



national film and video foundation
SOUTH AFRICA

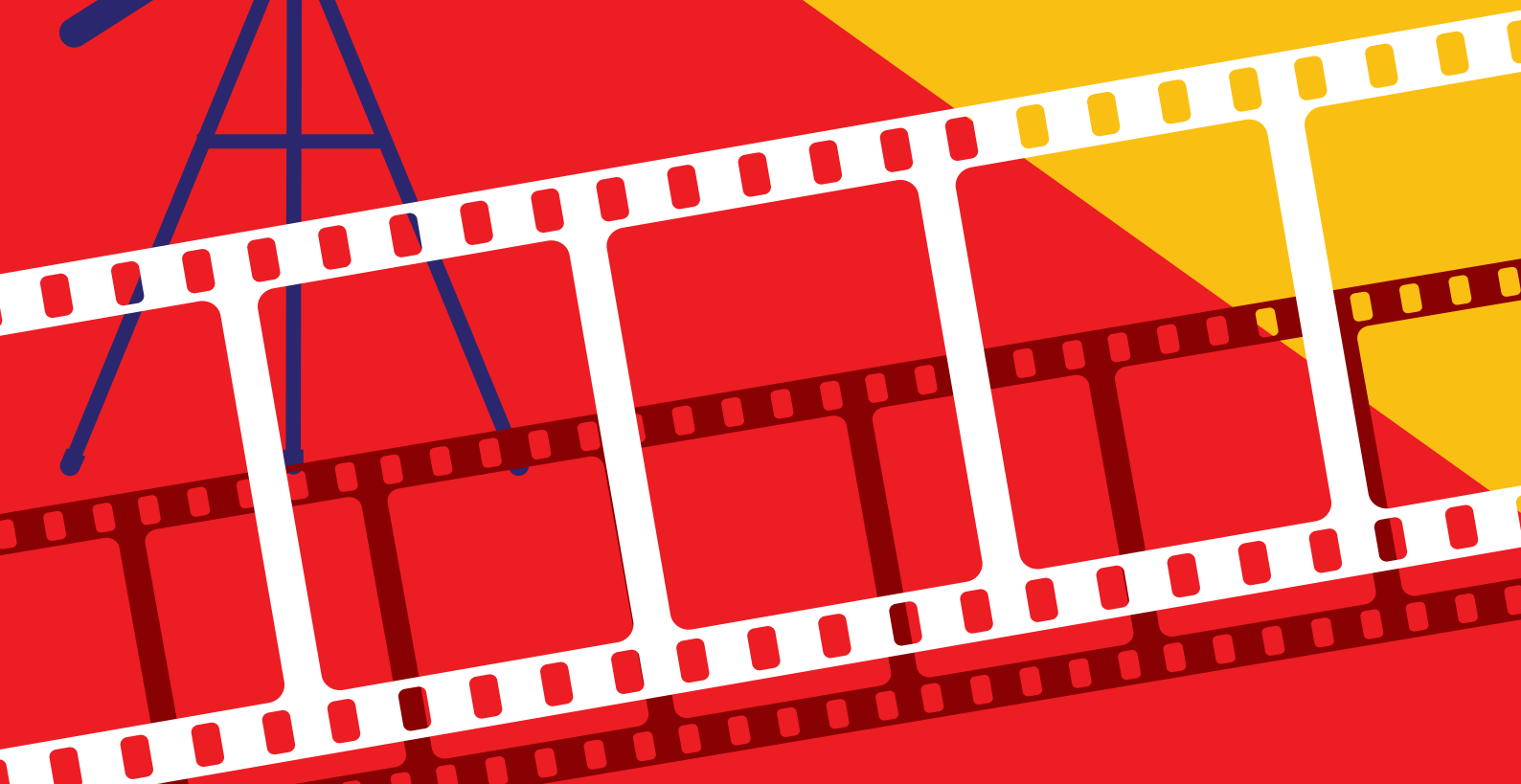
an agency of the Department of Sport, Arts and Culture

NFVF Transformation

REPORT 2022



**THE STATE OF
TRANSFORMATION
IN THE SOUTH AFRICAN
FILM AND TELEVISION
INDUSTRY**



EXECUTIVE SUMMARY

Approach

The National Film and Video Foundation (NFVF) has commissioned research to understand the extent of transformation within the film and TV industry in South Africa, with a focus on conditions 'behind the camera'.

While earlier studies have evaluated levels of transformation in the industry, there is a need for deep and comprehensive research to interrogate sites of transformation within the film and TV ecosystem. This study is the second iteration of the transformation research project NFVF has commissioned. By expanding the framework of the research and developing a strong base of key statistical data, this report builds on the data gathered and insights gleaned from studies previously commissioned by the NFVF.

The present report therefore has a strong quantitative emphasis, to begin to develop detailed transformation data sets to facilitate the assessment of industry transformation rates over time. Within this expanded framework, it is not always possible to meaningfully compare data collected in the present study against data gleaned from the narrower research carried out in the past. Nevertheless, there remains potential for future research based on the larger data sets established by this research to enable greater insight over time.

This report is therefore important in offering an expanded and detailed understanding of the current state of racial, gender, age-based, disability-based and provincially based social equity in the film and TV industry, thereby serving as a foundation on which to accurately track further changes over time.

We focus on
conditions
'behind
the camera'.



Methodology

Surveys were distributed through representative organisations and their communications networks, through social media targeting and through the NFVF database. Interview subjects were identified through a mapping of key players in the literature review (see below), in transformation lobbying associations, as well as through 'snowballing'. Key individuals and companies within the film and television sector were interviewed, with a focus on established black-owned companies. The research worked from a database of approximately 1000 individuals identified as black, from which 295 questionnaires were garnered from all nine provinces. A total of 40 in-depth interviews were undertaken.

Study Limitations

The report seeks to facilitate and extend opportunities for in-depth analysis by enabling comparative research over time and across diverse data sets. However, direct comparison with preceding research is constrained by the disparate and inconsistent processes of data collection and methods of analysis. These limitations are indicated where possible. Within the primary data collated for this research (from surveys and interviews), there have been some additional limitations to data gathering. We have not, for example, been able to access detailed data from all government agencies. Furthermore, though the research attempted various models to broaden the pool of our total target population, including through targeted snowballing to fill identified gaps, the service industry, which dominates the film and TV industry in the Western Cape, is inadequately represented in this report. The survey in particular garnered more responses from black individuals than white and therefore our comparative data pool of white owned companies and individuals is also limited.

The report seeks to facilitate and extend opportunities for **in-depth analysis**



Key Findings

Transformation remains a somewhat murky intention with little to no consensus within the film and TV industry in South Africa.

True transformation should enable companies and people of previously disadvantaged backgrounds to move beyond survival and dependence to a space of thriving independence.

Employment access of black individuals has grown by approximately 300% from data available on the film and TV industry from 2004.

Black individuals have gained ground in achieving decision making roles within the creative arena. However, this does not apply in the case of business and economic decision making such as crewing and finance. Access is further limited by gender, with women trailing behind men in all decision-making areas.

Non-black companies appear to have far greater resilience than black owned companies.

Black owned companies are more likely to hire larger numbers of black practitioners and, additionally, are more likely to hire women and youth. This trend continues for women and youth owned companies. This indicates that transformation is self-reinforcing and has a multiplier effect.

Black owned companies end up dependent on government funding and on accessing the various levels of government funding offered for film and TV projects.

The market has shifted to a recognition of the worth of content from the African continent and thus the potential of greater market access. This serves as a unique moment of opportunity for market capture and requires targeted and strategic responsiveness.

Results

The current moment in South African film and TV has unique promise which, if supported strategically through funding, can markedly increase meaningful participation in the industry for the majority. The expansion of markets for the film and TV industry – particularly internationally – is of vital importance to grow the industry. If addressed strategically, this growth can significantly impact transformation.

Networks and gatekeepers remain sizeable hurdles to transformation in an industry appreciably based on relationships, referrals and word of mouth. This is especially challenging in the context of geographies outside of the three leading film and TV cities. Mentorship, and support for companies owned by previously disadvantaged individuals, are two strategies identified to address this.

The shifts in transformation over the past 27 years and in film and TV in the past five years require dynamic and responsive strategies towards transformation. These need to be changed from a focus on access to a focus on sustainability, especially for companies owned by previously disadvantaged individuals. This is particularly important as these companies show an outsized commitment to continued transformation within their orbits.

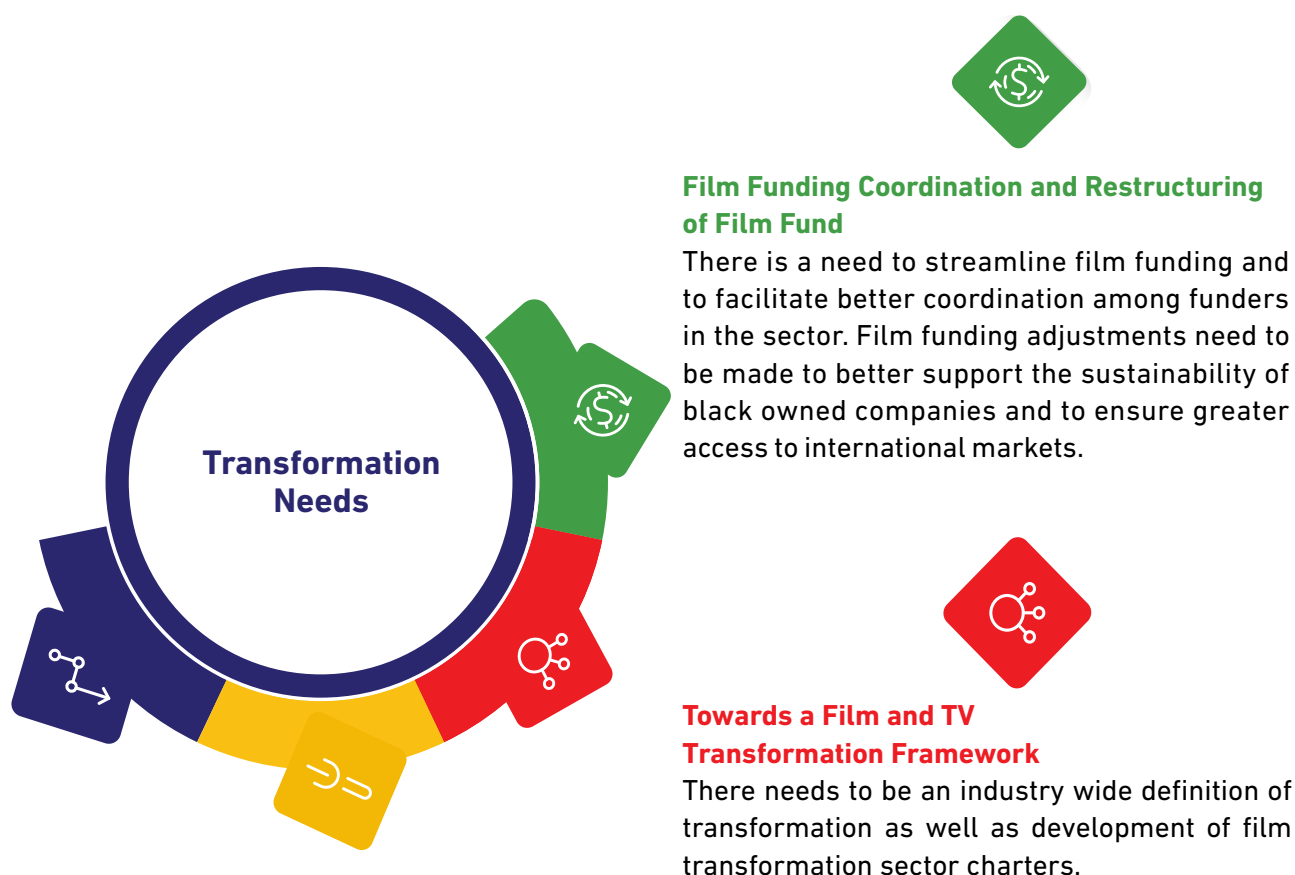


Conclusion and Recommendations

In general, there is a clear moment of strategic potential for the South African film and TV sector, burgeoned by shifts in streaming, global interest in the African continent and surging opportunities offered by digital technologies. It is clearly necessary for the South African film and TV industry to drive a strategic agenda in the best interests of the industry, in order to ensure that growth and change has broad transformation impacts with long term potential.

There are several recommendations that might assist the industry to realise transformation and in so doing grow the industry. While there have been great strides taken through various transformation interventions to facilitate the access of black individuals, women and people living with disabilities to meaningful participation in the film and TV value chain, there is much that remains to be done.

The following needs have emerged from the study:





International Market Access Strategy

There needs to be a development of an international market access strategy that will ensure the South African film and TV industry takes advantage of the growing international market opportunities.



Further Research

Several research studies have been identified to enable a better understanding of the sector in relation to transformation. These include studies on international market opportunities, which would inform the international market access strategy. Further research is needed on SPVs.

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ACRONYMS

ANC	African National Congress
BBBEE	Broad Based Black Economic Empowerment
CCIs	Creative and Cultural Industries
DASCT	Department of Arts and Culture, Science and Technology
DCDT	Department of Communications and Digital Technologies
DSAC	Department of Sports, Arts and Culture (prev. Department of Arts and Culture, DAC)
DTIC	Department of Trade, Industry and Competition
DTT	Digital Terrestrial Television
ECDC	Eastern Cape Development Corporation
GDP	Gross Domestic Product
IBFC	The Independent Black Film Makers Collective
ICASA	Independent Communications Authority of South Africa
ICT	Information and Communications Technology
IDC	Industrial Development Corporation
IP	Intellectual Property
IPAP	Industrial Policy Action Plan
ISPs	Internet Service Providers
KZNFC	KwaZulu-Natal Film Commission
LEDA	Limpopo Economic Development Agency
LGBTQ+	Lesbian, Gay, Bisexual, Transgender, Queer/Questioning and further inclusive
MICT-Seta	Media, Information and Communication Technologies Sector Education and Training Authority
NAB	National Association of Broadcasters
NDP	National Development Plan
NFVF	National Film and Video Foundation
NPO	Non-profit organisation
PWC	Price Waterhouse Coopers
RWP	The Revised White Paper on Arts, Culture and Heritage
SARS	South African Revenue Services
SASFED	The South African Screen Federation
SMEDP	Small Medium Enterprise Development Programme
SMME	Small Medium and Micro-Enterprises
SWIFT	Sisters Working In Film and Television
SPCV	Special Purpose Corporate Vehicles
UIF	Unemployment Insurance Fund
Wesgro	Western Cape Tourism, Trade and Investment Promotion Agency

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INTRODUCTION

Study Purpose, Scope and Objectives

The National Film and Video Foundation (NFVF) has commissioned Andani. Africa to undertake research to understand the extent of transformation in the film and TV industry in South Africa, with a focus on conditions **'behind the camera'**.

While earlier studies have evaluated levels of transformation in the industry, there is a need for a deep and comprehensive study that interrogates sites of transformation within the film and TV value chain ecosystem. This study is the second iteration of the transformation research project commissioned by the NFVF. It builds on the NFVF's past research, taking into consideration industry debates and insights and tracking ways in which the sector has transformed by comparing data collected in the proceeding years where possible. Further, the research undertakes a deep dive to source a wider range of quantitative data, covers a wider provincial engagement, and begins to examine a range of elements of the site of transformation that were previously neglected.

We approach this study with these critical questions in mind:

- 1 Are post-democracy policies and subsequent initiatives/programmes assisting or hindering transformation in the film industry, and to what degree?
- 2 What are the current market environments and conditions that black businesses operate in, including but not limited to, regulatory processes, competition, funding, income streams, ownership patterns, and commissioning and employment practices?
- 3 How can the South African film and TV industry be transformed in alignment with the proposed White Paper on Arts, Culture and Heritage and the government's radical social and economic transformation agenda?



The study is national in focus and covers all the nine (9) provinces in South Africa.

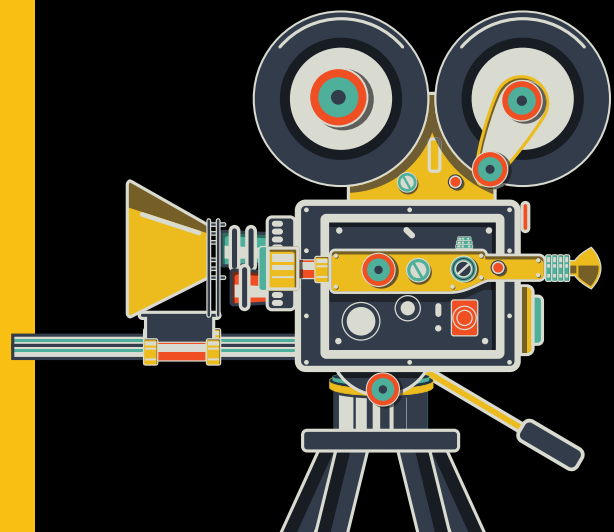


It considers the following aspects:

- National and provincial policies that have been introduced to transform the South African economy with emphasis on those that apply to the film and television industry.
- Sector or industry driven proposals and initiatives to transform the industry and enhance inclusivity and equitable participation.
- Initiatives at the local, provincial, and national level that have been established to ensure that transformation takes place in the industry and how these have contributed to transformation.
- Employment trends for black, female, youth, and provincial talent behind the camera.
- Ownership trends for black, female, youth, and provincial companies behind the camera.
- Drivers and barriers of transformation.

The research is specifically focused on the 'behind the camera' side of the film and TV industry.

This means it does not directly include actors, actresses and other 'front of camera' elements. It is rather focused on the many facets of taking a film or television show from initial development, through production and all the various elements of making a film or television show, through marketing and distribution processes, and including financing, co-production and servicing. The research includes animation in this framework; however, it is recognised that the animation sector differs significantly from the rest of the industry and therefore not all the findings for live action film and TV will apply for animation, and vice versa.

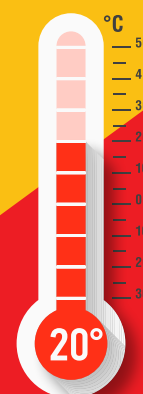


Significance of the report

The NFVF regularly conducts and commissions research, collects and disseminates statistics, and analyses South African film industry trends to monitor challenges and opportunities within the industry with a focus on annual local box office market and co-production activities, and regular industry insights on topics such as economic impact, skills, and gender.

The NFVF has undertaken several research initiatives reporting broadly on the structure of the film industry, including demographic data profiling aspects such as race and gender. In 2015, a transformation specific study was undertaken under the auspices of the NFVF entitled *Transformation in the South African Film Industry*.

The report was a broad-based temperature test for the positions and considerations of transformation in the film industry at the time. The report's primary findings addressed questions such as industry practitioners' definitions of transformation, understandings of the role of government in transformation, opinions on current policy and the potential for a transformation charter or the industry.



