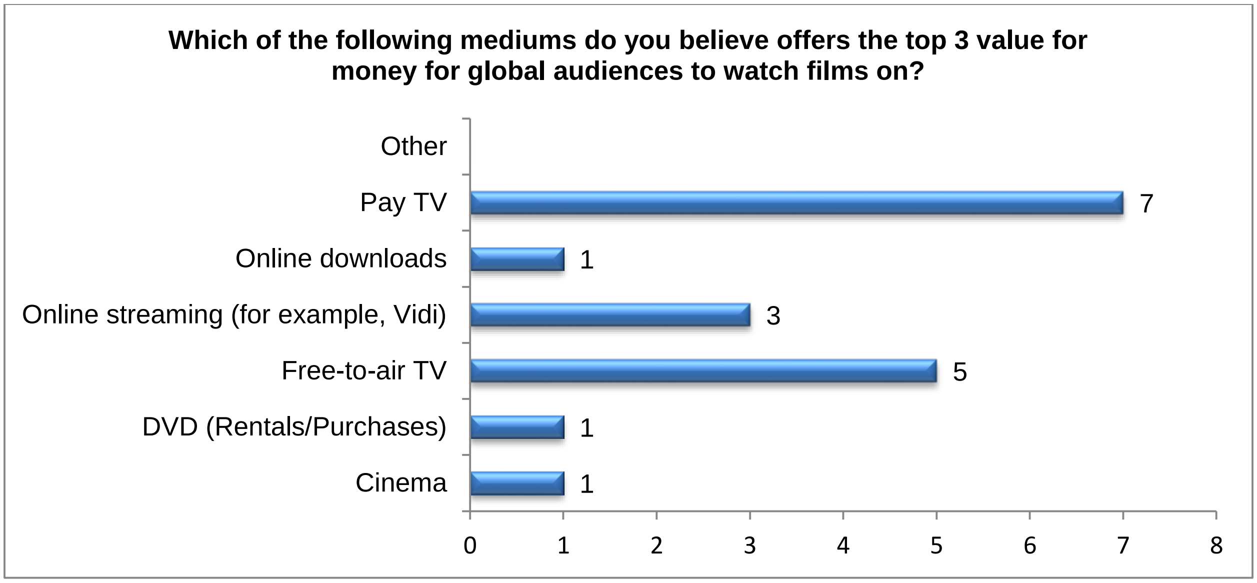
The table shows that international stakeholders had various opinions on rating 3D experiences. One said 3D is superior, another found no difference between the two, while the other respondent was indifferent.

8.4 Spending patterns

8.4.1 Platforms offering the most value for money

Here we explore the relationship between viewing platform preferences and audience spending habits/patterns. International stakeholders were asked to indicate the platform they believe offers the most value for money for global film audiences.

Figure 115: Platforms that offers most value for money



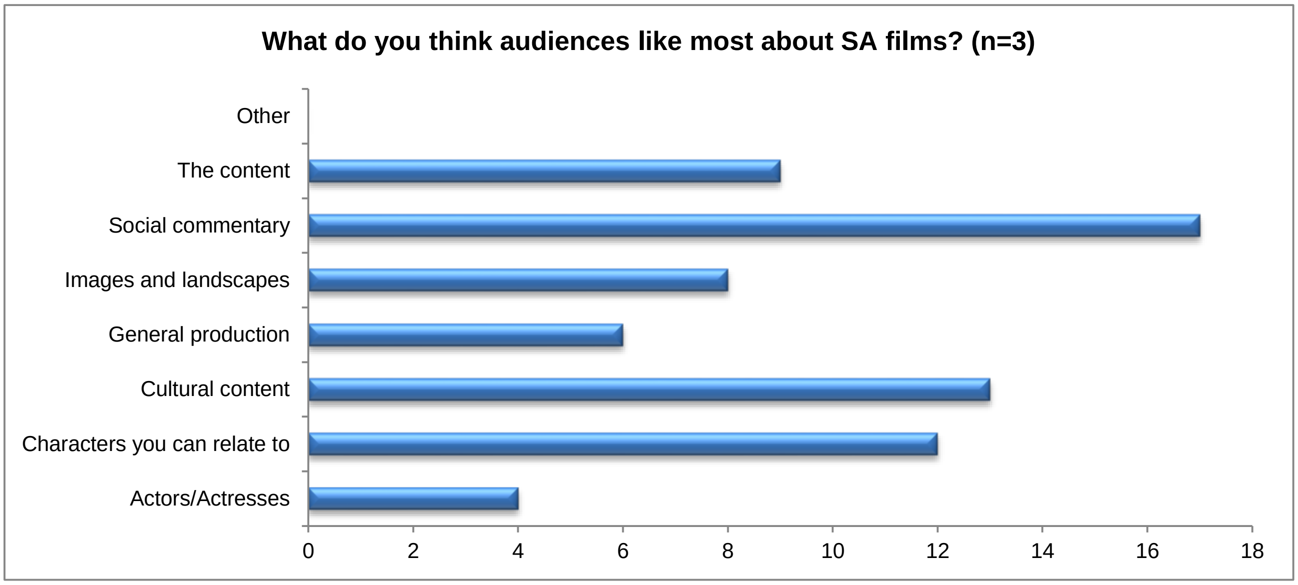
Pay TV was considered the best viewing platform that offers the most value for money for global audiences, followed by Free-to-air TV and online streaming, for example, Vidi. Online downloads, DVDs (rentals/purchases) and cinema were considered to offer the least value for money for global audiences.

8.5 General perception and attitude towards SA film and video

8.5.1 Likeable elements of SA films

International stakeholders were asked to indicate what they thought audiences like most about SA films.

Figure 116: What's likable about SA films?



In the opinion of the respondents, the most likable elements of SA films are social commentary, followed by cultural content, characters they can relate to, images and landscapes, content, general production and actors/actresses.

8.5.2 Rating SA films in contexts

International stakeholders were asked to rate SA films on a number of contexts.

Table 75: Rating of SA films

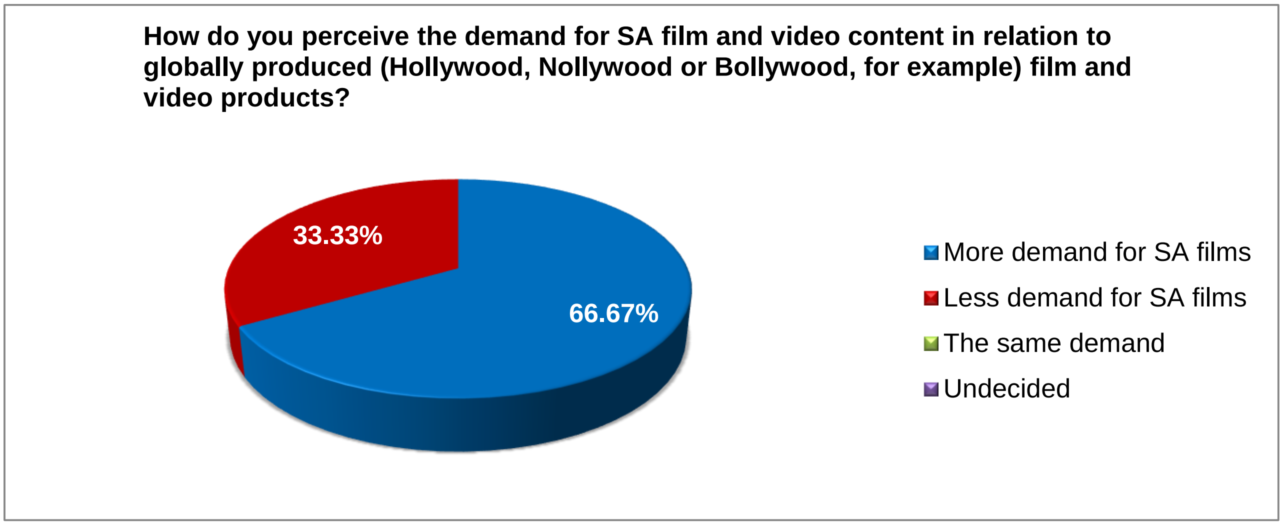
Context of SA films	Excellent	Very good	Good	Fair	Bad	Very bad	Don't know	Total count
Visuals/Cinematography	0	1	2	0	0	0	0	3
Storylines	0	0	1	1	0	0	0	2
Actors or actresses performances	0	2	0	0	1	0	0	3
Film characters	0	0	2	0	1	0	0	3
Technical production quality	0	0	2	1	0	0	0	3
Historical and political content	0	0	3	0	0	0	0	3
Local content representative of SA languages and culture	0	2	1	0	0	0	0	3
Local content representative of SA natural environment and wildlife	1	1	1	0	0	0	0	3
Availability in other official languages beside English	0	1	2	0	0	0	0	3
Entertainment value	0	0	2	1	0	0	0	3

Visuals/cinematography, storylines, actors/actresses, film characters, technical production (one respondent rated it as 'fair') historical and political content, and so on, was generally rated as good by respondents.

8.5.3 Demand for SA films against foreign films on the globally market

International stakeholders were asked to indicate their perception if the demand of SA films, compared to foreign made films, on the global market.

Figure 117: Demand for SA films against foreign films on the globally market



A large portion, around 67% of respondents said they think that there's more demand for SA films while a small portion of around 33% indicated that there's less demand for SA films.

8.5.4 Ways to improve SA films and video products

International stakeholders were asked to indicate ways in which they think SA films need to work on and improve.

Table 76: Ways to improve SA films and videos

Responses	Count
Acting quality	0
Directing and production quality	1
Music	0
No area – all are up to standard	0
Script/Storyline	3
Visual effects	1

Total	**5**

It can be noted that respondents mostly indicated that SA films need to improve on script/storylines; there was less indication that visual effects, directing and production quality should be improved.

8.5.5 Variances that can endear SA films

For the purposes of distinction and to distinguish SA films from being labeled as imitating/mimicking mainstream Hollywood film patterns, respondents were asked to indicate any artifacts, symbols, iconic symbols, popular phrases and landmarks that can serve to endear SA films to audiences.

Table 77: Variances that endear SA films

Variances that can be used to endear SA films	Percentage (%)
Brightly-coloured Bo-Kaap houses	0.00
Cape Minstrels	0.00
Cape Point	0.00
Cape Sightseeing Bus	0.00
Gumboot dance	0.00
Hector Peterson photo	0.00
Images of Soweto	0.00
Images of the 'Big Five'	0.00
Nelson Mandela Bridge in Newtown	50.00
Pantsula dance	0.00
Phrases like *lekker, eish, wena*	0.00
SA currency	0.00
SA musical icons – Hugh Masekela, Miriam Makeba & Brenda Fassie	0.00
SA National anthem	50.00
Statue of Nelson Mandela at the Union Building	0.00
Table Mountain	0.00
The 'Cape Flats smile'	0.00
The SA flag	0.00
Vuvuzela	0.00
Wine estates	0.00
Other	0.00
Total	**100**

The findings presented in the figure above revealed that respondents highlighted the Nelson Mandela Bridge in Newton and/or SA National Anthem as elements that can distinct SA films internationally.

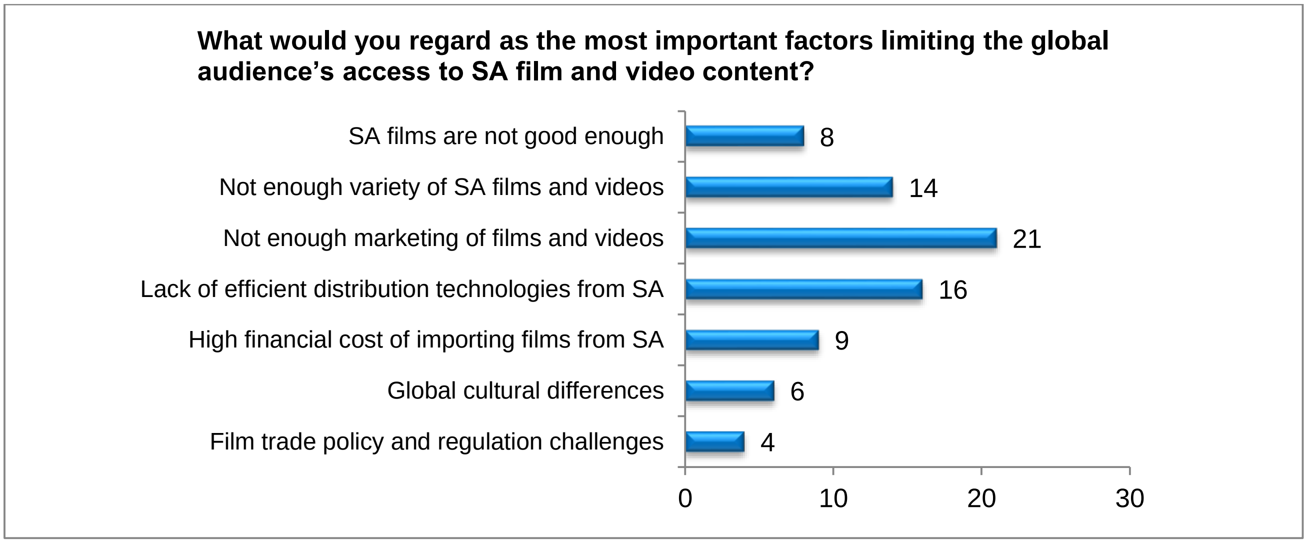
8.6 Audience access to film and video products

This section investigated factors that limit the global audiences' access to film and video products and sought to identify factors that address the imbalances on the availability of SA films on the international market.

8.6.1 Factors limiting global audiences access to SA films

Respondents were asked to indicate the factors they think limit global audiences access to SA films.

Figure 118: Factors limiting SA audience access

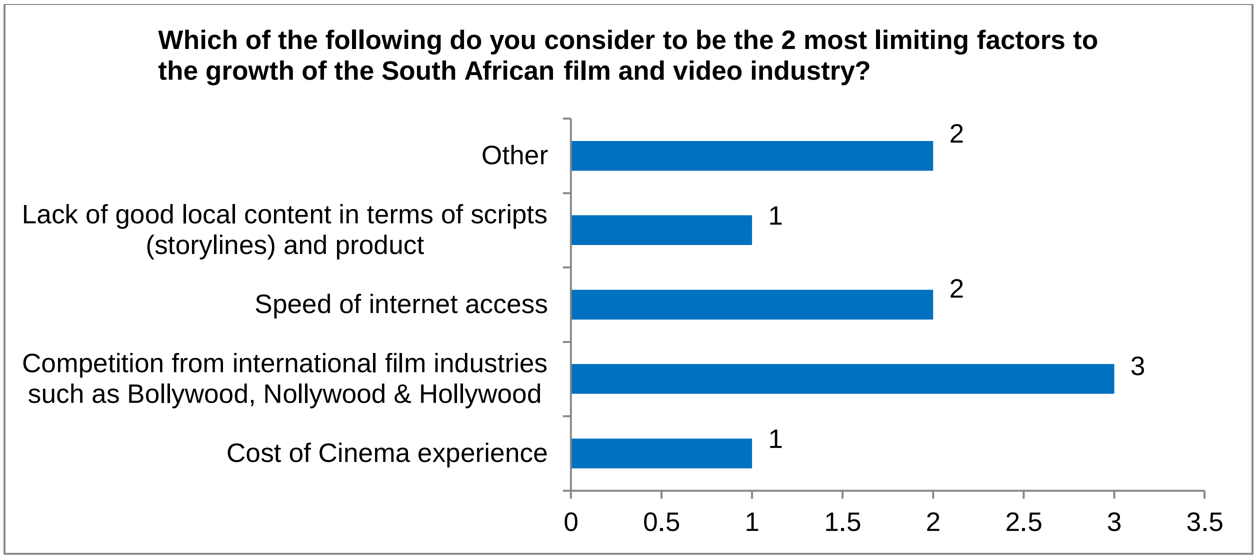


The factors noted were (in order of ranking) – not enough marketing of films and videos, followed by lack of efficient distribution technologies, not enough variety of products and the high financial cost of importing films from SA.

8.6.2 Factors limiting the growth of the SA film industry

International stakeholders were asked to indicate the factors they think limit the SA film industry's growth.

Figure 119: Factors limiting the growth of the SA film industry



The findings shown in the figure above revealed that most respondents identified competition from international film industries as the most limiting factor, followed by similar proportions of respondents who identified speed of internet access, and other factors, such as lack of funding as limiting factors hindering the growth of the industry.

9 STRATEGIC STAKEHOLDERS – INTERNAL

9.1 Introduction

Generally, in research the consultation of internal stakeholders is pivotal as their views are usually aligned to an organisation's interests and objectives. For the purposes of this research, internal stakeholders were NFVF employees.

9.2 NFVF mandate

The aim of the questions in this section was to explore and find out where NFVF as an organisation stand in terms of developing the film industry. It sought to reveal how they ensure their mandate of seeing to the growth and the thriving of the SA film industry.

9.2.1 Rating of NFVF's success

Respondents were asked to indicate how successful the NFVF is in line with its mandate to ensure equitable growth of the SA film and video industry.

Table 78: Rating of NFVF's success against its mandate

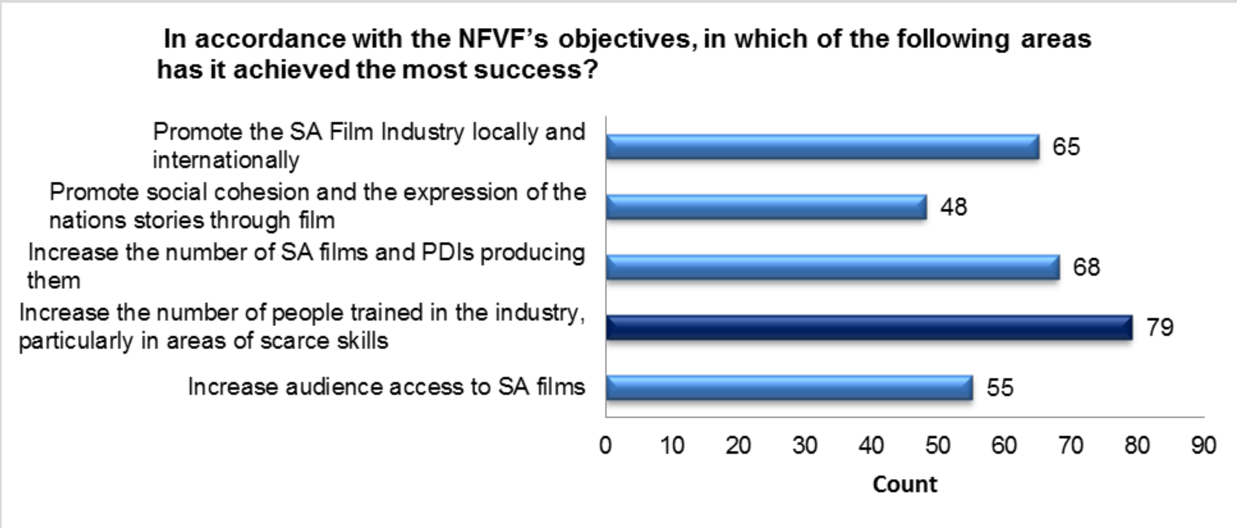
Success	Count	Percentage (%)
Very successful	1	4.76
Successful	4	19.05
Reasonably successful	16	76.19
Unsuccessful	0	0
No opinion	0	0
Total	**21**	**100%**

Most of the internal stakeholders (76%) surveyed indicated that the NFVF can be considered to be reasonably successful in terms of its mandate of ensuring an equitable growth of SA's film and video. Around 24% of the respondents indicated that the NFVF was successful, to very successful, in terms of its mandate.

9.2.2 NFVF achievements

This is an analysis of the NFVF's achievements in-line with their objectives. The respondents were provided with a number of options to select, in order of preference, by identifying the areas they think the NFVF has achieved the most success. The findings are illustrated in the following figure.

Figure 120: NFVF's success measured against its objectives



The internal stakeholders felt that the NFVF has been mostly successful in the area of increasing the number of people trained in the industry, particularly with regard to areas of scarce skills. Furthermore, it was also highlighted that the NFVF is successful in increasing the number of SA films, as well as the PDIs producing them, and promoting SA films locally and internationally.

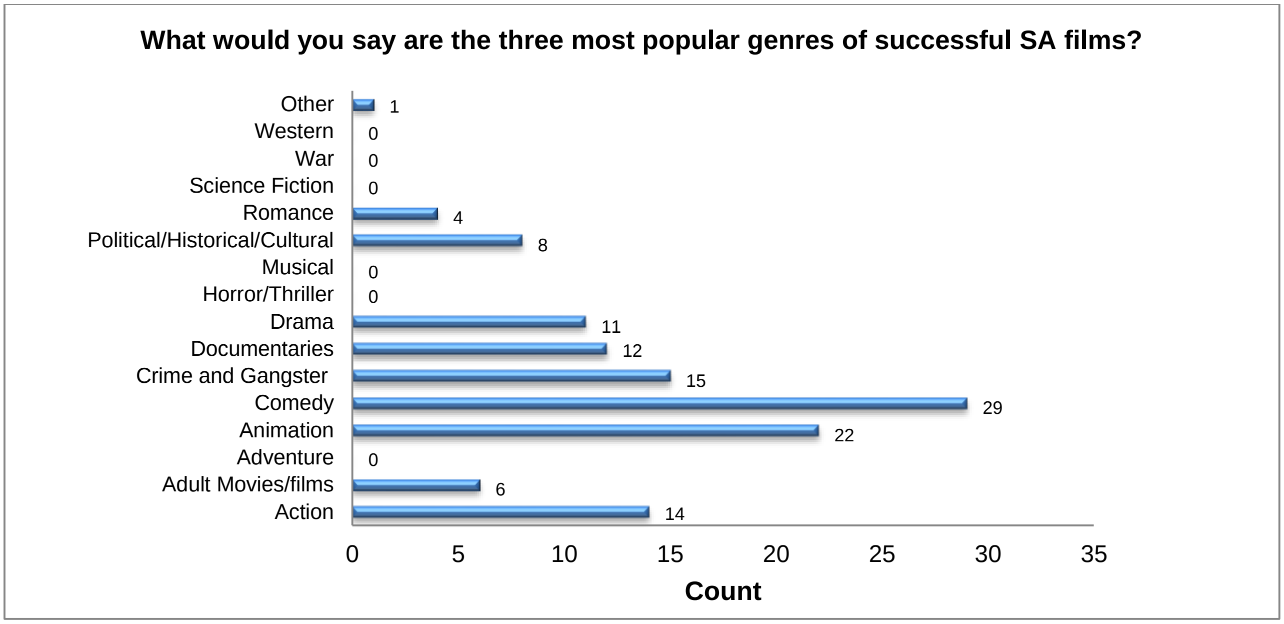
9.3 Audience preferences and content preferences

The main aim of this section was to gain an insight into audiences' consumption patterns and description of major forms in which films are consumed.

9.3.1 Three most popular genres of SA films

To gain an understanding on content preferences, respondents were asked to indicate what they think are the three most popular genres of successful SA films. The findings are presented in the following figure.

Figure 121: Three most popular genres of SA films

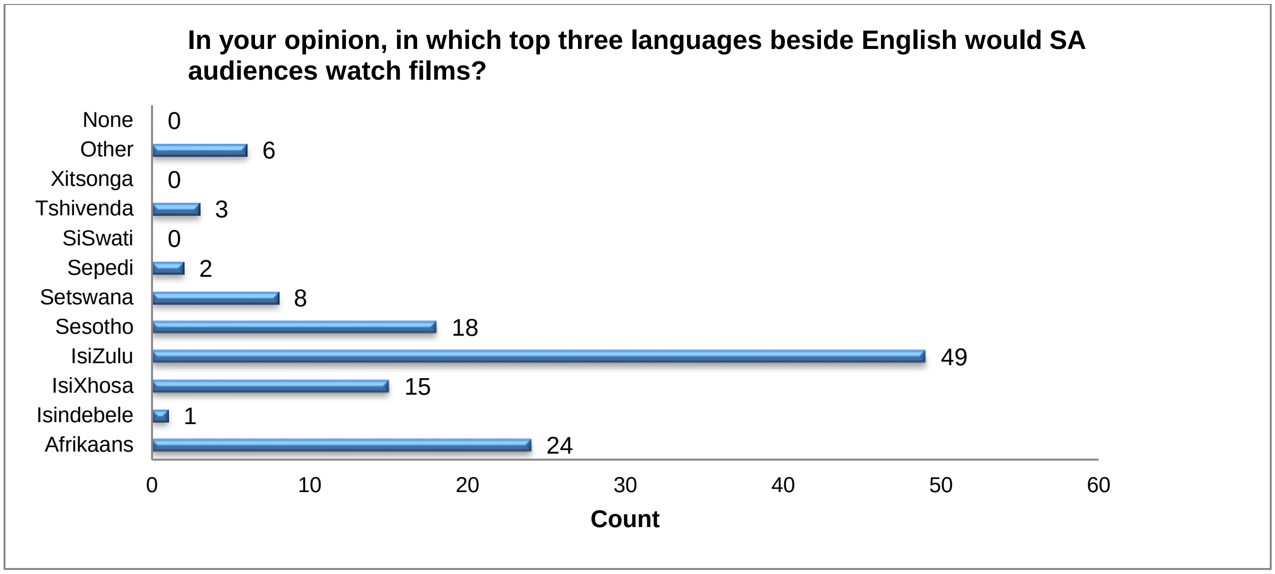


Most internal stakeholders consider comedy as the most popular genre of successful SA films, followed by animation, crime and gangster, as well as action.

9.3.2 Preferred language besides English

Respondents were asked to indicate any three top languages SA audiences would view SA films in besides English.

Figure 122: Preferred language besides English

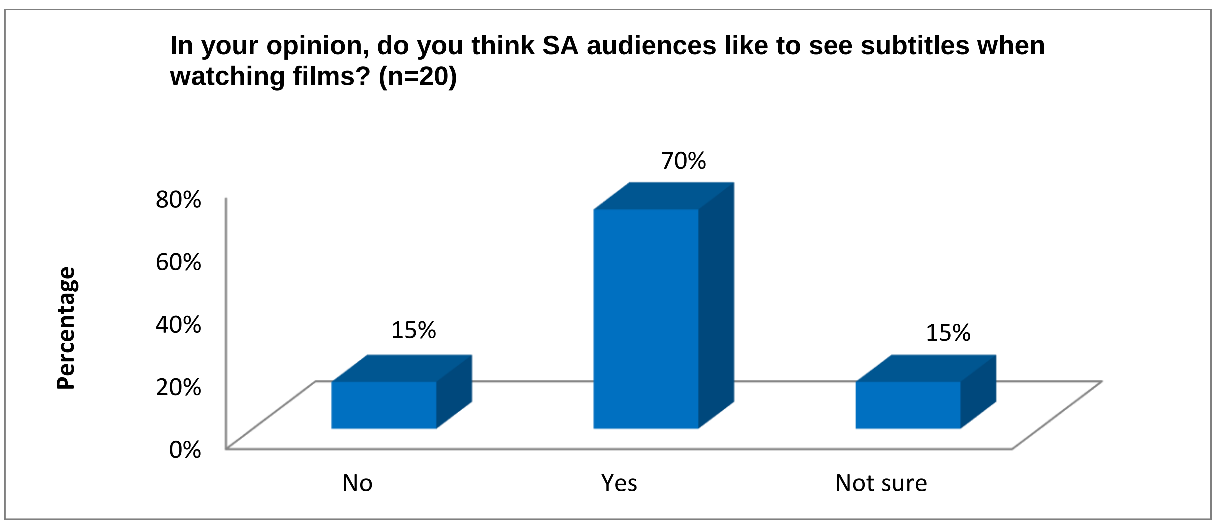


According to respondents the top three languages, beside English, which SA audiences desire to watch films are IsiZulu, Afrikaans and Sesotho.

9.3.3 Watching of films with subtitles

Respondents were asked if they think SA audiences would enjoy movies with subtitles.

Figure 123: Watching films with subtitles



The findings displayed in the table shows that most respondents (70%) indicated that they think the SA audiences would enjoy subtitles. On the other hand, the remaining 30% were split between those that think SA audiences would not enjoy films with subtitles and others who weren't sure what audiences would prefer.

9.3.4 Variances that endear SA films

Respondents were asked what they consider as the iconic symbols, landmarks, artefacts or popular phrases that can be adopted to distinguish and serve SA films to audiences.

Table 79: Variances that endear SA films

Iconic symbol, landmark or popular phrase	Percentage (%)
Brightly-coloured Bo-Kaap houses	0
Cape Minstrels	0
Cape Point	4.76
Cape Sightseeing Bus	0
Gumboot dance	0
Hector Peterson photo	0
Images of Soweto	9.52
Images of the 'Big Five'	4.76
Nelson Mandela Bridge in Newtown	9.52
Pantsula dance	0
Phrases like *lekker, eish* and *wena*	14.29
SA currency	4.76
SA musical icons – Hugh Masekela, Miriam Makeba & Brenda Fassie	0
SA national anthem	0
Statue of Nelson Mandela at the Union Building	23.81
Table Mountain	14.29
The 'Cape Flats smile'	0
The SA flag	9.52
Vuvuzela	0
Wine estates	0
Other	4.76
Total	**100**

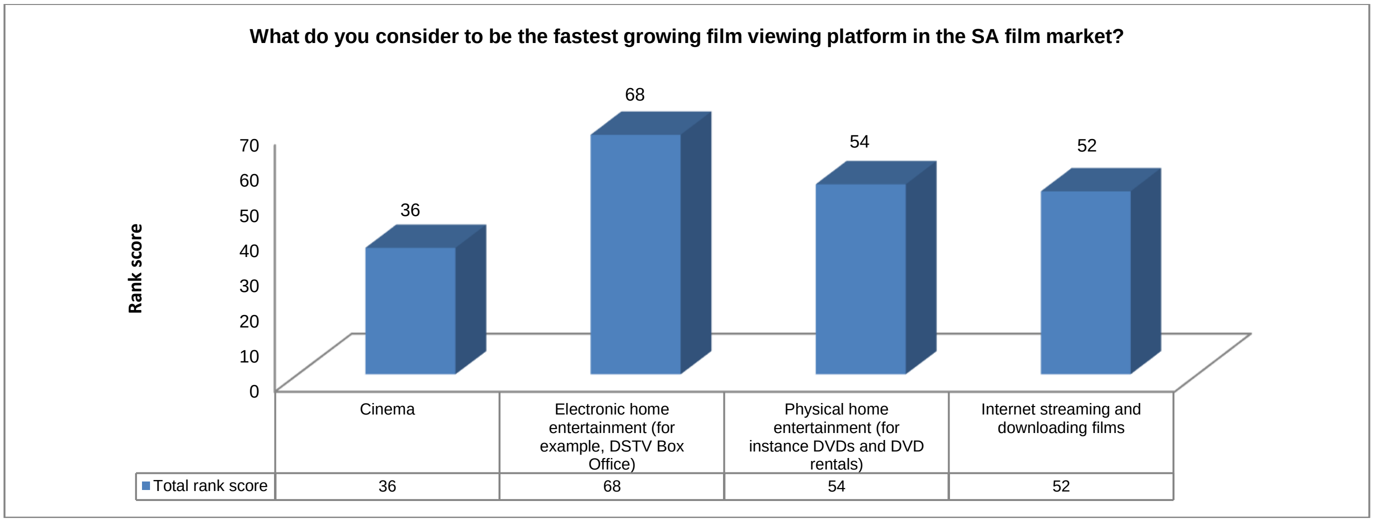
A larger proportion of the respondents (24%) indicated the statue of Nelson Mandela at the Union Building, followed by 14% who said Table Mountain and a similar portion who indicated phrases like *lekker, eish* and *wena*.

9.4 Film viewing platform

9.4.1 Fastest growing film viewing platform

To explore platform preferences within the SA film market, respondents were asked to indicate what they think is the fastest growing film platform.

Figure 124: Fastest growing film viewing platform



The respondents consider electronic home entertainment (DSTV Box Office, for example) as the fastest growing film viewing platform, followed by physical home entertainment (DVDs and DVD rentals, for instance) and internet streaming and downloading of films.

9.4.2 Rating of 3D experiences

Respondents were asked to indicate how they rate the growing industry of 3D movie experiences compared to 2D.

Table 80: Rating 3D experiences

Response	Percentages
Superior	71.43
Inferior	0
No difference	23.81
No opinion	4.76
Total	**100**

Most of the respondents (71%) rated the 3D experience as superior to the normal 2D, followed by 24% who indicated that there's no difference, and the remaining 5% were indifferent.

9.5 Reaching SA audiences

9.5.1 Advertising SA films to reach large audiences

Respondents were asked to indicate where they would advise that SA films be advertised to reach the largest audience.

Table 81: Advertising SA films to reach large audiences

Advice on where to advertise or publicise SA films	Percentage (%)
At sport events (soccer matches – especially Soweto derbies – rugby matches, cricket matches, and so on)	0
On billboards, especially on highways leading to townships	9.52
On radio	4.76
On TV	4.76
All of the above	80.95
Total	**100**

The majority (81%) of the internal respondents indicated all options as significant means/places that can be utilised to advertise SA films.

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9.6 Spending patterns

9.6.1 Willing price to watch a foreign-made film

Respondents were asked to indicate how much they think SA audiences are willing to pay to watch foreign-made films at the cinema.

Table 82: Willing price to watch a foreign-made film

Willing price	Percentage (%)
Less than R50	14.29
R50-R100	38.10
R100-R200	9.52
Whatever it costs as long as they like it	28.57
They aren't willing to pay	4.76
Other	4.76
Total	**100**

A larger proportion (38%) of respondents indicated that they think audiences are willing to pay between R50-R100 to watch a foreign-made film at the cinema, followed by 29% who said they think SA audiences are willing to pay 'whatever it costs as long as they like it'. The results also show that a sizeable portion of 14% said they think the SA audience are willing to pay less than R50.

9.6.2 Willing price to watch a SA film

Respondents were asked to indicate how much they think SA audiences are willing to pay to watch a SA film at the cinema.

Table 83: Willing price to watch a local SA-made film

Willing price	Percentages (%)
Less than R50	71.43
R50-R100	19.05

R100-R200	0
Whatever it costs as long as they like it	4.76
They are not willing to pay	0
Other	4.76
Total	**100**

Most respondents (71%) indicated that audiences are willing to pay less than R50 to watch a SA-made film at the cinema, while 19% said audiences are willing to pay between R50-R100. Around 5% of the respondents said they think SA audiences are willing to pay 'whatever it costs as long they like the film'.

9.6.3 Reason for differences in willing price

To gain an in-depth understanding, respondents were further asked to indicate the reasons for the differences between willing prices for a foreign- and locally-made film.

Table 84: Reason for differences in willing price

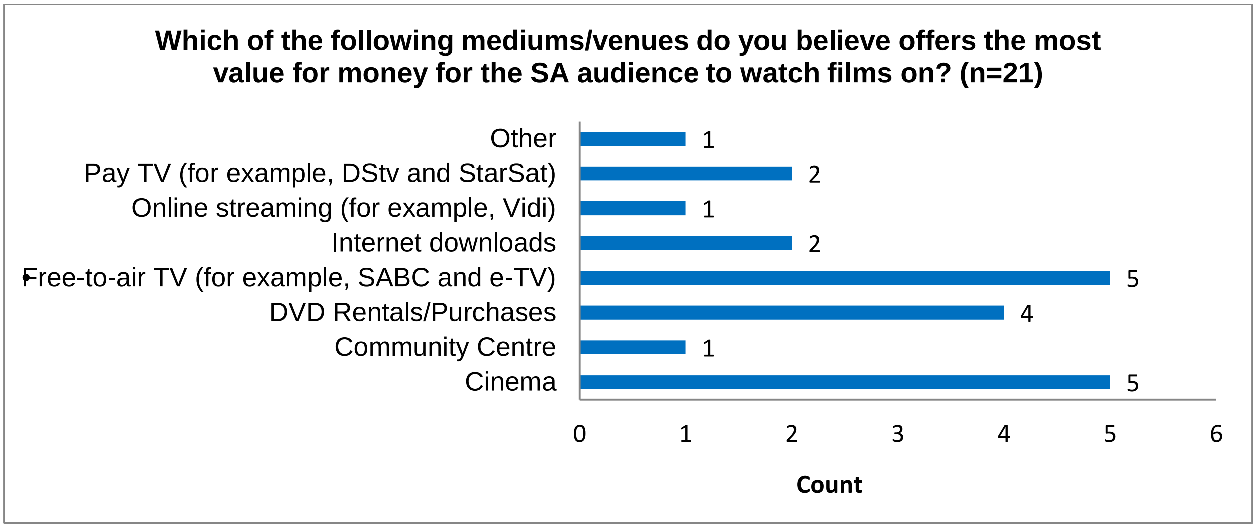
Reasons for differences	Percentage (%)
Audiences prefer the content in foreign films	43.75
Audiences prefer the content in local films	6.25
Foreign-made films should be cheaper	18.75
Locally made films should be cheaper	12.50
Other	18.75
Total	**100**

A greater proportion of respondents (44%) said SA audiences prefer the content in foreign films, and so, are always willing to pay whatever the cost, just to consume the content. Around 19% indicated that foreign films should be cheaper, while 13% opposed the assertion, saying locally-made films should be cheaper. These findings seem to suggest that SA audiences are willing to pay less for SA made films, thereby, ticket prices for local films should be cheaper as a promotional measure for an increase in local content consumption.

9.6.4 Viewing platform that offers most value for money

Respondents were asked to indicate their opinion on the viewing platform which they think offers the most value for money.

Figure 125: Viewing platform that offers most value for money



Most respondents consider Cinema and Free-to-air TV as the best viewing platforms that offer the most value for money. Community centre viewing and online streaming were considered to offer the least value for money.

9.7 General perceptions and attitude towards SA films

9.7.1 Rating SA in contexts

Respondents were asked to rate SA films in a number of contexts.

Table 85: Rating of SA films in contexts

Context	Excellent	Very good	Good	Fair	Bad	Very bad	Don't know
Visuals/Cinematography	4.76%	47.62%	23.81%	14.29%	4.76%	0%	4.76%
Storylines	0%	23.81%	42.86%	28.57%	4.76%	0%	0%
Actors or Actresses Performances	4.76%	33.33%	42.86%	14.29%	0%	0%	0%
Film characters	9.52%	23.81%	42.86%	23.81%	0%	0%	0%
Technical production quality	0%	33.33%	57.14%	4.76%	4.76%	0%	0%
Historical and political content	20%	30%	35%	10%	0%	0%	5%
Local content representative of SA languages and culture	4.76%	23.81%	33.33%	23.81%	14.29%	0%	0%

Context	Excellent	Very good	Good	Fair	Bad	Very bad	Don't know
Local content representative of SA Natural Environment and Wildlife	9.52%	23.81%	33.33%	19.05%	9.52%	0%	4.76%
Availability in other official languages beside English	19.05%	9.52%	38.10%	9.52%	14.29%	9.52%	0%
Entertainment Value	4.76%	14.29%	47.62%	33.33%	0%	0%	0%
Total	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**

Upon aggregating the ratings for excellent, very good and good, the scores obtained are as follows:

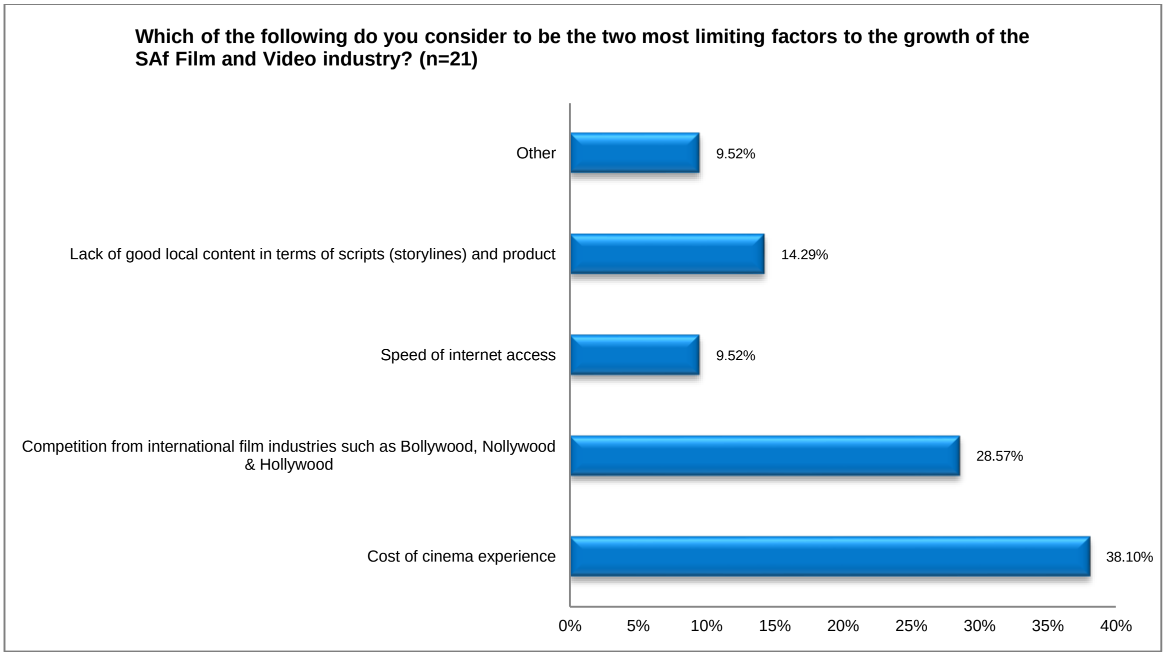
- Technical production quality: **90%**
- Historical and political content: **85%**
- Actors/actresses performance: **81%**
- Visuals/cinematography: **76%**
- Film characters: **76%**
- Local content representative of SA natural environment and wildlife: **67%**
- Availability in other official languages beside English: **67%**
- Entertainment value: **67%**
- Storylines: **67%**
- Local content representative of SA languages and culture: **62%**

9.8 Audience access to film and video products

9.8.1 Factors limiting SA audience access

Respondents were asked to indicate what they consider to be the two most limiting factors to the growth of the SA film and video industry.

Figure 126: Factors limiting growth of the SA Film and Video industry



The respondents consider the cost of cinema experience and competition from international film industries as the two most limiting factors to the growth of the SA film and video industry.

9.9 NFVF's strategy

9.9.1 NFVF's strategy in promoting the growth of the SA film industry

Respondents were asked to indicate what they think best represents the NFVF's strategy and practice in promoting the growth and sustainability of SA film and video products. The findings are illustrated in the following table.

Table 86: NFVF strategy in promoting the growth of SA film industry

Strategy	Percentage (%)
Conduct good research and due diligence on all funded film and video products to ensure that these funded films and videos have above average chances of success	23.81
Fund as many big ticket SA film and video products, and see how many succeed	0
Fund film and video producers who have a history of success, to replicate their successes	4.76
Investigate what audiences want and will consume, and thereby fund the film and video products that will cater to the audiences, and if need be, leverage audience tastes to nudge them in the desired direction	23.81

Strategy	Percentage (%)
Spread the available funding support to as many previously disadvantaged film and video producers as possible to ensure more SA film and video products are made	23.81
The NFVF generally offers support, as it deems necessary, based on how the industry evolves	23.81
None of the above	0
Total	**100%**

Interestingly, there were equal proportions of respondents indicating what strategies to employ, apart from: 'Fund as many big ticket SA film and video products, and see how many succeed', which received no support.

9.9.2 Strategy recommendation

Respondents were asked to indicate the best strategy they can recommend NFVF adopt so as to create a sustainable SA Film and Video industry.

Table 87: Strategy recommendation

Recommendation	Percentage (%)
Conduct good research and due diligence on all funded film and video products to ensure that these funded films and videos have above average chances of success	28.57
Fund as many big budget SA film and video products and see how many will succeed	4.76
Fund film and video producers who have a history of success, to replicate their successes	0
Investigate what audiences want and will consume, and thereby fund the film and video products that will cater to the audiences, and if need be, leverage audience tastes to nudge them in the desired direction	57.14
Spread the available funding support to as many previously disadvantaged film and video producers as possible to ensure more SA film and video products are made	4.76
The NFVF should generally offer support, as it deems necessary, based on how the industry evolves	4.76
Total	**100**

With regards to recommending a strategy for NFVF, most of the internal stakeholders (57%) indicated that the NFVF should Investigate what audiences want and will consume, and thereby fund the film and video products that will cater to the audiences, and if need be, leverage audience tastes to nudge them in the desired direction.

About 29% of the internal stakeholders indicated that the NFVF should conduct good research and due diligence on all funded film and video products to ensure that these funded films and videos have above average chances of success.

9.9.3 Best solution for NFVF to achieve its strategy

Respondents were further asked to indicate how best, in their opinion; the NFVF can achieve its strategy.

Table 88: Solution for NFVF to achieve its strategy

Solution	Percentage (%)
By remaining at the apex of the film and video industry, and allowing provincial and regional film structures to offer funding for the films that satisfy the general guideline provided by the NFVF	61.90
Continue to operate as it currently does, providing funding to film producers directly	0.00
Doing a little bit of both	38.10
Total	**100**

The finding revealed that most of the internal stakeholders (62%) said that the NFVF can achieve its strategy by remaining at the apex of the film and video industry, and allowing provincial and regional film structures to offer funding for the films that satisfy the general guideline given by NFVF.

The findings also showed that 38% of the internal stakeholders can achieve its strategy by doing a little bit of both (the solution above).

10 EXTERNAL STAKEHOLDERS: GOVERNMENT

10.1 Introduction

The film industry of any given country is an economic entity that contributes significantly to the country's GDP, and as such, the film industry – from pre-production to distribution – is vital to any country's economy. Furthermore, the film industry helps foster democracy through engendering debate and providing political commentary (Tuomi, 2005).

It's against this background that the questionnaire for government stakeholders was formulated. The stakeholders that were considered as government in this research included the following;

- National Department of Arts and Culture;
- National Treasury;
- Department of Trade and Industry;
- Department of Economic Development;
- The Presidency;
- Department of International Relations and Co-operation;
- Department of Basic Education;
- Department of Higher Education and Training;
- Department of Labour; and
- Department of Home Affairs.

10.2 Respondents profile

From a quantitative approach this section aimed to establish the different variables in occupational levels and seeks to reveal the respondents knowledge in the film industry. In other words, it shows the basic classification data. Respondents were asked a series of questions which was used to profile them in terms of their demographics.

10.2.1 Occupational level

Respondents were asked to indicate their occupational level.

Table 89: Occupational level

Occupational level	Count	Percentage
Director General	3	8.57
Deputy Director General	0	0
Chief Director	3	8.57
Director	10	28.57
Deputy Director	1	2.86
Senior Manager	1	2.86
Manager	3	8.57
Other	14	40
Total	**35**	**100**

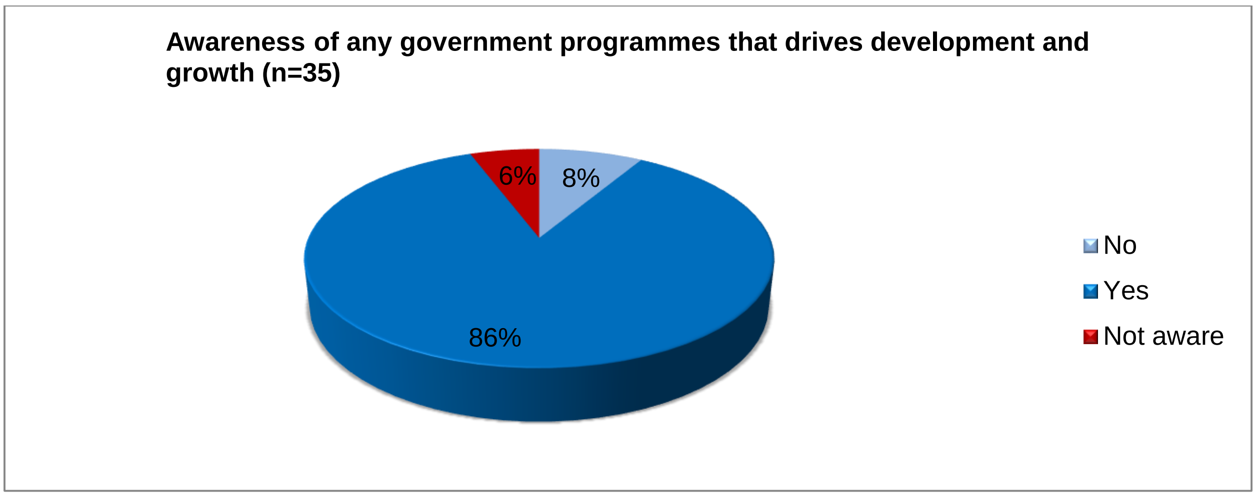
Those who indicated ‘Other’ were probed further and the answers provided included academia, administrator, producer, film student, CEO, senior administrator, director of photography and secretary to chief whip.

10.3 Awareness of film and video programmes

10.3.1 Awareness of government programmes

Respondents were asked to indicate their awareness of any governmental programmes aimed at developing the film industry.

Figure 127: Awareness of government programmes

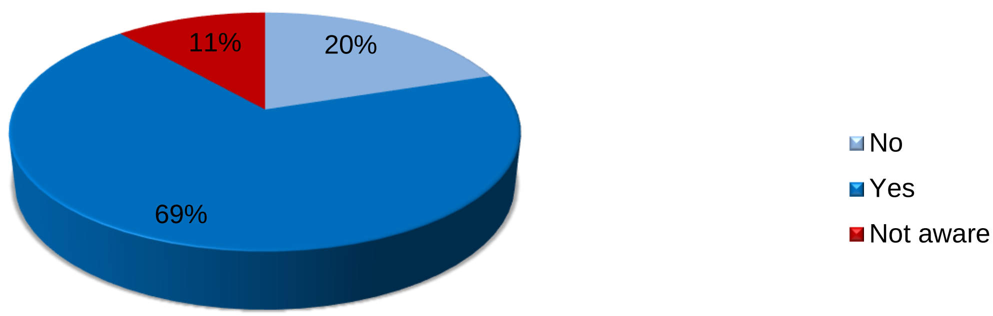


The findings revealed that the majority (86%) of the respondents are aware of government initiatives aimed at improving the film industry. On the other hand, 14% of the respondents were not aware of any government programmes.

10.3.2 Government programmes for audience development

Furthermore, respondents were asked to indicate if they’re aware of any governmental programmes aimed at developing the film markets and audiences.

Figure 128: Awareness of government programmes



Looking at the findings presented in the figure above, the majority (69%) of the respondents said they're aware of government initiatives aimed at improving and developing SA film markets and audiences.

10.3.3 Government vision

Respondents were asked to indicate their opinion on government's vision in relation to the promotion of SA film and video products.

Table 90: Government vision

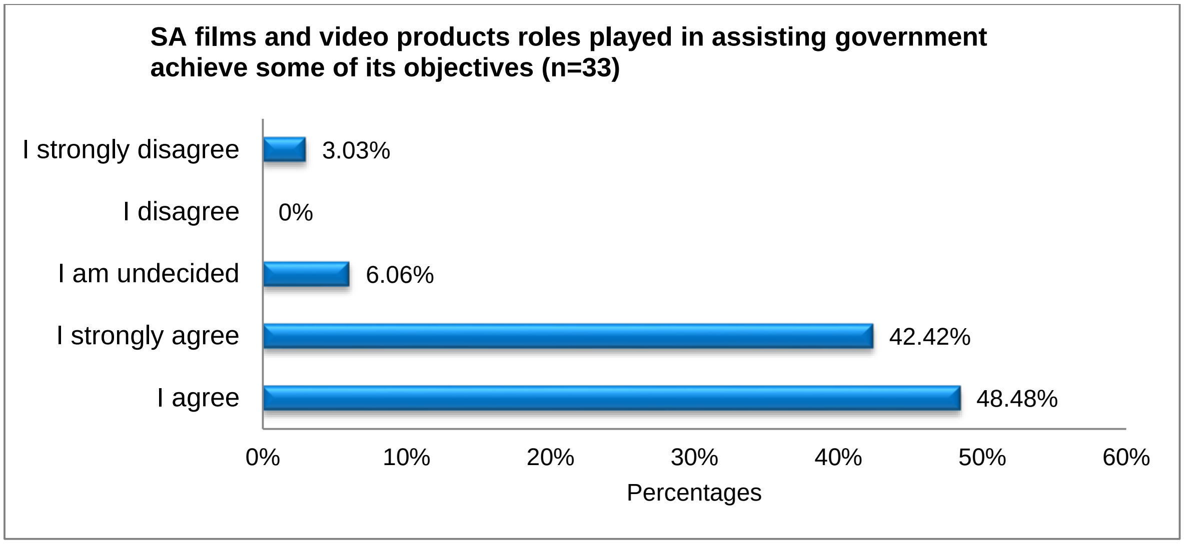
Response	Count	Percentage (%)
Provide funding mechanisms to support its growth	26	22.22
Support the industry through policy and regulation	24	20.51
For entertainment purposes	12	10.26
To enhance social cohesion and dialogue	14	11.97
To help create sustainable and decent jobs	20	17.09
To transform society support and international relations	18	15.38
Other	3	2.56
Total	**117**	**100%**

About 22% said government's vision in promoting SA films is to provide funding mechanisms to support its growth, followed closely by respondents (21%) who said the government should support the industry through policy and regulation. Around 17% of respondents were of the view that government vision should be to help create sustainable and decent jobs.

10.3.4 Role of SA films to the government

Respondents were asked if they think SA films have a role to play in assisting some of government's objectives.

Figure 129: Role of SA films to the government



The findings revealed that the majority of respondents (91%) – an aggregate who 'strongly agree' and simply 'agree' – stated that they think SA film and video products have a role to play in assisting government achieve some of its objectives.

10.3.5 Role of SA films in fostering social cohesion

Respondents were asked to indicate their opinion on whether or not they think SA film has a role to play in fostering social cohesion in the country.

Table 91: Role of SA film in fostering social cohesion

Do you think SA film has a role to play in fostering social cohesion in the country	Count	Percentage (%)
I agree	12	35.29
I strongly agree	16	47.06
I am undecided	4	11.76
I disagree	1	2.94
I strongly disagree	1	2.94
Total	**34**	**100%**

The findings showed that a majority of respondents (82%) – an aggregate who 'strongly agree' and simply 'agree' – stated that they think SA film has a role to play in fostering social cohesion in the country.

10.4 Content preferences

Respondents were also asked a series of questions to investigate and gain insight into the audiences' content preferences, with respect to preferred formats and language, preferred platforms for consumption, what informs choices of films at cinema, and so on.

10.4.1 Variances that can endear SA films

For the purposes of distinction or to distinguish SA films from the imitating/mimicking mainstream Hollywood film patterns, respondents were asked to indicate any artifacts, symbol, iconic symbols, popular phrases and landmarks that can serve to endear to SA film audiences.

Table 92: Variances that endear SA films

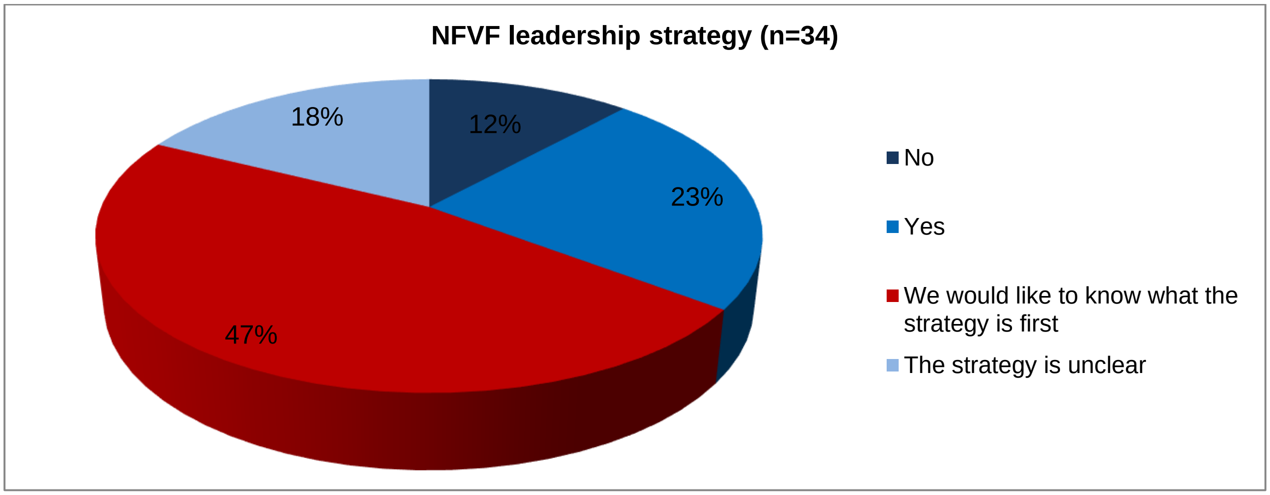
Variances	Count	Percentage (%)
Brightly-coloured Bo-Kaap houses	0	0
Cape Minstrels	0	0
Cape Point	1	2.94
Cape Sightseeing Bus	0	0
Gumboot dance	1	2.94
Hector Peterson photo	0	0
Images of Soweto	0	0
Images of the Big Five•	1	2.94
Nelson Mandela Bridge in Newtown	2	5.88
Pantsula dance	0	0
Phrases like *lekker*, *eish* and *wena*	3	8.82
SA currency	2	5.88
SA musical icons: Hugh Masekela, Miriam Makeba & Brenda Fassie	3	8.82
Statue of Nelson Mandela at the Union Building	7	20.59
Table Mountain	4	11.76
The 'Cape Flats smile'	0	0
The SA flag	8	23.53
The SA National Anthem	0	0
Vuvuzela	0	0
Wine estates	2	5.88
Total	**34**	**100**

The findings revealed that a greater proportion of respondents (24%) indicated the SA flag, followed by 21% who said the Statue of Nelson Mandela at the Union Building and 12% who said the Table Mountain can be used to endear SA films to audiences.

10.4.2 NFVF leadership

The respondents were further asked if they're happy that the NFVF takes leadership of the general strategy of achieving a sustainable film and video industry in SA. The findings are presented in the next figure.

Figure 130: NFVF leadership of the general strategy



The findings show that 47% – almost half – the respondents stated that they would like to know what the strategy is first, followed by 23% who said they were happy that the NFVF takes leadership of the general strategy, and 18% indicated that the strategy is unclear. About 12% of respondents said they weren't happy that the NFVF takes leadership of the general strategy of achieving sustainable film and video industry in SA.

10.5 General perceptions and attitude towards SA film

Questions were aimed at providing insights into respondents' perceptions and attitudes toward SA film.

10.5.1Rating of SA film

Respondents were provided with a catalogue of contexts and asked to rate SA film using a scale ranging from excellent to very bad. The findings are presented in the table below.