This report builds on previous data gathering and specific insights studies on transformation commissioned by the NFVF by expanding the framework of the research and developing a strong base of key statistical data. The material presented here therefore has a strong quantitative emphasis, to begin collating detailed data sets to enable an assessment of the transformation of the industry over time. This expanded framework means that not all the data collected in the present study can be meaningfully compared against the narrower research carried out in the past. Nevertheless, there remain avenues for future research based on the larger data sets established by this research to enable greater insight over time. This research and attendant report are therefore significant in providing an expanded and detailed understanding of the current state of racial, gender, age-based, disability-based and provincially based social equity in the film and TV industry, thereby serving as a basis on which to accurately track further changes over time.

This detailed data analysis and understanding is particularly significant in this current period for the South African film and television industry.

The relatively recent shifts presented to the global industry by streaming, and the arrival of international streaming agencies and digital platforms such as YouTube and TikTok to the African continent, and South Africa specifically, mark a shift in potential. Galvanised by the success of the full-length feature film *Black Panther* (2018), and demographic shifts within the continent, international interest in content from Africa has burgeoned. South Africa retains a narrow window as the gateway country for African industry, offering local offices, formal relationships and exciting new agreements for new productions and financing. This has vital potential for invigorating meaningful transformation in the industry.

Notable Aspects of the Methodology

The research methodology presented here has a quantitative emphasis aimed at developing a rigorous data set for statistical analysis. This approach is entirely new, as previous research into transformation has not looked to developing a broad-based understanding of the prevailing status of transformation in the industry. The data set is supplemented by in-depth interviews with industry stakeholders from enablers (funders, associations, and other support functions), key players and companies across genres and roles in the value chain, in addition to transformation lobbying bodies. This report therefore gathers a wider set of demographic data, extends across all nine provinces, and engages a broader set of research questions.

► Approach

The research approach was developed by Andani.Africa to gather detailed demographic and economic data on transformation through a survey methodology. The structure of this large-scale survey was refined in consultation with an initial focus group made up of key industry representative organisations who fed into the development of the research framework. Surveys were distributed through representative organisation communications networks, through social media targeting and through the NFVF database.

Interview subjects were identified through a mapping of key players in the literature review as well as through snowball sampling. Interview subjects were identified first and foremost through key enablers (funders and associations) and transformation lobbying associations such as Sisters Working in Film and Television (SWIFT) and the Independent Black Film Makers Collective (IBFC). Interviews were also undertaken with key identified individuals and companies within the film and television sector with a focus on established companies and those that are black owned, though not solely.

► Sample snapshot

As there is currently no reliable data on the number of film and television entities and practitioners in South Africa nor the number of Broad Based Black Economic Empowerment (BBBEE) owned entities and practitioners, developing a percentage sample based on population size was not feasible. We therefore looked to maintain a relative sample like that of the 2015 research. The 2015 research worked from the database of the Association for Transformation in Film and Television to the amount of 179 individuals identified as black, from which 26 valid questionnaires were garnered, and 22 key informant interviews undertaken across four provinces (NFVF 2015, 25). By comparison, the research from the present report, conducted from April to July of 2021, worked from a database of approximately 1000 individuals identified as black, from which 295 valid questionnaires were garnered from all nine provinces, with 40 in-depth interviews.

Survey responders as individuals or company representatives



Figure 1 Survey sample

Representation of film or television



Figure 2 Survey sample

Representation of survey respondents across the value chain



Figure 3 Survey sample

Genre representation of respondents

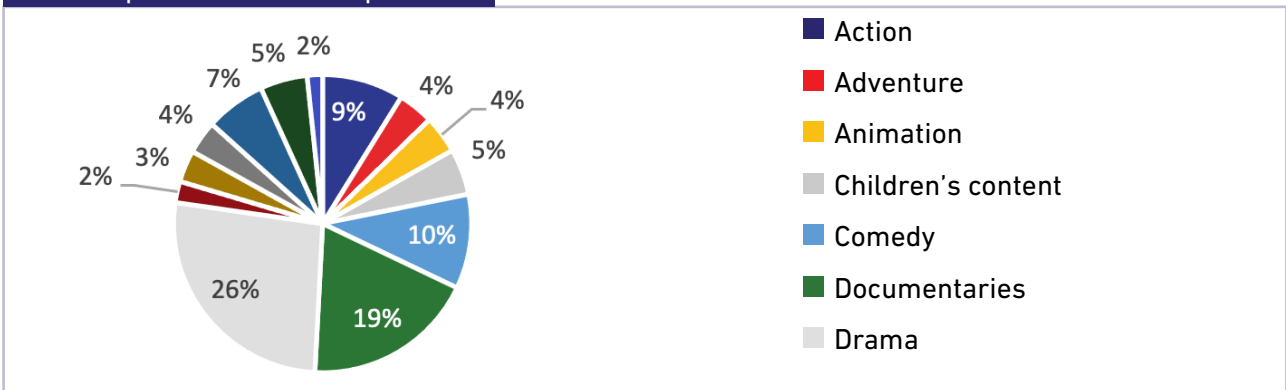


Figure 4 Survey sample

2021 total survey respondents provincial representation

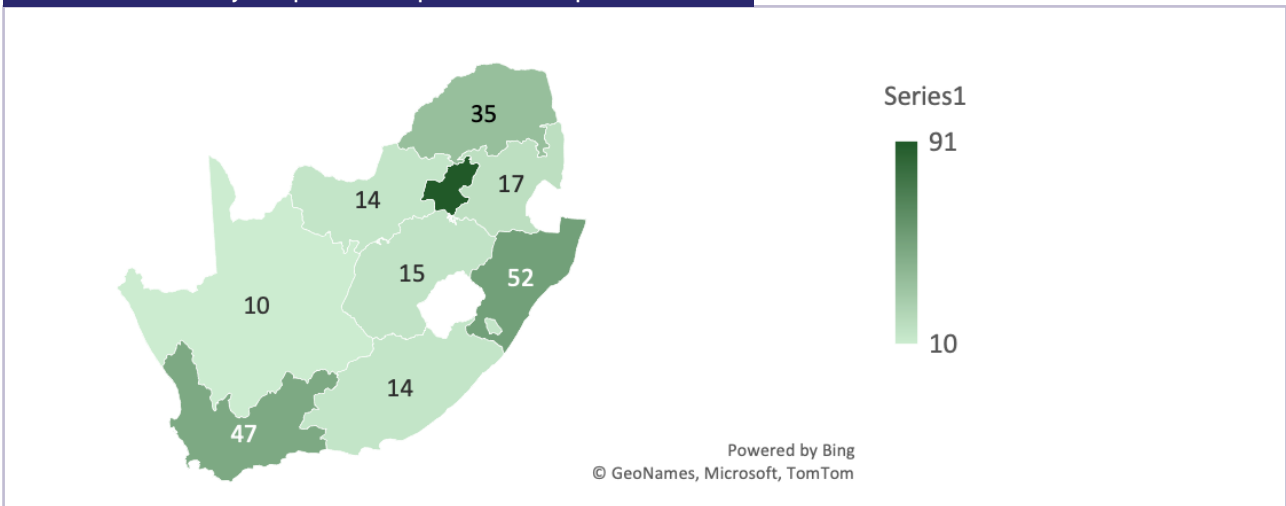


Figure 5 Survey sample

► Limitations of the research

There are some limitations to the research that shape the way in which data should be read and inferred, but that also illuminate potential for future research and in-depth consideration of key areas, which lay beyond the scope of the present research.

The first noteworthy constraint is the inability to conduct comparative analyses over time. This arises from the absence of a consistent methodology being applied across the range of disparate research undertakings regarding demographic data and transformation issues specifically for film and TV. We have therefore not been able to develop a methodology that exactly replicates all the previous ones, resulting in data that is not fully methodologically comparable. For example, some reports indicate 'black' by the broader BBBEE definition inclusive of Indian and coloured individuals, while others exclude these demographic categories.

As such, and without direct access to the raw data, a comparative analysis cannot be fully accurate.

Furthermore, the nature of collection of the data is limited in that we have identified several errors or shifts in collection methodologies. In broad, these are not statistically consequential and as such the data remains valuable for a broad overview. This said, in any comparative analysis between different research reports or years, it should be taken as given that each report likely has methodological inconsistencies. We therefore develop quantitative comparative analyses – and the literature review in particular – for a broad, speculative assessment of the data rather than an exact science. In the report, we look to enable comparative research across time and various forms of data for in-depth analysis, and we indicate, as far as possible, the limits to direct comparability.

Within the primary data collated directly for this research (from surveys and interviews) there have been some additional limitations to data gathering. We have not, for example, been able to access detailed data from all government agencies. We have detailed breakdowns only from the NFVF. The NFVF's data has a predominance of non-servicing industry film and television sector participants. We were unable to obtain data from the Department of Trade, Industry and Competition (DTIC), which would have enabled greater access to this part of the industry. Furthermore, though the research attempted various models to broaden the pool of our total target population including some targeted snowballing to fill identified gaps, the service industry that dominates the film and TV industry in the Western Cape is inadequately represented in this report due to poor response. In the context of the known demographics within the service and film and TV industries in the Western Cape, the lack of response in turn indicates a dearth of interest from white owned companies and white individuals in the region. Overall, our survey garnered a better response from black individuals than white, and therefore our comparative data pool of white owned companies and individuals is significantly limited. All data in the report is therefore slightly skewed to a higher proportion of black and black owned representation and this is evident in the statistical outcomes presented. Interviews were specifically targeted to cater for this limitation in qualitative data. Furthermore, we had a higher response rate from practitioners in the industry who are earning an annual turnover of less than R500 000 per annum. Though an effort was made to target larger companies in the industry, there was limited responsiveness to the survey. The statistical data presented in this research report therefore differentiates where relevant between trends emerging in under R500 000 and over R500 000 annual turnover companies to indicate the levels of transformation at different scales. Again, interviews were distinctly targeted to address this imbalance in qualitative information.

The intricacies of some of the under-represented parts of the industry offer potential for further engagement as they differ from the dominant parts of the sector. Areas such as the service industry, the industry in the Western Cape, and larger turnover companies are under-researched sites that could be targeted to improve understanding. There are arenas that warrant specific focus and detailed engagement that could not be covered in this research due to its broad and national focus. One of these specificities is animation – a film and television genre that operates differently from live action and shows increasing growth but limited transformation in South Africa – though some animation issues are covered in this report. Other such focused issues refer to nuances within the film and television sector such as the nature of Special Purpose Corporate Vehicles (SPCVs) often referred to as SPVs, which create subtle distinctions in understanding issues of ownership and company sustainability. This is discussed in more detail in the Recommendations section below.



LITERATURE REVIEW

A Brief Historical Overview: The impetus for a transformation agenda in film and television

South Africa's racial history plays a role in the state of transformation in the film industry. Film and television were largely governed – both in content/storyline and in industry – by the same racist laws and terms of the balance of South African life under apartheid. Films produced in this time were a portrayal of, not only the theory of apartheid, but also enforced and entrenched stereotypes and racist narratives. The roles of black workers – in front of and behind the camera – were made subservient and repressed, with funding and infrastructural support being ringfenced for white professionals. As such, film and television remained a largely racist and repressive sector.

An estimated R2 billion was spent by the apartheid government's Subsidy A scheme to enable the production of films; between 1956 and 1992 about 800 feature films were funded by this subsidy, which was reserved for white filmmakers only. Filmmakers would use their own resources and then claim about 80% of their investment back from the subsidy. The operation of the subsidy was rooted in the apartheid principles of racial inequality and lacked the logic required for coherent development and growth of the industry beyond racialisation. The films produced under these conditions had a political agenda. For the most part, they comprised Afrikaans language films with predominantly Afrikaans speaking production crews who earned more than others in the industry. Even though the subsidy was granted, only 16 films were exported (DACST, 1998).

In 1974, the Subsidy B scheme was introduced as a secondary vehicle aimed at providing funding for black Africans, with films produced in native languages. These movies were apolitical; they did not challenge the status quo nor the racial segregation policies of the country. Anyone who produced politically inflected films would lose their funding (NFVF, 2000). Although limiting, this funding scheme brought opportunities to a few black filmmakers.

South Africa's first nationwide television broadcast took place in 1976. The apartheid government's long resistance to television meant that the state-run South African Broadcasting Corporation's (SABC) first broadcast occurred about 20 years after most developed countries had started broadcasting (Evans 2014, 27). While South Africa's television history is a relatively short one, it has been tumultuous, marked by complexity and political change. After years of an oppressive apartheid regime, South Africa began to move towards democracy in the 1980s and held its first democratic elections in 1994.

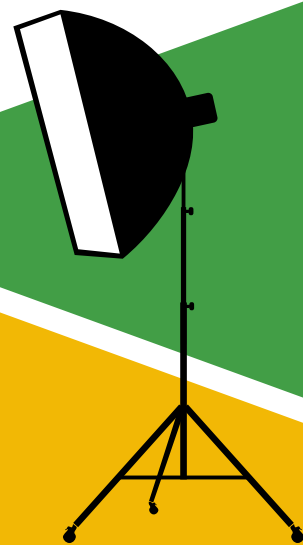
That said, the film and television industry undoubtedly played a pivotal role in the collapse of the apartheid government in the early 1990s. It was through art forms such as film that the stories of South Africans were documented for the world to see.

This was despite the distorted and stereotyped narratives of black people and black culture that the apartheid film industry had sought to disseminate (Media Monitoring Project, 1999). Through reclaiming the rich yet hidden cultures of black people, the post-apartheid film and television industry challenged and continues to challenge apartheid-engineered notions of black lives through the telling of complex black stories, the presentation of poetry and the circulation of critical song. It was in the film industry that black creatives and filmmakers were given the opportunity to narrate what was happening in their country and secure empathy from key players globally (SAHO, 2011).

Efforts to transform and restructure the film and television sector began in the immediate post-1994 period, as the new government sought to overcome the barriers left in place by the apartheid state and its racist funding and broadcasting structures. In an attempt to bring cohesion to the fragmented and complex infrastructure in the local film industry, the Department of Arts and Culture, Science and Technology (DACST) formulated the Film Development Strategy to set the tone and direction for the industry. The strategy recognised that the approximately 435 cinemas owned by two entertainment corporates (Ster Kinekor and Nu Metro), served predominantly white and Indian communities. This total, plus 120 independent theatres, contrasted sharply with the 28 facilities servicing the bulk of the black population (DACST). The strategy recommended the establishment of the National Film and Video Foundation, which came into being with the promulgation of the NFVF Act of 1997.

In the wake of the inauguration of the NFVF, the Department of Trade, Industry and Competition (DTIC, previously the Department of Trade and Industry), has initiated further strategies with a specific industry development focus. The DTIC has introduced policy and incentives to ensure the participation of previously disadvantaged groups as well as to attract international film and television investment in South Africa. These programmes and incentives include Foreign Film and Television Production incentives, the SA Film and TV Production and Co-Production Incentive, and the SA Emerging Black Filmmakers incentive. State organisations such as the Industrial Development Corporation (IDC) have introduced incentives that allow filmmakers access to finance through various instruments. The South African Revenue Services offers the Film Tax Incentive, an inducement aimed at high-net-worth individuals and corporates as a way of reducing their tax liability when investing in film. Furthermore, provincial entities have been developed with the intention of enabling greater fluency at local level, and to address access and integration of the industry beyond the largest three cities in the country.

Efforts to transform and restructure the film and television sector began as the new government sought to overcome the barriers left in place by the apartheid state.



Contemporary Strategies for Transformation in Film and Television

Notable strides have been taken towards transformation. However, these are, by-and-large, seen to be insufficient (DSAC, 2019). The following section offers a summary of the action taken by key players to bring about transformation in the industry. It is followed by an assessment, to the degree to which this is possible, of how transformation has shifted within the industry across the various transformation indicators.

NFVF

The NFVF Act 73 of 1997, Sections 3(b) and 3(e), clearly stipulates the transformation objectives of the foundation, which are:

- (a) 3(b) To provide and encourage the provision of opportunities for persons, especially from disadvantaged communities, in order to allow them the opportunity to become involved in the film and video industry.
- (b) 3(e) The NFVF seeks to also address historical imbalances in the infrastructure and in the distribution of skills and resources in the industry, by providing employment and opportunities to those who have been historically disadvantaged (Government Gazette, 1997).

The primary aim of the NFVF was to endorse a local film and television industry and to fund activities that are intrinsic to narrating the stories and lived experiences of South Africans. As a body created through legislation, the foundation's mandate reflects the transformative role that the institution is designed to play in making the South African film industry inclusive, accessible, and equitable in its development and growth. The NFVF provides funding for education and training, development of scripts, production, as well as marketing and distribution (NFVF, 2000). These funding initiatives were created to foster growth in the film industry. A second aim of the NFVF is to ensure the international competitiveness of the industry, believing that through international co-productions, skills will be transferred, and foreign investment encouraged. Consequently, the film industry provides technical and logistical assistance to foreign productions.

The report seeks to facilitate and extend opportunities for **in-depth analysis**



The NFVF has furthermore invested in initiatives including training, education and skills development programmes, to provide transformation and growth in the South African film industry. These initiatives include the Sediba Training Programme, Youth Filmmaker Project, Female Filmmaker Project, internships/Bursary Programmes and Fiction, Non-fiction and Animation Slate development programmes.



Over the past five years, the NFVF has funded 1899 black individuals and black owned companies (82% of total funding).

1899



In total, 1188 female individuals and female owned companies (50% of total funding) have received support.

1188

Though we do not have complete applicant numbers, our knowledge of a relatively male dominated industry infers that this amounts to substantial support being given to women filmmakers who would be in the minority of applicants. Between 2016/2017 and 2020/2021, the NFVF awarded 527 bursaries to students from previously disadvantaged backgrounds, with a value of just over R34.8 million. The annual budget for bursaries has decreased each year, partly due to limitations in accessing funding from the Media, Information and Communication Technologies Sector Education and Training Authority (MICT-Seta) among other issues (NFVF, 2021). Of the total surveyed, 75% of respondents indicated that NFVF funding had contributed towards transformation in their company, 92% said NFVF funding had helped to accommodate disabled individuals, and 73% said NFVF funding had assisted with youth employment (NFVF, 2014).

Department of Trade, Industry and Competition

The objective of the DTIC is to promote structural transformation with the intention of creating a dynamic industrial and globally competitive economy. It seeks to provide a predictable, competitive, equitable and socially responsible environment. It further aims to create an environment that is conducive to investment, trade, and enterprise development so as to broaden participation in the economy to support economic development. Moreover, it works to constantly improve the skills and capabilities of the DTIC as an influential stakeholder to successfully deliver on its mandate in the film industry.