Table 93: Ratings of SA films

	Visuals	Story lines	Actors or Actresses	Film characters	Technical production	Historical & political content	Local Content: SA languages & culture	Local Content: SA natural environment & wildlife	Availability in other official languages beside English	Value
Excellent	3	3	5	3	4	3	2	1	1	2
Very Good	11	6	8	5	8	3	1	1	2	5
Good	10	10	11	12	15	12	7	8	5	13
Fair	9	12	6	11	3	9	14	9	11	7
Bad	0	2	2	1	2	2	6	7	9	4
Very	0	0	0	0	1	4	3	6	5	2

	Visuals	Story lines	Actors or Actresses	Film characters	Technical production	Historical & political content	Local Content: SA languages & culture	Local Content: SA natural environment & wildlife	Availability in other official languages beside English	Value
Bad										
Don't know	0	0	0	0	0	0	0	1	0	0
Total	33	33	32	32	33	33	33	33	33	33

Upon aggregating the ratings for 'excellent', 'very good' and 'good', the overall rating obtained for the various content are as follows:

- Technical production quality: **82%**
- Visuals/cinematography: **73%**
- Actors or actresses performances: **73%**
- Film characters: **63%**
- Storylines: **61%**
- Entertainment value: **61%**
- Historical and political content: **55%**
- Local content representative of SA languages and culture: **30%**
- Local content representative of SA Natural Environment and Wildlife: **30%**
- Availability in other languages beside English: **24%**

11 STRATEGIC STAKEHOLDERS: EXTERNAL

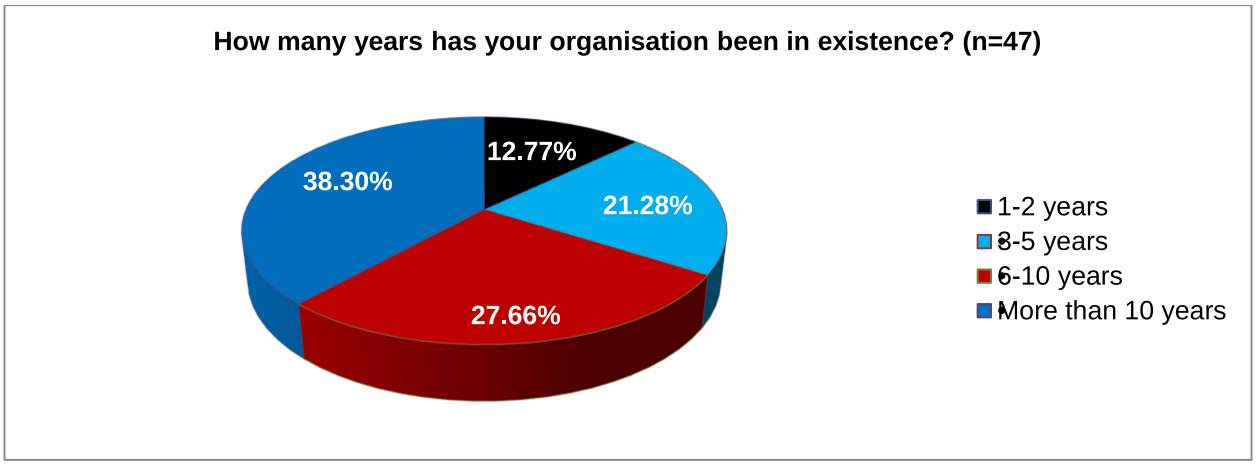
11.1 Introduction

This section presents a catalogue of findings obtained from the analysis of strategic stakeholders (external) results. External stakeholders in this research were considered to be actors and actresses, advertisers, development agencies/corporations, documentaries, film producers, film festival organisers, film makers, heritage agencies, script writers/editors, Sector Education and Training Authority (SETA), sponsors and transformation associations.

11.2 Profile of respondents

11.2.1 Organisational Profile

Figure 131: Number of years in existence

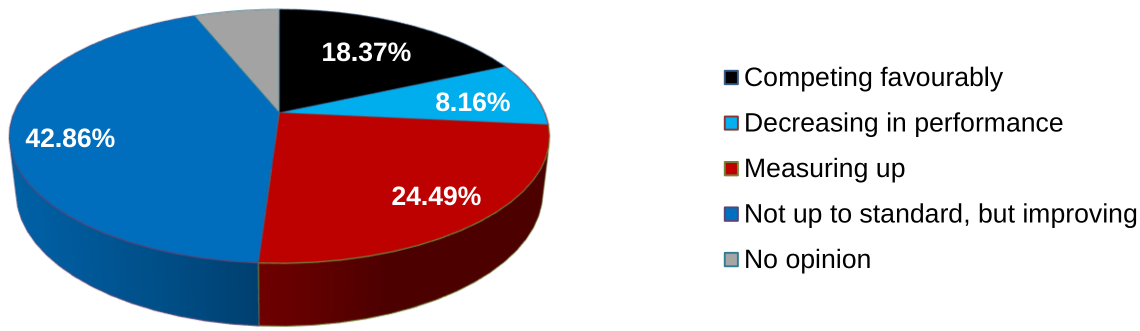


The findings show that the highest number of external stakeholders (38%) said their organisations had been in existence for more than 10 years, followed by 28% whose organisations have been in existence for between 6-10 years; 21% indicated between 3-5 five years and 13% stated between 1-2 years.

11.2.2 Vibrancy and development of SA film industry

These findings were obtained when the respondents were asked to indicate how vibrant and developed the SA film and video industry is in relation to the US, India and Nigeria film industries.

Figure 132: SA film and video industry in relation to counterparts

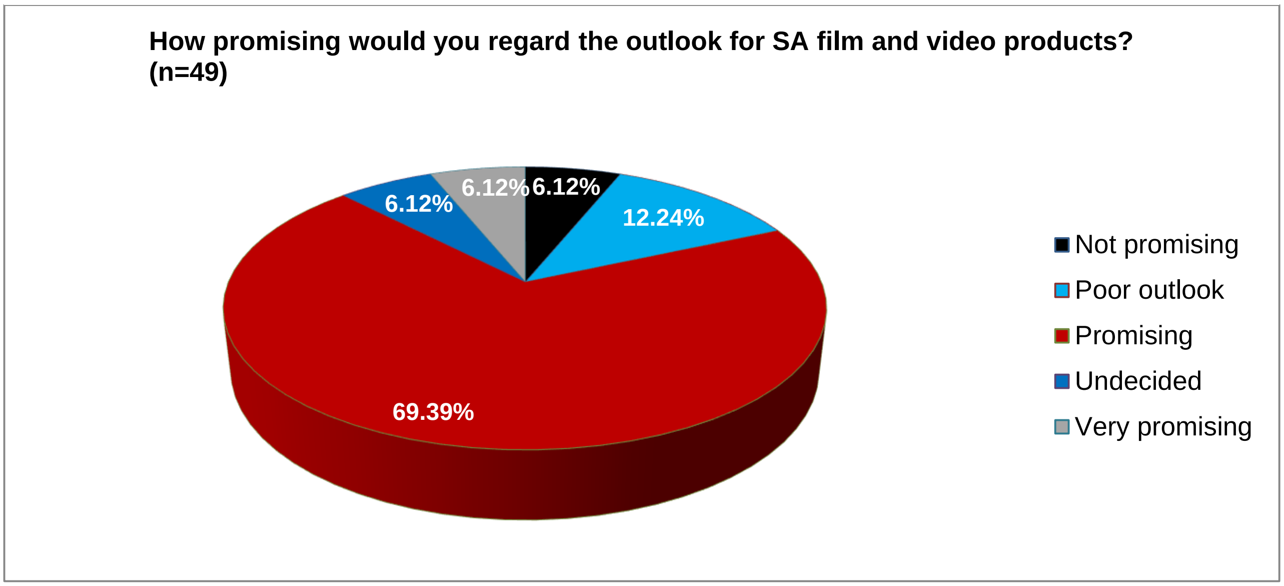


The findings revealed that the highest proportion of the external stakeholders (43%) said they believe that the SA film and video industry is not up to standard, while 25% said they believe that it's measuring-up. About 18% said they feel that SA film and video industry, in relation to other counterparts, is competing favourably; 8% said it is declining in performance and 6% were indifferent when asked.

11.2.3 Outlook of SA films and video products

External stakeholders were asked to indicate their opinions regarding the outlook for SA film and video products.

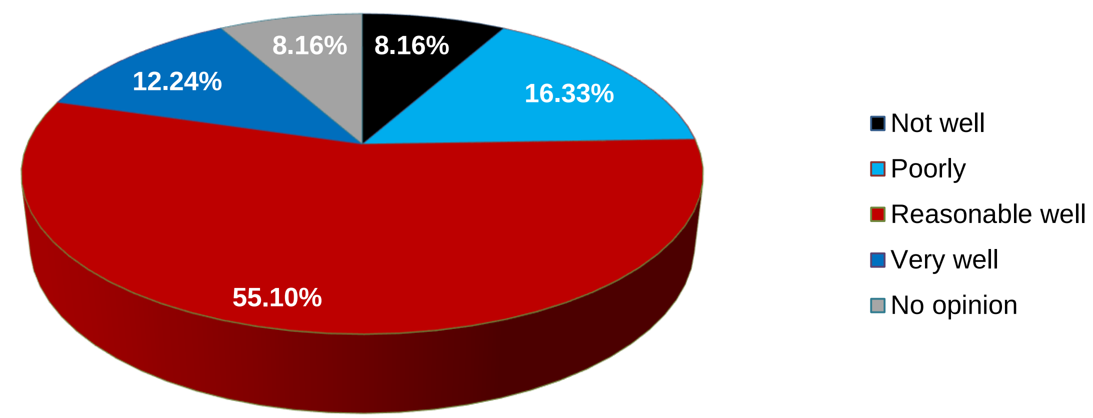
Figure 133: Outlook for SA film and video products



Most (69%) of the external stakeholders stated that the outlook for SA film and video products is promising, while around 13% said the outlook is poor; 6% of respondents said the industry isn't promising, 6% said it's very promising and 6% were undecided.

11.2.4 Working relationships in the film industry

Figure 134: Working relationships



Most of the external stakeholders (55%) said film industry organisations works reasonably well with other SA film players, while 16% said the working relationship is poor. Furthermore, 12% indicated that they think film industry organisations work very well with the other players, while 8% stated that film industry organisations find it difficult to work with others. Around 8% of the respondents were indifferent.

11.3 Content preferences

11.3.1 Most popular genres of successful SA films

External stakeholders were asked to indicate the three most popular genres of successful SA films.

Table 94: Most popular genres of successful SA films

Most popular genres of successful SA films	Rank 1	Rank 2	Rank 3
Action	**12.24%**	**14.29%**	**18.75%**
Adult movies	2.04%	0.00%	4.17%
Adventure	4.08%	2.04%	4.17%
Animation	2.04%	10.20%	6.25%
Comedy	**44.90%**	**10.20%**	**12.50%**
Crime and gangster	6.12%	14.29%	14.58%
Documentaries	4.08%	12.24%	4.17%

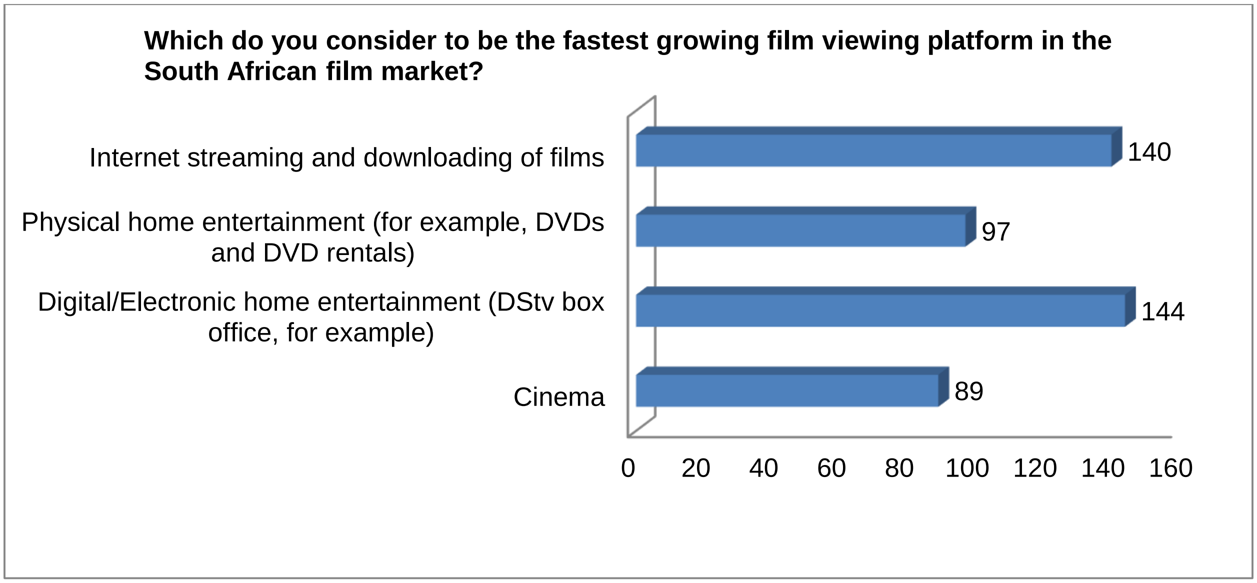
Drama	**12.24%**	**16.33%**	**14.58%**
Horror/Thriller	0.00%	2.04%	2.08%
Musical	0.00%	4.08%	0.00%
Political/historical/cultural	4.08%	0.00%	6.25%
Reality shows	4.08%	4.08%	4.17%
Romance	4.08%	8.16%	4.17%
Science-fiction	0.00%	0.00%	2.08%
War	0.00%	0.00%	0.00%
Western	0.00%	0.00	0.00%
Other	0.00%	2.04	2.08%
Don't know	0.00%	0.00	0.00%

The findings revealed that according to the external stakeholders, the three most popular genres of successful SA films were comedy, followed by drama and action.

11.3.2 SA fastest growing film viewing platform

External stakeholders were further asked to indicate what they consider to be the fastest growing film viewing platform in the SA film market.

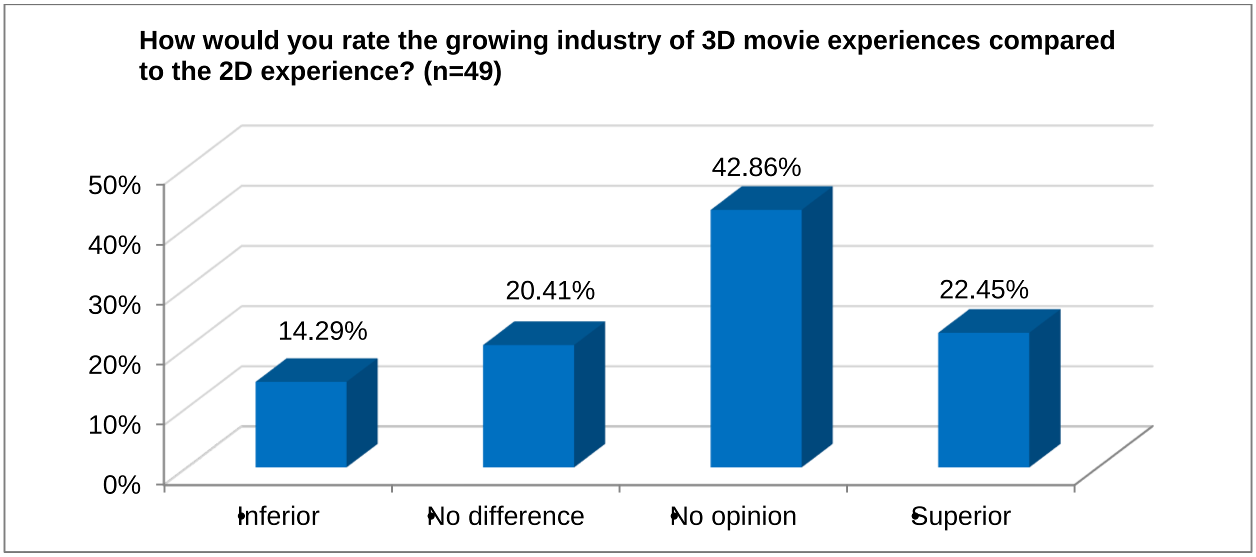
Figure 135: Fastest growing film viewing platform in SA



The external stakeholders said the digital/electronic home entertainment (DSTV box office, for example) is the fastest growing film viewing platform in the SA film market, followed by internet streaming and downloading of films and physical home entertainment (DVD and DVD rentals, for example) and Cinema. This trend could be partly associated with more people having access to digital/electronic home entertainment and internet streaming and downloading of films, and so, spurring the downward trend in physical home entertainment and Cinemas.

11.3.3 Comparing 3D and 2D movie experiences

Figure 136: Comparing 3D and 2D movie experiences

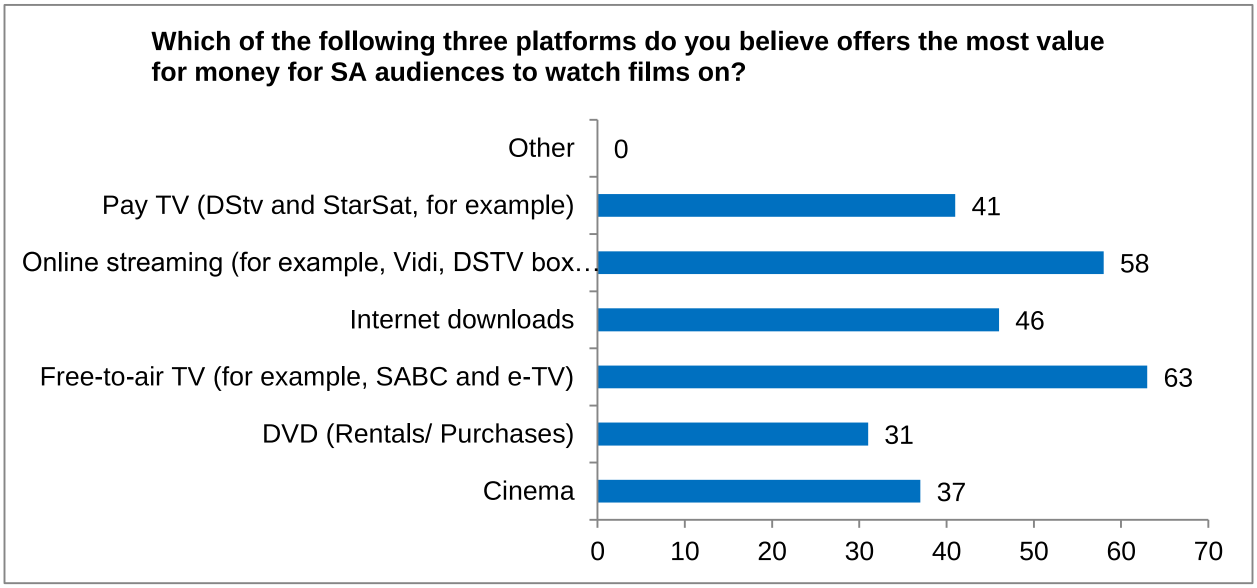


Although 43% were of no opinion, 23% of the internal stakeholders rated the growing industry of 3D experience as being more superior than the 2D experience; on the other hand, 20% stated that there's no difference in the 3D and 2D movie experiences. About 14% rated the 3D as inferior to 2D experience.

11.4 Spending pattern

11.4.1 Platforms that offer the most value for money

Figure 137: Platforms offering most value for money



The findings revealed that most external stakeholders (63%) viewed Free-to-air TV (SABC and e-TV, for example) as the platform which offers the most value for money for SA audiences to watch films on, followed by online streaming, 58% (Vidi, DSTV box office, YouTube, and so on) and internet downloads with 46%; 41% of respondents answered Pay TV, 37% chose Cinema and 31% opted for DVD.

11.5 General perceptions and attitude towards SA films

11.5.1 Rating of SA films

External stakeholders were asked to rate SA films. The results are shown in the table below.

Table 95: Rating of SA films

Rating	Visuals	Story-lines	Actors/ Actresses	Film Characters	Technical Production Quality	Historical & Political Content	Local Content: Language & Culture	Local Content: SA Natural Environment & Wildlife	Availability in other official languages beside English	Entertainment Value
Excellent	8.51%	6.38%	4.17%	2.08%	8.33%	8.51%	8.33%	10.42%	6.38%	4.17%
Very Good	27.66%	10.64%	4.17%	8.33%	16.67%	27.66%	12.50%	14.58%	4.26%	4.17%
Good	40.43%	42.55%	39.58%	41.67%	52.08%	25.53%	20.83%	20.83%	21.28%	31.25%
Fair	19.15%	19.15%	31.25%	33.33%	10.42%	25.53%	37.50%	29.17%	27.66%	50.00%
Bad	0.00%	14.89%	14.58%	12.50%	6.25%	4.26%	12.50%	16.67%	25.53%	6.25%
Very Bad	2.13%	4.26%	4.17%	2.08%	6.25%	4.26%	4.17%	2.08%	6.38%	4.17%
Don't know	2.13%	2.13%	2.08%	0.00%	0.00%	4.26%	4.17%	6.25%	8.51%	0.00%
Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

Generally, most external stakeholders rated SA films either good, very good or excellent. On the other hand, when it came to local content, in terms of SA natural environment and wildlife, availability of SA films in other languages and entertainment value, most external stakeholders rated SA films as fair.

11.5.2 Demand for SA films compared to foreign produced

External stakeholders were asked to indicate their opinion on the demand for SA film and video content in SA in relation to foreign produced (US, Europe, India and other African countries, for example) film and video.

Table 96: Demand for SA film and video content

Demand for SA film and video content compared to foreign produced	Count	Percentage
Demand is at the same level	1	2.13%
It is not clear which demand is more	8	17.02%
There is less demand for SA films	35	74.47%
There is more demand for SA films	3	6.38%
Total	47	100%

The majority of the external stakeholders said that there's less demand for SA films and video content in relation to foreign produced film and video content.

11.5.3 SA symbols and landmarks to endear SA films

Table 97: Iconic symbols, landmarks and artifacts

Iconic symbols, landmarks, artifacts or popular phrases to distinguish SA films	Count	Percentage (%)
Brightly coloured Bo-Kaap houses	1	2.13%
Cape Minstrels	0	0.00%
Cape Point	2	4.26%
Cape Sightseeing Bus	1	2.13%
Gumboot dance	1	2.13%
Hector Peterson photo	0	0.00%
Images of Soweto	1	2.13%
Images of the 'Big Five'	1	2.13%
Nelson Mandela bridge in Newton	3	6.38%
Pantsula dance	2	4.26%
Phrases like ***lekker***, ***eish*** and ***wena***	8	17.02%
SA currency	0	0.00%
SA musical icons: Hugh Masekela, Miriam Makeba & Brenda Fassie	4	8.51%
Statue of Nelson Mandela at the Union Building	1	2.13%
Table Mountain	**9**	**19.15%**
The 'Cape Flats smile'	0	0.00%
SA flag	3	6.38%
SA national anthem	1	2.13%
Vuvuzela	0	0.00%
Wine estates	1	2.13%

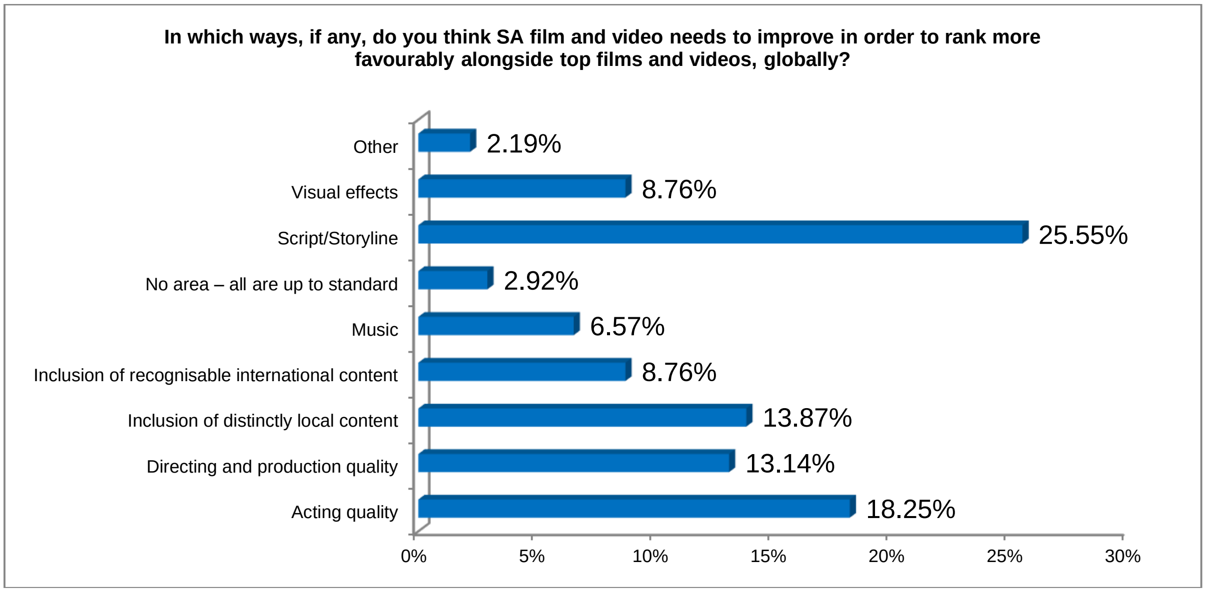
Iconic symbols, landmarks, artifacts or popular phrases to distinguish SA films	Count	Percentage (%)
Other	8	17.02%
Total	47	100%

Most of the external stakeholders indicated that Table Mountain can be used to distinguish SA films and serve to endear SA films to audiences.

11.5.4 Ways to improve SA film and video

External stakeholders were asked to indicate the ways they think SA film and video could be improved, in order to rank more favourably alongside top films and videos, globally.

Figure 138: Ways to improve SA film and videos

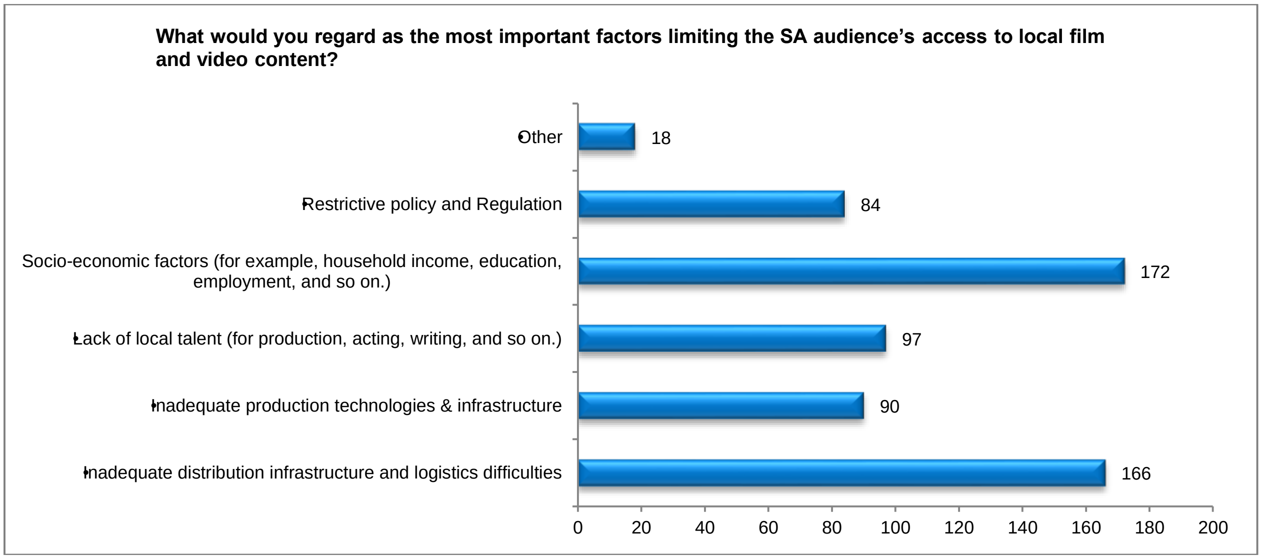


Most of the external stakeholders said that SA film and videos should mostly be improved in terms of the script/storyline, followed by acting quality, inclusion of distinctly local content and directing and production quality.

11.6 Audience access to films and video products

11.6.1 Limiting factors to film and video access

Figure 139: Factors limiting SA audience's access to local content



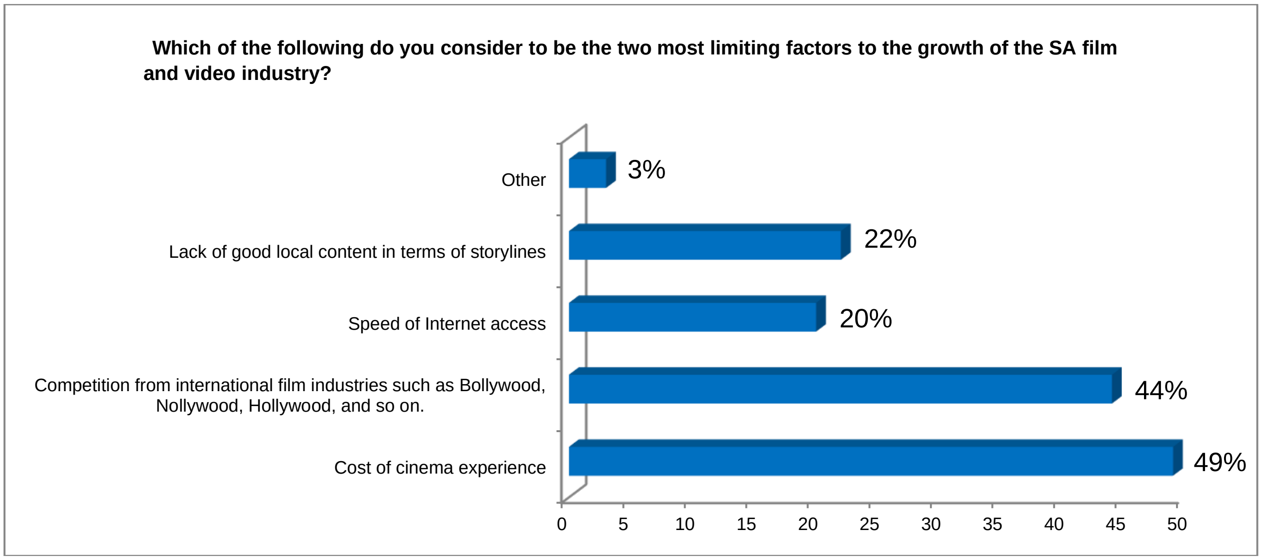
The most limiting factor identified by the external stakeholders was socio-economic factors (household income, education, employment, and so on) followed by inadequate production technologies and infrastructure, lack of local talent (for production, acting, writing, for example) and restrictive policy and regulation.