The DTIC spearheads the national tax incentive programme relating to film, including the film and television rebate scheme. In addition, it offers incentives to attract investment to local manufacturing projects; among these are the:

Foreign Investment
Grant

Small Medium
Enterprise Development
Programme (SMEDP)

Skills Support Programme

To date, South Africa has entered into co-production treaties with Canada, Italy, Germany, the United Kingdom, France, New Zealand, Ireland, Australia and the Netherlands. This has played a role in enabling large-scale international film production in South Africa. Studies have shown that spending by large international productions has measurable impact, with estimates suggesting that for every R1 the DTI spends in incentives, the industry spends R4 in South Africa (including in the broader economy such as hotels, car hire and travel) (Moneyweb, 2021). The Foreign Film and Television Production and Post-production Incentive aims to grow the local film and television industry through attracting large-budget foreign based productions to utilise South Africa's locations and generate post-production activities that would benefit the industry (DTI, 2014). The Emerging Black Filmmakers Production Incentive offered by the DTI in 2015 was introduced to level the playing field to some extent for black producers who had struggled to meet the requirements for the South African Production Incentive of 2014 (DTI, 2015). This incentive was expected to grow the number of films produced locally in a year. The project has sponsored three to four emerging black filmmakers' productions each year, to the amount of R3 to R4 million annually. In 2019/2020, the DTIC joined forces with the NFVF to support the production of 10 short films by young filmmakers. These incentives are expected to lapse at the start of 2022, as announced in the National Budget of February 2021. However, the ruling is not final and remains open for public comment. The impact of the termination of these incentives is not yet determined.

Complete data measuring the DTIC's funding disbursed to black, youth and/or female filmmaker's productions is not available. However, in 2018/2019, a total of R529 487 million was disbursed to the film industry in a combination of incentives and grants; this indicates an increase from R267 505 million in 2013/2014 (DTIC, 2020; DTIC, 2014).

Industrial Development Corporation

The IDC, through the Media and Motion Pictures Division, has been productive in the equity and loan financing of large film industry projects. The Media and Motion Pictures Division is centred on supporting programmes to fund motion pictures, digital cinemas in townships, broadcasting for the development of black industrialists, and developing animation hubs and films (NFVF, 2010). The IDC capitalises on the production of content, services, infrastructures, and production in the film industry, while facilitating the entrance of new players, particularly black industrialists, into the sector through working with clients from start-up through to the completion of specific projects (IDC, 2019). It further offers support to emerging black filmmakers to develop bankable projects aimed at producing low-budget feature films (IDC, 2014).

The IDC contributed R444 million to the film and television industry in 2019 (IDC, 2020). This is up from approximately R283 million in 2010. The Media and Motion Pictures unit provided some funding to the animation genre in that year.

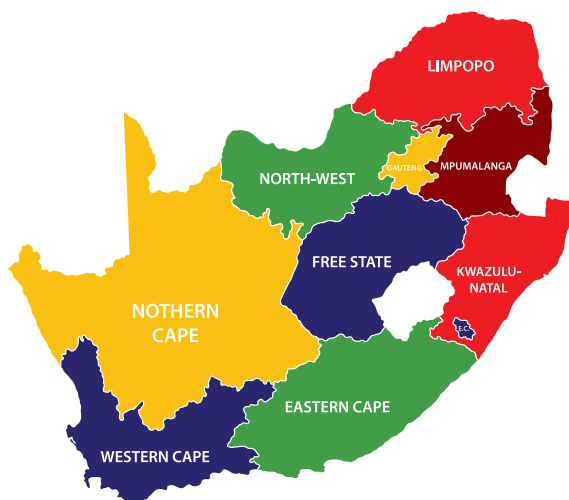


South African Revenue Service - The Film Tax Incentive/Allowance

The South African income tax system contains an incentive to stimulate the production of films within the country. The current incentive is outlined in s120 of the Income Tax Act, No 58 of 1962 (Act). Section 120 came into effect on 1 January 2012 and applies to all receipts and accruals of approved films if principal photography commenced on or after this date but before 1 January 2022. Section 120 provides for an exemption from normal tax, specifically income derived from the exploitation rights of a film. The South African Revenue Service (SARS) has also recently issued a guide reflecting its interpretation of this provision (SARS Guide).



Provincial Commissions

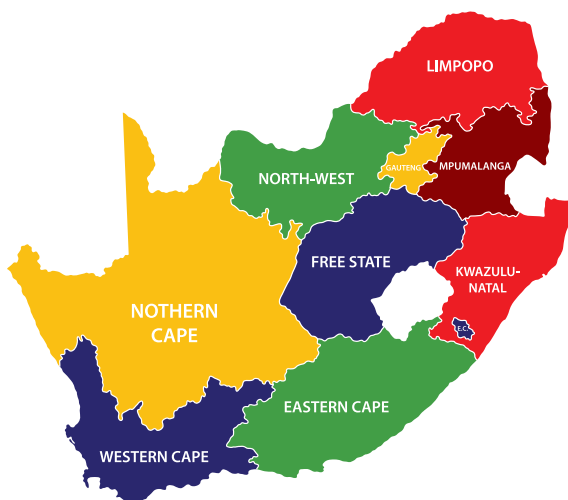


The Gauteng Film Commission (GFC) is a commission that develops, endorses, and manages film and television production in the Gauteng province. It is one of the leading commissions in the South African film industry. In 2019/2020, the GFC spent R11 517 million on programmes that included production support, audience development, distribution, post-production and research hubs, skills development, production for broadcast, script development, enterprise development and location permits. As part of the GFC's contribution to a provincial pillar of radical economic transformation, it provided training opportunities to 1009 individuals through 18 training programmes and supported the production of local content through 20 productions.

The KwaZulu-Natal Film Commission (KZNFC) was established through the KZN Film Act No. 3 of 2010, with the aim of enhancing the province's profile as a film production centre and promoting its film industry nationally and internationally. It is accompanied by the Durban Film Office (DFO), established in 2003, and a Department of eThekweni Municipality's Economic Development and Investment Promotion Unit. It is responsible for the promotion and development of the film and television industry in the city of Durban. In 2019/2020, the KZNFC indicated that it had achieved a BBBEE spending of 114% for the year against a target of 110%. In the same year, the KZNFC Film Industry transformation initiative graduates completed six productions that were shot in different locations around Durban, with the support of a team of senior producers.

Wesgro's (Western Cape Tourism, Trade and Investment Promotion Agency) Film and Media Unit aims to ensure a high standard of film production in the province. It assists with regulating and discovering co-production parties but does not provide funding or development programmes. Rather it acts as a liaison and advocate for film production in the Western Cape, in collaboration with other departments and agencies that finance film, as well as with broader government within the province. The unit provides assistance to film festivals hosted in the province and promotes the Western Cape as a region to international production houses (Wesgro, 2017). In 2020/2019 the unit reported production value spend reaching R2 189 billion in five declarations, with 2147 full time jobs linked to these productions (Wesgro, 2020). Wesgro does not provide reporting on transformation agendas or achievements.

Provincial Commissions



The Limpopo Film Commission was launched in 2016 as part of the Limpopo Economic Development Agency (LEDA), to support filmmaking in the Limpopo context. It remains small, and reporting on transformation within the film and television sector is not made publicly available.

Similarly, the **Eastern Cape Development Corporation (ECDC)** supports film within the Eastern Cape province as one small part of its larger development mandate. In 2020, the ECDC reported that it had secured and approved seven feature film projects in the province with an investment revenue of R114 million. The projected benefit to the Eastern Cape economy, over and above the investment revenue, is 2223 jobs, and 160 SMMEs are expected to benefit from the investment (ECDC, 2020). With the support of NFVF and Cortex Hub, the Eastern Cape has opened a Film Hub incubator/accelerator aimed at promoting the development of the South African film and media industry using technology. The Film Hub provides training to entrepreneurs and filmmakers in the Eastern Cape to allow them to navigate the international film industry by leveraging technology to create and edit movies that can compete globally. This hub attracts predominately black filmmakers in the Eastern Cape. The newly minted Mbombela Film Office was established in 2017 to promote Mpumalanga as a filmmaking destination. The office sets out to develop and stimulate the film and television industry as well as to attract international production to the province. As this office is relatively new, there is limited information available on the extent of its work on transformation. The North West Film Commission (NWFC) develops, promotes and coordinates the film and television production industry in North West's wealthiest region. A partner of the North West province, the commission is tasked with positioning the province as a world-class destination for filmmaking, as well as attracting local and international investment in the film and television industry. International films, including the romantic comedy *Blended* (2014), have been filmed in North West, creating employment as well as stimulating the local economy.

A Select Overview of Efforts towards Transformation since 2006

The table below provides an overview of a select range of imperatives from the perspective of the state, as they have emerged over the years. The overview points to the development of targeted interventions as greater understanding of the industry and its transformation needs have emerged (such as slates and specific funds). It also points to the material differences in budgets and their potential impacts across different bodies. The data is taken primarily from annual reports and compared over time as far as is possible.

	2006/7: Annual reports of various entities: NFVF, DTI, GFC, IDC	2014: (20 Years of NFVF and GFC) Annual reports of various entities: NFVF, DTI, GFC, IDC	2019/20: Annual reports of various entities: NFVF, DTI, GFC, IDC
Imperatives addressing inclusion and transformation as regards race	Realisation of a lack of shortlisted applications by black and female filmmakers resulted in development of filmmaking talent through indigenous language and women directed short film contests.	By 2014, most funding from funding agencies accrued to black owned companies or PDIs.	Need for greater participation by emerging black filmmakers results in the NFVF/IDC/DTI Emerging Black Filmmaker Transformation Fund, which supported four projects to the tune of R3'050'000.00 in 2019/20.
	NFVF granted 50 bursaries for full time studies, 92% going to black applicants in 2006/7.	NFVF granted 116 bursaries for full time studies, 84% were black applicants (53% were black males and 31% black females) in 2014.	NFVF granted 68 bursaries (due to a drop in funding) for full time studies, 88% were black applicants.
Imperatives addressing inclusion and transformation as regards gender	Realisation of a lack of shortlisted applications by black and female filmmakers resulted in development of filmmaking talent through the indigenous language and women directed short film contests.	The Female Filmmaker Project to produce 10 female led short films.	The NFVF and KZNFC funded 11 short films that were developed and produced by 10 female filmmakers from South Africa. A further 22 films by women were funded in this year.
	NFVF granted 50 bursaries for full time studies, 34% of the bursaries were awarded to female students.	NFVF granted 116 bursaries for full time studies, 37% were female.	

Imperatives addressing inclusion and transformation as regards youth	In 2006/7 the NFVF annual report identifies the need to address youth participation in the film and TV industry and plans put in place.	By 2014 the Youth Filmmaker Project produces 10 youth led short films.	The NFVF and DTIC funded 10 short films developed and produced by 10 young South African filmmakers.
		NFVF started an internship programme placing 30 interns.	In 2019/20, 120 interns were placed.
		Provincial roadshows undertaken predominantly targeting youth involved or interested in the industry.	1421 learners participated in NFVF's school programme.

Imperatives addressing inclusion and transformation as regards disability	None reported in annual reports.	None reported in annual reports.	None reported in annual reports.
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Imperatives addressing inclusion and transformation as regards training, development and production	Developed 10 feature film scripts in 2005. Developed 14 commissioned SABC drama projects, aired in 2006-2008.	42 projects funded for development by NFVF. 33 production projects funded by NFVF. 5 TV concepts have been supported for development by NFVF.	80 development projects funded. 46 production projects funded. 3 co-production activations were implemented.
	25 local, foreign and co-productions approved by DTI incentive scheme.	137 film and TV productions supported by DTI.	*Annual report not available at time of reporting
	50 bursaries awarded.	116 bursaries awarded.	68 bursaries awarded.

Disbursement DTI (in total, not transformation specific)	R97 million.	R267.5 million.	R529 million.
Disbursement NFVF (not transformation specific)	R32 million.	R94.6 million.	R96 million.
Disbursement IDC (not transformation specific)	Not available.	R192 million (in 2013).	R444 million.
Disbursement GFC (not transformation specific)	Not available/unclear.	R4.6 million.	R11.5 million.

Ongoing Efforts: The South African Audio-visual/Film Reference Group

The South African Audio-visual/Film Reference Group (Reference Group) was established by the Minister of Sport, Arts and Culture. The Reference Group, according to its terms of reference, serves two purposes. Firstly, it is an industry tactical forum with a mandate to implement the recommendations of the inaugural South African Film Summit that took place on 4-5 February 2019. Secondly, it serves as a consultative forum between DSAC and industry that addresses and responds to issues that impact the sector directly and indirectly.

The breakaway commission on 'Empowerment, Inclusivity and Capacity' made two key recommendations to accelerate transformation at the South African Film Summit. The establishment of a South African Audio-visual Charter and a Bargaining Council were recommended as part of the short terms goals to be achieved between 2019 and 2021. The establishment of the Reference Group in 2019 enabled continuity towards the achievement of the short, medium, and long terms goals that were set to give effect to various recommendations. A Transformation Charter and Bargaining Council subcommittee has laid the groundwork towards the establishment of a sector transformation charter and a bargaining council. This coincided with the Department of Labour and Employment engagement with the sector regarding a possible sectoral determination. The Reference Group is made up of industry organisations including SASFED, the Cultural and Creative Industries Federation of South Africa (CCIFSA), the Independent Producers Organisation, SWIFT, and the South African Arts and Cultural Youth Forum. Government stakeholders represented include the NFVF and DCDT.

REFERENCE GROUP

INDUSTRY ORGANISATIONS

- ▶ SASFED
- ▶ The Cultural and Creative Industries Federation of South Africa (CCIFSA)
- ▶ The Independent Producers Organisation,
- ▶ SWIFT
- ▶ South African Arts and Cultural Youth Forum

GOVERNMENT STAKEHOLDERS

- ▶ NFVF
- ▶ DCDT

Industry Representation and Transformation Agendas

The film and television industry is relatively well represented – in comparison with other South African creative industries – by a broad spectrum of professional and advocacy associations. The South African Screen Federation (SASFED) is the national federation of independent film, television and audio-visual industry organisations in South Africa. It represents approximately seven full member organisations and nine associate organisations.



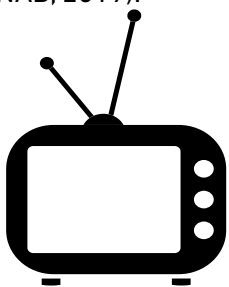
As a federation, SASFED represents key concerns for the industry including policy change, broadcasting, and advocacy. In terms of transformation, SASFED asserts its opposition to discrimination and oppression and its support for non-racialism, non-sexism and democracy. Based on this position, the federation encourages its member organisations to adopt policies and programmes specifically engaged with transformation agendas. While each organisation hosts a transformation agenda, two member organisations are issue based, with a focus on concerns of transformation and representation. These include the Independent Black Filmmakers Collective (IBFC) and Sisters Working in Film and Television (SWIFT).

Through SASFED's broader policy and advocacy submissions to consultative processes with government entities, we are able to gather a broader impression on transformation even though no detailed position or research from SASFED is currently publicly available. SASFED has indicated that 'policies of transformation related to access, equity and diversity have undoubtedly been a driver of industry growth and development, including in content and aesthetic development'. It added, however, that more needed to be done, including the employment of more women in positions of seniority and at creative/craft level (SASFED, 2009). SASFED has also identified the need for co-productions and pre-sales with shared Intellectual Property rights as the best way to ensure true empowerment and transformation within the industry (SASFED, 2015). Furthermore, SASFED has undertaken broad advocacy campaigns regarding pandemic support and relief efforts offered by government, the new copyright bill, the Independent Communications Authority of South Africa's (ICASA) local context regulations, and engagements with the national broadcaster, some of which include transformation concerns.

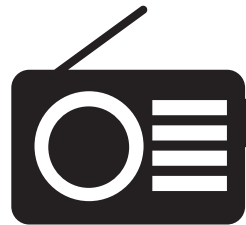


The National Association of Broadcasters (NAB) represents the broadcasting industry, particularly at private level.

The NAB has undertaken extensive research into the sector, some of which directly points to key transformation statistics. The data indicate that as far as private commercial broadcasting is concerned, 67.3% of television broadcasters and 62.3% of radio broadcasters are black owned (NAB, 2019).



67.3%
black owned



62.3%
black owned

According to ICASA, this is primarily due to community broadcasting services, which constitute a critical avenue for transformation within the broadcasting arena. Community radio is collectively the third largest tier of broadcasters nationally with 8.8 million listeners found in mostly rural areas across all the provinces. Community radio holds about 26% of the national radio audience (NAB, 2019). Unfortunately, the share of audience does not translate into share of revenue, which remains a serious challenge to the sustainability of community channels. This constitutes a significant impediment to transformation, where the most transformed arenas struggle to remain sustainable, operating – in similar ways to black and women owned companies and individuals – within a state of precarity, which is oppositional to growth and development.



The state of transformation in the industry more broadly

The state of transformation in the film and television industry can be loosely pieced together from a range of reports on the sector, each of which engage with the subject in various ways. In each case, the data reports differ in terms of methodology, terminology, and various other important factors, which preclude us from adequately comparing statistics and findings. That said, together they make up various interesting puzzle pieces that give us some sense of an incomplete image of transformation in the sector. These different pieces are discussed below, and where possible the limits to comparability are indicated.

Race

Overall, reports point to a high level of participation of black individuals in the film and television industry on average – though this does not hold in the Western Cape with the ratio of white:black at 55:22 (Wesgro, 2017). Though there is high participation, the levels, employment terms and power of black individuals are not equitable to their sizeable participation, particularly when measured against white participation in the industry. An early report in 2004 undertaken by the HSRC (2004, 8) indicates that ‘amongst permanent employees the white:black ratio is 59:41, the ‘black’ category here including black Africans, coloured and Indian employees. The opposite is the case amongst the freelance/ temporary category, where the white:black ratio is 23:77’.

This remains the case more than 10 years later. The NFVF Impact Report (2017) points to the fact that black individuals (in this case black is determined as a separate category from Asian and coloured) are far more likely to be temporary staff than other races. There was also a correlation between high skills and permanent employment, and low skills associated with temporary employment; from this we might surmise that black individuals are less skilled on average. This points to serious limitations in the training of black individuals within the film sector, and thus a lack of mobility into professional – and more permanent – roles. This has expanded, knock-on effects as far as transformation is concerned. The high percentage of black temporary employees indicates much higher rates of black individuals with intermittent incomes, a lack of social security such as medical aid or contributions to the unemployment insurance fund (UIF), among other concerns endemic to the gig economy. This would have aggravated impacts during the SARS Cov-2 Pandemic, which significantly affected freelance and temporary workers throughout the arts industry (SACO, 2020).