11.6.2 Limiting factors to growth of SA film industry

The external stakeholders were asked to indicate two factors they consider limit the growth of the SA film and video industry.

The findings revealed that the external stakeholders identified that the cost of the cinema experience and competition from international film industries such as Bollywood, Nollywood, Hollywood, and so on, are the two most limiting factors to the growth of the SA film and video industry.

Figure 140: Limiting factors to SA film and video industry growth



11.6.3 NFVF strategy and practice

External stakeholders were asked to indicate which, in their view, best represents the NFVF strategy and practice in promoting the growth and sustainability of SA films and video products.

Table 98: NFVF strategy and practice

NFVF strategy and practice	Count	Percentage
Conduct good research and due diligence on all film and video products to be funded, to ensure the films and videos funded have an above average chance of success	15	31.25%
Fund as many big budget SA film and video products and see how many will succeed	2	4.17%
Fund film and video producers who have a history of success, to replicate their successes	5	10.42%
Investigate what audiences want and will consume, and thereby fund the film and video products that will cater to audience, and if need be, leverage audience tastes to nudge them in the desired direction	6	12.50%
Spread the available funding support to as many film and video producers as possible, to ensure more SA film and video products are made	9	18.75%
The NFVF generally offers support as it deems necessary, based on how things evolve in the industry	7	14.58%
None of the stated strategies	4	8.33%
Total	**48**	**100%**

A greater proportion of the external stakeholders said that:

> '*Conducting good research and due diligence on all film and video products to be funded to ensure that the films and videos funded have an above average chance of success*'.

This best represents the NFVF strategy and practice in promoting the growth and sustainability of SA films and video products
In addition, the external stakeholders were asked to indicate what, in their view, should be the best strategy adopted by the NFVF to create a sustainable SA film and video industry.

Table 99: Suggested strategy and practice to be adopted by NFVF

What should the NFVF strategy be to create a sustainable SA film and video industry?	**Count**	**Percentage**
Conduct good research and due diligence on all film and video products to be funded, to ensure the films and videos funded have an above average chance of success	13	27.66%
Fund as many big budget SA film and video products and see how many will succeed	4	8.51%
Fund film and video producers who have a history of success, to replicate their successes	7	14.89%
Investigate what audiences want and will consume, and thereby fund film and video products that will cater to audience, and if need be, leverage audience tastes to nudge them in the desired direction	9	19.15%
Spread the available funding support to as many film and video producers as possible, to ensure more SA film and video products are made	10	21.28%
The NFVF should generally offer support, as it deems necessary, based on how things evolve in the industry	3	6.38%
None of the above	1	2.13%
Total	**47**	**100%**

Most of the external stakeholders suggest the NFVF should adopt the strategy and practice of:

> '*Conducting good research and due diligence on all film and video products to be funded, to ensure the film and videos funded have an above average chance of success'.*

Followed by a strategy and practice of:

> *'Investigating what audiences want and will consume, and thereby fund the film and video products that will cater to audience, and if need be, leverage audience tastes to nudge them in the desired direction*'.

11.7 Organisation-specific findings

11.7.1 Role of organisations in the film and video industry

External stakeholders were asked to indicate their role or their organisation's role in the film and video industry.

Table 100: Role in the film and video industry

Role in the film and video industry	Count	Percentage
Actor/Actress	1	2%
• Advertiser	0	0%
• Branding/Marketing	4	8%
• Development Agency/Corporation	4	8%
• Documentaries	2	4%
• Film and Publication	0	0%
• Film Commission	1	2%
• Film Festival Organiser	3	6%
• Film Library	0	0%
• Filmmaker	28	56%
• Film Producer	6	12%
• Heritage Agency	1	2%
• Script Writer/Editor	0	0%
• Sector Education and Training Authority (SETA)	0	0%
• Sponsor	0	0%
• Transformation Association	0	0%
Total	**50**	**100%**

Most of the external stakeholders who participated in the survey were filmmakers, followed by film producers, branding/marketing and development agencies/corporations.

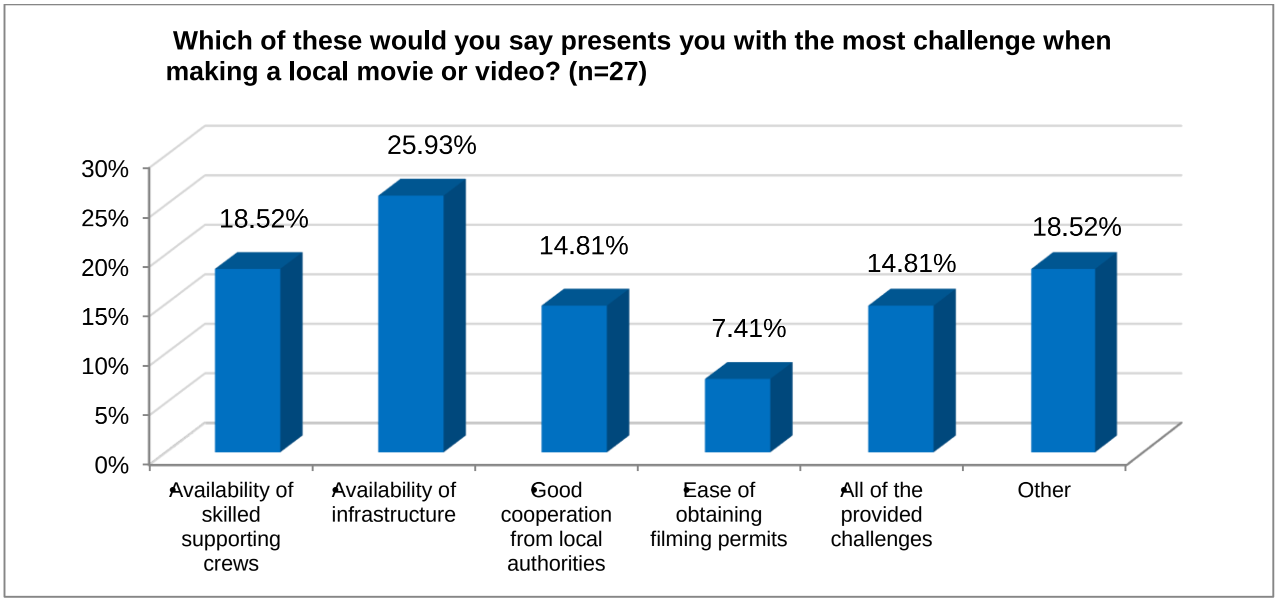
The response rate was low in most of the organisation type. As a result, further analysis of results was only conducted for the film makers who had a sizeable response rate, and from which meaningful findings could be discerned.

11.8 Film makers findings

11.8.1 Challenges faced when making a local film or video

Filmmakers were asked to indicate what they consider to be the most challenges when making a local movie or video.

Figure 141: Challenges faced when making a local movie or video

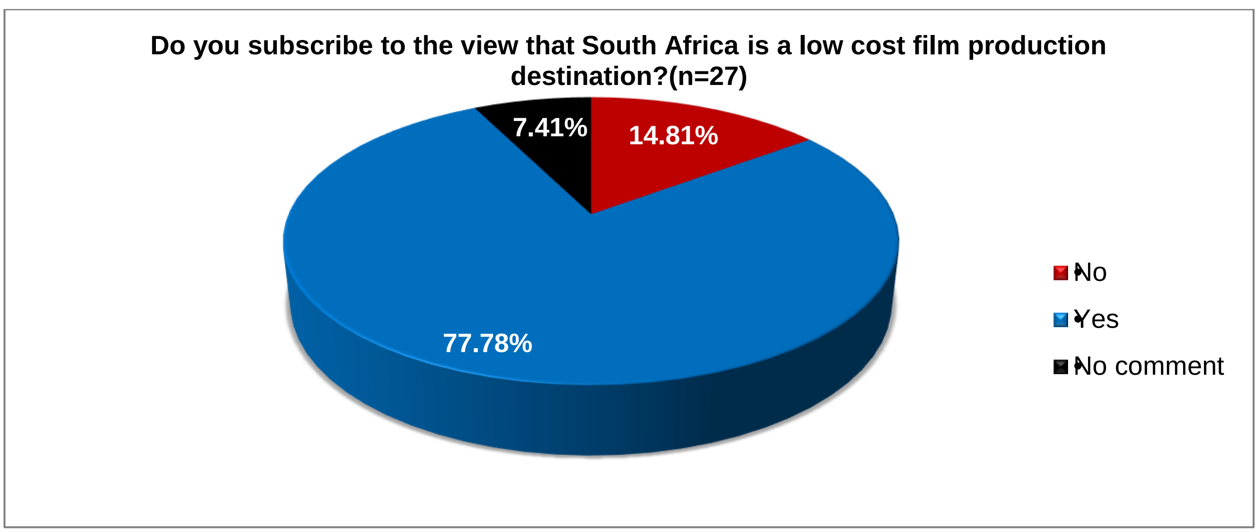


A large proportion (25%) of the film makers said the availability of infrastructure is the most challenging when making a local movie or video, followed by around 19% who said availability of skilled supporting crews. A similar proportion of around 19% stated that lack of funding is the most challenging, while almost 15% of external stakeholders revealed a lack of good co-operation from local authorities was challenging, and around 7% mentioned difficulty with obtaining filming permits.

11.8.2 Production destination status of SA

Filmmakers were asked whether or not they prescribe to the notion that SA is a low-cost film production destination.

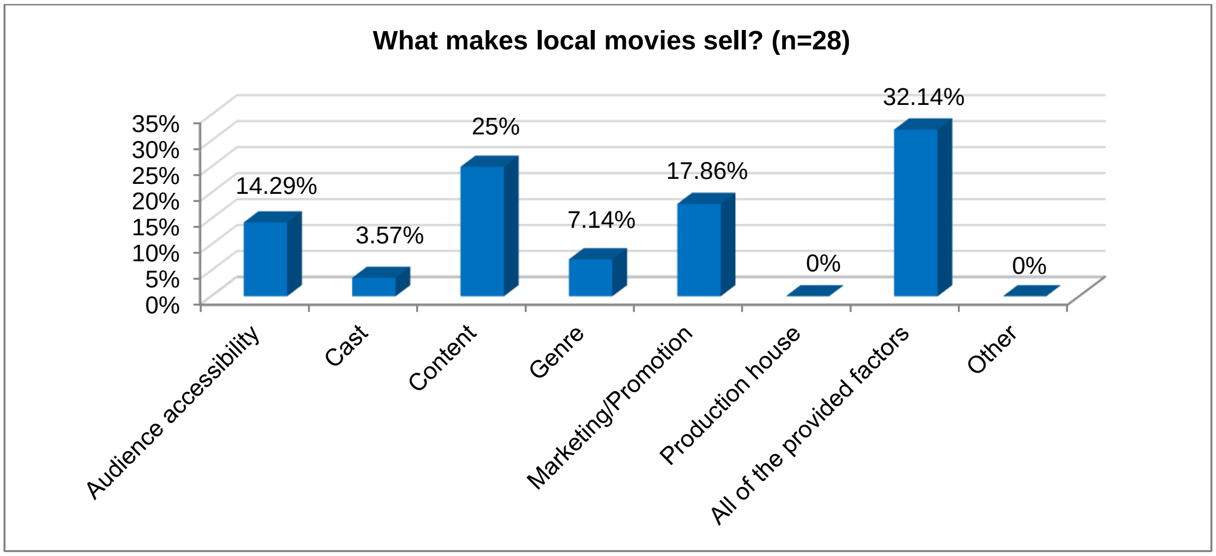
Figure 142: Production destination status of SA



Most of the film makers (78%) said they view SA as a low-cost film production destination, while on the other hand 15% conveyed the opposite, and around 7% of filmmakers were indifferent.

11.8.3 Enabling and disabling factors for local movies

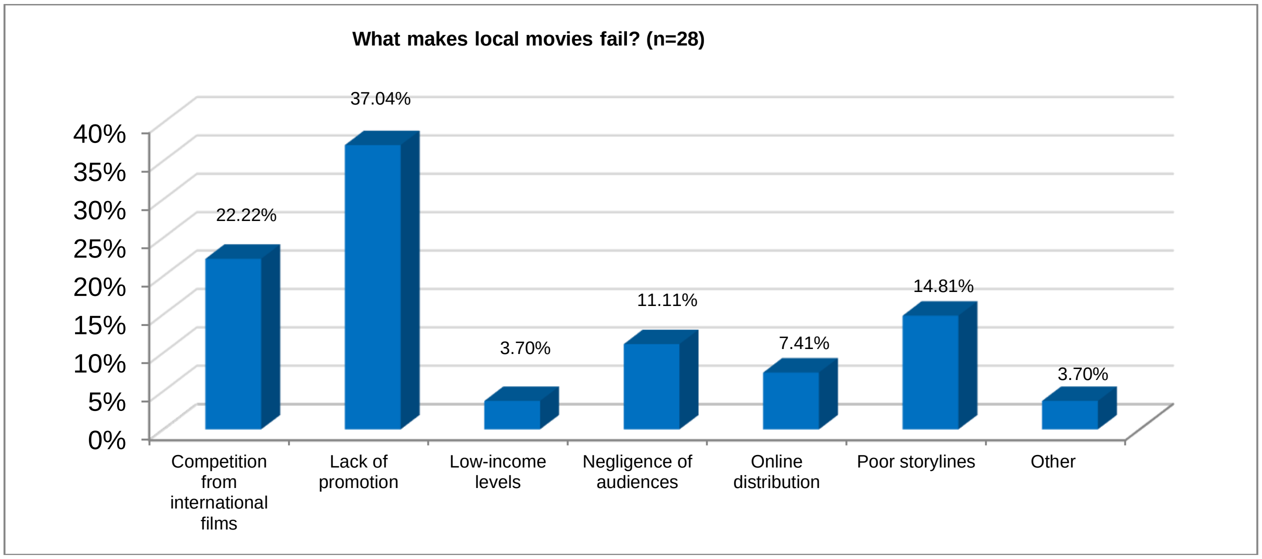
Figure 143: Enabling factors



Most filmmakers said all the factors that were provided – cast, audience accessibility, content, genre, marketing/promotion and production house – contribute to local movies selling.

In addition, the filmmakers were asked to indicate the factors that make local movies fail.

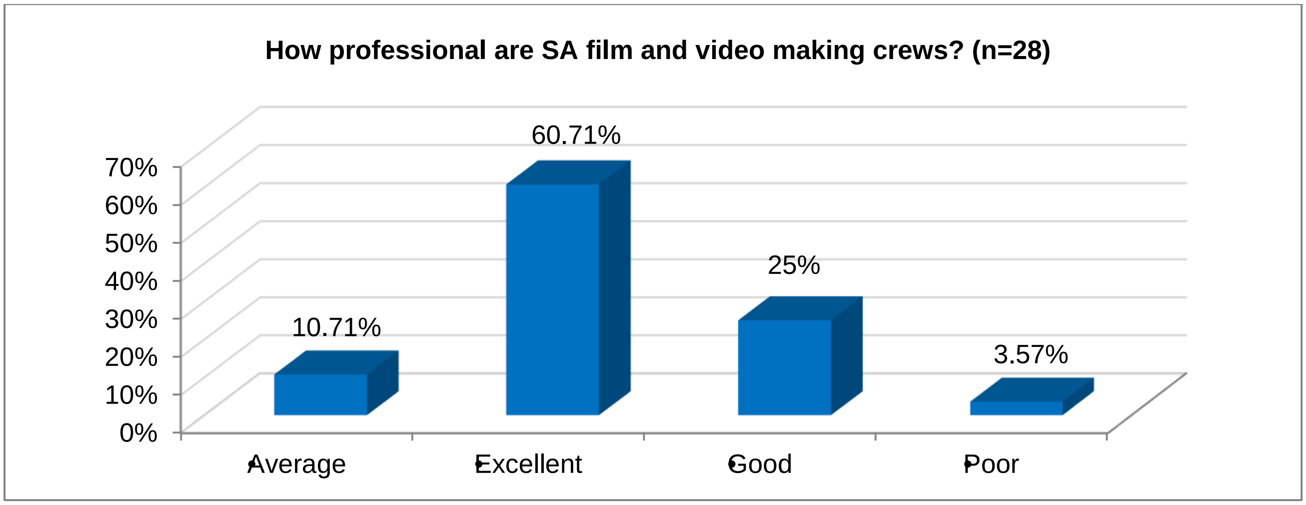
Figure 144: Disabling factors for local movies



Lack of promotion was the main reason highlighted by filmmakers for movies failing (37%) followed by 22% who indicated competition from international films; 15% stated poor storylines and 11% stated negligence of audiences were the reason for local films failing.

11.8.4 Professionalism of SA film and video making crews

Figure 145: Professionalism of SA crews

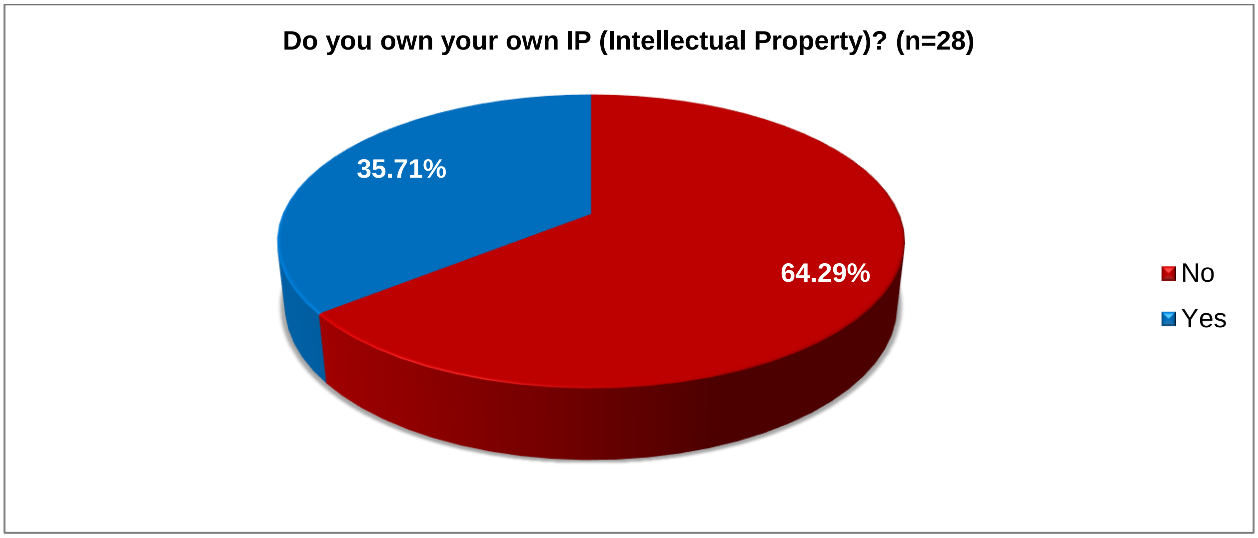


Most filmmakers (60%) viewed SA film and video making crews as excellent with regard their professionalism, followed by 25% who said they are good and 11% who said they're average. On the other hand, 4% of filmmakers rated the professionalism of film and video crews as poor.

11.8.5 Intellectual Property (IP)

Filmmakers were asked whether or not they own their own Intellectual Property (IP).

Figure 146: Intellectual Property



Most filmmakers (64%) indicated that they don't own their own intellectual Property (IP) while 36% said they do.

11.8.6 Greatest weakness in SA film and video industry

Table 101: Greatest weakness of SA film and video industry

Greatest weakness of SA film and video industry	Count	Percentage
• Audiences	8	28.57%
• Distribution	3	10.71%
• Entrepreneurial flair	1	3.57%
• Filmmaking	3	10.71%
• Marketing and publicity	4	14.29%
• Ownership of film & video production IP	6	21.43%
Other	3	10.71%
Total	28	100%

A greater proportion of film makers (29%) highlighted audiences as the greatest weakness in SA film and video industry followed by ownership of the intellectual property of film and video production (21%) and marketing and publicity (14%).

11.8.7 Views of what SA audiences want from film/TV series

Filmmakers were asked to indicate what they think SA audiences want from a film/TV series.

Table 102: Qualities of a good film/TV series

What SA audiences want from a film/TV series	Percentage
Beautiful music	4.55%
• Great acting	13.64%
• Gripping content	38.64%
• Quality visual effects	13.64%
• Unique storylines	25%
Other	4.55%
Total	**100%**

The filmmakers said SA audiences mostly seek gripping content, followed by unique storylines, quality visual effects, great acting and beautiful music.

12 DISTRIBUTION CHANNELS

12.1 Introduction

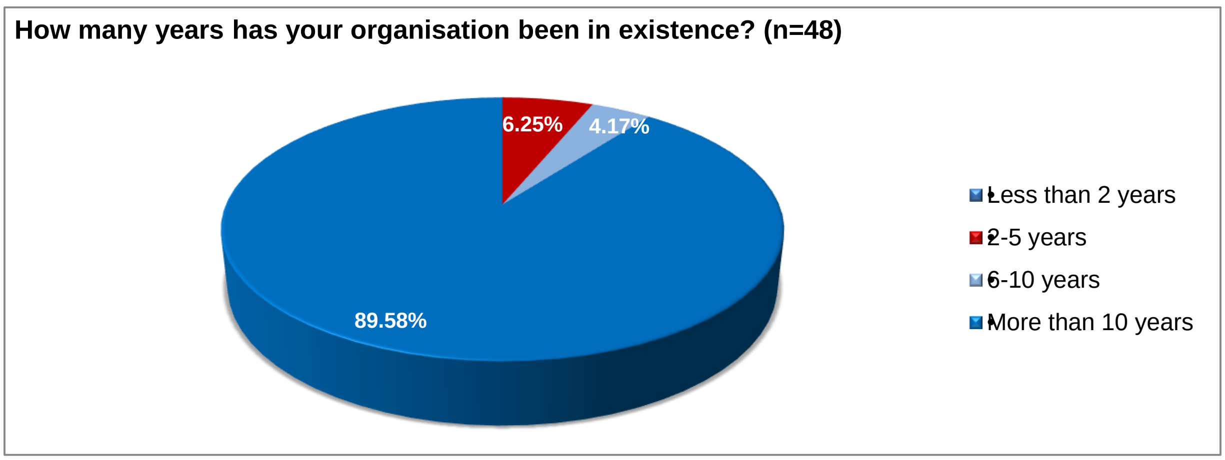
Distribution channels form an integral part of the delivery system for film and video products. They facilitate and are responsible for the delivery of film and video products to the end consumer and audiences. They deal directly or indirectly with audiences. Distribution is comprised of marketing and management of films/video products across a variety of media. A survey of the distribution channels allows an understanding of the changing dynamics in the distribution market space and the intelligence gathered is also crucial for an ADS.

12.2 Respondents' profile

12.2.1 Years in existence

Respondents were asked to indicate the number of years their organisation has been in existence. The findings are presented in the next figure.

Figure 147: Years in existence

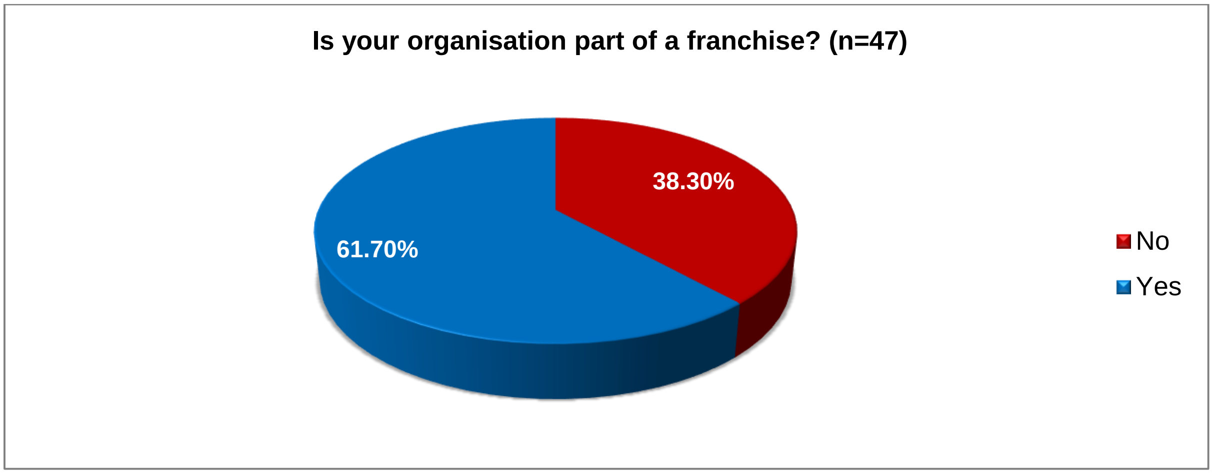


The figure shows that majority (90%) of the respondents indicated that their organisation has been in existence for more than 10 years while 6% indicated that they have been in business for 2-5 years and about 4% indicated that they had been existing for 6-10 years.

12.2.2 Type of organisation

Respondents were asked to answer either 'yes' or 'no' on whether their organisation is part of a franchise. The findings are shown in the next figure.

Figure 148: Franchise status of organisation



The results show that most distribution channel organisations belong to a franchise (62%) while 38% indicated that they aren't.

12.2.3 Provinces organisation is located

Respondents were asked to indicate in which province their organisation is located. The next table presents the results.

Table 103: Province(s) where organisation is located

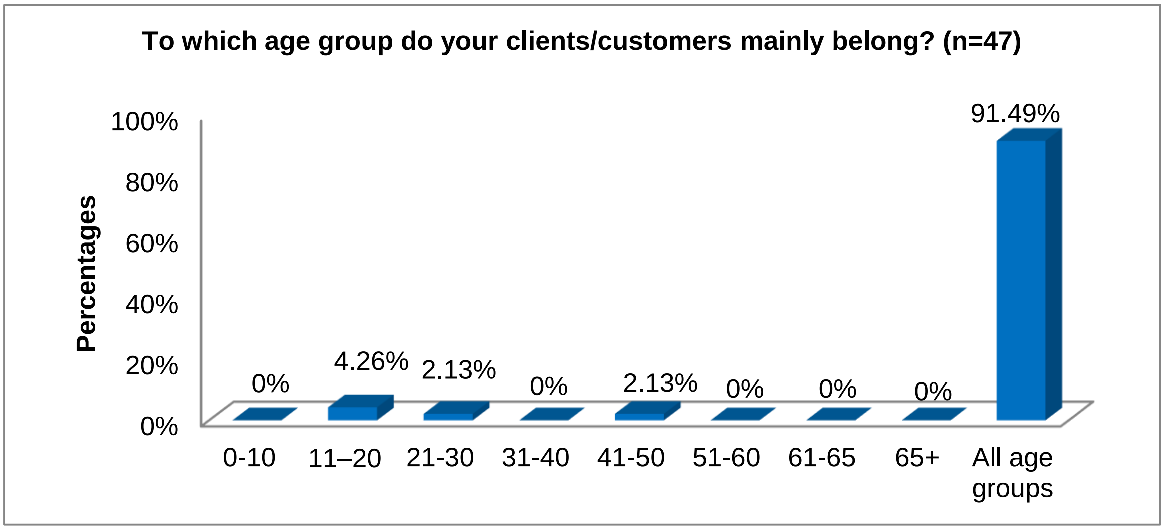
Province	Count	Percentage (%)
Eastern Cape	3	5.08
Free State	1	1.69
Gauteng	16	27.12
KwaZulu-Natal	3	5.08
Limpopo	1	1.69
Mpumalanga	0	0
Northern Cape	0	0
North-West	0	0
Western Cape	28	47.46
All Provinces	7	11.86
Total	**59**	**100**

Almost half of the respondents (47%) indicated their organisation is located in the Western Cape, 27% said there were in Gauteng and 12% said they're located in all the provinces.

12.2.4 Age groups of clients/customers

Respondents were asked to indicate the age groups to which most of their clientele belong. The findings are illustrated in the next figure.

Figure 149: Age categories of organisation's clients



Distributors reported that nearly all age groups constitute their customer base (91%). Other notable age groups were 11-20 with 4% followed by 21-30 and 41-50 which both had 2%.

12.2.5 Population groups

Respondents were asked to indicate the population group to which most of their clients/customers belong.