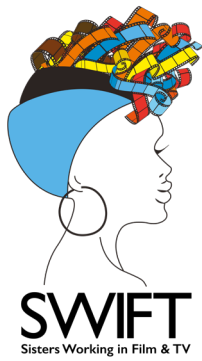


Figure 6 Diagram taken from the NFVF Impact Report (2017)

Anecdotal evidence indicates this is also a concern in regard to ‘creative’ or ‘senior management’ roles within the industry (NFVF, 2015), and highlights the relative juniorisation of black staff. Only a few individuals have been able to break into senior roles that impact decision making, hiring practices and the stories that are told. This is even more the case for black women, who are impacted by intersectional limitations that compound their race and gender disadvantage and result in further barriers to attaining senior positions (NFVF, 2018). Several other key issues have been raised in regard to participation of black practitioners in the industry including challenges to SMME development, cash flow, and business management expertise among others. However, no quantitative data accompanies these concerns. The ramification of race in relation to transformation plays out in complex ways and suggests that broad participation does not address the many obstructions intrinsic to black experiences within the industry.

Gender and sexuality

In 2004, the HSRC report found that more males than females were employed in the industry, and that the male:female ratio was slightly higher (61:39) among permanent employees than freelance/temporary employees (56:44). This trend continues, with a higher concentration of women in temporary work. By 2017 Gender Matters (NFVF, 2017) reported 15.78% of women being employed full time and 37.66% freelancing, as a consequence of hiring practices within the industry. Similarly, as discussed above for black individuals working in radio broadcasting, this results in precarity that remains a greater burden for female workers in the industry.



Sisters Working in Film and Television (SWIFT) is a non-profit organisation (NPO) that represents women working in the film industry, and advocates for gender and race parity.

For SWIFT, precarity has sweeping impacts, with women having to make difficult choices arising from their limited capacity and power within the industry. SWIFT notes that 70% of respondents to the Gender Matters report felt that they had been discriminated against based on their gender, and more than 23% disclosed that they had been violated. SWIFT and the NFVF stand for better working environments for women, and for the eradication of cultures of harassment and subjugation of women in the industry (Thobega, 2017).

The Gender Matters report indicates that the absence of transformation has multiple effects that reinforce a lack of transformation in a vicious cycle. Women tend to be restricted to certain roles within the industry, which in turn curtails their power to effect change and influence. This is evident from the positioning of women in front of, instead of behind, the camera; furthermore, those who are 'behind the camera' are typically concentrated in stereotypically female roles such as wardrobe.

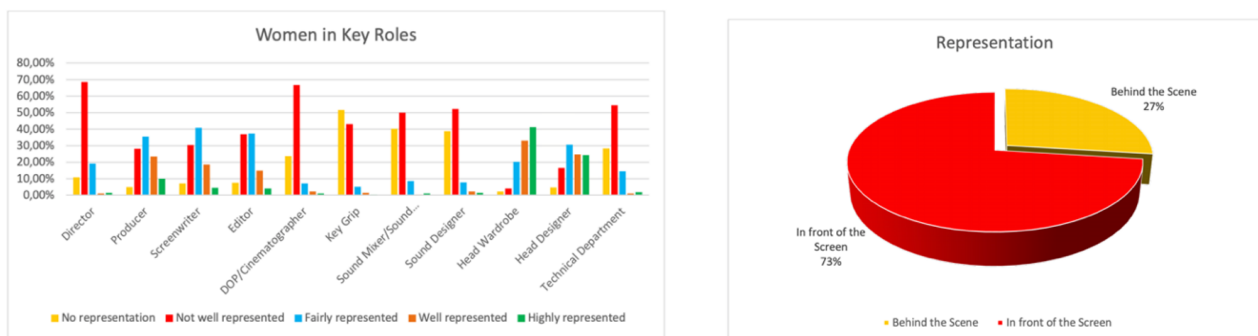


Figure 7 Charts from NFVF Gender Matters report (2017)

This lack of access to roles, and permanency, for women working in the industry belies their generally highly trained status. South African women filmmakers are largely skilled, with the majority (52.15%) having gone through formal film school training, and another 31% having acquired their skills through experience, or being self-taught. Others have participated in mentorships and learnerships, while 7.34% have learned through other mechanisms, such as attending workshops, conferences, and film festivals.

In an effort to address the power dynamics within the industry, the NFVF has introduced the Female Filmmaker project. This is an intervention intended to provide female entrants, particularly those from historically disadvantaged backgrounds, with an opportunity to produce a short film in collaboration with other female writers and directors. It is a skills development programme that seeks to enhance the skills of female filmmakers and mentor them through their short film project. The Female Filmmaker project is targeted at emerging filmmakers who aspire to be great directors/writers and who have not had the opportunity to make a commercial film either for television or cinema. The successful production company must manage, execute and deliver 10 films each year, over a period of three years, of which each must be made by a team of mostly female filmmakers with women occupying all key creative roles.

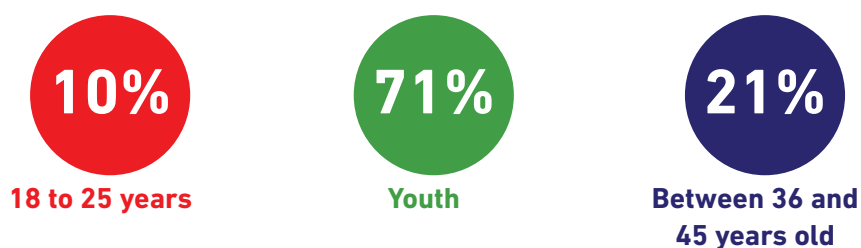
In addition to gender, sexuality remains of concern within the spectrum of diversity in the film industry. Notwithstanding that the South African Constitution forbids discrimination based on sexuality, there remain cracks in the representation of people of diverse sexualities and members of the LGBTQ+ community in the sector. The voices of LGBTQ+ individuals remain confined to the margins when it comes to the South African film industry (Botha and Swinnen, 2010). Yet the releases of feature films like *While You Weren't Looking* (2015) and *Inxeba* (2017) suggest that transformation in the South African film industry is progressing (Page, 2017; Sosibo, 2015). These feature films, in the context of contemporary South Africa, are honouring and showing the multiplicity of the lived experiences of sexuality in South Africa. Presently however, no quantitative data are publicly available on LGBTQ+ participation and narrative presence in the industry.



In addition to gender, sexuality remains of concern within the spectrum of diversity in the film industry.

Age

Also key to the transformation picture in the film and television industry is the entry and participation of youth (age 16 to 35). In 2007, more than half of the filmmakers who had made films were in the category of 25 to 35 years of age, with just less than a third being 36 to 45 years, and 10% being 18 to 25 years of age; therefore, 65% of filmmakers were classified as youth. Importantly though, in comparison to the total sample population of the 2007 study, 71% were classified as youth and only 21% were between 36 and 45 years old, thus indicating that there were more 'middle-aged' filmmakers who have actually made films.



Since the 2007 study, much literature has focused on employment data rather than on the actual 'making of films'. These data consider the degree to which young people are integrated into the industry. In a 2013 study of graduate absorption, the NFVF indicates 69.2% of graduates were absorbed into the film industry (NFVF, 2013). The study examined the experiences of 52 graduates of film and television programmes of whom 35 (21 black, 5 coloured and 9 white), were employed. It revealed that of the 52 respondents, 17 (13 black, 2 coloured, 1 Asian and 1 white) had not yet been absorbed into the film industry's labour market. The study also revealed that about 83% of the respondents were employed in the TV sector after graduating and 16.7% were employed in fields that are not related to the film and TV industry although they were qualified for that sector (NFVF, 2013). The NFVF (2017) also found that 73% of all employment created by the film industry between 2013 and 2015 was among the youth, although in this case youth was determined as between the ages of 25 and 39. The research further noted that this employment uptake remained in the unskilled and semi-skilled markets, which does not immediately point to potential for upward mobility of young people within the industry (NFVF, 2017).

Wesgro (2017) found a similar trend, indicating age categories vary depending on skill level and position within the organisation. Staff at lower levels or entry levels are aged between 16 and 24 years, which represented 22% of respondent employee data, while those positions that require high levels of skill and decision making tend to be aged between 40 and 64 years of age (31% of respondent employee data). However, the majority (47%) of staff within the industry are aged between 25 and 39 years and are considered skilled staff members. While this is not unsurprising considering skills and even training emerge with age, it does point to a relatively low level of skills at entry level.

This may be an outcome of the processes of skilling themselves, with the 2016 NFVF skills report pointing to a divide between the level of skills and work readiness that education institutions believed themselves to be providing, and the opinions of industry players and workplaces. This is of concern, as it points to a potential hurdle for youth entry into the industry, which might be based on perceptions of insufficient education. The report indicated that when asked whether graduates' qualifications prepared them adequately for employment or the workplace, a quarter (25%) of respondents believed they were well prepared, 30% felt that their qualification had prepared them, 38% believed that their qualification had prepared them fairly well; while one person (6%) did not feel it had prepared him adequately for the workplace. By comparison, when employers were asked whether they thought that institutions of higher learning (universities or other training institutions) had adequately prepared graduates for working in their companies, the overwhelming majority (72%) said no, while 14% felt that graduates were somewhat prepared, and a further 14% thought that they were adequately prepared. For lecturers, when asked 'Do you think your institution prepares its graduates adequately for the world of work in the film industry?', most respondents (89%) said yes.

The NFVF Youth Filmmakers Project provides recent graduates of film schools, particularly those from historically disadvantaged backgrounds, with an opportunity to make their first professional short film in collaboration with a mentor/producer. The aim of this initiative is to build, strengthen and nurture first time writers and directors so that they can produce their first film with all the support necessary to achieve the highest level of storytelling and production values. The successful production company must manage, execute, and deliver 10 films each year over a period of three years. This project begins to bridge the above stated gap of youth readiness to work in the industry.



Disability

While many areas of transformation are tackled head on in the industry, disability remains relatively invisible as an agenda across the board. For the industry to be fully transformed, it is essential that all people who have been historically disadvantaged are included. Thus, people with disabilities need to be included and represented in the film industry. In mainstream films and TV, characters with disabilities are constantly subjected to pity, scorn and defamation (Watermeyer, 2006). However, people with disabilities, especially black women, are crowded together in lower levels in the production and distribution process in the film industry and they are paid less when compared with able bodied people (Bhavnani, 2007). It is rare to find disabled filmmakers in the industry. This means that their voices are silenced. Unquestionably, there is a need to include and allow people with disabilities to participate at all levels in the film industry and not be hindered because they are disabled (Bhavnani, 2007).

The Independent Communications Authority of South Africa (ICASA) has provided codes in which the broadcasting industry is implored to provide access for people with disabilities as this is a basic need for them (Lotz, 2017). Beyond this, very little incentive, advocacy or research exists on the current status of individuals living with disabilities within the industry, with most of the research pointing to little to no participation (NFVF, 2015, 2017, 2018).



Gaps in the Literature

Within this overall review some key gaps emerge in the data. In some cases, qualitative accounts mention that there has been some change in the representation of black people at 'creative' or senior management levels in the film and television industry (SASFED, 2015), but that these movements cannot be attributed to transformation agendas, but rather to the hard slog of those individuals. Furthermore, evidence points to notable engagement of youth within the industry, but there is little detail on the specifics of the roles they play nor on the potential for mobility.

Similarly, there is extensive evidence drawing on more than 10 years of programmes focused on supporting youth, women and black filmmakers, but no literature available to provide detail on career trajectories or to track the impacts of these programmes in terms of engagement with the industry once an individual moves on from the programme, or a film is made. As such, there is evidence of a significant disconnect in understanding the direct nuances of transformation in the industry. This is partly due to limitations in the consistency and quality of data collection on transformation over time. Research aimed at filling these gaps would have worthwhile potential for greater understanding and longer-term monitoring of transformation within the film and television industry, as well as measuring the impacts of initiatives and programmes towards transformation.



While some of these gaps can be identified and introduced in this report, their true aggregate meaning will only be possible **through ongoing monitoring and evaluation.**

POLICY, TRANSFORMATION, AND DEVELOPMENT IN SOUTH AFRICA

Introduction

Since 1994, several policies have been developed mainly at national level to give effect to the economic and socio-economic imperatives linked to film and television. The key players in the policy development landscape for film and television are DSAC, the Department of Communication and Digital Technologies (DCDT) and the DTIC at national level. The ambit of policies developed nationally deals with institutional arrangements, funding for the various value chain activities in the production cycle of creative and cultural industries (CCIs), as well as the regulation of content linked to the democratisation of airwaves post-apartheid. The lack of government coordination, which often leads to policy incoherence, is attributed to the often-competing mandates of the various implementing agencies. Terminology forms an important part of the policy incoherence: film and television is often referred to as film and video, or audio-visual media. Ultimately, film and television are subject to policies that are developed in the areas of broadcasting, trade and industry and arts, and culture and heritage, led by different government departments.

The social cohesion agenda led by DSAC, which recognises the role of arts, culture, and heritage to bridge societal divisions across race, religion, and culture in South Africa, places the sector at the centre of nation building. The job creation potential of the film and television industry cements the duality of the sector in terms of its social and economic imperatives in the South African policy landscape.

At the provincial level, departments of Sports, Arts and Recreation as well as of Economic Development and Tourism, play an instrumental role in supporting the CCIs, especially film. In the Eastern Cape, Gauteng, Mpumalanga and North West provinces, films form part of the broader sports, arts, and recreation portfolios. In the Western Cape, KwaZulu- Natal and Limpopo, film forms part of economic development and tourism initiatives resulting in the adoption of an economic/trade focus compared to a cultural development focus.

At local government level, there have been few support strategies let alone policies that have been developed to support CCIs. KZN, the Western Cape and Eastern Cape are the only provinces where there are local/regional and city level film interventions.

Transformation Policy Discussion



Transformation in South African society is framed in different ways that resonate with the various policy contexts for film and TV's place in our society as discussed earlier. We have transitioned from 'black economic empowerment' to 'broad based black economic empowerment', and more recently, to 'radical economic transformation'. The ultimate goal of transformation in South Africa is to achieve an inclusive society through tackling the triple challenges of inequality, unemployment, and poverty.

The DTIC is the custodian of South Africa's framework for black economic empowerment and subsequently, broad based black economic empowerment. For the purposes of this research, it is important to acknowledge the slow pace of transformation both in terms of racial and gender participation, as discussed in the Literature Review section. One of the setbacks for film and television sector transformation is the lack of a sector transformation charter. A sector transformation charter can be developed either in terms of Section 9 or Section 12 of the BBBEE Act. Such a charter serves to encapsulate what the various sector stakeholders aim to achieve by setting out transformation targets. Charters have been developed by the Marketing, Advertising and Communications sector, the Print Media, and Tourism sectors as examples.

Policies that have identified the CCIs for social and economic transformation in SA

The ANC's Reconstruction Growth and Transformation: Building A New, Inclusive Economy discussion paper (ANC, 2020) has the objective of building a new, inclusive economy in the wake of Covid-19 and has identified sectors of the economy for priority intervention. The CCIs have been selected along with other industries. The ANC proposes that online platforms for the distribution of creative products should be established and strengthened. This flows from one of the changes observed in consumer behaviour necessitated by Covid-19, which has driven the growth and uptake of digital content development and online consumption. Digital access to online content is acknowledged as a matter of public interest. The ANC recommends that online dissemination of cultural products (including filmed content) must be encouraged, supported, and incentivised.

The National Development Plan (NDP), developed in 2009, maps South Africa's socio-economic development trajectory towards 2030, with the aim of, among others, eliminating poverty and reducing inequality. The NDP acknowledges the role of the cultural industries to foster social cohesion and its contribution towards job creation. Several interventions have been proposed to support the sector, such as:

- Providing financial and ICT support to artists to enable the creation of works expressing national creativity, while opening space for vibrant debate.
- Strengthening the Independent Communications Authority of South Africa's mandate for nation building and value inculcation.
- Incentivising commercial distribution networks to distribute and/or host art.
- Developing and implementing plans for a more effective arts and culture curriculum in schools with appropriate educator support.
- Supporting income-smoothing for artists in a special unemployment insurance scheme and evaluating funding models for such initiatives.
- Developing sectoral determination legislation frameworks to protect arts sector employees.



Online dissemination of cultural products (including filmed content) must be encouraged, supported, and incentivised.

Key Film and Television Policies

There are several policies that impact on the film and television industry directly and indirectly. For the purposes of this research, the focus is on those policies that have a direct impact on the transformation of the sector. This is in terms of the configuration of the arts, culture and heritage sectors, which includes the audio-visual sector.

The Revised White Paper on Arts, Culture and Heritage (RWP), 2020

The RWP is South Africa's cultural policy. It sets out the government's approach and various interventions in the cultural landscape. It took many attempts to revise the White Paper on Arts, Culture and Heritage after 1996, when South Africa's first cultural policy was developed. Some of the notable outcomes of the 1996 White Paper on Arts and Culture is the establishment of 'arm's length' institutions (the arm's length principle ensures freedom of expression in arts and culture and grants to artists are given with no political strings attached), which included the National Film and Video Foundation, to give effect to the objectives of the enabling legislation. There are two important developments that are introduced by the RWP that impact on the film and television sector. These are principles of transformation as well as the reconfiguration of film and video as it was known in the NFVF Act, one of DSAC's implementing agencies.

The principle of transformation in the RWP is centred around an arts, culture and heritage sector that reflects the demographics of an African society with diverse cultures. This entails the reconfiguration of personnel, programmes, and collections, exhibits, performances, and events. This deals with some of the inequalities of the past, which have led to access to the arts as well as distribution of arts infrastructure such as cinemas, film studios and post-production, being concentrated in areas that were predominantly white. Access to the means of production including film finance is recognised as among the barriers to entry that continue to evolve and are influenced by several factors.

Audio-visual media is one of the arts, culture and heritage disciplines that has been reconfigured to replace 'film and video' as it was known in the 1996 White Paper. Audio-visual includes film, television, photography, video, and broadcasting. There are several reasons for this change, including technological developments as well as South Africa's adoption of UNESCO's cultural domains. The RWP outlines the objectives to be implemented by the proposed South African Audio-visual Council whose oversight will vest in a consolidated National Arts, Film and Audio-visual Council.

National Industrial Policy Framework (NIPF), 2007

The NIPF sets the South African government's approach to industrial development of the economy. The 13 strategic programmes, which include sector strategies, industrial financing and trade policy, are iterated in the Industrial Policy Action Plan (IPAP) annually. The film and television sector is one of the beneficiaries of IPAP as part of the support intervention for the creative industries including crafts and music. The Film and Television Incentives programme introduced in 2004 is regarded by the DTIC as one of its success stories for IPAP as it has enabled South Africa to compete globally and driven growth for the local production sector. The Film and Television Incentives programme is discussed in detail within the Literature Review.