Table 104: Population groups

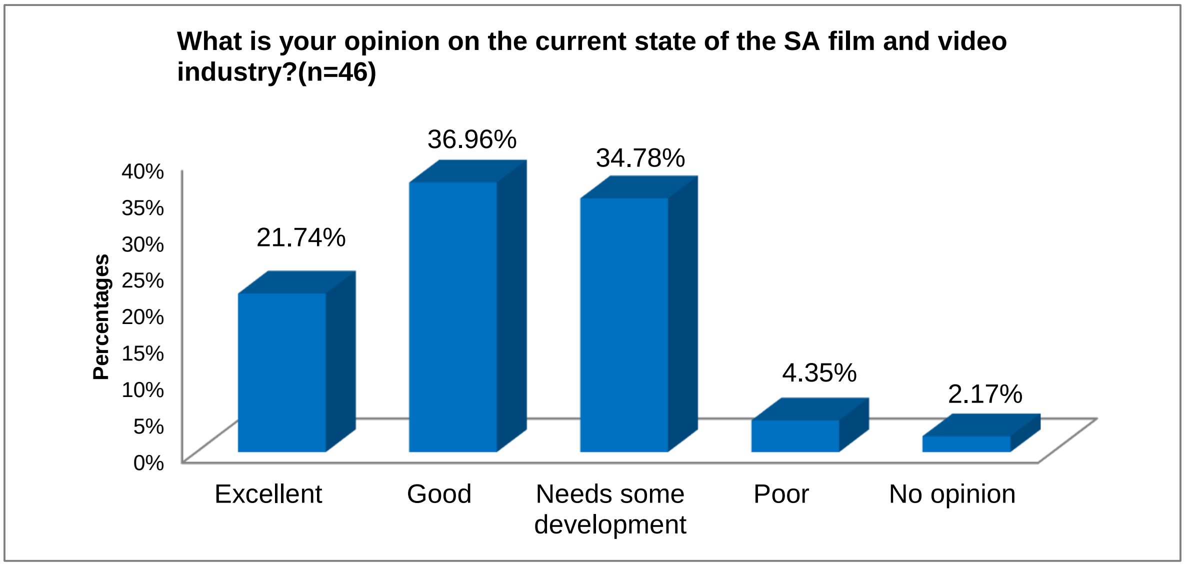
Population Group	Count	Percentage (%)
Black African	0	0
Coloured	0	0
Indian/Asian	0	0
White	6	12.50
All of the above	41	85.42
Other	1	2.08
Total	**48**	**100**

Most of the respondents (85%) indicated that all population groups constitute their client base, while 13% indicated that their client base is White.

12.2.6 Current state of SA film and video industry

Respondents were asked to indicate their opinions on how they view the current state of the SA film industry. The findings are shown in next figure.

Figure 150: Current state of the SA film industry



The figure illustrates that 37% of respondents view the SA film industry's current state as good followed by 35% who indicated that it needs some development and 22% were of the view that it's excellent.

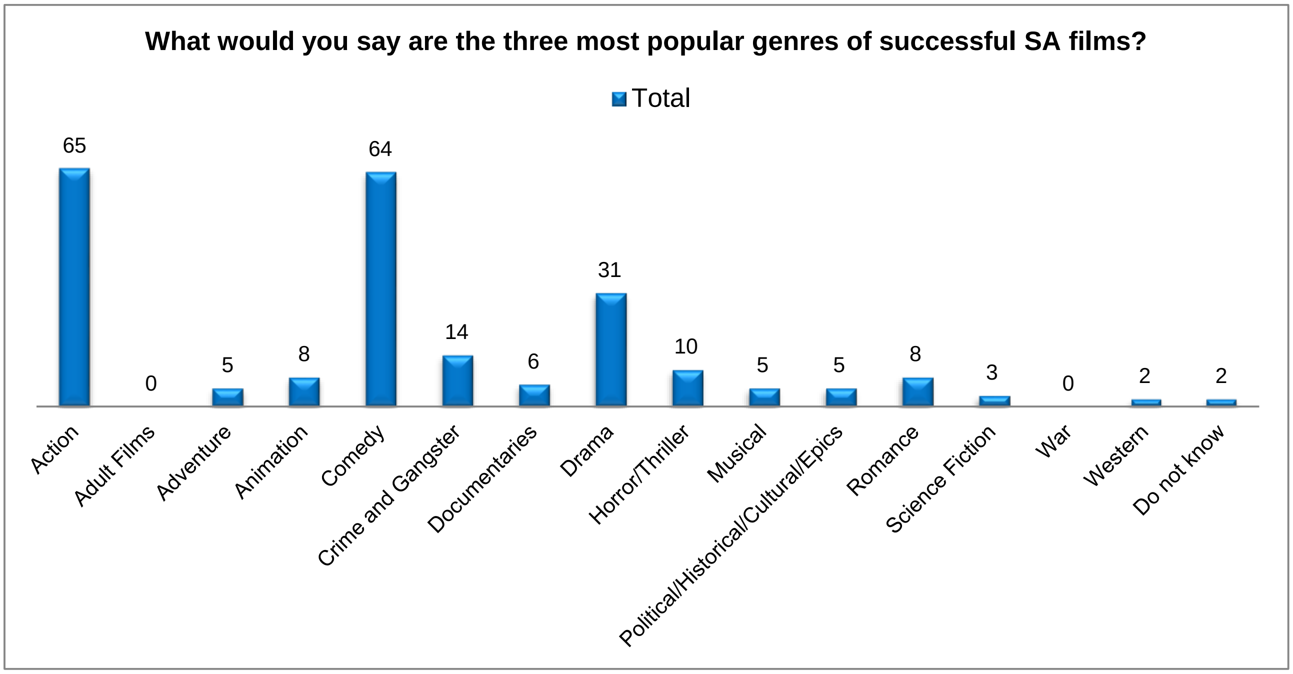
12.3 Audience preferences and content of SA film and video

Respondents were asked a series of questions to gain an insight of audience dynamics in content preferences, platform preferences and choice of films.

12.3.1 Popular genres/types of films

Respondents were asked to indicate what they would say are the three most popular genres of successful SA films.

Figure 151: Popular genres/types of films

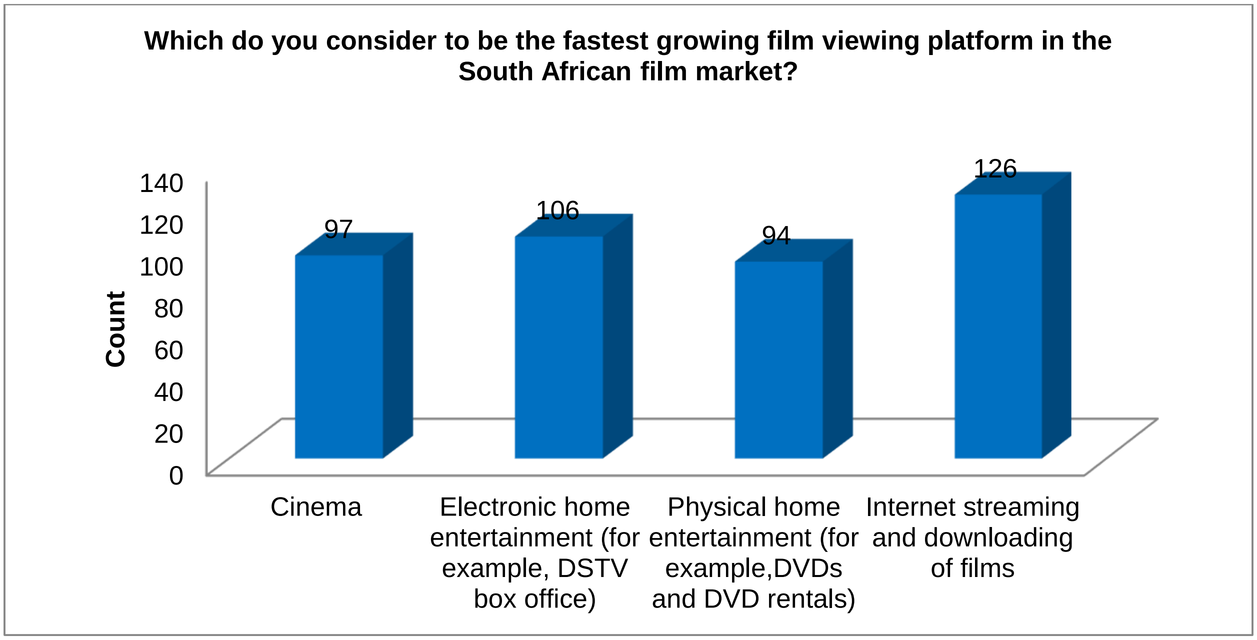


The findings revealed action films, closely followed by comedy and drama are considered by distribution channels as the three most popular genres of successful SA films.

12.3.2 Fastest growing film viewing platform

To explore platform preferences among SA audiences, respondents were asked to indicate what they view as the most growing film viewing platform in the SA film market.

Figure 152: Fastest growing film viewing platforms



Respondents considered internet streaming and downloading of films as the fastest growing film viewing platform, followed by electronic and physical and home entertainment.

12.4 Spending patterns

12.4.1 Value for money

Respondents were asked whether or not SA audiences were receiving value with regard to the type of programmes they watch on SABC 1, 2, 3 and e-TV, paying a R265.00 per annum TV licence.

Table 105: Value for money in relation to the type of programmes

Responses	Count	Percentage (%)
No	36	75
Yes	12	25
Total	**48**	**100**

The findings revealed that most (75%) of respondents indicated that the SA audiences are not receiving value for their money from the programmes that they are shown, after paying their TV licences; on the other hand 25% of the respondents said that SA audiences are receiving value for money.

For those respondents who said SA audiences are not receiving value for money, they were further asked to indicate reasons for their specific answers.

Table 106: Reasons why you feel SA audiences don't receive value for money

Reason	Count	Percentage (%)
The content isn't entertaining	7	20.59
There are too many repeats	19	55.88
The quality is poor	5	14.71
Other	3	8.82
Total	**34**	**100**

Most of the respondents (56%) said there are too many repeats on TV, while 21% said the content isn't entertaining, with 15% saying the quality is poor.

12.4.2 Willing price to watch a foreign made film

Respondents were asked to indicate how much they think SA audiences are willing to pay to watch a foreign-made film at the cinema.

Table 107: Cinema price to watch a foreign-made film

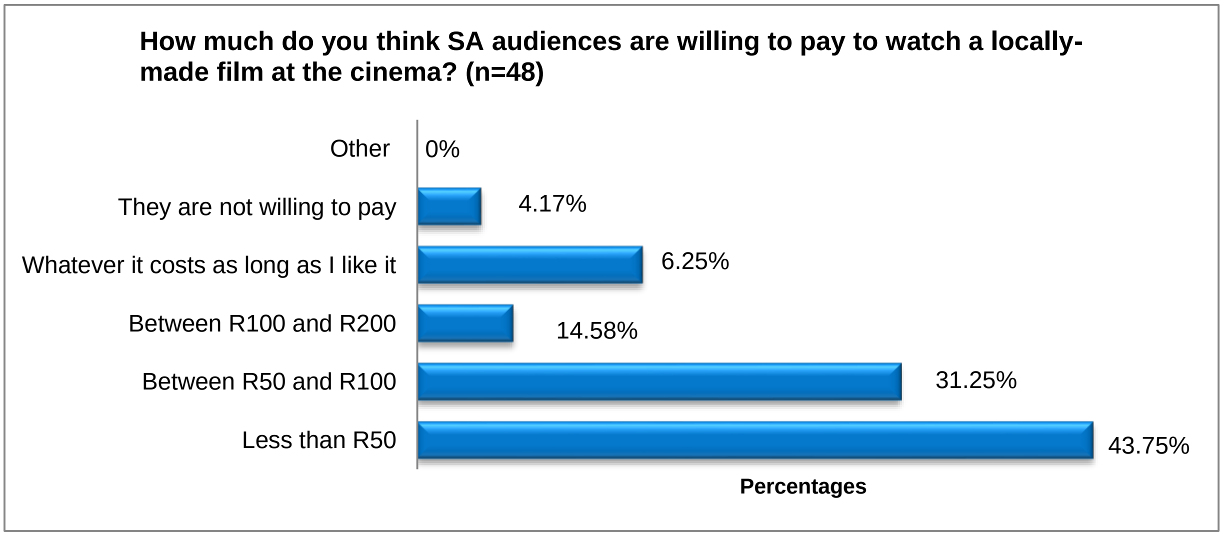
Willing price	Count	Percentage (%)
Less than R50	15	31.91
Between R50 and R100	22	46.81
Between R100 and R200	2	4.26
Whatever it costs as long as they like it	8	17.02
They are not willing to pay	0	0
Other	0	0
Total	**47**	**100**

A greater proportion of the distribution channels (47%) indicated that audiences are willing to pay between R50-R100 while 32% of respondents said they think the SA audiences are willing to pay less than R50. Furthermore, 17% said SA audiences 'are willing to pay whatever it costs as long as they like it', while 4% said they think they're willing to pay between R100 and R200.

12.4.3 Willing price to watch a local (SA) made film

Respondents were asked to indicate how much they think SA audiences are willing to pay to watch a locally-made film at the cinema.

Figure 153: Cinema price to watch a local film

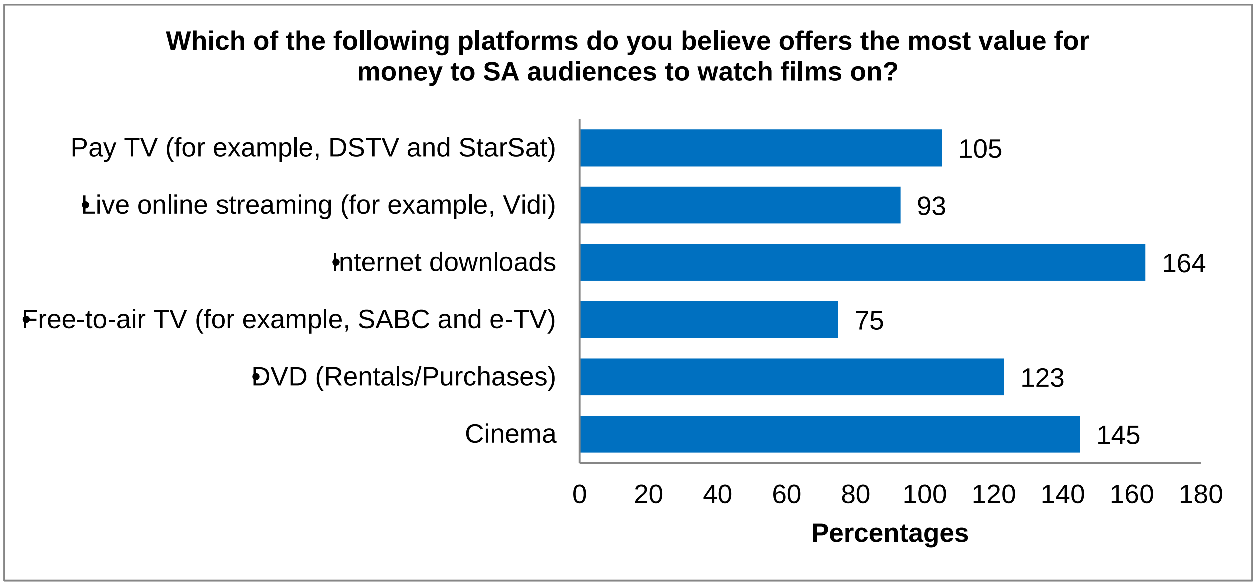


The findings revealed that a greater proportion (44%) are willing to pay less than R50 to watch an SA film at the cinema, followed by 31% who indicated that they think they're willing to pay between R50 and R100.

12.4.4 Platforms that offer most value for money

Respondents were asked to indicate the platform which they believe offers the most value for money to SA audiences to watch films on.

Figure 154: Viewing platforms that offer most value for money



The findings show that most respondents believe that internet downloads offer the most value for money, followed by cinema, DVD rentals/purchases and Pay TV.

12.5 General perceptions and attitudes

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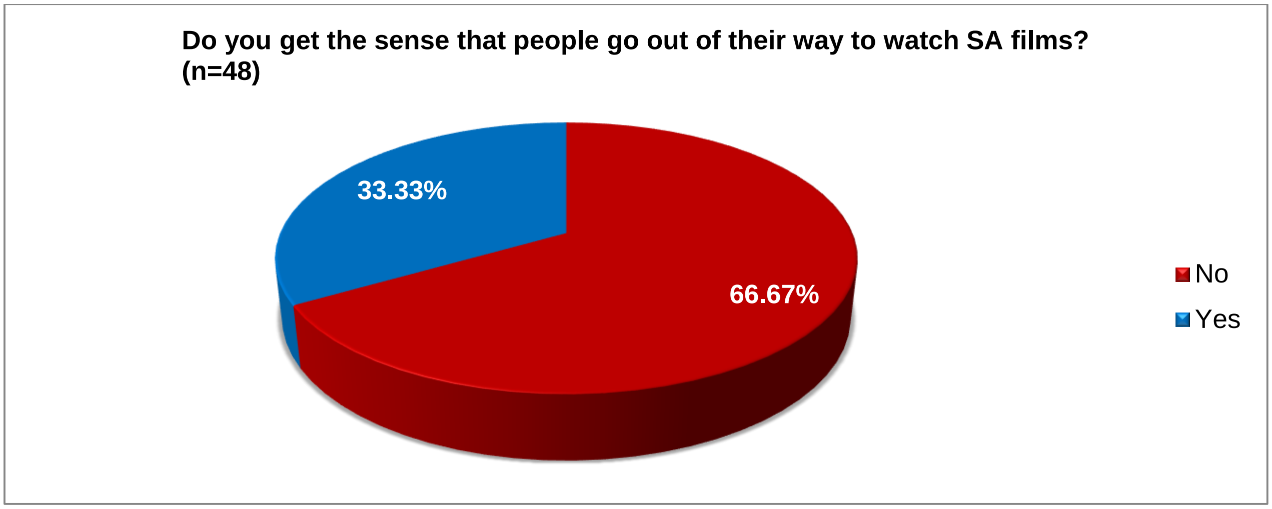
12.5.1 Consumption of local content

Respondents were asked to indicate if they sense that people go out of their way to watch SA films.

Figure 155: Consumption of local content

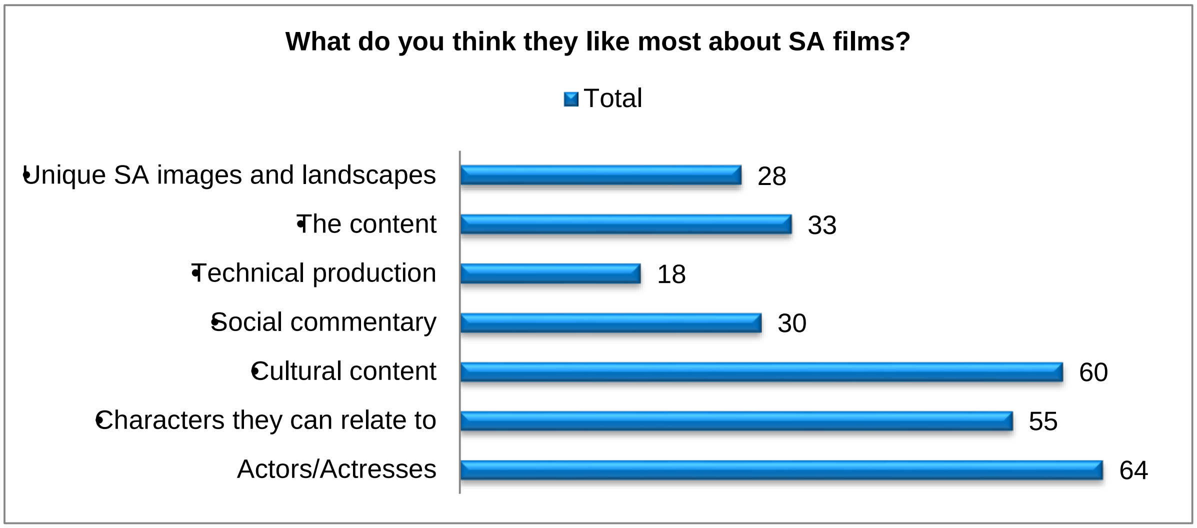


Most respondents (67%) think that people go out of their way to watch SA films, while 33% disagreed.

12.5.2 Likable attributes of SA films

For those who indicated that they sense that people go out of their way to watch SA films, they were further asked to rank in order of preference what they think people like most about SA films.

Figure 156: Rankings of what's likable about SA films



The highest ranked likeable attribute of SA films was actors/actresses, followed by cultural content and characters they can relate to.

12.5.3 Rating of SA films in contexts

The table presents different views by respondents. They were provided with a catalogue to indicate how they rate SA films in a number of contexts, from excellent to very bad.

Table 108: Rating SA films in different contexts

Rating	Visuals/ cinematography	Storylines	Actors/Actresses performances	Film characters	Technical production quality	Historical and political content	Local content representative of SA languages and culture	Local content representative of SA natural environment and wildlife	Availability in other official languages beside English	Entertainment value
Excellent	2.08%	8.51%	4.35%	6.25%	8.33%	10.42%	6.25%	10.64%	6.38%	8.70%
Very Good	25%	19.15%	17.39%	25%	18.75%	16.67%	20.83%	21.28%	23.40%	28.26%
Good	31.25%	31.91%	43.48%	37.50%	25%	35.42%	45.83%	46.81%	34.04%	26.09%
Fair	31.25%	25.53%	26.09%	22.92%	37.50%	35.42%	18.75%	12.77%	19.15%	26.09%
Bad	8.33%	12.77%	8.70%	8.33%	10.42%	0%	8.33%	8.51%	12.77%	8.70%

Rating	Visuals/ cinematography	Storylines	Actors/Actresses performances	Film characters	Technical production quality	Historical and political content	Local content representative of SA languages and culture	Local content representative of SA natural environment and wildlife	Availability in other official languages beside English	Entertainment value
Very Bad	2.08%	2.13%	0%	0%	0%	0%	0%	0%	2.13%	2.17%
Don't know	0%	0%	0%	0%	0%	2.08%	0%	0%	2.13%	0%
Total	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**

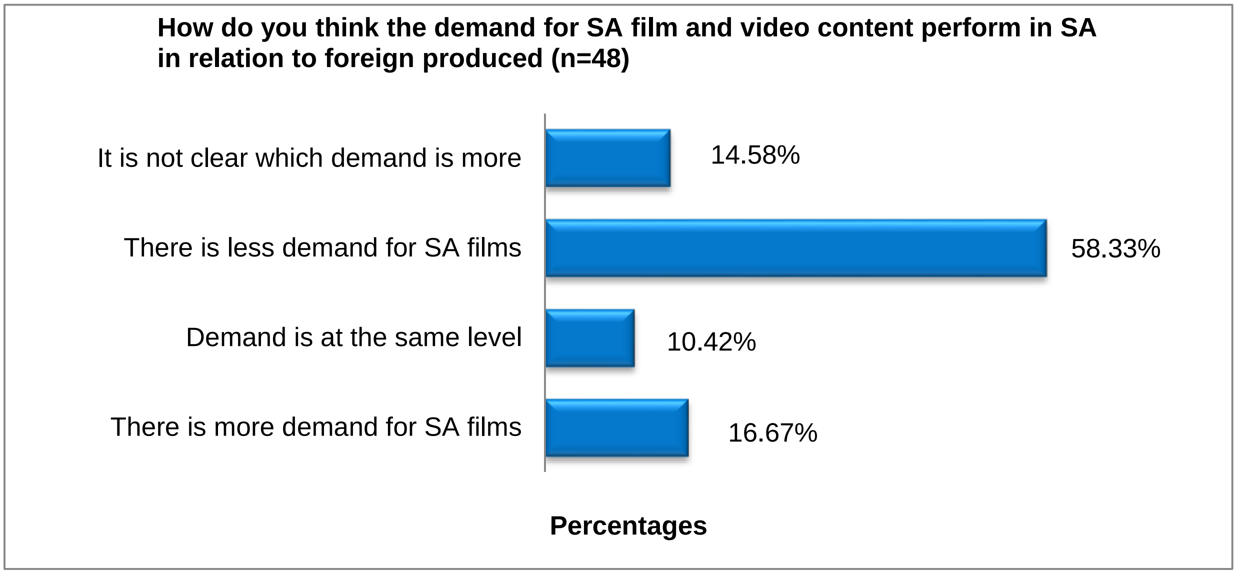
Upon aggregating the ratings for excellent, very good and good, the scores obtained are as follows:

- Local content representative of SA natural environment and wildlife: **76%**
- Local content representative of SA languages and culture: **73%**
- Film characters: **69%**
- Actors/actresses performance: **65%**
- Availability in other official languages beside English: **64%**
- Entertainment value: **63%**
- Historical and political content: **63%**
- Storylines: **60%**
- Visuals/cinematography: **58%**
- Technical production quality: **52%**

12.5.4 Demand for SA films against foreign films

Respondents were asked to indicate what they think about the demand of SA films compared to foreign made films.

Figure 157: Demand for SA films compared to foreign films



Most of the distribution channels surveyed (58%) said they think there's less demand for SA film and video content compared to foreign produced content, followed by 17% who indicated that they think there's more demand for SA films. The findings also showed that a small proportion of the respondents (10%) said they think the demand is the same while 15% said they think it's not clear which demand is more.

12.5.5 Ways SA needs to improve

Respondents were asked to indicate ways in which they think SA films and video need to improve in order to rank more favourably alongside top films and videos globally.

Table 109: Ways to improve SA films and videos

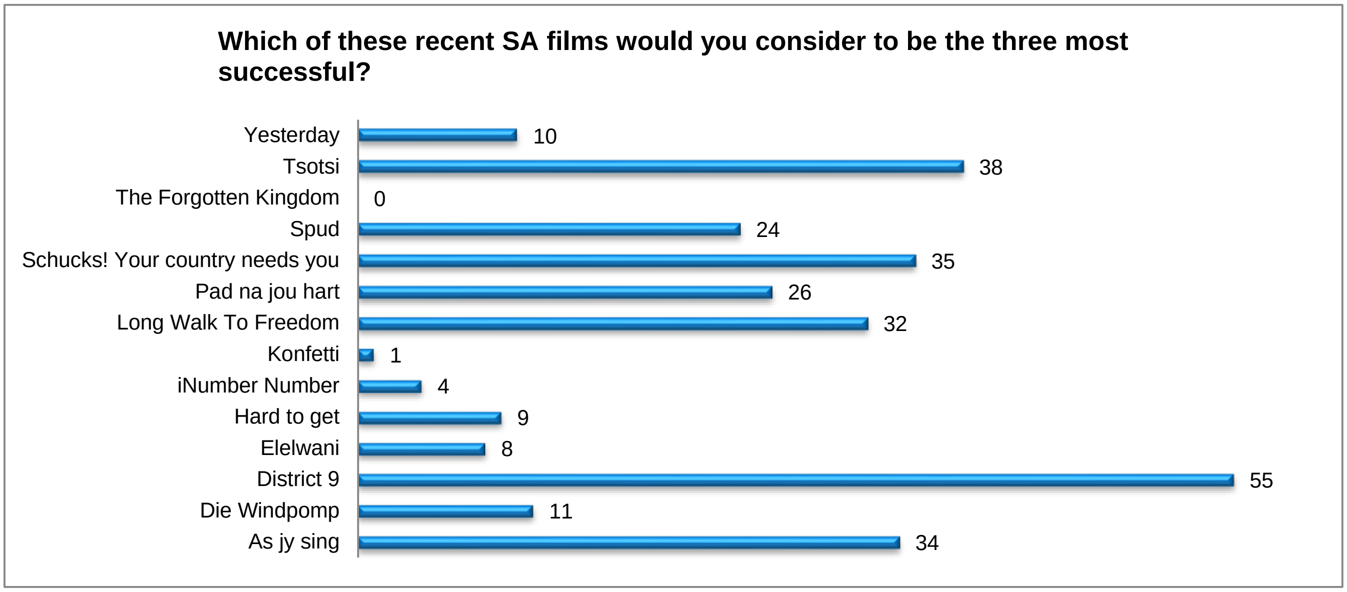
Responses	Count	Percentage (%)
Acting quality	21	24.14
Consistency in the roles of actors	10	11.49
Directing and production quality	17	19.54
Music	4	4.60
No area – all are up to standard	3	3.45
Script/Storyline	15	17.24
Visual effects	15	17.24
Other	2	2.30
Total	**87**	**100**

It can be noted that a larger proportion of respondents (24%) indicated that SA films and videos need to improve in terms of acting quality, followed by about 20% who said directing and production quality should be improved. About 17% said improvement is needed in terms of script/storyline, and a similar proportion (17%) indicated that improvement is required in terms of visual effects. Smaller proportions mentioned improvements needed in terms music and consistency in the roles of actors.

12.5.6 Successful SA films

Respondents were provided with a list of SA films and asked to rank the films in order of success.