Digital Migration Policy for South Africa, 2008, as amended in 2015

The objective of the then Department of Communications led policy was to chart South Africa's migration from analogue signal to digital. Though marred by policy changes and legal challenges related to encryption, the policy remains significant for the South African film and television industry. South Africa missed the June 2015 deadline for set switchover, a move that was expected to transform the broadcasting landscape by making available technology for the roll-out of digital terrestrial television (DTT) services in South Africa. One of the policy objectives of DTT was to develop the creative industries and local content. The benefit for content creators was the anticipated growth in demand for content for the anticipated DTT channels, to fill the gap for content from provinces, youth, and in multiple languages. The advent of digital broadcasting was seen as a means to reduce the digital divide and information gaps that remain prevalent. The proposed establishment of provincial digital content generation hubs was meant to transform the film and television industries, which remain largely centralised in Gauteng and the Western Cape. The rollout of set top boxes continues with provincial switchover being implemented to date. Notably, a digital content fund was proposed to support the development of digital content, but this did not come to fruition.

The National Integrated ICT Policy, 2016

The objective of the National Integrated ICT Policy for the film and television industry is the attainment of universal access to and universal service across communications platforms, services, applications, and content. The television and film industry benefits from the regulation of broadcasting services through the imposition of local content quotas for television. These have evolved over the years to also set quotas for content that television broadcasting service licensees must procure from the independent production sector, and for setting budget percentages that must be spent in the procurement of content outside of the established provinces.

The urgent need to bridge the digital divide in South Africa has been brought into the spotlight by the Covid-19 pandemic. Access to education, government services and the ability to afford content streaming services with the required bandwidth and data has exposed the depth of the digital divide. ICASA is currently working on the much-anticipated licensing of high frequency spectrum technologies, which are expected to reduce South Africa's high data costs especially for the prepaid market.

Draft White Paper on Audio and Audio-visual Content Services Framework, 2020

The DCDT's White Paper, 2020 proposes necessary policy changes to the ways in which broadcasting services on radio and television are configured and regulated, to drive technological improvements after many years of lagging behind. One of the key proposals in the White paper is to bring non-linear broadcasting services within the ambit of regulation in South Africa. The introduction of international streaming services in the broadcasting landscape has prompted regulators such as the Film and Publication Board and ICASA to attempt to introduce regulatory measures. The challenge remains that the broader environment including the overarching policy and subsequent pieces of legislation are out of date. The often piecemeal approach has led to policy incoherence and uncertainties that impact negatively on the film industry especially from a global investor and business perspective.

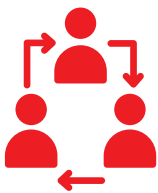
There are two proposed policy changes that will transform the film and television industry in terms of anti-piracy and funding for the sector. The proposal for internet service providers (ISPs) to cooperate with rights holders and measures to prevent signal piracy will help to curb the negative impact to content creators of revenue loss arising from piracy. The call for institutional and funding mechanisms for the audio-visual sector acknowledges the difficulty experienced by content creators to raise finance from the NFVF, IDC, DTIC, SARS and provincial film commissions. The desired policy outcome is an optimum funding mechanism that supports content creators at local, provincial, and national level.

Transformation to South Africa's Copyright Regime

The Copyright Amendment Bill (CAB), 2017 has been introduced to reform South Africa's outdated Copyright Act, 1978. The Performers Protection Amendment Bill, 2016 (PAB) was introduced to amend the Performers Protection Act, 1967. Both Bills have been subject to rigorous debate in terms of the proposed changes that they will introduce to the rights regime for the CCIs. President Ramaphosa has not signed either Bill. Both were referred back to the National Assembly for further consideration. The President indicated his reservations about their constitutionality. The contentious provisions of the CAB related to incorrect tagging, provisions that are viewed as retrospective and arbitrary deprivations of property. Both Bills should be considered against South Africa's treaty obligations such as to the World Intellectual Property Office Copyright Treaty, the Performance and Phonographs Treaty and the Marrakesh Treaty. The amended Fair Use provisions of the CAB were not put out for public comment before the publication of the final Bill. The PAB contains cross references to these provisions that deal with copyright. This is in respect of the ability of performers to authorise fixations of performances for films and sound recordings. The share of royalties on the use of such sound recordings and films is dealt with as part of the related rights that form part of copyright. Members of the public had until 9 July 2021 to submit comments on specified provisions on Fair Use and copyright to the Portfolio Committee on Trade and Industry.

Synopsis

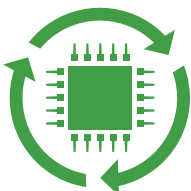
The South African transformation debate in the film and television industry requires many interventions to address the inequalities caused by apartheid. These are prevalent within the industry value chain in the form of barriers to entry such as access to the means of production, film training, funding and infrastructure that enables the distribution and exhibition of filmed content. Part of the transformation requires:



Improved policy coordination and collaboration among the key players such as DCDT, DSAC and DTIC including industry organisations.



Implementation of long overdue policy changes to bring policy abreast of technological and market driven changes.



Transformation in film and television is multifaceted; it reaches beyond demographics and requires the digital divide to be closed to facilitate access by all to the digital economy.



The BBBEE Generic Scorecard currently applies to film and television enterprises. The Reference Group has made a recommendation to DSAC to initiate a sector transformation charter in terms of Section 9 of the BBBEE Act.

MAPPING TRANSFORMATION: FINDINGS OF THE INTERVIEWS AND SURVEYS

The contemporary context for transformation

The meaning of transformation for the film and television industry

The goal of an industry wide Transformation Charter is a long-held aspiration that has faltered since at least 2004 when the former Cape Film Commission held a workshop to begin the discussion. The NFVF's research on transformation (NFVF, 2015) showed a near 50/50 split in the perceived impact of a transformation charter for the industry, with many feeling it would not be influential where most needed. The same report found that within the South African film and TV industry, the

'definition of transformation is quite complex and sometimes misunderstood. While there is a common understanding that transformation is another word for 'change', what counts as transformation/change is still contested' (NFVF, 2015).'

More than five years later, it becomes clear that this remains the case. The lack of a clear definition of transformation for the sector has real implications.

Of the many associations and enablers of the sector interviewed – including government associated entities – only two had formal transformation policies or agendas for film and television. None of the industry associations had developed a policy or guiding document, though many indicated an intention or in process commitment to this kind of clarifying document. This identifies a potential lack of urgency or lack of knowledge in the arena of identifying clear intentions and metrics for transformation. It became clear through the various interviews with practitioners across the ecosystem of the film and television industry that there were many conflicting positions on what transformation is, what a transformed industry looks like, and at what point – and on what terms – the industry might be able to claim success in the arena of transformation.

Transformation remains a somewhat murky intention with little to no consensus within the film and TV industry in South Africa.

Are industry associations engaging with transformation issues?

■ yes ■ no ■ somewhat ■ Not sure

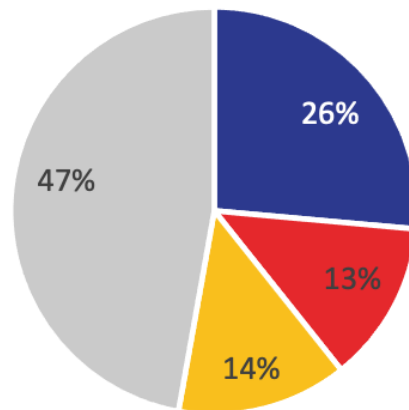


Figure 8 Perceptions of industry associations. Data from 2021 Survey

This is not just a film and television industry issue, but a broader South African one, as well as one of serious concern across the creative and cultural industries. Furthermore, the South African economy is, by and large, considered materially untransformed. Though numbers point to relatively high participation of black individuals in the economy, this is predominantly at lower levels with commensurately lower incomes. Within the creative industries, research by the South African Cultural Observatory (SACO, 2019) indicates slightly less transformation in general representation (i.e. not articulated for levels of participation and income) than in the economy more broadly. Our survey results point to comparable rates of participation by race in the film and TV industry as identified in the graph below. However, the complexities and intricacies of this industry make the usual markers of transformation difficult to discern. The National Treasury of South Africa indicates that:

Inclusive growth requires broad-based transformation to break down structural impediments to new economic activities, deconcentrate industries dominated by few participants, accelerate the inclusion of millions of black South Africans into jobs and businesses, and return to a path of rising per capita incomes for all (Treasury, 2017)

Rates of participation by race in the various delineations of the economy

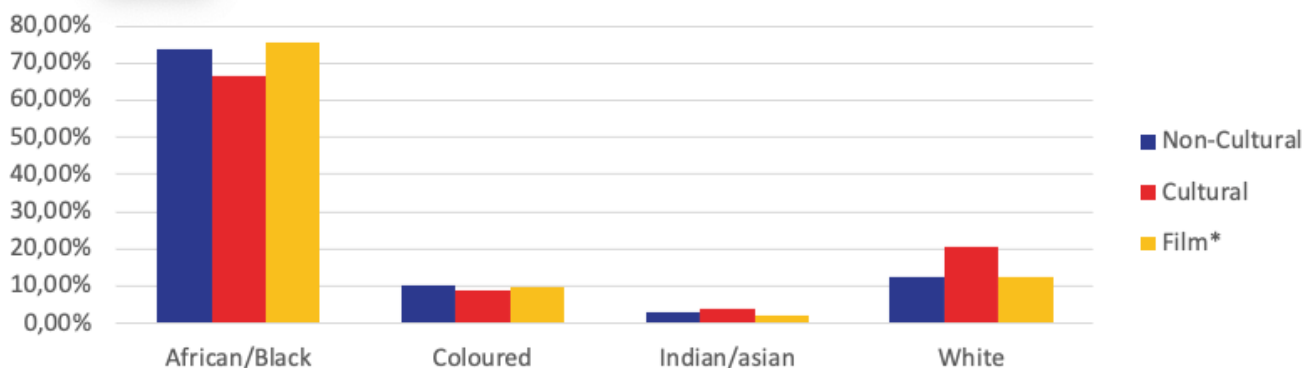


Figure 9 Participation by race. Data from 2019 SACO and 2021 Survey

The challenge is how to identify the rate at which this is happening and the degree of change that is considered acceptable: to what degree should barriers be broken down? To what degree should de-concentration happen? At what rate should acceleration of inclusion happen? And importantly, by when? Broad Based Black Economic Empowerment (BBBEE) indicators – the base marker for transformation in South African economic issues – such as ownership and employment are perceived by many to be misleading. In many cases, such as commissioning by the SABC or until 2017 DTIC funding, BBBEE indicators were not definitive requirements for financial support by government or its agencies. Moreover, the number of BBBEE exemptions granted to small companies, together with complex financing models such as SPCVs for each film, circumnavigate some of the usual frameworks for assessing transformation. These realities, as well as the large freelancer core of the labour force, make the industry difficult to measure against the usual metrics and as such it is difficult to enforce the usual transformation standards.

For many black and woman owned companies and practitioners in the sector, transformation is also more nuanced than BBBEE metrics suggest. Importantly too, in an industry constantly changing, the way in which we understand transformation needs to shift with it. Over and over again, interviewees pointed to the fact that employment representation or even ownership of companies was not enough:

True transformation should enable companies and people of previously disadvantaged backgrounds to move beyond survival and dependence to a space of thriving independence.

This aspiration has significant implications for the kinds of state support granted to the industry, and the way in which understandings of transformation have shifted as the sector has become more representative. It needs to be recognised that transformation is no longer simply about access; it is about sustainability.

Black and African stories in demand

The past five years have seen strong global growth in interest in stories by and from black and African storytellers – driven by global shifts in the kinds of stories being told and the markets interested in accessing them. A report by McKinsey (McKinsey, Dunn and Onyeador, 2021) found that ‘by addressing the persistent racial inequities [in Hollywood], the industry could reap an additional \$10 billion in annual revenues – about 7% more each year’. This economic drive together with social shifts pushing for greater representation, are enabling shifts in the industry in Hollywood. Another report out of the United States (Smith, Choueiti and Pieper, 2018) points to the growth of representation, indicating that ‘between 2007 and 2017, 7.3% of films came from black directors. However, in 2018, that figure rose to 18%, with 18 of the 100 top grossing movies directed by black filmmakers’ (Obenson, 2018). Closer to home, a Price Waterhouse Coopers report (PwC, 2017) found that Nollywood contributed \$660 million (2.3%) to the gross domestic product (GDP) of Nigeria, but expected this to grow to \$1 billion by 2021 (number estimated prior to the pandemic). The attention paid to the African continent by international players such as Netflix has pointed to the growing value of African stories – as well as the global markets for them. Netflix has indicated that for every one view in South Africa of a South African title, there are on average 26 views of that same title outside of South Africa (Vermeulen, 2021). For some South African titles such as *Shadow* (s1, 2019), this number goes up as high as 62 international views for every one South African view. Similar trends can be seen from South African broadcasters whose content has shifted to represent a growing financially influential market (often referred to as the black middle class) within South Africa who demand local stories, in local languages, developed and produced by diverse teams.



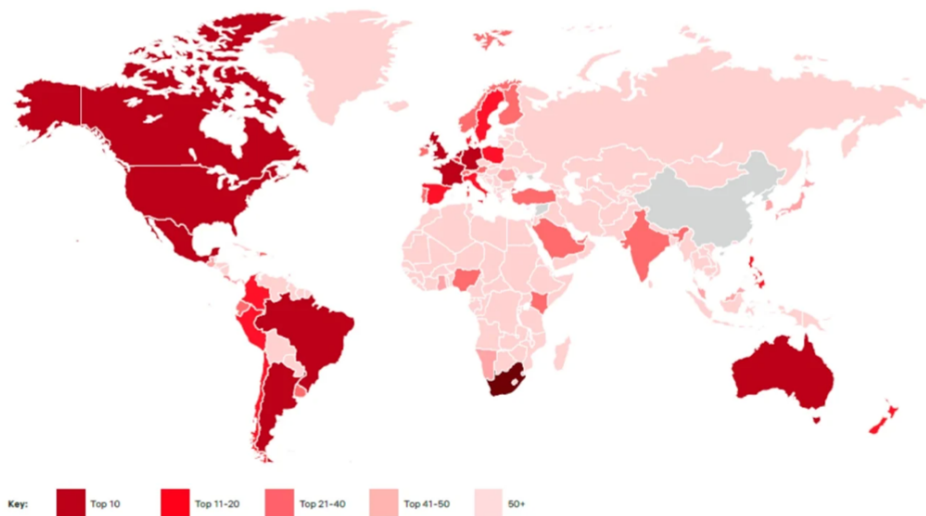


Made in South Africa, watched by the world

Great stories from South Africa can be loved everywhere. With members in more than 190 countries around the world, Netflix provides subtitles and dubbing for the vast majority of our content so members can enjoy it no matter what language they

speak. This raises the profile of local productions that are made in South Africa around the world, introducing homegrown talent from in front of and behind the cameras to new audiences and boosting their careers.

TOP 50 COUNTRIES WHERE SOUTH AFRICAN CONTENT IS VIEWED OUTSIDE OF SOUTH AFRICA



1 : 26*

For every one view of a South African title during the first four weeks of availability on Netflix by South African households there were 26 views of South African titles on Netflix by households outside of South Africa.

Blood and Water S1 1 : 35

For every one household that chose to watch Blood and Water during its first four weeks on Netflix, there were 35 households that chose to watch it outside of South Africa.

Queen Sono S1 1 : 30

For every one household that chose to watch Queen Sono during its first four weeks on Netflix, there were 30 households that chose to watch it outside of South Africa.

Seriously Single 1 : 56

For every one household that chose to watch Seriously Single during its first four weeks on Netflix, there were 56 households that chose to watch it outside of South Africa.

Shadow S1 1 : 62

For every one household that chose to watch Shadow during its first four weeks on Netflix, there were 62 households that chose to watch it outside of South Africa.

* Data: based on 84 shows available on Netflix between 16 Sept 2014 - 26 July 2020

Figure 10 Netflix infographic. Accessed through mybroadband.com 10 July 2021

In interviews with industry players in the film and television sector, there is a staunch sentiment that the industry, both locally and internationally, has reached a turning point in acknowledging the promise of representative storytelling by representative teams – and this is a major marker of the potential for transformation within film and TV in South Africa. However, all interviewees noted that while this opportunity is ripe for the picking, it requires strategic, targeted action to truly take advantage of its potential.



Understanding career journeys and the value chain in relation to transformation

It is vital to understand transformation as it plays out in various ways across the value chain. This is important in order to identify what the McKinsey report identifies as 'pain points', which we might define as blockages, ceilings, barriers and other concerns that stand in the way of industry transformation. By mapping these onto the value chain we are able to locate the specific points for potential interventions, and we are also better able to trace the pathways to be followed in the creation of a film or television series.

However, to focus on the value chain alone is to maintain a myopic view of the activity chain as being made up only of 'products' or the projects that are made – rather than by the individuals and/or companies that make them. Within each career journey can be found an additional layer of identification, enabling further deconstruction of the various pathways of productivity in the film and television value chain and exposure of the pain points that limit career or company development and transformation.

A brief and simplified mapping of these pain points over the chains and pathways of productivity within the film and television industry is presented below. While these maps are simplistic and explore only a selection of major issues in the sector, the balance of the report provides additional detail to disentangle the specificities of how these pain points play out along the journey, as well as some of their impacts. It is also important to recognise that while there are pain points along these journeys, there are also vital moments of 'keeping the door open', breaking through barriers, developing strategies, and identifying gaps, which all together enable greater transformation and offer the potential to grow and strengthen transformation with the right support. These aspects are discussed in more detail later in this report.

A complex, interdependent value chain filled with dozens of hidden barriers and other pain points reinforces the racial status quo in the industry. Based on research, McKinsey catalogued close to 40 specific pain points that black professionals in film and TV regularly encounter as they attempt to build their careers (McKinsey, Dunn and Onyeador, 2021).



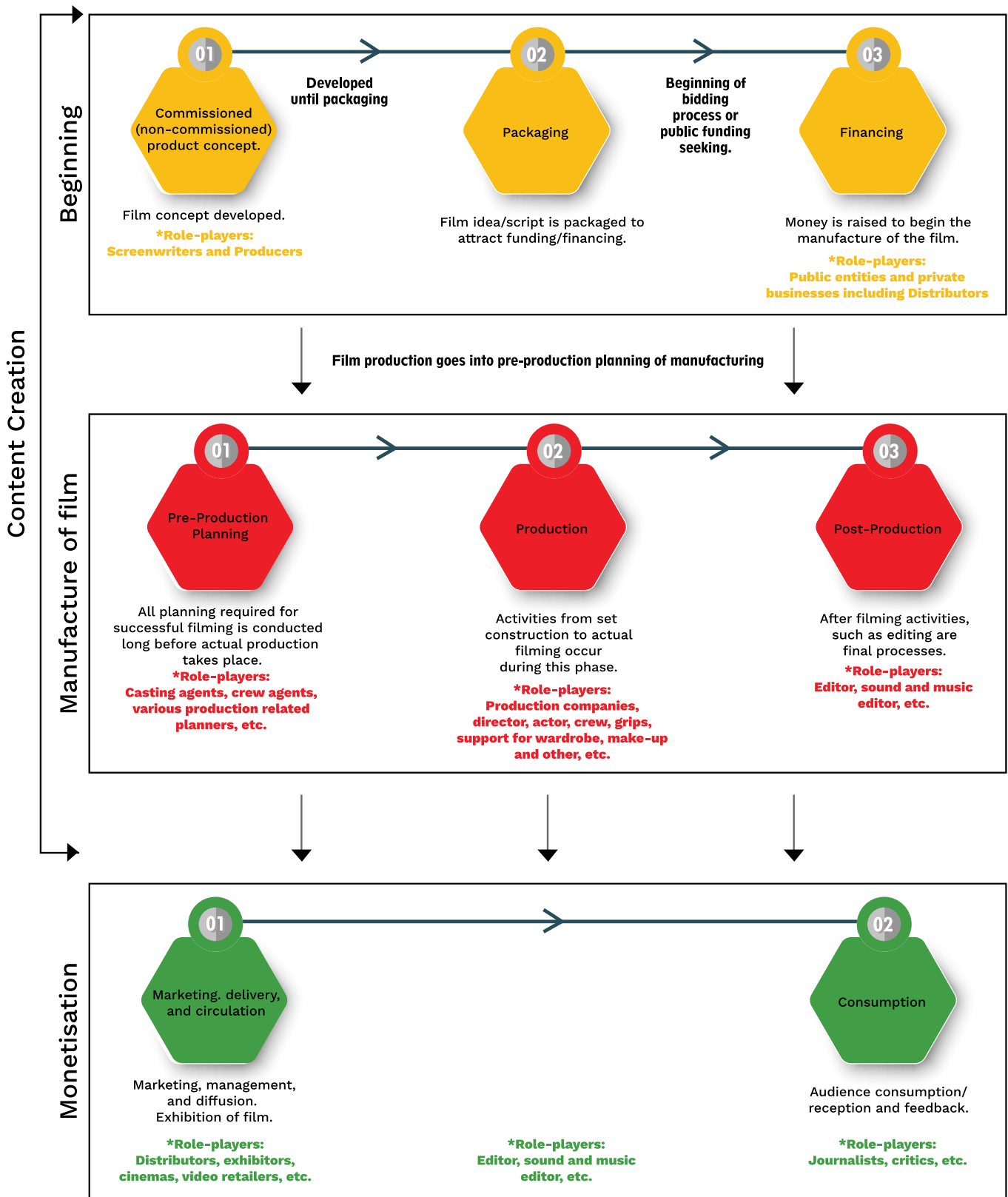


Figure 11 Film and TV value chain from NFVF Economic Impact Study Report (2017)

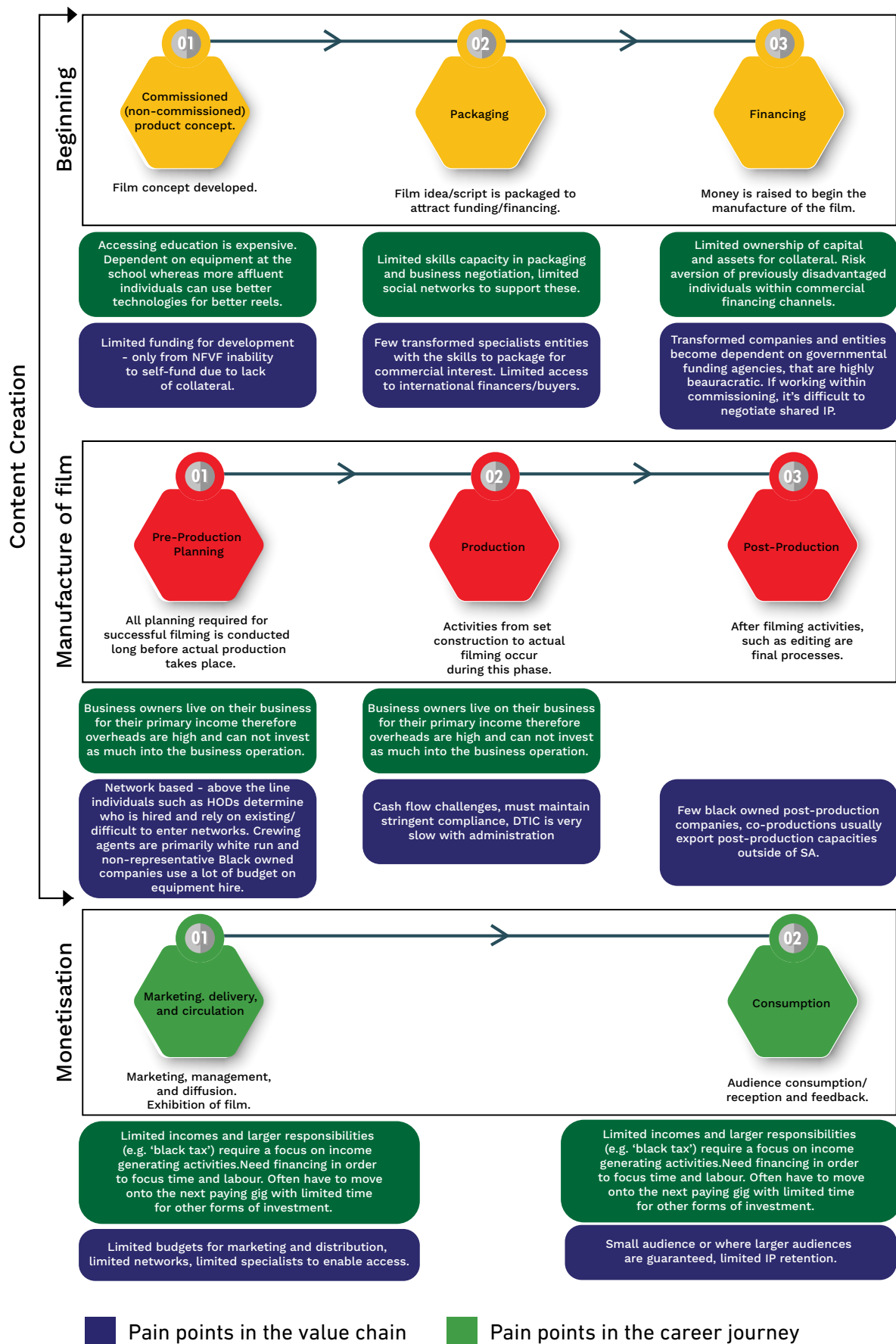


Figure 12 Value chain pain points. Data from 2021 Interviews

Current Industry Dynamics

The survey results point to a significant proportion of black owned companies in the film and TV industry when compared to white ownership. As noted earlier, black is identified by the terms of BBBEE and includes Indian/Asian and coloured ownership. Ownership is identified on the basis of 51% title holding, while turnover is listed at pre-pandemic averages. While the data provide a sense of the emergence and development of black start-ups and ownership of companies, the results should be considered in light of the limited response received from the services industry. Furthermore, the ratio of black:white ownership decreases among companies earning over R500 000 per annum, indicating that black ownership is not interchangeable with transformation or living wage levels in the film and television industry. The data moreover suggest variances of access and participation within the industry itself, and the range of companies that enablers such as the NFVF seek to develop and support. This in turn influences how the notion of transformation is understood.

Company ownership by race in the film and television industry

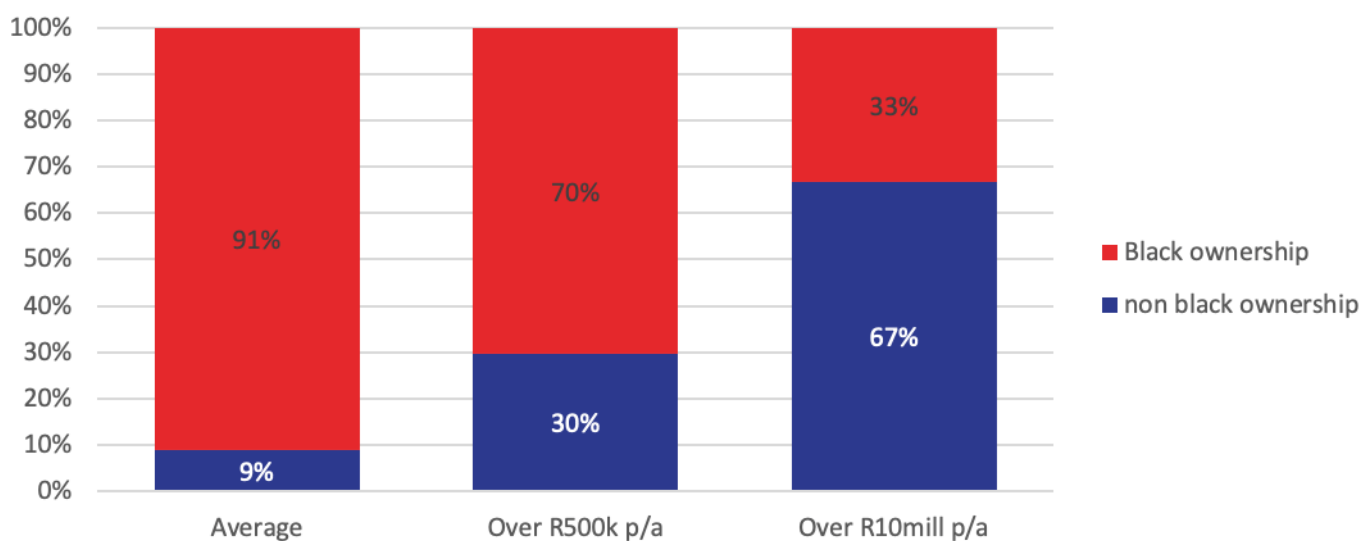


Figure 13 Black ownership measured against turnover. Data from 2021 Survey

At an individual income level, we see similar patterns showing a larger representation of black individuals at the lower rung, although a sliver of high-income earners appears. By comparison, a balanced spread across income brackets is shown in the case of white individuals.

Income brackets to race representation of individuals working in film and television

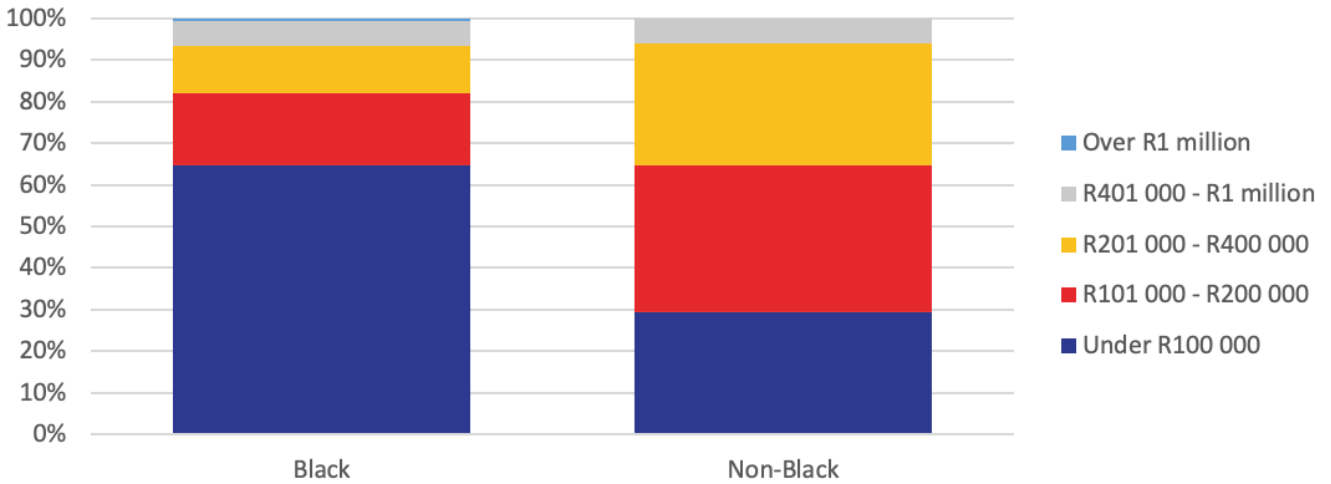


Figure 14 Distribution across income brackets for white and black individuals. Data from 2021 Survey

Corresponding patterns emerge for female ownership of companies as with black owned companies, though a notable decrease appears at the point of companies earning more than R10 million. In the case of respondents to this survey, no companies earning more than R10 million were recorded as having black female ownership. This points to both race and gender as a compounded barrier to transformation at the intersection of participation and access to the sector. Again, we see that female ownership of companies is not the same as meaningful participation of women in the industry, and this is particularly the case for black women.

Ownership on the basis of gender of companies in the film and television industry



Figure 15 Female ownership measured against turnover. Data from 2021 Survey

At the individual level, we see diverging rates of participation when compared by gender and income. Men outnumber women at every level of participation and income, and this is further pronounced at lower income levels. While the South African population breaks down at close to 50% male and 50% female, the survey shows that men participate in the industry in higher numbers than women. As income levels rise, the ratio between female to male participation reduces. This suggests that women predominate in technical – and lower paid – roles. Several interviewees pointed to sizeable difficulties lying in the way of identifying female technicians. This finding echoes one made in the Gender Matters report (SWIFT and NFVF, 2018), indicating that women are more likely to be forced out of the industry because of their inability to earn enough to support their families. In turn, this would explain why more men are able to remain in the sector and make progress along the value chain.

Gender against income bracket when considering overall industry participation

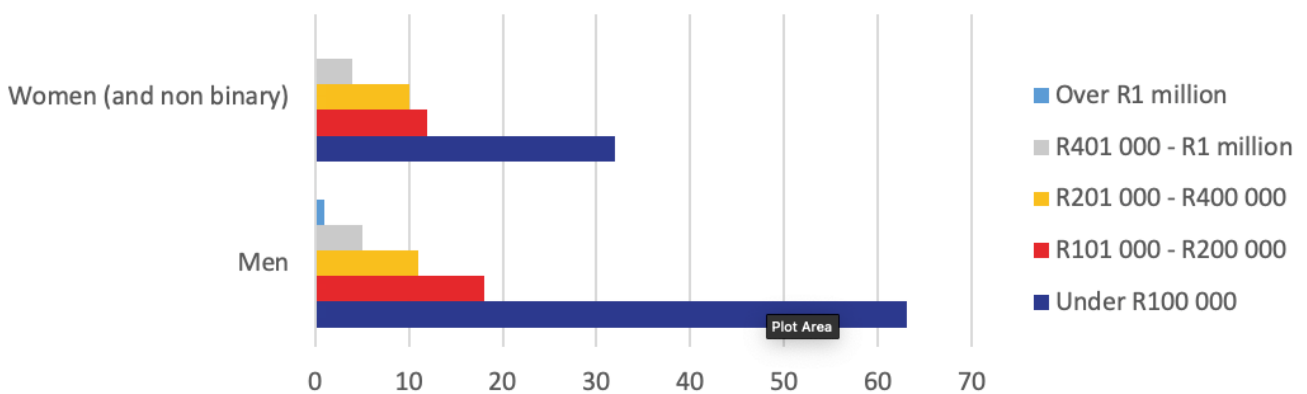


Figure 16 Income brackets for men and women. Data from 2021 Survey

In the case of companies owned by youth and people living with disabilities, the survey results showed limited meaningful participation, and little to no participation, in each of the two categories respectively. On the other hand, while large numbers of youth owned companies participate in the industry broadly, the number drops off steeply when annual turnover reaches above R500 000. Similarly, at an individual level, there is a high representation of youth at low-income levels, but this tapers off as income levels rise. Furthermore, interviewees expressed concern about the industry’s growth potential in the face of limited scope for upward mobility, with young people in particular reaching a ‘bottleneck’ where their progress to higher income brackets was constrained by older practitioners’ inability to ‘free up space’ for newcomers.

People living with disabilities are barely represented in companies’ ownership structures, appearing in only 2% of companies surveyed including in the over 51% ownership bracket.

Only 10% of South African film and television companies in total have any representation in their ownership structures of people living with disabilities.

This drops to 0% ownership and 1% representation on ownership structures once turnover of R500 000 and above is considered; in this instance only white owned companies earning more than R500 000 showed any representation of people living with disabilities in their ownership structures. Interestingly however, at the individual level there is relatively wide representation of people with disabilities across income brackets. This suggests there are opportunities for people with certain disabilities to enjoy meaningful engagement within the industry – and this is true across races. There is potential for further research in this arena.