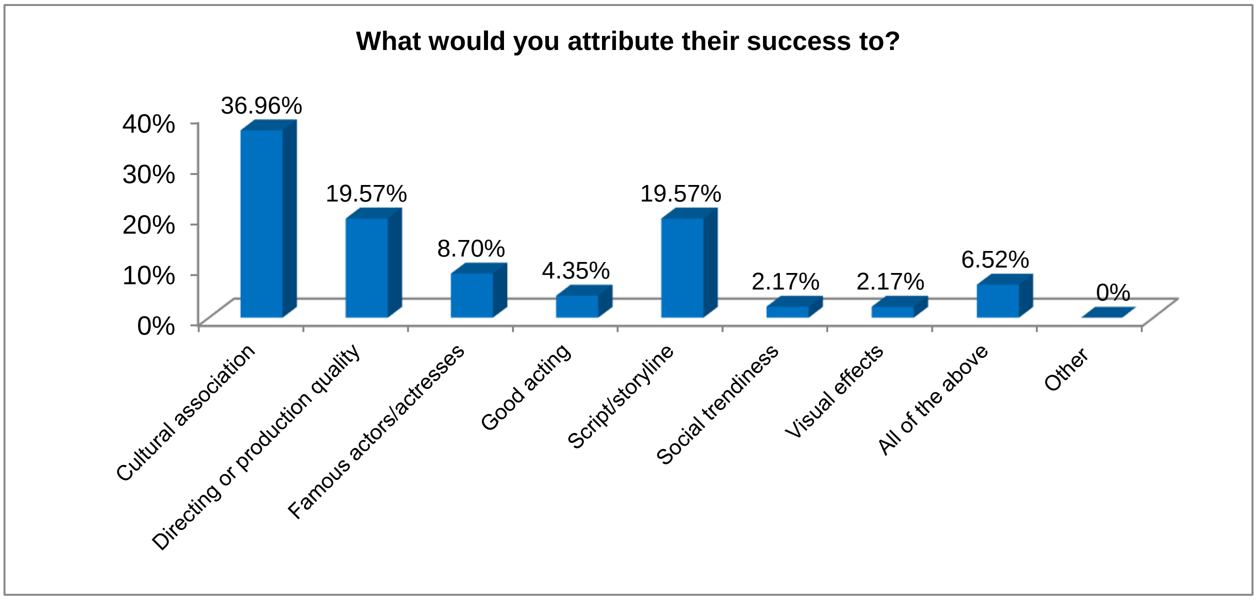
Figure 158: Successful SA films



In terms of three most successful films, the findings revealed that the distribution channels rated **District 9** as the most successful film followed by **Tsots**i and **As Jy Sing**.

Furthermore, the respondents were asked to indicate what they attribute the success of the films to.

Figure 159: Successful films attributes

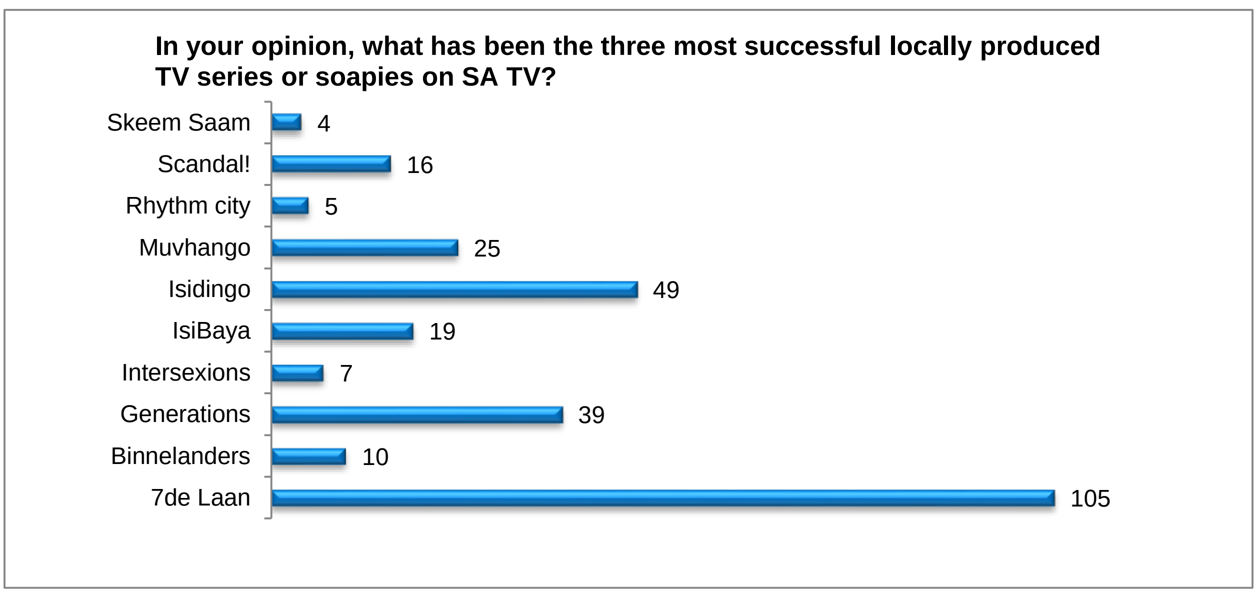


The findings illustrated in the figure shows that the success of these films was mostly attributed to their cultural association, followed by directing/production and lastly to storylines.

12.5.7 Three most successful soapies and series

Respondents were asked to indicate what they think has been the three most successful TV series/soapies.

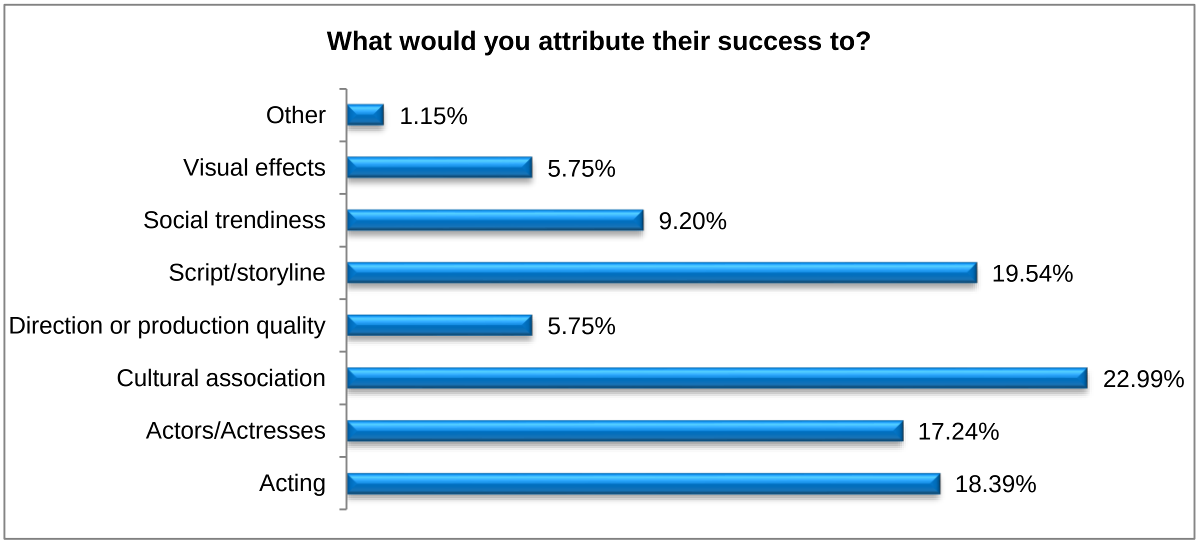
Figure 160: Successful TV series/soapies



In terms of three most successful locally-produced TV series or soapies, the findings showed that respondents consider **7de Laan** the most successful SA series/soapie, followed by **Isidingo** and **Generations**.

Respondents were further asked to indicate what they attribute the success of their top three mentioned series/soapies.

Figure 161: Successful series/soapies attributes



The success of these locally produced TV or soapies series was attributed to their cultural association, followed by script/storyline and lastly to actors/actresses.

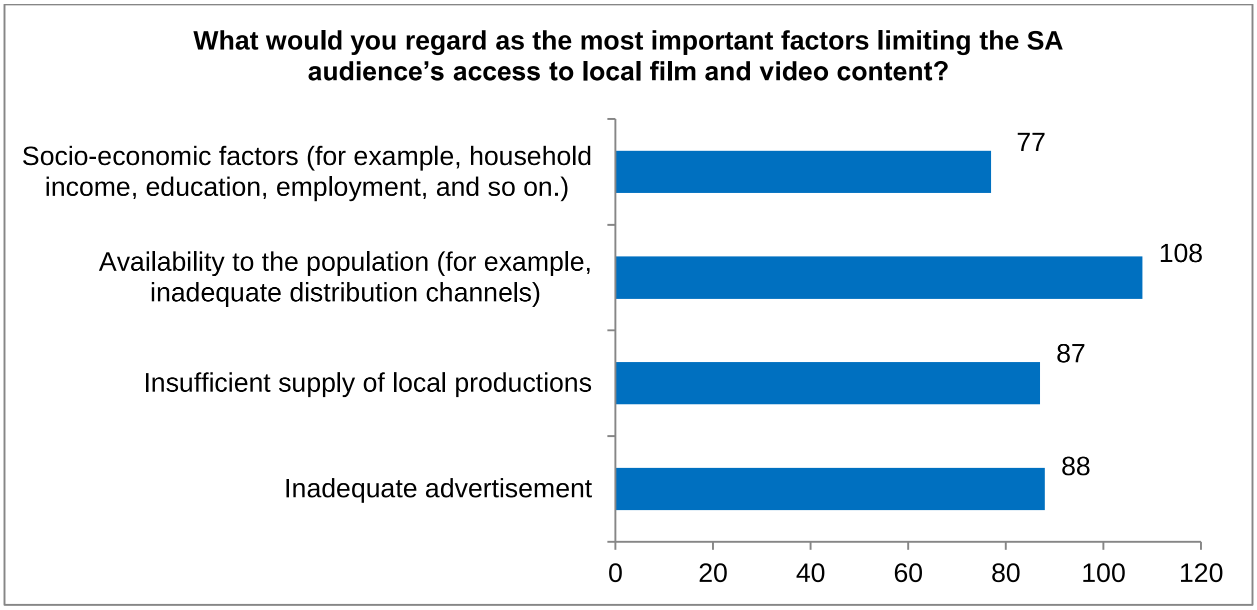
12.6 Audience access to film and video

12.6.1 Factors limiting SA audience access

Respondents were asked to indicate what they regard as the most important factors limiting the SA audience's access to local film and video content.

The findings shown in the following figure revealed that inadequate distribution channels was considered as the most important factor limiting the SA audience's access to local film and video content, followed by inadequate film advertising and insufficient supply of local productions.

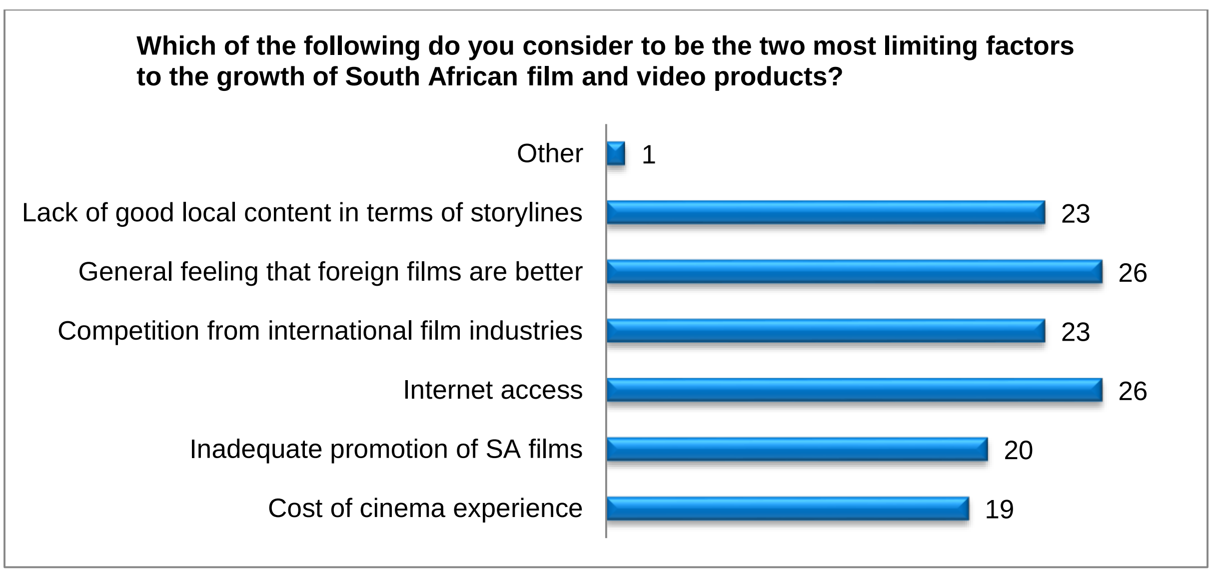
Figure 162: Factors limiting SA audience's access to films and videos



12.6.2 Factors limiting growth of the film industry

Respondents were asked to indicate what they consider to be the two most limiting factors to the growth of SA film and video products.

Figure 163: Limiting factors to the growth of SA films and videos



The findings revealed that the general feeling of foreign films being better and internet access, were identified as the two most limiting factors to the growth of SA films and videos.

12.6.3 Main challenges to expansion

Respondents were asked to indicate the main challenges they face with respect to expanding the business to a wider audience/client base for SA films.

Table 110: Challenges experienced in expanding business

Challenges	Count	Percentage (%)
Diminishing income levels	11	23.40
Greater access to other forms of entertainment	5	10.64
Inadequate promotion of SA films by production companies	9	19.15
Increased competition from other distribution platforms	8	17.02
Not enough supply of good quality SA films	11	23.40
Other	3	6.38
Total	**87**	**100**

The main challenges experienced relate to audiences' diminishing income levels (23%) not enough supply of good quality SA films (23%) inadequate promotion of SA films by production companies (19%) and increased competition from other distribution platforms (17%).

12.6.4 How best can SA market films

Respondents were asked to indicate what they view as the way to best package SA films or market them, to enable them to be competitive in view of international movies.

Table 111: Solutions to improve SA films

Solutions	Count	Percentage (%)
Employ globally famous actors/actresses in local films	17	26.98
Employ globally famous directors for local films	9	14.29
Increase availability of different platforms	13	20.63
Increase co-productions with globally famous producers	10	15.87
Better advertisement globally	13	20.63
Other	1	1.59
Total	**87**	**100**

A larger proportion of respondents (27%) said it's important to employ globally famous actors/actresses; 21% said it's important to increase the availability of different platforms and a similar proportion of 21% indicated that it's important to advertise globally.

12.7 Organisation-specific findings

In this research, the distribution channel stakeholder bloc was conceptualised to be composed of a number of sub-stakeholders, such as home video retailers, video rentals, Free-to-air TV, Pay TV, cinemas and Internet Service Providers(ISPs). It's thereby important to obtain insights from these sub-stakeholders by using sub-stakeholder focussed questions.

12.7.1 Nature of involvement

Respondents were asked to indicate their nature of involvement in the film industry. The results are presented next.

Table 112: Nature of involvement in the film industry

Type of business	Count	Percentage (%)
Cinema	3	6.12
Home movie retailer	13	26.53
ISP	11	22.45
Pay TV	1	2.04
TV (Free-to-air)	0	0.00
Video rentals	21	42.86
None	0	0.00
Total	**49**	**100**

Most respondents involved in the film industry were video rental (43%) followed by home movie retailers (27%) and ISPs (22%).

Further analysis of results of home movie retailers, ISPs and video rentals was done as the sample sizes are considered to be sufficient enough to enable discerning, useful information.

12.8 Home video retailers

12.8.1 Number of national branches

Respondents were asked to indicate how many branches they have, nationally.

Table 113: Number of branches nationally

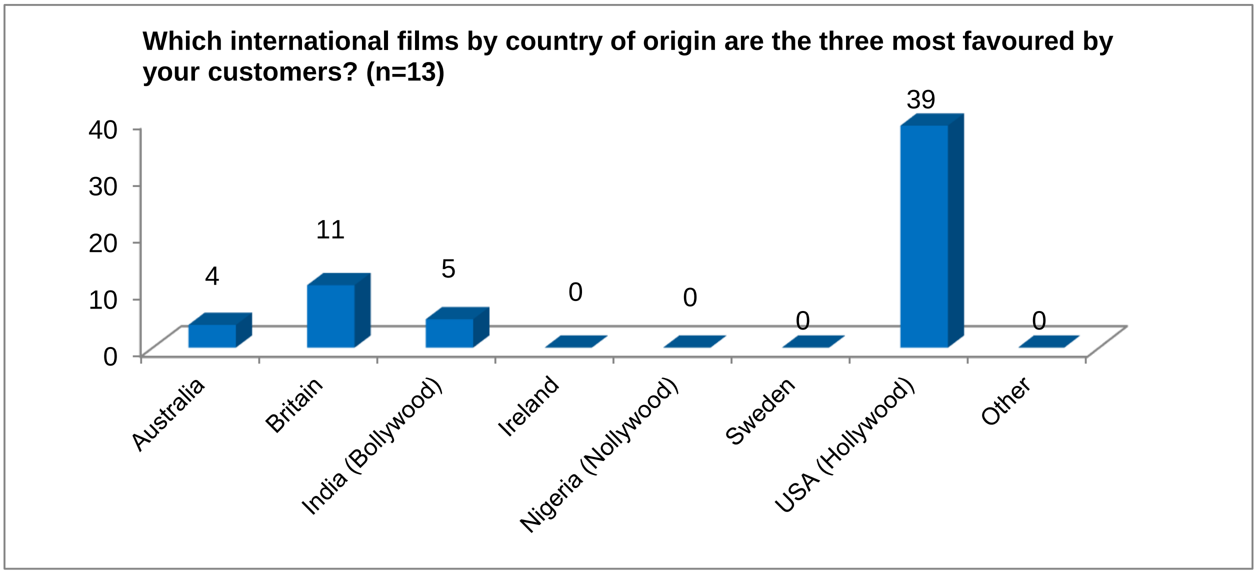
Number of branches	Count	Percentage (%)
1-2	1	7.69
3-10	0	0
11-25	0	0
26-50	2	15.38
More than 50	10	76.92
Total	**87**	**100**

Most (77%) of the home retail organisations have more than 50 branches nationwide, followed by 15% who have 26-50 branches and 8% indicated that they have -1-2 branches nationally.

12.8.2 Film preferences by country of origin

To gain an understanding of audience content preferences, respondents were asked to indicate the country of origin of the films that are most consumed by their customer base. The results are shown in the next figure.

Figure 164: Preferred films by country of origin

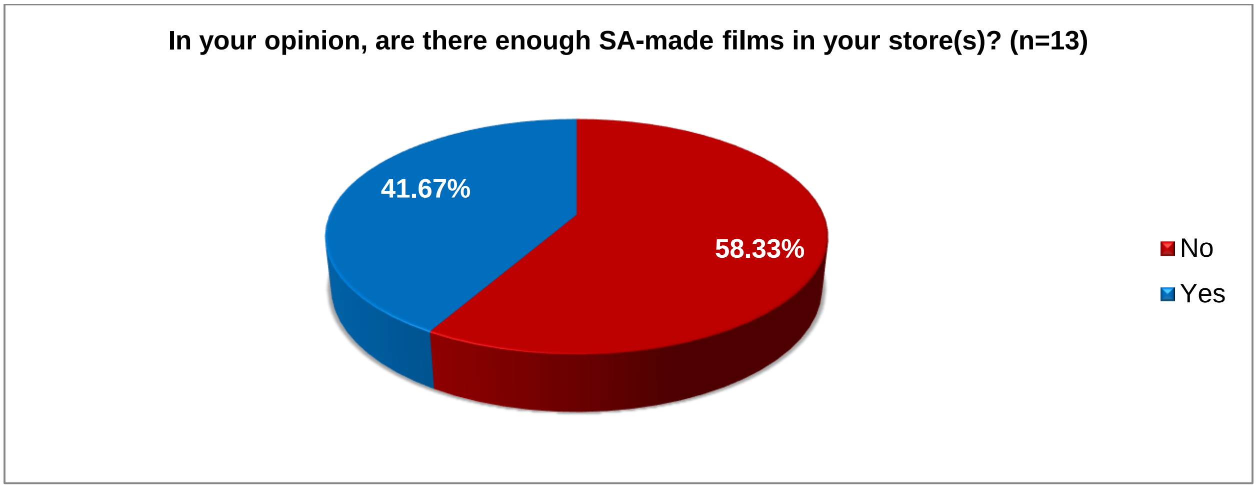


The findings revealed that customers mostly favour films (in order of popularity) from the USA, Britain and India, followed closely by Australia.

12.8.3 Do you have enough SA films?

Respondents were asked if they have enough SA films in their stores.

Figure 165: Having enough SA films in stores

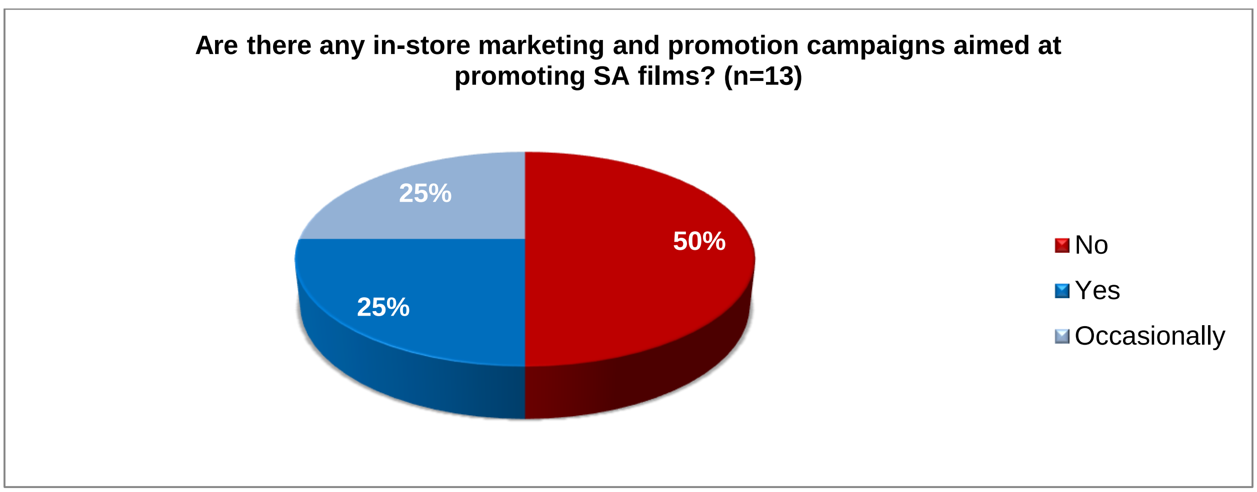


Most (58%) of the home video retailers indicated that don't have enough SA-made films in their stores and 42% said they do.

12.8.4 In-store marketing campaigns for SA films

Respondents were asked if they have any in-store marketing and promotion campaigns aimed at promoting SA films.

Figure 166: Promotional campaigns for local content



Half of the home video retailers surveyed (50%) said they don't have any in-store marketing or promotional campaigns aimed at promoting SA films; 25% said they occasionally have in-store promotions, and 25% said they do have campaigns aimed promoting SA films.

12.8.5 Price for local films vs. foreign-made films

To gain an insight into pricing, respondents were asked to provide their opinion on whether local films should be sold at the same price as international films.

Table 114: Price for local films versus international films

Price	Count	Percentage (%)
Higher	0	0
Less	5	38.46
Same	8	61.54
Total	**87**	**100**

Most of the home video retailers (62%) said local films should be sold at the same price as foreign-made films while 38% indicated that local films should be cheaper.

12.9 Video rentals

12.9.1 Branches nationally

Respondents were asked to indicate how many branches they have, nationally.

Table 115: Number of branches nationally

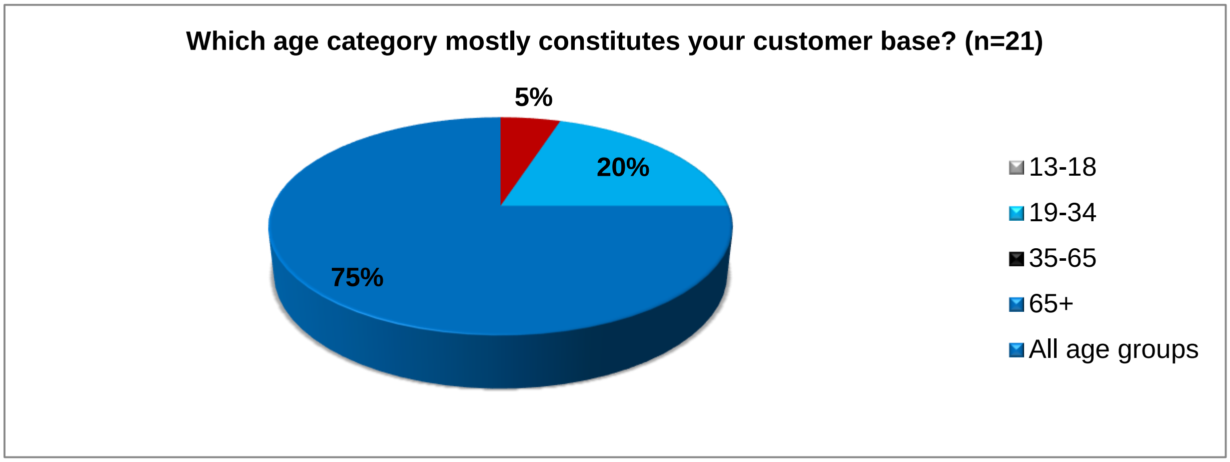
Number of branches	Count	Percentage (%)
1-2	4	21.05
3-10	4	21.05
11-25	2	10.53
26-50	3	15.79
More than 50	6	31.58
Total	**87**	**100**

A greater proportion (32%) of the video rental organisations surveyed indicated that they have more than 50 branches nationwide, followed by 21% who said they have between 1-2 and 21% also who said they have between 3-10 branches nationwide. Around 16% said they have between 26-50 and 11% said they have between 11-25 branches nationally.

12.9.2 Age component of customer base

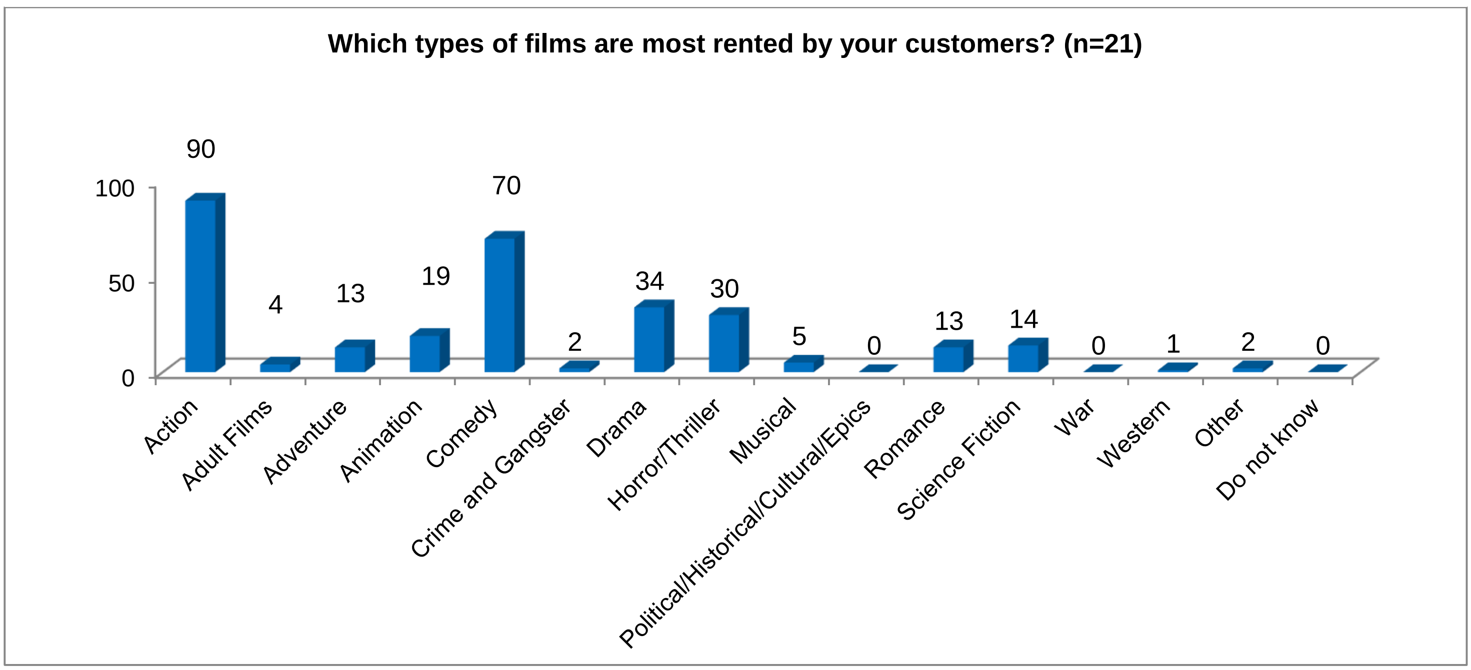
Respondents were asked to indicate the age groups to which most of their clientele belong.

Figure 167: Age categories of clients/customers



Most video rental organisations (75%) reported that all age groups constitute their customer base, while 20% of respondents said their customer base is made up of 19 to 34-year-olds with 5% saying theirs is made up of mostly 0 to 12-year-olds.