Ownership on the basis of age of companies in the film and television industry



Figure 17 Age-based ownership measured against turnover. Data from 2021 Survey

Income bracket to age group representation of individuals working in film and television

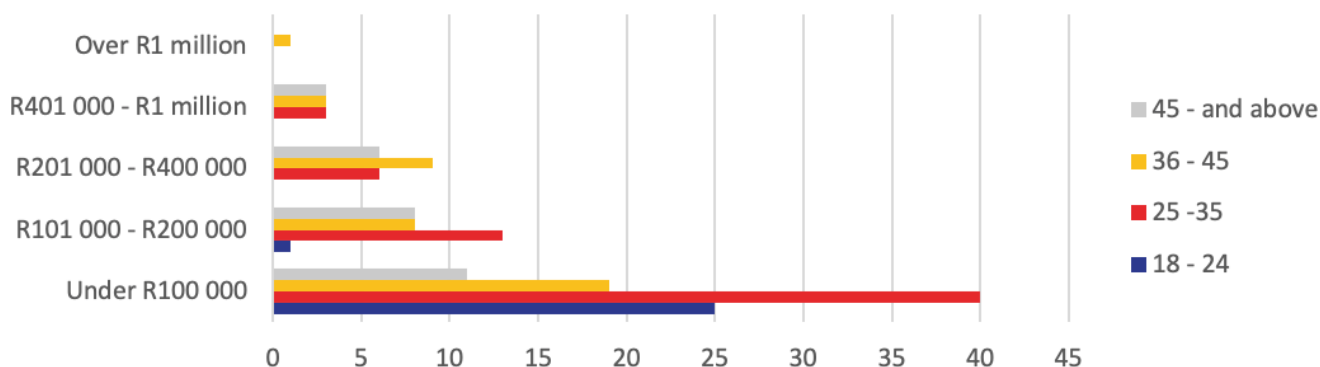


Figure 18 Youth by income bracket. Data from 2021 Survey

Representation of people living with disabilities in ownership of companies in film and television

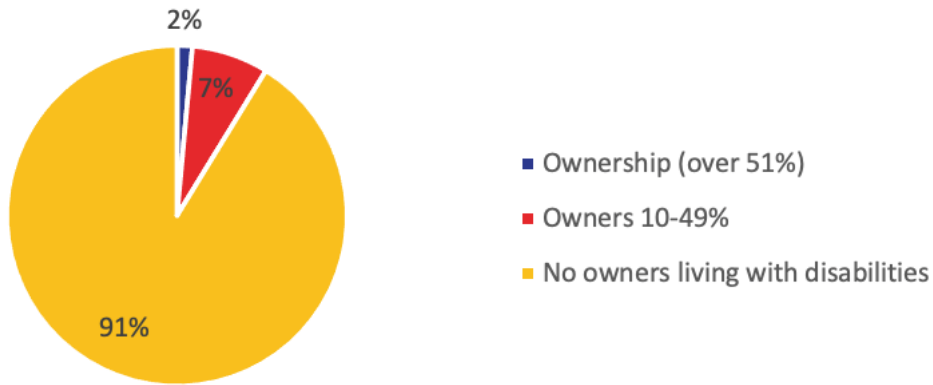


Figure 19 Ownership rates of people living with disabilities. Data from 2021 Survey

Income bracket to representation of individuals living with disabilities working in film and television

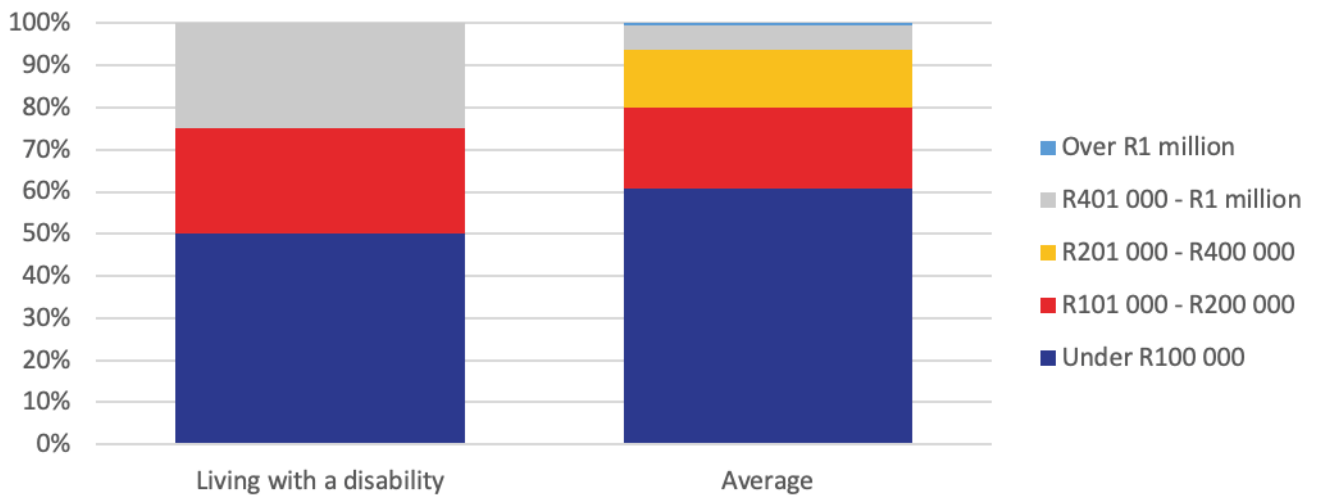


Figure 20 People living with disabilities by income bracket. Data from 2021 Survey

As far as provincial reach is concerned, the industry is best represented in Gauteng, the Western Cape and KwaZulu-Natal. This distribution is consistent with previous reporting (NFVF, 2015). We also see a wider band of income brackets in these three provinces, with a tapering off of representation across all nine provinces as income brackets rise. This indicates high levels of low-income employment in the sector in provinces such as Gauteng, KwaZulu-Natal and the Western Cape, but with higher income potential to work towards. By comparison, Limpopo province shows a relatively large level of participation in the sector, but limited potential for growth in income generation. These corollaries are repeated across the other five provinces. Importantly, the data presented in Figure 21 must be understood in the context of low levels of participation in the survey by larger companies and the service industry in the Western Cape. Anecdotally, the Western Cape's statistics are likely to mirror those of Gauteng.

The geographical locations of the established parts of the industry with reference to income range are presented in Figure 21. The graph suggests that limited career trajectories exist outside of the three largest industry provinces. This corroborates interview findings showing that individuals who train and gain experience in film and TV are likely to take their skills away from smaller provinces in search of better prospects in Gauteng and the Western Cape. This trend reflects how the value chain operates across the country, with interviewees identifying, for example, that post-production and animation are almost entirely carried out in Johannesburg and Cape Town, whereas other aspects of production are more broadly spread across the country. Though it cannot be expected that a film industry be spread equally across a country, some consideration does need to be given to developing clearer pathways for industry engagement and growth outside of the leading three film industry provinces.

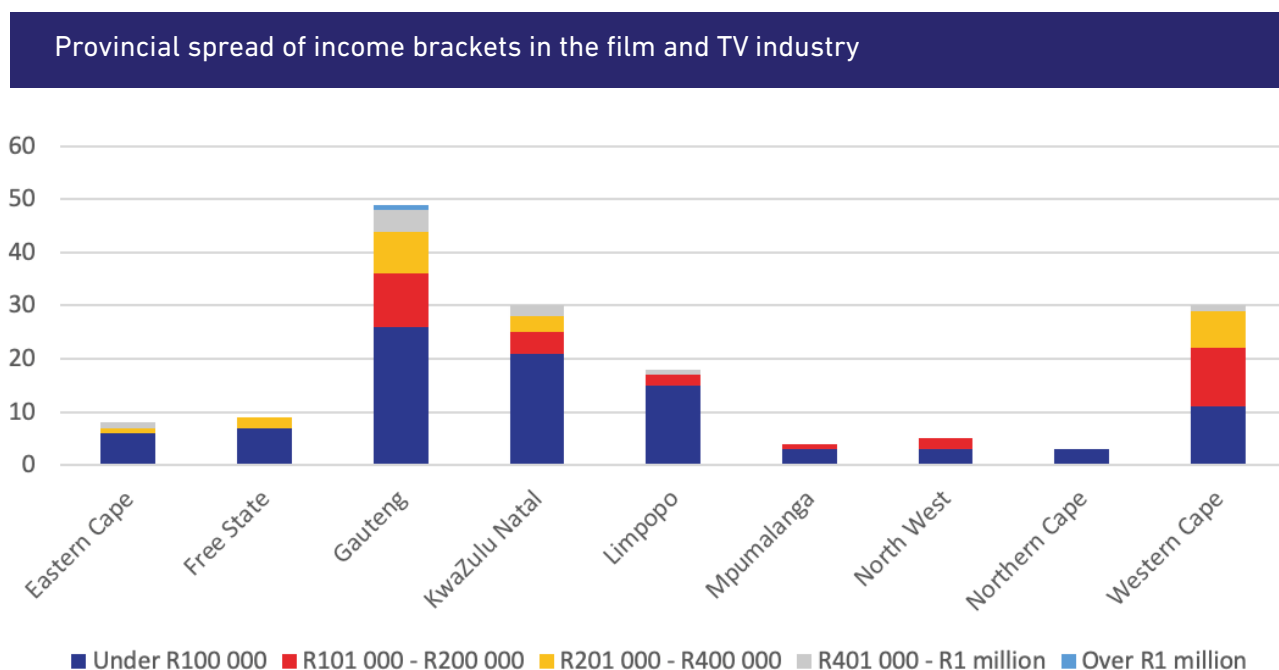


Figure 21 Income brackets by province. Data from 2021 Survey

Navigating transformation in the film and TV industry

Function, expertise and experience

The level of skills and expertise among people of previously disadvantaged backgrounds contributes to how transformation operates. In principle, gaining skills, education, and experience improves potential for meaningful participation in the economy in general and in the film and TV industry in particular. Understanding the nature of skills, education, and experience attained by practitioners in the industry is essential for clearly framing the state of transformation in the industry.

By and large the film and television industry demands highly educated practitioners, and this trend is visible in the education levels surveyed among previously disadvantaged individuals. For example, 61% of black respondents indicated they have completed a diploma or higher tertiary education programme. Of these 18-24 year olds dominated the category of only matric, 25-35 year olds dominated certificate and degree education levels. 36-45 year olds dominated the diploma category and the post graduate category was dominated by those 45 and older.

Levels of education among black practitioners in film and television

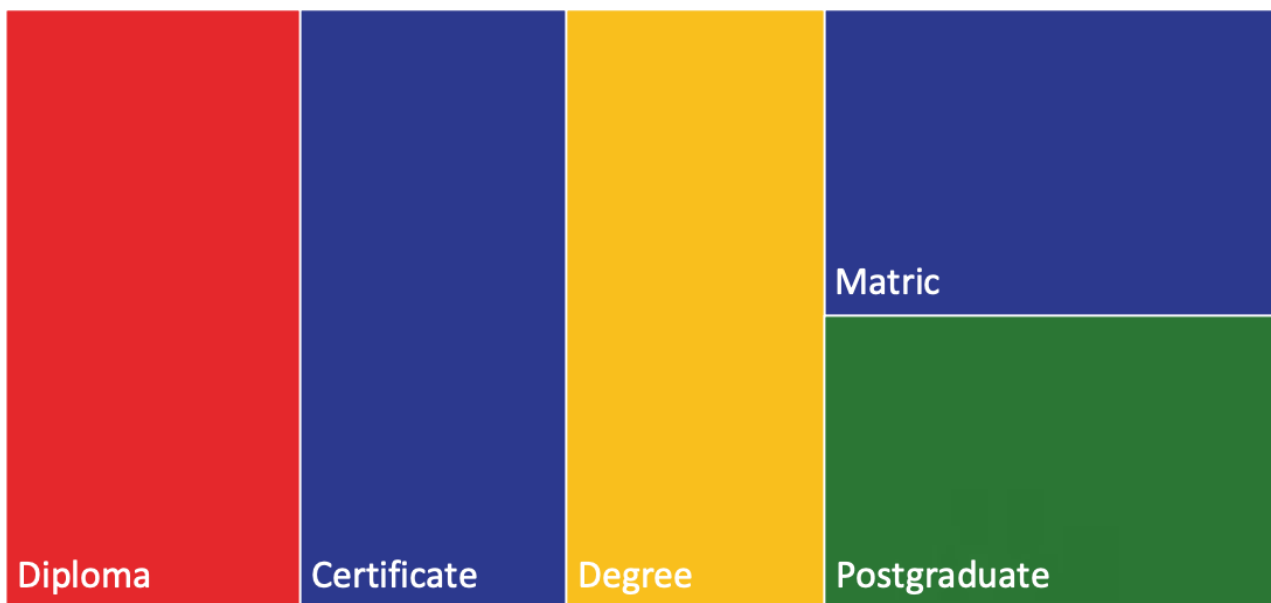


Figure 22 Black practitioners' education levels. Data from 2021 Survey

Though the industry is relatively well educated, interviewees lamented that business, financial and distribution skills were rare among practitioners from previously disadvantaged backgrounds, a feature they felt constrained growth and transformation in the sector. Educational specialisation remained focused on creative capacity and did not address the business, finance, marketing and distribution requirements of the industry. This observation is consistent with the State of Skills report (NFVF, 2016), which found that education programmes focused on building creative capacity rather than on enhancing business and industry operational skills, with 72% of employers/industry players indicating they felt that education institutions did not adequately equip young people to function in the industry. Furthermore, interviewees said that while some skills might be ordinarily accessible across the industry, it was difficult to find a black or female person with appropriate qualifications. Specialist roles identified as trailing behind from a transformation perspective included Directors of Photography, 1st Artistic Directors, Composers and Line Producers. Interviewees pointed to black women as being especially underrepresented in these professional areas.

Subject specialisation of practitioners' education

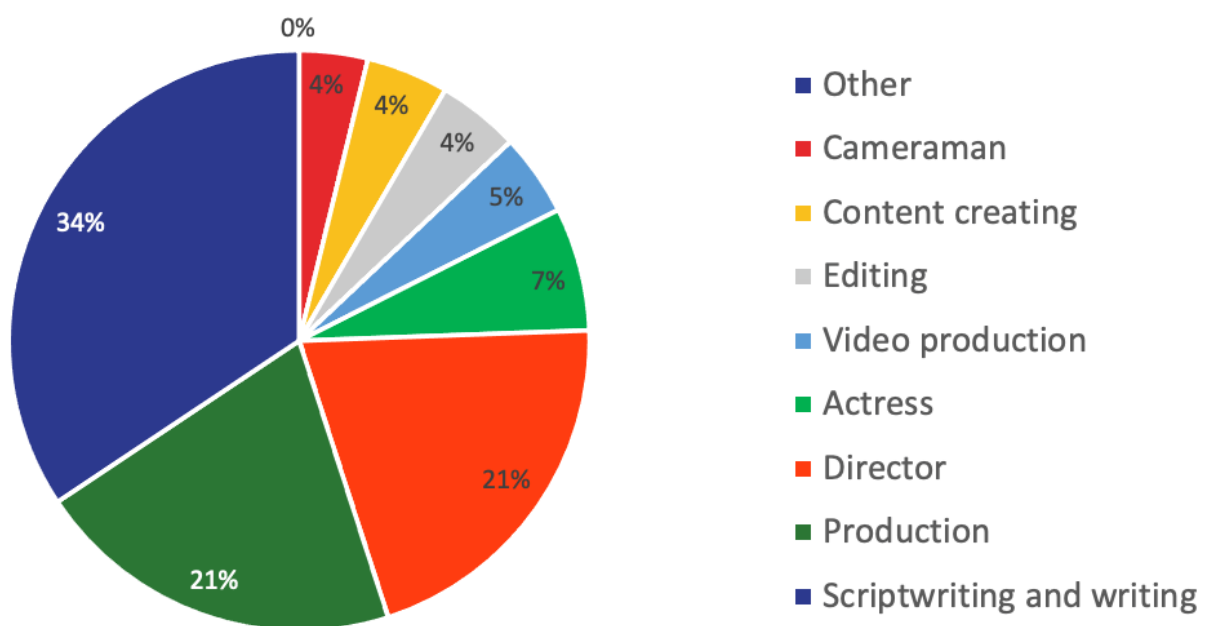


Figure 23 Subject specialisation in education. Data from 2021 Survey

Non-creative skills seen to be essential to transformation

Industry identified scarce creative skills

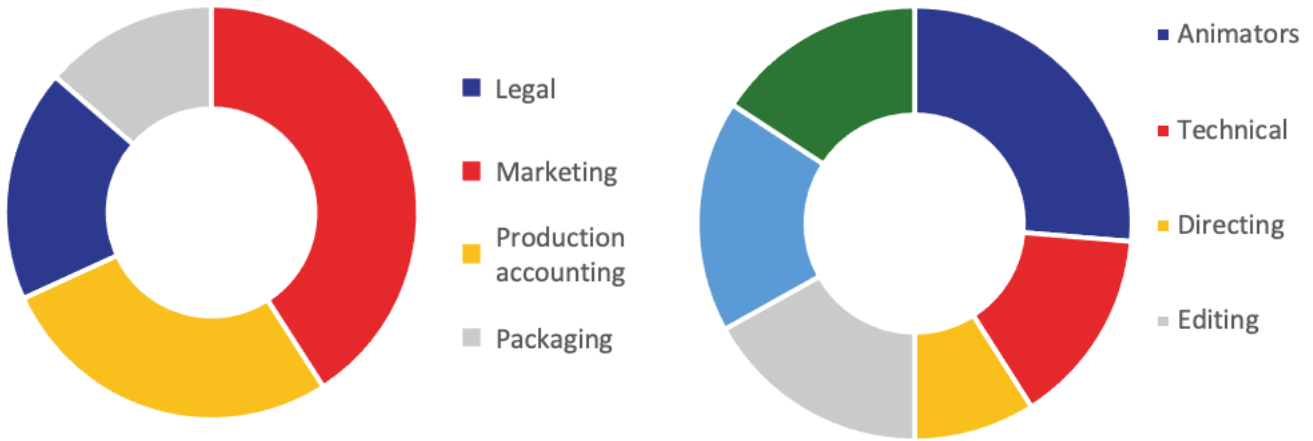


Figure 24 Scarce creative and non-creative skills. Data from 2021 Survey

For many, part of the solution to addressing the scarcity of skills was through on-the-job training and mentorships to help aspirant practitioners gain experience and develop proficiency in these arenas. Many of the black and female practitioners interviewed said they shared their skills through informal mentorships. However, tight budgets and rigid timeframes set limits on the flexibility needed to mentor inexperienced trainees on set. The pressure to produce content speedily and on budget, even in the case of commissioned work, impinges on the space and time needed for mentorship and development. Nonetheless, mentorship regularly arose as a key strategy for addressing skills and experience capacity towards transformation.

At the same time however, some institutional mentoring/partnering programmes such as those of the SABC were critiqued for pairing a white mentor with a black mentee. For many this arrangement was seen as unproductive, and at the SABC’s own admission during an interview for this research, was regarded as a less than ideal approach to enabling transformation. For many black and female interviewees, this was perceived as a way of labelling them as perpetually unqualified regardless of the years spent in the industry, the level of knowledge gained in a subject area, or the depth of talent acquired. In the survey, levels of decision making measured by race indicated varying degrees of transformation across three key areas: financial management, crewing, and creative direction. In these areas we see that **black individuals have gained substantial ground in reaching decision making roles within the creative arena. However, this is not the case when it comes to decision making in business and economic planning roles such as crewing and financial management. This situation is acute in relation to gender, where women trail behind men in all decision making areas.** This result echoes the established pattern showing greater representation by black individuals in creative decision making, and much less representation in regard to financial management.