Figure 168: Film genres generally rented by customers

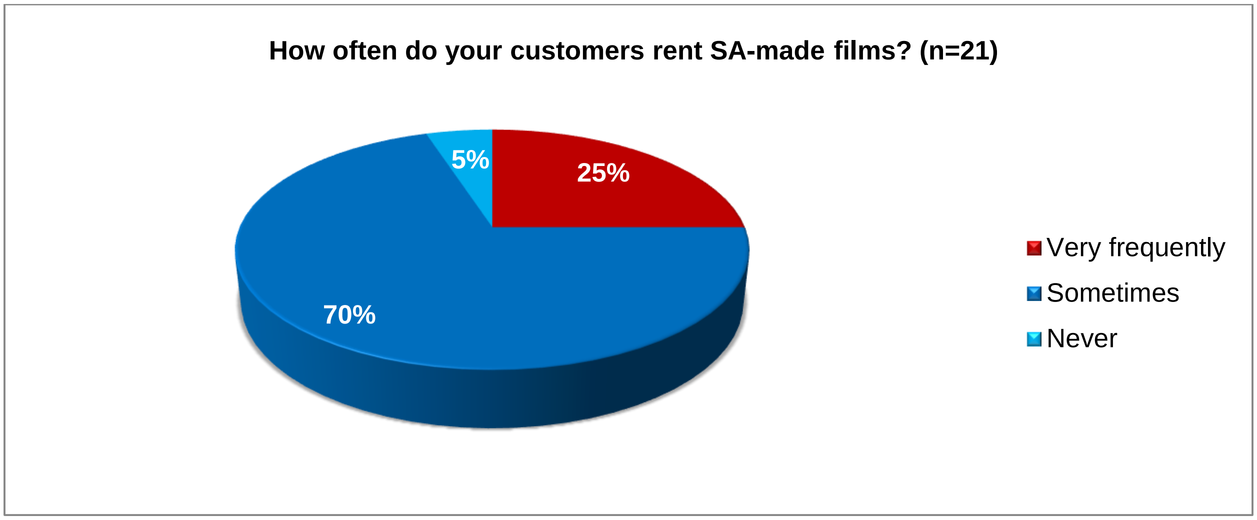


The five film genres mostly rented were (in order of popularity) action, comedy, drama, horror/thriller and animation.

12.9.3 Frequency of clients renting SA films

Respondents were asked to indicate how often their customers rent a SA-produced film.

Figure 169: Frequency of customers renting a SA film

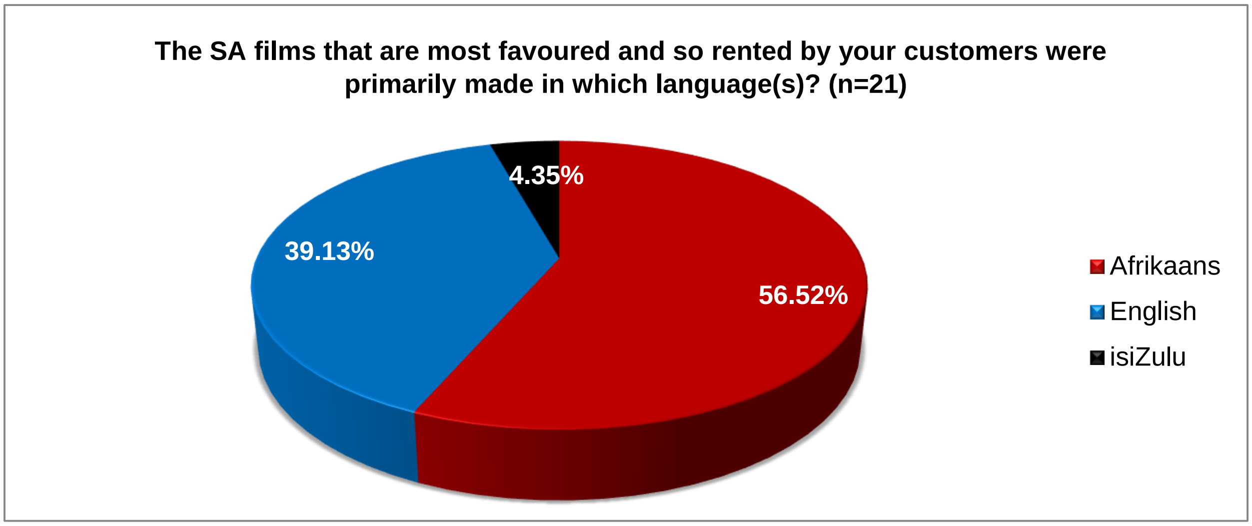


Most of the video rentals organisations (70%) described the frequency with which their customers rent SA made films as ‘sometimes’, while 25% of respondents said their customer base do so very frequently.

12.9.4 Favoured language for SA films

To investigate content preferences of audiences on language level, respondents’ were asked to indicate the most favoured language for SA films rented by their customers.

Figure 170: Most favoured language for SA films

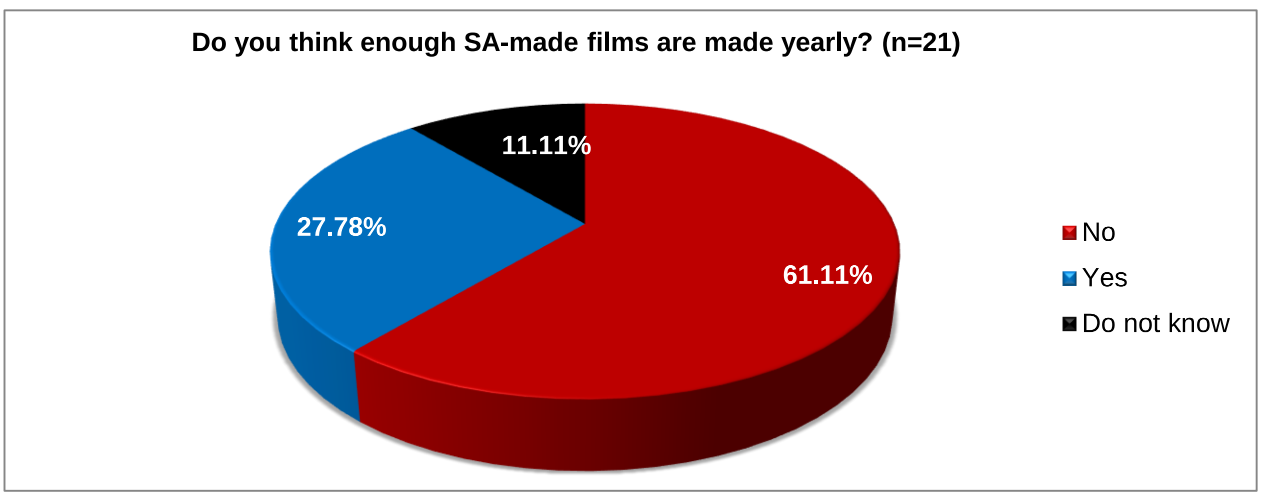


Most of the video rentals organisations (57%) said that the most favoured, and so rented, by their customer were primarily Afrikaans, followed by 39% who indicated English; around 4% of the respondents said isiZulu.

12.9.5 Opinion on yearly production of SA films

Respondents' were asked to indicate if they think enough SA films are made yearly.

Figure 171: Opinions on SA film productions

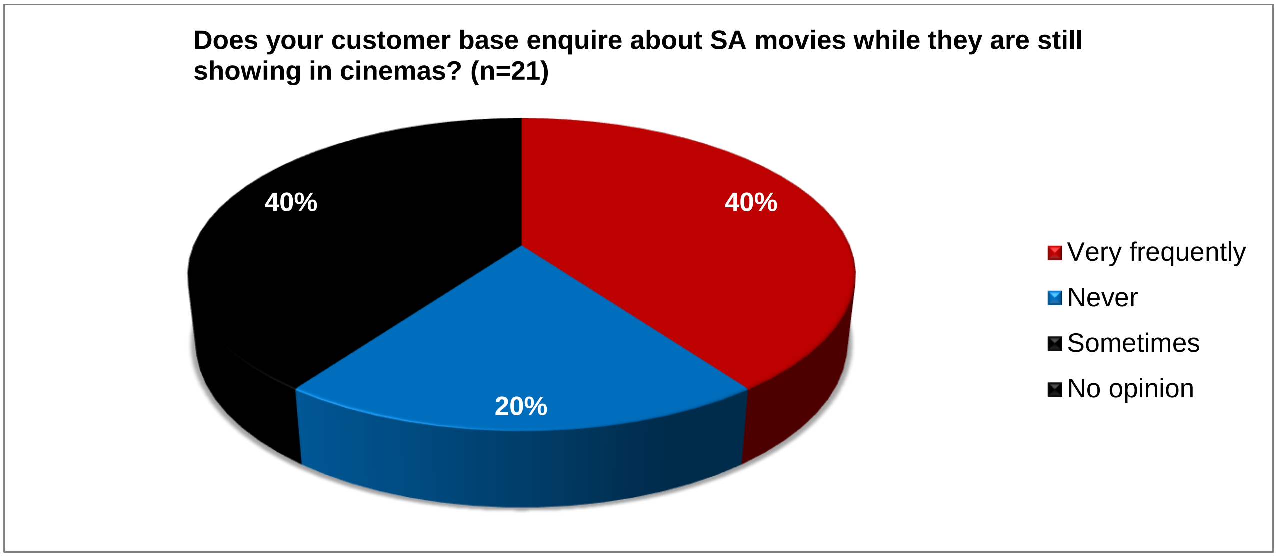


Most of the video rental organisations (61%) said they don't think that enough SA films are made yearly while 28% said they think enough are; 11% of respondents indicated that they don't know.

12.9.6 Customers' enquiries about SA films

Respondents were asked to indicate their customers' frequency in enquiring about SA films while they're still being screened in cinemas.

Figure 172: Enquiries about SA films

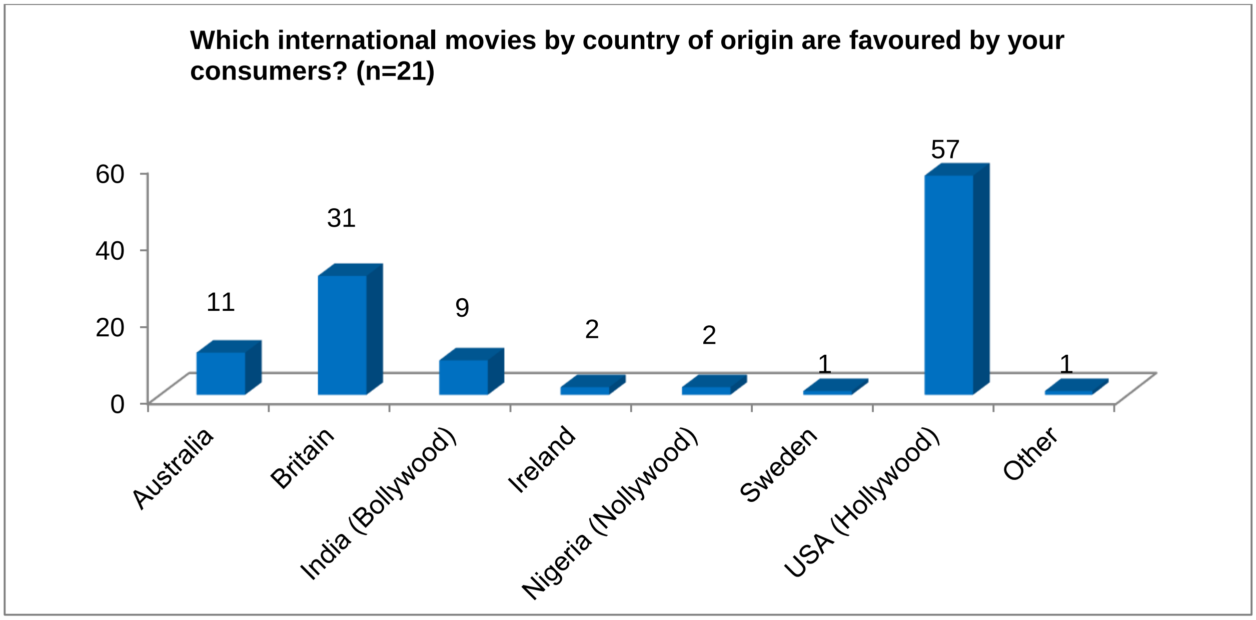


The findings revealed that a greater proportion of the video rental organisations (40%) indicated that their customer base make enquires 'very frequently' about SA movies, and 40% of the respondents said their customer base 'sometimes' do so; 20% said their customer base never make enquiries.

12.9.7 Film preferences by country of origin

To gain an understanding of audience content preferences, respondents were asked to indicate the country of origin of international films that are most consumed by their customer base.

Figure 173: Preferred films by country of origin

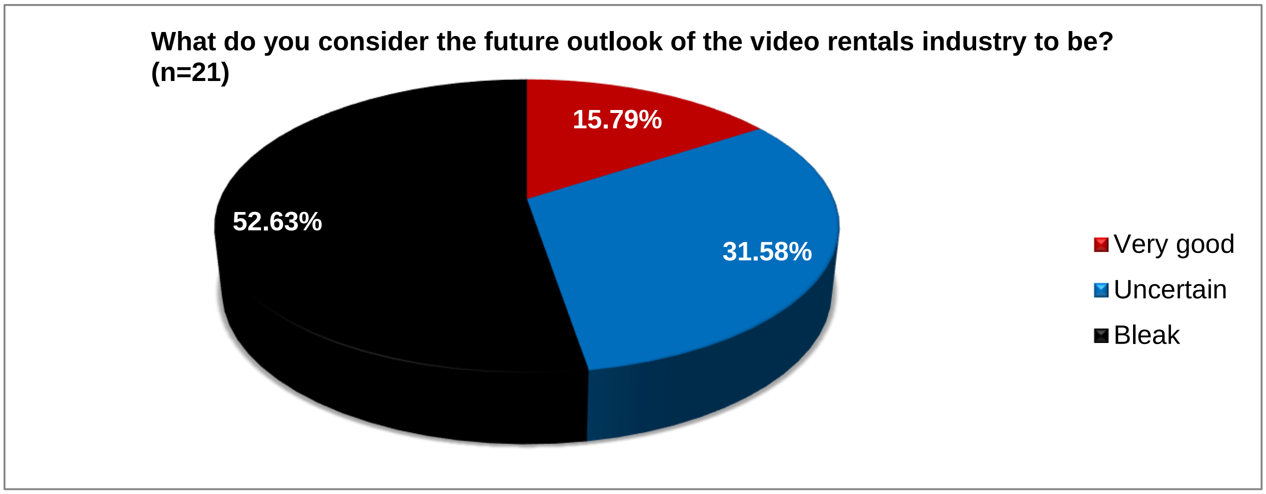


The findings revealed that customers mostly favour films from the USA, followed by those from Britain and Australia.

12.9.8 Future outlook for the video rentals industry

Respondents were asked to indicate what they consider to be the future outlook of the video rentals (rentatainment) industry.

Figure 174: Future outlook for the video rentals industry



Most of the video rentals organisations (52%) indicated that the future of video rentals is bleak, followed by 32% who said it's uncertain and 16% said very good.

12.10 Internet Service Providers

12.10.1 Effect of internet film/video content

Respondents were asked to indicate how the internet film/video content has affected SA audiences' data usage.

Table 116: Impact of internet film/video content on data usage

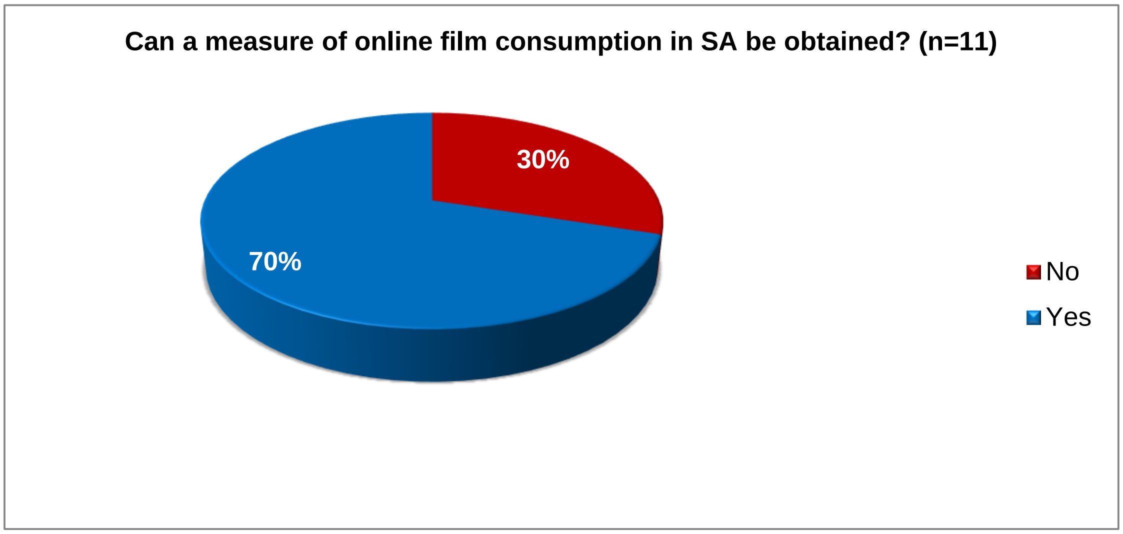
Impact	Count	Percentage (%)
Decreased data usage	0	0
Increased data usage	9	81.82
No impact	2	18.18
Total	**11**	**100**

The findings revealed that most internet service providers (82%) indicated that internet film/video content has increased data usage among SA audiences, while 18% said there's been no impact.

12.10.2 Measurement of online film consumption

Respondents were asked to indicate if measuring online film consumption in SA is possible.

Figure 175: Measurement of online film consumption

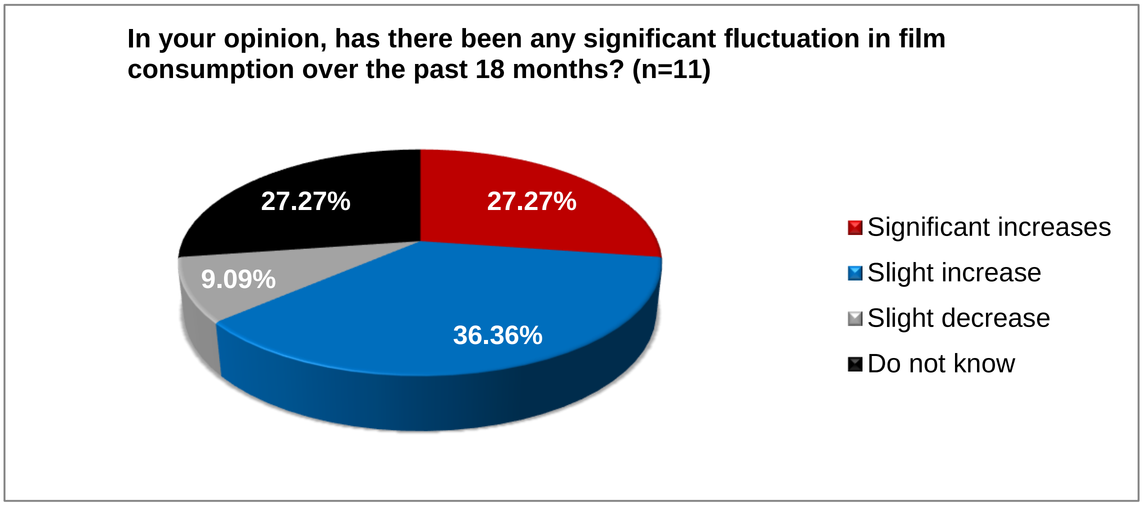


Most of the ISPs (70%) indicated that it's possible to measure it, while 30% said it's not possible.

12.10.3 Trends in film consumption

To identify consumption patterns in relation to online platforms, respondents were asked to indicate if there's been any significant fluctuation over the past 18 months.

Figure 176: Overview of film consumption, online, over the past 18 months



A larger proportion of the ISPs (36%) indicated they think that there was a slight increase in film consumption, followed by 27% who said there was a significant increase, while 27% said they don't know; around 9% of the respondents said they think there's been a slight decrease in film consumption.

In the opinion of ISPs, desktop PC, laptops and smartphones were the most popular platforms SA audience use to access/download film and video content.

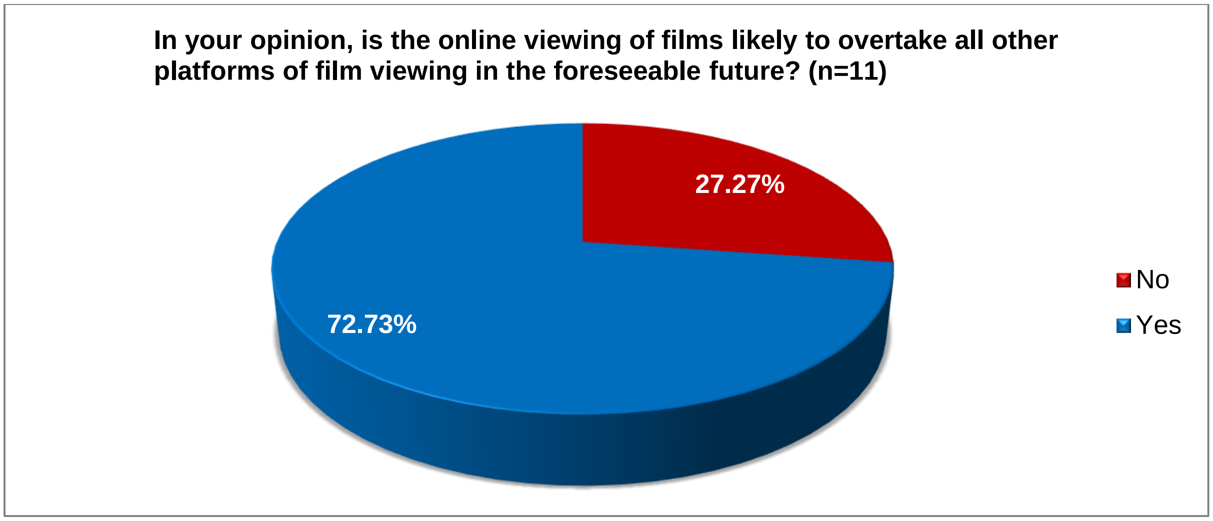
12.10.4 Effect of online film/video platforms

Respondents were asked to indicate whether or not online film/video platforms (You Tube, Vidi, and so on) increased local audiences' access to SA produced films. Most of the ISPs surveyed (73%) indicated that they believe online film/video platforms have increased local audiences' access to SA produced films; some respondents (18%) said they don't know and around 9% indicated that they don't think they have.

12.10.5 Future outlook for online viewing platforms

Respondents were asked to indicate whether or not they think online viewing of films is likely to overtake all other platforms of film viewing in the foreseeable future.

Figure 177: Future outlook of online viewing of films



The findings revealed that most of the ISPs (73%) believed that online viewing of films is likely to overtake all other platforms of film viewing in the foreseeable future while 27% disagreed.

13 CONCLUSIONS

13.1 Introduction

The SA audience research that was undertaken was able to provide an assortment of insights, responses, facts, opinions, preferences and suppositions that enabled the answering of the main research questions of the study. The main research questions that were answered questions were;

- Profile of the respondent;
- Content preferences;
- Spending pattern;
- General perception and attitudes towards SA movies; and
- Access to cinemas.

13.2 Adults

13.2.1 Profile of respondent (adults)

- The profile of respondents discerned from this research closely reflects the profile of the national population. For example, the survey findings showed that 48% of the adults were male and 52% female. The male-to-female proportion observed in the respondents is consistent with the gender distribution of the population of SA, where on average, the population consists of 48.2% male and 51.8% female. It can be concluded that the findings obtained in this research regarding respondents' province of residents reflects the distribution of the SA population by provinces. Most of the adults surveyed indicated Gauteng as their province of residence, followed by KZN, Eastern Cape, Western Cape, Limpopo, Mpumalanga, North West, Free State and Northern Cape. These findings were consistent with StatSA's mid-year population estimates by provinces, 2013, which show that Gauteng has the highest percentage of total population and Northern Cape the lowest. Most of the adults surveyed (69%) indicated that they reside in urban areas and 31% said they reside in rural areas.

- Most of the respondents (81%) who took part in the survey were black African, followed by coloured (19%), white (7%) and Indian/Asian (3%). This distribution reflects the national distribution of population groups in SA. According to StatsSA's 2013 mid-year population estimates for SA by population group, black Africans constitute 79.8%, followed by coloured (9.0%), white (8.7%) and Indian/Asian (2.5%). Most of the adults (64%) indicated that they were single, 24% said they were married and 5% said they were co-habiting. About 4% said they were widowed, and the least, with 3% said there were divorced. Most adults were economically active, as the findings showed that most (44%) were employed, followed by 21% who were unemployed. The proportion of respondents who were studying as full-time students was 20%, followed by those who were employed and studying 8%. The findings showed that 4% of respondents said they were studying and seeking employment, while another 4% were pensioners.

- Most of the adults (66%) said that they earned up to R5000, followed by 16% who said they were earning between R5001-R10000. Around 9% of respondents indicated that they earned between R10001-R15000, while 5% said they were earning between R15001-R25000, with some 4% indicating that their monthly income was R25001 and above per month. Most of the adults (52%) said they completed high school, followed by 43% who indicated that they had attained a post high school qualification such as certificates, diploma, degree, masters, and so on. Around 4% had attained primary school level and 1% of respondents gave other answers such as IT certification, never went to school, and withdrew from school.

- Considering the top five activities of entertainment enjoyment, most of the adults said they mostly enjoy listening to music at home, followed by braaing, socialising with friends and family at home, attending social gatherings (weddings and birthdays, for example) and watching movies at home.

13.2.2 Content preferences

- It can be concluded from the research that most adults prefer action films followed by comedy and drama.

- The most well-known film viewing mediums by adults are DVDs (rentals/purchases), Free-to-air TV, Pay TV and cinema. The less-known viewing mediums are online streaming and internet downloads on PCs, laptops, smartphones and tablets. This is understandable given that most adults said they watch films mostly on DVDs (rentals/purchases), TV in its various forms of Free-to-air (SABC and e-TV, and so on) and Pay TV (DSTV and Starsat, for instance). However, given a choice, most adults said they would prefer to watch films mostly through Pay TV followed by DVDs, cinemas and Free-to-air TV. Few adults indicated they would prefer online streaming and internet downloading, respectively.

- Besides English, most adults indicated that they prefer to watch films in isiZulu followed by Afrikaans and isiXhosa. Other languages preferred are Sepedi and Setswana. Most (65%) adults indicated they enjoy films with subtitles. Most of the adults (65%) said they enjoy films with subtitles.

- There are a number of factors that inform audiences' choice of films. It can be concluded from this research that these factors relate to type of film, followed by mood of the viewers, award nominations, word-of-mouth/recommendation, specific actors/actresses and media reviews. The country of origin/location of production axis and Box Office success were found out to the least factors that inform choice of films to watch.

- As a way to distinguish SA films from films from other countries, most adults were of the notion that the Nelson Mandela bridge in Newton can serve to endear SA films to audiences, followed by the SA flag and Table Mountain.

- While watching films, adults enjoy other activities also, for instance, they engage in having drinks, eating and socialising with family and friends. Most adults (63%) prefer watching films in the comfort of their homes, followed by consuming films anywhere and going out to watch films. Advertisements or previews play a significant role informing or alerting audiences about new movies. Most adults indicated that they learn about a movie from advertisements on TV, followed by press reviews and social media. Few indicated that they find out about movies through internet reviews, radio and billboards advertising media. This seems to suggest that, currently, there's less advertising of films on internet, radio and billboards.

- There's a strong predilection or penchant among audiences to spread news about a good film. The majority (86%) of the adults indicated that they tell other people if they learn or watch a good film and 14% don't. With respect to the means used to tell other people about a good film, most (65%) indicated word-of-mouth, followed by 25% who said they place a notice about the movie on social networks and 10% who said they post a review online.

- Advertising of films heavily influence audiences' decisions on films to watch in future. Most of the adults said they are very heavily influenced by film advertisements and previews on films to watch. All forms of advertising should be used if SA films are to reach the largest audience.

Cinema:

- The cinema is apparently not the most popular place to watch films. Just over half the adults (52%) said they don't go the cinemas, while (48%) do go. There's a need to vigorously stimulate consumers to attend cinemas to watch films.

- Good and or excellent films stimulate the propensity to watch more films. Most of the adults (51%) said they visit the cinema as often as there's something interesting to watch, followed by 33% who said they go once a month. About 9% said they attend cinema one to four times a month; 6% said they visit more than five times a month, while a small proportion (1%) said they visit a cinema one to four times a week.

- The SA audiences engage in other activities when they visit cinemas. Most of the adults indicated that they mostly eat at a restaurant, followed by going for going for a drink, then shopping and followed by playing video games. Few said they just watch films and do nothing else, or go to a Shisanyama and do almost every activity.

- The proximity to the big screen is a key determinant of whether or not one attends the cinema. Most adults (51%) indicated that they go to a cinema of their choice because it's close to where they live, followed by 18% who said go because they show the films they like, while 16% said it's because of the comfortability and 15% expressed the relaxing atmosphere.

- Most adults (57%) prefer visiting the cinema on Saturdays than on other day of the week; 18% said they prefer to go to the cinema any day if there a good film to watch. About 14% of the respondents said they prefer weekdays, with 5% preferring public holidays and 4% preferring Sundays. To many, the comfort and safety of a cinema are key aspects in terms of an ideal cinema, followed by other factors such as a free and relaxed atmosphere and the big screen being located in a mall.

- Most adults (69%) indicated that they are familiar with the 3D experience. A greater proportion of adults (46%) rated 3D prices as being just right followed by 27% who said it's too expensive, while 16% indicated that they had no opinion. About 10% indicated that the 3D experience was not worth paying for. There's significant room for films to be made in 3D in the future. A greater proportion of adults said that, '*the experience of watching a 3D film is more exciting than that of the standard (2D) forma*t' followed by adults who indicated that *'it's crucial to keep up with the world's evolving technology*'.

- Despite advances in technology, the cinema is set to remain one of the most important film viewing platforms in future. Most (72%) indicated that they are likely to continue visiting the big screen in the next six months because they are 'just used to it'. On the other hand, it can be concluded that there are a number of factors affecting cinema audiences. Adults who said they won't be visiting the cinema indicated that it's too expensive to do so, others said it's located far away from where they live, while others said they simply don't have time. Others mentioned that they dislike the content, thereby generally disliking films.

Digital Video Discs (DVDs)

- DVDs are very popular film viewing platforms. Most adults (81%) said they watch films on this medium and 19% said they don't. Friends and families, followed by purchases, are the key sources of DVDs watched by adults.

- Most (75%) are likely to watch DVDs in the next six months. About 75% of the adults indicated they are likely to use the medium in the next six month because they are 'just used to it' and watching DVDs provides an opportunity to choose whatever they want to watch.

TV

- The majority of adults (89%) said they watch films on TV and 11% said they don't. Most adults (46%) said they do watch films on the medium as often as there's something that interest them, followed by 23% who said they watch one to four times a week and 12% who said they watch films on TV more than four times a month. About 10% said indicated that they watch films on the medium once a month and 8% watch one to four times a month.

- TV viewership based on days is a matter of personal convenience; people watch films on TV of their own will, with the particular time often commensurate with their socio-economic statuses. Pay TV and Free-to-air are the mostly used mediums for watching films on TV. Most adults (81%) said they are likely to watch films on TV in the next six months, as they are 'just used to it'.

Video on Demand (VoD)

- Majority of adults (79%) said they don't watch films on VoD, and only 21% of the respondents do.

- Among the adults who watch films on VOD, most of them (57%) said they watch films on VoD/DSTV Box Office as often as there is something interesting to watch, followed by 16% who said they do so once a month; 10% watch more than four times a month, while 8% said they watch one to four times a year, and 8% who said they watch four times a month. Most indicated that they are likely to continue watching films on VoD in the next six months because they are 'just used to it'.

Internet (online streaming)

- Internet (online streaming) isn't a popular film watching platform among adults. The majority of the adults (71%) said they don't watch films on the internet, while 29% said they do.

- Of those who watch on the internet, most (56%) said they do so 'as often as there is something interesting to watch', 13% said once a month, while another 13% said more than four times a month. The findings further showed that 11% said they watch films online one to four times a month and 7% said they do so one to four times a year.

- Most of the adults (70%) indicated that they don't download films on the internet while 30% said they do. Nonetheless, this may not be a true reflection of reality as piracy is an offense and usually most respondents in similar researches shy away from providing a true account.

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- A larger proportion of adults (40%) indicated that the reason they don't download films off the internet is lack of access to internet, followed by 25% who don't know how to download, and another 25% who don't have time to download. Around 7% of the adults indicated that they have a slow internet connection.

- Most of the adults (85%) who watch films on the internet indicated that they are likely to continue doing so in the next six month because they are 'just used to it' and by the virtue that it's easier to watch films online as one can choose what to watch.

- Advantages embedded in a particular platform were found to be key determinants of the likelihood of watching films in future. Overall, it may be concluded that, with respect to the likelihood of watching films in the next six months on different platforms, TV is the most preferred platform, followed by online streaming, DVDs, cinema and VoD.

13.2.3 Spending patterns

- Most adults (53%) indicated that they receive value for their money (in view of a TV license fee of R265 per annum) regarding the type of programmes they have to watch on SABC 1, 2, 3 and e-TV. Those who felt they aren't receiving value for money, felt that the content isn't entertaining, the quality of programming is poor, there are too many advertisements in between films, too many old films and a lot of films being repeated. Interestingly, a few said local content should be free.

- Most of the adults indicated that they are willing to pay less than R50, irrespective of whether the film is foreign- or SA-made. There's not much difference in terms of which films should be cheaper between SA- and foreign-made films. A greater proportion of the adults (27%) said that locally-made films should be cheaper, followed by 26% who said that foreign-made films should be cheaper; 25% were of the opinion that they prefer the content of locally-produced films, and 18% said they prefer the content of foreign films. The quality of a film is also very important to viewers other than whether a film is foreign- or SA-made. A sizeable proportion of the adults indicated that they are willing to pay 'whatever it costs to watch a film as long as they like the film'.

- Most of the adults (64%) said they don't watch films on pay per view, while 36% said they do. For those who do, a larger proportion of the adults (33%) estimated that they spend R100-R200 per month, followed by 22% who estimated R50-R100, and about 18% who indicated that they cannot recall. About 17% of the adults estimated that they pay less than R50 and 10% indicated that they don't know.

13.2.4 Perception and attitude towards SA films

- SA-produced films have a huge audience in SA. The majority of the adults (85%) recalled that they watched SA-produced films and 15% didn't. This results shows that there's great scope for expansion in terms of developing an audience for SA-produced films.

- All platforms of watching films are being utilised by adults to watch SA-made films. A larger proportion of adults (48%) had watched an SA film on TV, followed by 32% who had watched SA film on DVD and 15% had watched an SA film at cinema. About 3% had watched an SA film on the Internet, 1% said in public viewing and another 1% indicated they hadn't watched one anywhere. TV and DVD are thereby the most widely used platforms that were utilised to watch SA-produced films.

- Most adults are prepared to go out of their way to watch SA films in future. The highest proportion of (48%) said they would do so, followed by 38% who said 'maybe', meaning they may or may not watch and 14% said they would not go out of their way to watch a SA film. These findings seem to suggest that there's great scope for rousing further appetite for SA films.

- With respect to preferences between SA- and foreign-produced films, most adults (55%) have no preferences but do watch film as long as the storyline is interesting to them. About 19% said they prefer to watch SA films, while 18% prefer foreign ones. About 6% indicated that there are just not enough SA films to watch, while some 2% gave other answers such as 'they do not watch films'.

- In terms what's likeable about SA films, a large proportion of the adults (19%) said they like the actors/ actresses, followed by 18% who said they like the cultural content' 17% said they like characters they can relate to, while 12% said they like everything about SA films. About 11% of the adults said they like the images and landscapes, 7% said the social commentary appeals to them and another 7% said they the content, in general. A small proportion of the adults (2%) provided other reasons like, 'they like nothing about SA films'.

- Upon aggregating the excellent, very good and good ratings, the ratings SA films within a number of contexts were:
  - Actors and actresses – **76%**
  - Entertainment value – **74%**
  - Film characters – **72%**
  - Local content representative of SA languages and culture – **72%**
  - Storylines – **71%**
  - Visuals/Cinematography – **69%**
  - Availability in other official languages, beside English – **67%**
  - Historical and political content – **66%**
  - Technical production quality – **64%;** and
  - Local content representative of SA natural environment and wildlife: **63%**

13.3 Children (0 to 4-year olds)

- Most of the children aged between 0 to 4 years (96%) said they like cartoons, and a small proportion of 4% said they don't. The majority (99%) said they do watch cartoons and only 1% indicated that they don't.

- Children constitute an integral part of the audience for films and videos. Majority (96%) said they watch movies at home and only a small proportion (4%) said they don't. Most (65%) said they watch movies on TV, followed by 17% who said they watch on computers while 10% watch on the phone. The least proportion of children said they watch movies on tablets.

- Most children usually watch films in the company of others, especially family members and friends. A large proportion of the 0 to 4-year-olds (35%) stated that they watch movies with their mothers, followed by 23% who said they do so with either sibling and 17% watch with their dad. About 16% of respondents selected the 'other option', and when asked to specify, they said they mostly watch with the whole family. Smaller proportions (4%) said they mostly watch movies with grandparents and 5% said they mostly with friends.

13.3.1 Cinema

- Just over half (51%) of the 0 to 4-year olds watch movies at the cinema. However, in terms of preference, most (68%) prefer to watch movies at home while 32% said they prefer the cinema. Platform preference by age points to the fact that children prefer TV compared to other platforms.

- A bigger proportion of the 0 to 4-year-olds (36%) said they go to the cinema with their parents, followed by 25% who selected the 'other' option. On enquiring further, they said they attend the big screen as a whole family, implying parents, siblings and others; 16% said a sibling, and another

(16%) said mother, while 7% said father. As expected, it can be observed that this age group mostly goes to the big screen in the company of immediate family members.

- ***Frozen*** was the most watched movie, followed by **Despicable Me**, **Lego: The Movie** and **Cloudy**. The least watched movies were **Zambesia** and ***Khumba.*** These results seem to suggest that children within this age group consume more foreign-made films compared to their local counterparts. Zambezia and Khumba are SA animated produced films and from the findings they have the least number of respondents who have watched it.

13.4 Young children (5 to 7-years olds)

- TV is the mostly used and preferred film viewing platform for 5 to 7-year olds. The majority of the 5 to 7-year olds (96%) said they like watching films on TV, while, 93% indicated that they watch on DVD, 68% said they like going to the cinema, while 53% said they watch on the computer. A larger proportion of the 5 to 7-year-olds (44%) indicated that they like to watch films on TV because 'it has nice characters', followed by 25% who said 'because it looks nice' and 21% stated 'because of the nice music'. A smaller proportion (10%) provided other reasons such as 'movies on TV have interesting people' and 'movies are always changed'.

- Most of the 5 to 7-year-olds (62%) said they favour cartoons, followed by 19% who said they like adventure. The following results weren't a surprise, as none of the children said they favour sad or serious films. Very few of the respondents found films on real stories and about love appealing.

- Family plays an important role on cinema-going routines for 5 to-year olds. Most of the 5 to 7-year-olds (70%) indicated that are usually taken to the cinema by their parents, followed by 18% who said they usually go with either their sibling. Children aged five and seven years attend in the company of very close family members; most (74%) said what they like most about going to the big screen is the sweets and popcorn.

- Most of the 5 to 7-year-olds (71%) said they were aware that some films are made in SA while 29% were not. A majority (93%) of the 5 to 7-year olds indicated that they would watch films on the knowledge that some films are made in SA.

- The findings show that **Despicable, Frozen and Cloudy** were the most watched films. It's also pertinent to note these films are foreign productions. These findings suggest 5 to 7-year-olds watch more foreign films compared to local ones.

13.5 Children (8 to 12-year olds)

- TV is the mostly used and preferred film viewing platform for 8 to 12-year olds. The majority (97%) said they do watch films on TV, while 95% indicated that they watch films on DVDs with 81% saying they like going to cinemas to watch films, and 64% watch on the computer.

- The general film genres preferred by the 8 to 12-year-olds were cartoons, followed by adventures, scary and then funny films. Real life stories, movies about space and robots (sci-fi), sad or serious films and ones about love were reported as the least preferred.

- Saturdays and public holidays are the most preferred days of attending the cinema by 8 to 12-year-olds.

- Most (44%) indicated that they don't know the cost of watching a film at the cinema. This is understandable, given that most of the 8 to 12-year-olds said they are usually accompanied by their parents.

- **Spiderman 2, X- Men** and **Transformers** were the most watched films. Most of the watched movies are foreign productions. These findings revealed that this age category watch more foreign- compared to locally-produced features.

13.6 Children (13 to 16-year olds)

- The majority of the 13 to 16-year-olds (98%) stated that they like to watch films. TV ads were listed as the most popular channel through which they hear about new films, followed by TV Shows, friends, magazines and big screen advertisements.

- The film type most preferred by the 13 to-16-years olds was adventures, followed by funny, then scary ones, and then cartoons and lastly, musicals. The least preferred film types were sad or serious ones, real life, sci-fi and films about love.

- Most of the 13 to 16-year olds (81%) said they like going to the cinema. Most of 13 to 16-year-olds (53%) said they prefer going to the movies on Saturdays while 20% said they prefer any day and 16% said they like to go on public holidays. The least preferred days were Sundays and Mondays to Fridays; 50% said they go to the cinema with friends, followed by 22% who said with parents and 19% usually attend with either sibling. Some 9% stated the 'other' option, and upon further enquiry, they said they go as a whole family.

- Most of the 13 to 16-year-olds said they know how much it cost to watch a film at the cinema. This is understandable, given that most of this age group attend with their friends.

- TV is the mostly used and preferred film viewing platform for 13 to 16-year olds. The majority (93%) said they watch films on TV, while 91% said they watch on DVD; 71% said they view on the computer and 56% said the internet. The most used platforms by those who said they watch films on the internet were YouTube, followed by Box Office Accounts and Amazon Prime.
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- The most watched films by this age group was **Spiderman 2**, followed by **X-men**, and **Transformers.**

13.7 Internal stakeholders (NFVF employees)

In this research, insights were also sought from internal stakeholders. The respondents were operationalised as NFVF employees. The aim was to explore and find out where NFVF as an organisation stands in terms of developing the film industry. Insights were sought to reveal how the NFVF ensures its mandate of seeing to the growth and the thriving of the SA film industry.

- Regarding how successful the NFVF is in line with its mandate to ensure equitable growth of the SA film and video industry, most of the respondents (76%) surveyed indicated that the NFVF can be considered to be reasonably successful in terms of its mandate of ensuring an equitable growth of SA's film and video.

- Most of the respondents felt that the NFVF has been mostly successful in the area of increasing the number of people trained in the industry, particularly in areas of scarce skills, followed by its success in the area of increasing the number of SA films and PDIs producing them, as well as promoting film locally and internationally. With regards the future of the SA Film and Video Industry, while the success realised is laudable, it can be concluded that there's room for improvement in increasing audience access to South African films and promoting social cohesion and expression of the nation's stories through film.

- Advertising is a fundamental element in order to create awareness of SA films across a large section of the SA audience. Most of the respondents consider that advertising is key in order to reach large audiences. The majority (81%) of respondents indicated all options of advertising should be explored, including but not limited to TV, radio, billboards – especially on highways leading to townships – and at sport events (soccer matches – especially Soweto derbies – rugby matches, cricket matches, and so on).

- The internal stakeholders consider the cost of the cinema experience and competition from international film industries as the two most limiting factors to the growth of the SA film and video industry.

- Respondents were asked to indicate what they think best represents the NFVF strategy and practice in promoting the growth and sustainability of the SA films and video products. Interestingly, there were equal portions of respondents who indicated the following, as what they view best represents the NFVF strategy and/or practice, in promoting the growth and sustainability of SA films and video products:

  - Conduct good research and due diligence on all funded film and video products to ensure that they have above average chances of success;
  - Investigate what audiences want and will consume, and thereby fund the film and video products that will cater to the audiences, and if need be, leverage audience tastes to nudge them in the desired direction;
  - Spread the available funding support to as many previously disadvantaged film and video producers as possible, to ensure more SA film and video products are made; and
  - The NFVF should generally offers support, as it deems necessary, based on how aspects evolve in the industry.

- What this also means is that the internal stakeholders seem to suggest that there's still a lot more the NFVF can do with regard to focusing efforts to the following strategies and/or practice:

  - Funding as many big ticket SA film and video products, to see how many succeed; and
  - Funding film and video producers who have a history of success, to replicate successes.

- Most of the respondents felt that investigating what audiences want and will consume, and thereby funding the film and video products that will cater to the audiences, and if need be, leverage audience tastes to nudge them in the desired direction, is the best strategy to be adopted by the NFVF to create a sustainable SA film and video industry. Structurally, this strategy will be achieved when the NFVF continues to be at the apex of the film and video industry, and allowing provincial and regional film structures to offer funding for the films that satisfy the general guideline provided by the NFVF.

13.8 Distribution channels

- The client/customer base of distributors is constituted of all the demographic elements. For example, 91% of the distributors reported that nearly all age groups are constituted in their client/customer base, with 85% indicating that all population groups constitute their client base.

- Overall, most of the distribution channels (59%) viewed the SA film industry's current state as good. Action films, closely followed by comedy and drama are considered by distribution channels as the three most popular genres of successful SA films. Internet streaming and downloading of films were considered to be the fastest growing film viewing platform, followed by electronic the physical and home entertainment.

- In sharp contrast with what the adults respondents indicated, most (75%) of the distributors indicated that the SA audiences are not receiving value for their money from the programmes that are shown on SABC 1, 2, 3 and e-TV, after paying their TV licences. Most of the distributors felt that there are too many repeats, the content isn't entertaining, and the quality is poor.

- Most of the distribution channels were of the opinion that the SA audience is willing to pay between R50-R100 to watch foreign-made films. Most respondents were also of the opinion that SA audiences are willing to pay less than R50 to watch SA-made films. This observation is in part explained by the general perception that most foreign-made films are better than SA-made ones. Most of the distribution channels surveyed (58%) said they think there's less demand for SA film and video content compared to foreign-produced content.

- On the other hand, most of the distributors believed that most people go out of their way to watch SA films because of the likeable attributes of the films. The highest ranked likeable attribute of SA films was actors/actresses, followed by cultural content and characters they can relate to.

- Most distributors believed that internet downloads offer the most value for money, followed by cinema, DVD rentals/purchases and Pay TV.

- Most of the distribution channels indicated that SA films and videos need to improve in terms of acting quality, directing and production quality, script/storyline and visual effects. This is key in view of what the distributors rated as the three most successful films. The respondents rated **District 9** as the most successful film, followed by **Tsots**i and **As Jy Sing**. The success of these films was mostly attributed to their cultural association, followed by directing/production, and lastly to storylines.

- Inadequate distribution channels was considered as the most important factor limiting the SA audience's access to local film and video content, followed by inadequate film advertising and insufficient supply of local productions.

- The general feeling of foreign films being better and internet access, were identified by distribution channels, as the two most limiting factors to the growth of SA films and videos. In addition to these limiting factors, most of the distribution channels said audiences' diminishing income levels, not enough supply of good quality SA films, inadequate promotion of SA films by production companies, and increased competition from other distribution platforms, were identified as the main challenges to the expansion of business to a wider audience/client base for SA films.

- With respect to how the respondents view as the way to best package for SA films to market them, and to enable them to be competitive in view of international movies, most said it's important to employ globally famous actors/actresses, increase the availability of different platforms and advertise internationally.

13.9 Strategic stakeholders – Government

- The stakeholders that were considered as government in this research included the following;
    - National Department of Arts and Culture;
    - National Treasury;
    - Department of Trade and Industry;
    - Department of Economic Development;
    - The Presidency;
    - Department of International Relations and Co-operation;
    - Department of Basic Education;
    - Department of Higher Education and Training;
    - Department of Labour; and
    - Department of Home Affairs.
- The majority of the government officials interviewed (86%) were aware of government initiatives aimed at improving the film industry; 69% of respondents said they were aware of government initiatives aimed at improving and developing SA film markets and audiences.
- Although most government officials are agreeable on the role of the SA film in the country's economic and social platforms, there are different views on what they think is the government's vision with regard the promotion of SA film and video products. Most of the government officials felt that the government vision is about providing funding mechanisms to support the industry's growth, followed by those who feel that it's about supporting the industry through policy and regulation, using the industry to help create sustainable and decent jobs, and using it to transform society and support international relations. This dissimilarity in views on what the government's vision is can be addressed by delineating the government's vision and widely publicising it across all key stakeholders.
- Ostensibly, government officials concur that the SA films and video products have a role to play in assisting government achieve some of its objectives. The majority of the government officials (91%) stated that they think SA films and video products have a role to play in assisting government to achieve some of its objective. The same could be said of the role played by SA films and video products; most (82%) stated that they think SA films have a role to play in fostering social cohesion in the country.

13.10 Strategic stakeholders – External

- External stakeholders in this research were considered to be actors and actresses, advertisers, development agency/corporation, documentary film producers, film festival organisers, filmmakers, heritage agency, script writers/editors, Sector Education and Training Authority (SETA), sponsors and transformation association. The findings are divided into the following main themes:
- In terms of how vibrant and developed the SA film and video industry, compared to US, India and Nigeria, most respondents said they believe that the SA film and video industry is not up to standard.

On the other hand, most (69%) of the external stakeholders said the outlook for SA films and video products is promising.

- Most respondents (55%) considered that the film industry organisations find it reasonably easy to work with other SA film players.

- According to the respondents, the most three most popular genres of successful SA films were comedy, followed by drama and action. They said the digital/electronic home entertainment (DSTV Box Office, for example) is the fastest growing film viewing platform in the SA film market, followed by Internet streaming and downloading of films and physical home entertainment (DVD and DVD rentals, for instance) and cinema. This trend can be partly due to the result of the fact that the population have access to digital/electronic home entertainment and internet streaming as well as downloading of films, and so causing the downward trend in physical home entertainment and cinemas.

- Most respondents said that Free-to-air TV (SABC and e-TV, for example) offers the most value for money for SA audiences as a platform to watch films on, followed by online streaming (Vidi, DSTV Box Office, YouTube, and so on) and internet downloads.

- The majority of respondents said that there's less demand for SA films and video content in relation to foreign-produced film and video content. Most of the external stakeholders said the SA film and videos should be mostly be improved in terms of the script/storyline, followed by acting quality, inclusion of distinctly local content and directing as well as production quality.

- The most limiting factor identified by respondents was socio-economic (household income, education, employment, and so on), followed by inadequate production technologies and infrastructure, lack of local talent (for production, acting, writing, for example), and restrictive policy and regulation.

- Most respondents identified that cost of cinema experience and competition from international film industries such as Bollywood, Nollywood and Hollywood are the two most limiting factors to the growth of SA film and video industry.

- A larger proportion of the respondents said that conducting good research and due diligence on all film and video products to be funded, to ensure that they have an above average chance of success, best represents the NFVF strategy and practice in promoting the growth and sustainability of SA films and video products.

- In addition respondents were asked to indicate what, in their view, should be the best strategy to be adopted by the NFVF to create a sustainable SA films and video industry.

  - Most of the external stakeholders suggest the NFVF to adopt the strategy and practice of conducting good research and due diligence on all film and video products to be funded, to ensure that the films and videos funded have an above average chance of success; followed by, a strategy and practice of investigating what audiences want and will consume, and so, fund the film and video products that will cater to audience, and if need be, leverage audience tastes to nudge them in the desired direction.

  - Respondents were asked to indicate their role or their organisation's role in the film and video industry. Most who participated in the survey were filmmakers, followed by those who were film producers, branding/marketing and development agencies/corporations.

  - Filmmakers, in particular, indicated that the availability of infrastructure presents the biggest challenge when making a local movie, followed by around 19% who said 'availability of skilled supporting crews', with another 19% stated other challenges such as lack of funding; 15% said the challenges they face relate to lack of good co-operation from local authorities, with another 15% indicated that they face all of the challenges presented on the list and 7% said it's not easy to obtain filming permits.

- Most of the filmmakers (78%) said they subscribe to the view that SA is a low-cost film production destination, while about 15% said they don't. Around 7% of respondents said they had no comment on the issue. Most indicated that factors such audience accessibility, cast, content, genre, marketing/promotion and production houses make local movies sell. Conversely, most of filmmakers said local movies fail because of lack of promotion, competition from international films, poor storylines and audience negligence.

- Most of the filmmakers (60%) said SA film and video making crews are excellent in terms of their professionalism, followed by 25% who said they're good, and about 11% said average, with 4% saying 'poor'.

- Most of the filmmakers (64%) indicated that they don't own the intellectual Property (IP).

- A greater proportion of the filmmakers said audiences are the greatest weakness in SA film and video industry, followed by ownership of the IP of film and video production marketing and publicity. Most respondents said SA audiences mostly want gripping content from a film/TV series, followed by unique storyline, quality visual effects, great acting and beautiful music.

13.11 International stakeholders

- The international stakeholders' bloc consists of international film audiences, international film festival, co-productions, Bollywood, Nollywood and Hollywood.

- The respondents' view of SA's film industry current state is good. It can be concluded that the strength-points of the industry should be optimised if the industry is to be an excellent one.

- Respondents gave different responses on how SA film and video compare to the rest of the world. The answers were excellent, good and poor. This goes on to show the diversity of how SA films are rated by international stakeholders. There's scope in terms of improvement of SA films for them to be on the same par as US films, and the like.

- The opinions of respondents were that drama, followed by romance, adventure and crime and gangster were the most popular genres of successful SA films. Incongruently, respondents indicated the most popular genres of films in their own countries were action, adventure, comedy and horror/thriller.

- Electronic home entertainment (pay per view) was listed as the most and fastest growing film viewing platform, while internet streaming was the second fastest growing platform closely followed by cinema, with physical home entertainment as the least.

- Pay TV was considered the best viewing platform that offers the most value for money for global audiences, followed by Free-to-air TV and online streaming, for example Vidi. Online downloads, DVDs (rentals/purchases) and cinema were considered to offer the least value for money for global audiences.

- In the opinion of respondents, the most likable elements of SA films are social commentary, followed by cultural content, characters they can relate to, images and landscapes, content, general production and actors/actresses.
- A large proportion of respondents said they think that there's more demand for SA films while a small proportion indicated that there's less demand for SA films.
- It can be noted that a large proportion of international stakeholders indicated that SA films need to improve script/storylines. Smaller portions opined that directing and production, script and visual effects should be improved.
- The factors noted by respondents as limiting the global audiences' access to SA films and video content were: not enough marketing of films and videos, followed by lack of efficient distribution technologies, not enough variety of SA films and videos, and the high financial cost of importing films from SA.
- The two most limiting factors hindering the growth of the film industry in SA are: competition from international film industries and other factors such as lack of funding. For the purposes of improving the SA film industry, these limitations should be addressed in order to enhance and bring the SA film industry up to standard with other global film industries such as Hollywood.

14 LOG OF RECOMMENDATIONS

14.1 Introduction

The recommendations offered are result of the synthesis of the main conclusions drawn from the findings of the audience research undertaken with a number of stakeholders. The recommendations are intended to assist with the ADS, with particular focus to increase choices and access to SA films and video content, and grow the demand of SA films, firstly nationwide and secondly globally.

14.2 Enhance distribution and production value chain

New initiatives based on consultation with industry stakeholders could be developed to improve the effectiveness of distribution of SA films. This research found out that inadequate distribution was considered as the most important factor limiting the SA audience's access to local film and video content, followed by insufficient supply of local productions. An all-encompassing stakeholder approach should be adopted, given an array of stakeholders involved in production and distribution of films and video content. The preferences of the audience should also be taken into cognizance; for example, this study showed that TV is still the most widely used platform for watching films, followed by DVD and VoD.

14.3 Propagate film education

Film education can assist in growing the audiences of today and tomorrow, ensuring that more people have an improved understanding and appreciation of the value of different kinds of film. The young generation can be encouraged to learn through and about film, providing them with a wide-range of activities to encourage watching, understanding and making film. The starting point should be schools throughout SA, where film can become part of the cultural education of children in schools across SA. Such initiatives need funding.

14.4 Create awareness of SA films

This study showed that most people indicated that they are prepared to go out of their way to watch SA films in future, and on the other hand, also noted that SA films should be advertised in order to create awareness about them. An all-encompassing stakeholder approach can be used as a vehicle to create an integrated communications strategy, designed to create awareness of SA film and video content. There are a number of media platforms that are available and can be used to further awareness of SA films in both urban and rural areas. Such platforms include, but aren't limited to: TV, radio, outdoor (billboards, video billboards, posters and bus shelters) events or exhibitions, online, mail, magazines, newspaper, SMS' and press releases.

14.5 Secure continued government support

The pillars of government support to the film industry should be strengthened. Information on funding schemes should be widely distributed to film producers or filmmakers. Support mechanisms for the production, development and distribution have an impact on the structures and practices of the industry and on the type and quality of films produced and distributed. The strengthening of government support mechanisms will ensure that emphasis is placed on the following:

- Development phase to enhance quality of films;
- Production, distribution and promotion; and
- Accessibility by a wide audience of government-supported films.

14.6 Accessibility of cinemas

It's important to explore the feasibility of bringing the cinemas closer to the audiences, or for example, bringing state-of-the-art cinemas to townships, semi-urban areas and even rural areas. This research showed that people who said they won't be visiting in future, cited reasons like distance to the cinema and costs. Proximity to the cinemas can attract more audiences constrained by distance.

14.7 Talent and skills development

This research showed that most people indicated that they are prepared to watch a SA movie as long as it is good one, in terms of: visuals/cinematography, storyline, actors/actresses performance, film characters technical production quality, historical and political content, entertainment value, and so on. All these factors are a product of talent, skills, innovativeness and professionalism of all individuals involved in film production. It's thereby important to strengthen the creative environment and develop professional skills in the SA film industry. The talent, skills and needs of the film industry should be clearly identified and delineated, developed and balanced with other tools such as entrepreneurial know-how, ICT, and marketing abilities. It's through talent and skills development that audiences can be fully engaged through telling stories that relate to the audience.

14.8 Strengthen branding of SA films

The feasibility of branding SA films should be explored in order to build a stronger and more compelling SA film brand. The findings have shown that most stakeholders have indicated that they think the Nelson Mandela Bridge in Newton, or SA flag or Table Mountain can be used as iconic symbols, landmarks or artefacts that will distinguish SA films and serve to endear SA films to audiences. SA films should be treated, managed and celebrated as a brand availed and accessed by all audiences. Films festivals or annual premiers can be further strengthened to propagate the SA film brand.

14.9 Continued role of NFVF

The NFVF should remain at the apex of the film of the industry, allowing provincial and regional film structures to offer funding for the films that satisfy the general guideline provided by the NFVF. To develop, grow and sustain the SA film and video industry, the NFVF should further strengthen the following strategy prisms.

- Conduct good research and due diligence on all funded film and video products, to ensure that these funded films and videos have above average chances of success;
- Spread the available funding support to as many previously disadvantaged film and video producers as possible, to ensure more SA film and video products are made;
- The NFVF generally offers support as it deems necessary, based on how aspects evolve in the industry;

- Fund as many big ticket SA film and video products, and see how many succeed; and
- Fund film and video producers who have a history of success, to replicate successes.

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'... whatever may be our wishes, our inclinations, or the dictates of our passion, they cannot alter the state of facts & evidence'.

John Adams, 1770

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