Representation by race in decision making areas in film and TV

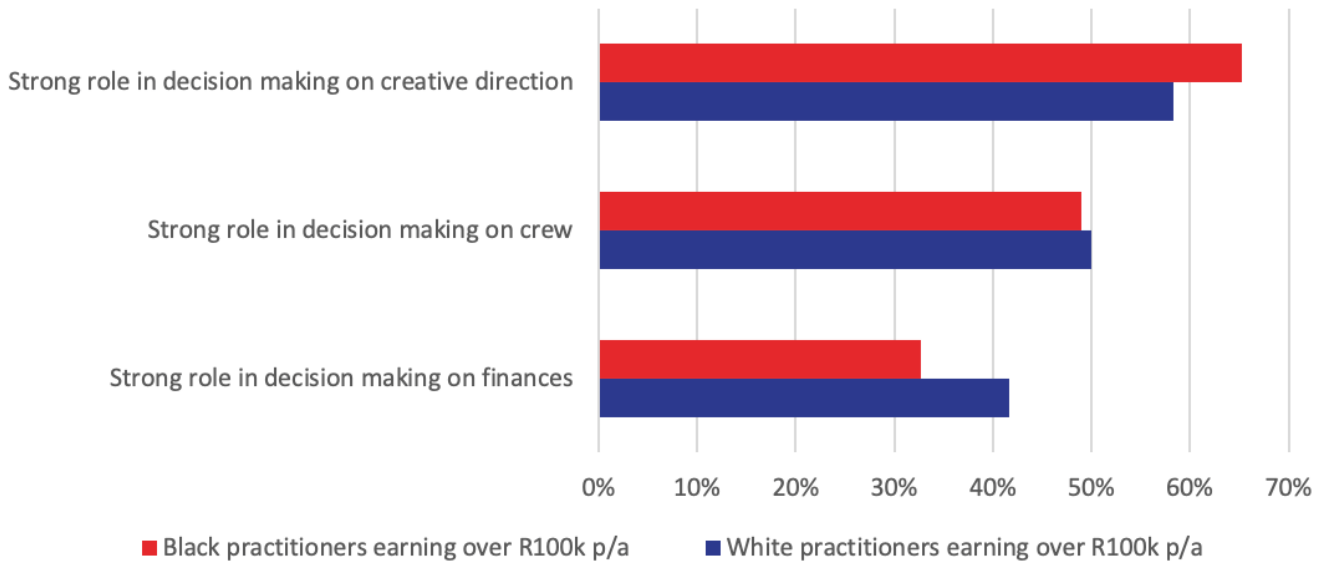


Figure 25 Representation in decision making by race. Data from 2021 Survey

Representation by gender in decision making areas in film and TV

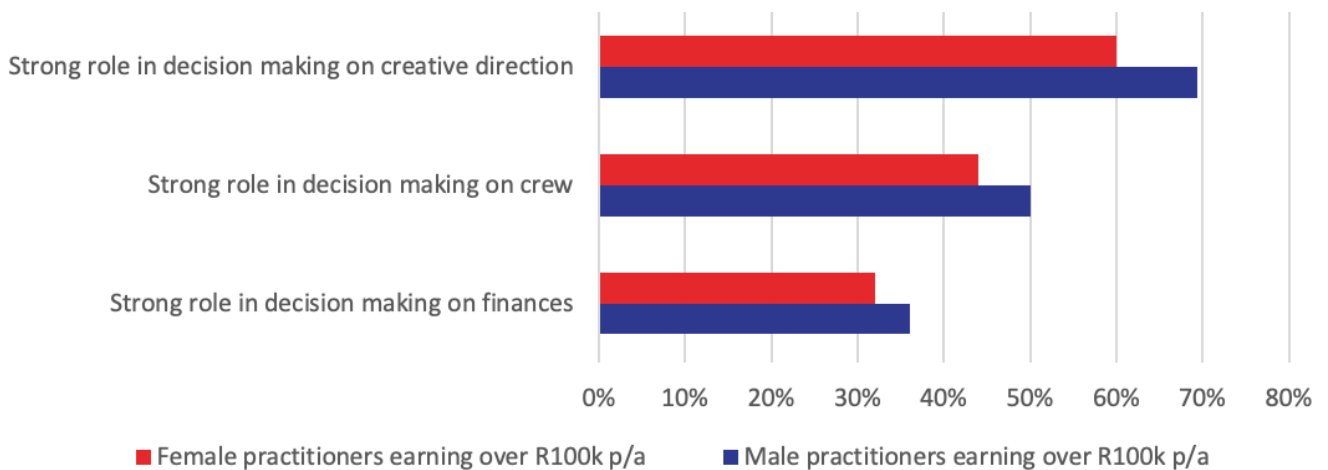


Figure 26 Representation in decision making by gender. Data from 2021 Survey

From an enterprise perspective, the survey suggests that black owned companies perceive experience as a critical factor in their ability to access work. Such companies view their competitors as coming from companies that are more established, larger, and more experienced than they are. That said, black owned companies earning more than R500 000 per annum expressed a relatively positive outlook, suggesting that though less experienced, their work enjoyed a fair chance of success. This indicates that networks, reputation, and market shifts – as well as transformation agendas – together contribute to enabling access to and success in the market. However, the survey suggested that on average there remains a somewhat negative sense of access and opportunity when measured against the conditions prevailing within the established competition.

This indicates that newer and smaller companies must compete for the same work as established companies, suggesting an absence of clear pathways for new entrants to the industry.

These issues of access are influenced by factors such as geographic proximity to the industry, networks, and skills.

Perceptions of competition in the sector for companies in film and television



Figure 26 Perceptions of competition. Data from 2021 Survey

Sustaining companies

Between 2004 and 2021, there has been robust growth and transformation at the level of permanent employment of black individuals. Over this period the **employment access of black individuals has grown by approximately 300%**, based on 2004 data from the film and TV industry. Across all categories, the survey shows significant employment growth among permanent black individuals with the 0 – 5 category showing a marked improvement. These statistics indicate the success of interventions such as bursary schemes and funding incentives designed to boost access to the industry for black individuals.

Permanent employment rates by race between 2004 and 2021

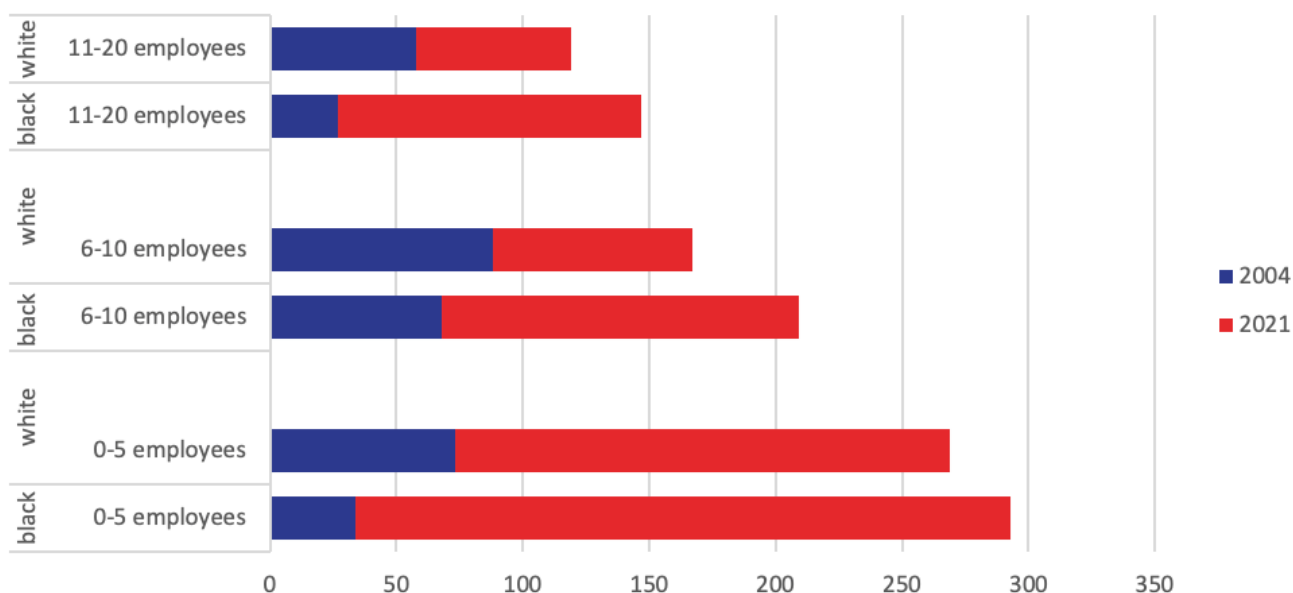


Figure 27 Employment growth for black individuals since 2004. Data from 2004 HSRC Study and 2021 Survey

While considerable effort has been made through funding and financing instruments to ensure opportunities and access for black owned companies, there remain barriers that obstruct sustainability and growth. A total of 80% of survey respondents cited lack of access to finances and funding as an issue, followed by 44% noting cashflow challenges and 43% naming constrained access to the market. Interviewees pointed to administrative challenges posed by DTIC processes, where businesses had to wait for years before they were reimbursed through incentive schemes.

Most businesses reported being unable to float these unpaid amounts because of limited reserves. Respondents noted that most black owned businesses were operating on a survival model, with no resources to allocate to business development strategies such as financial planning nor funding for equipment and business growth. SPVs have been noted as hinderance to the sustainability of black owned companies. Respondents further articulated that individual companies needed recurring financing programmes in order sustain and grow black owned business.

Major barriers for companies' growth

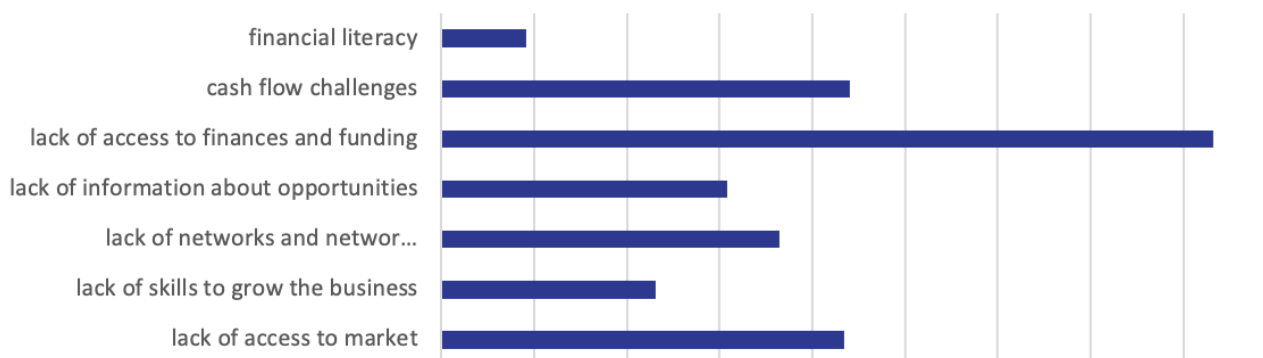


Figure 28 Barriers to growth. Data from 2021 Survey

The study suggests that companies across all categories rely on the survival business model, and this has become acute in the post-Covid period. Respondents from black owned companies earning more than R500 000 per annum reported earnings in excess of R14 million in the pre-Covid period. A significant fall in earnings is seen in data gathered post-Covid. For example, the company earning more than R14 million pre-Covid reported less than R2 million in earnings after the pandemic took hold. When measuring pre-Covid against post-Covid earnings among non-black companies earning over R500 000 on average, the numbers show sustained income levels with one company earning more in the post-Covid period.

Non-black companies appear to have far greater resilience than black owned companies.

Respondents interviewed asserted that black owned companies' overheads are generally higher as practitioners live off their businesses and often cannot invest in the sustainability and growth of their companies. Non-black companies retain assets such as equipment and reserves, which shelter them during difficult times. 'White businesses build their companies on assets, while black businesses build their companies on content.' Respondents noted that there needs to be a shift from an over-emphasis on project funding to funding programmes that grow businesses to build resilience. There is wide recognition that while transformation has been successful in creating access for black companies, there needs to be a targeted effort to support the sustainability and growth of black owned business.

Pre-Covid to post-Covid among black companies earning over R500k per annum

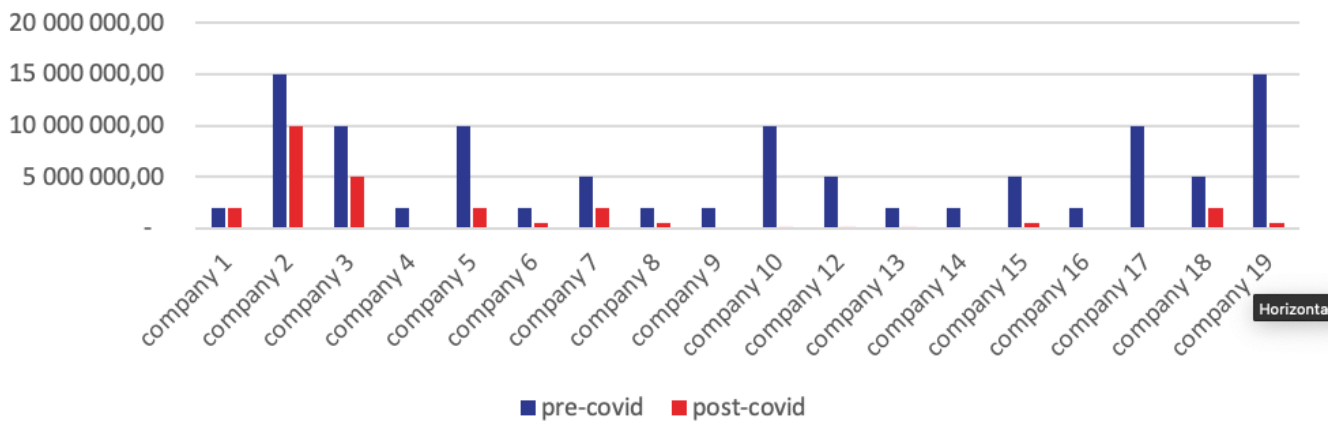


Figure 29 Covid impact on black owned companies. Data from 2021 Survey

Pre-Covid to post-Covid among non-black companies earning over R500k per annum

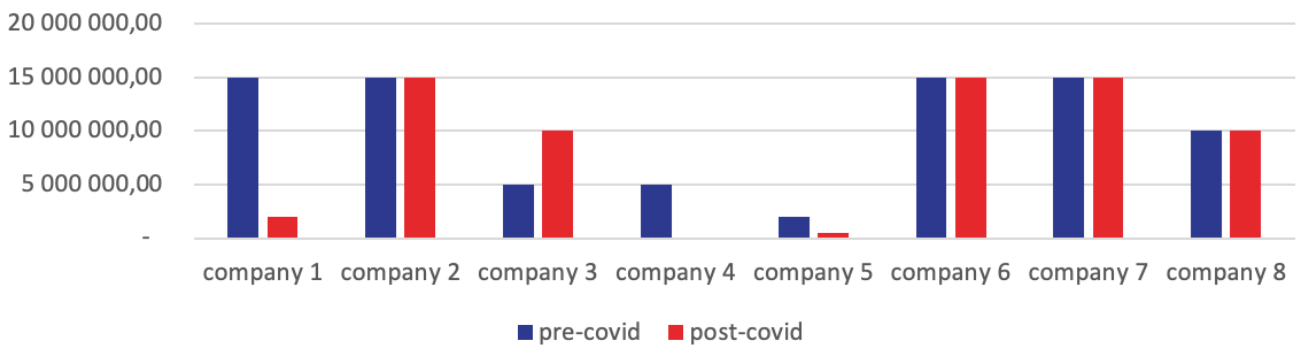


Figure 30 Covid impact on non-black owned companies Data from 2021 Survey

Networks

Individual survey respondents have noted that referrals and networks were by far the most efficient and successful mode of finding work opportunities, outstripping that of project advertising or working with an agent. The interviewed respondents felt that this could set limits on transformation. New entrants who are black, young, women and people living with disabilities often find it difficult to enter the industry as they lack the support of viable networks. The survey data indicate clearly that jobs are in the main accessed through referrals, networks and word of mouth at both individual and company level. At the individual level, these referral networks are managed and controlled by heads of department (HODs), who are responsible for hiring crew members. This has been identified as one level of gatekeeping. Respondents said that non-black HOD roles often stood in the way of black individual's chances of being hired. And as discussed above, black and female practitioners perceive themselves as being seen as perpetually inexperienced in certain positions, despite them working in the industry for many years.

How individuals find employment/freelance/independent contractor job opportunities

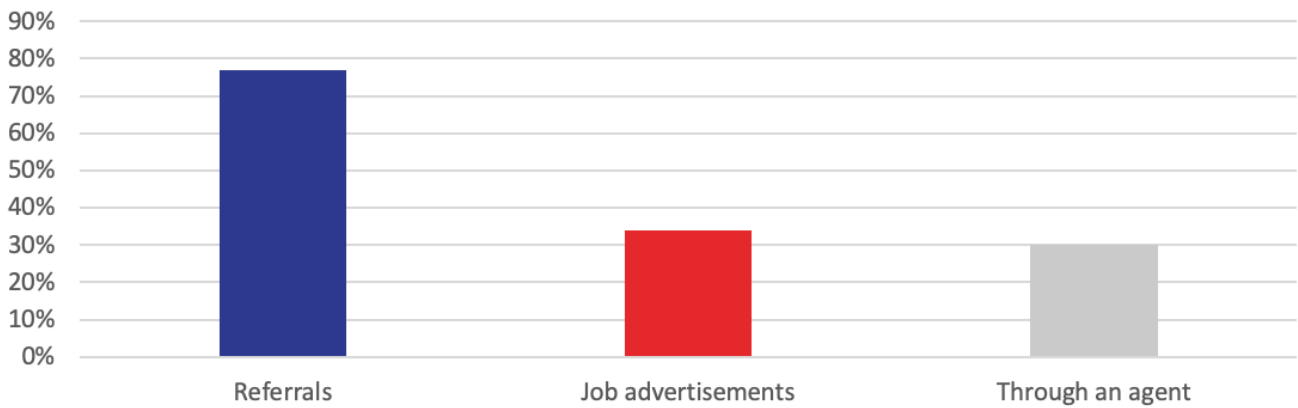


Figure 31 The role of networks for finding employment opportunities. Data from 2021 Survey

How businesses access new markets and opportunities

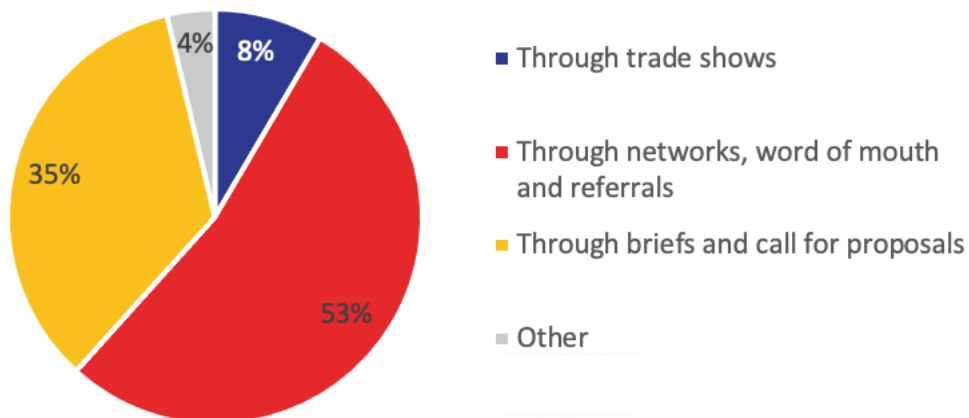


Figure 32 The role of networks for business opportunities. Data from 2021 Survey

Crucially, the reliance on networks requires individuals to build connections in the sector. This is easier to achieve for those who are located in the primary cities but difficult for practitioners on the periphery. Correspondingly, young people may struggle to enter the sector where an absence of contacts poses a barrier to entry. However, access to connections offers a key potential to advancing transformation. Data from the survey shows that **black owned companies are more likely to hire larger numbers of black practitioners and, additionally, are more likely to hire women and youth. This trend holds true for women and youth owned companies and suggests that transformation is self-reinforcing and has a multiplier effect.** This reinforces the need to invest in transformed companies to enable their sustainability, as they in turn enable further transformation.

Freelance representation across gender and race hired by demographically owned companies

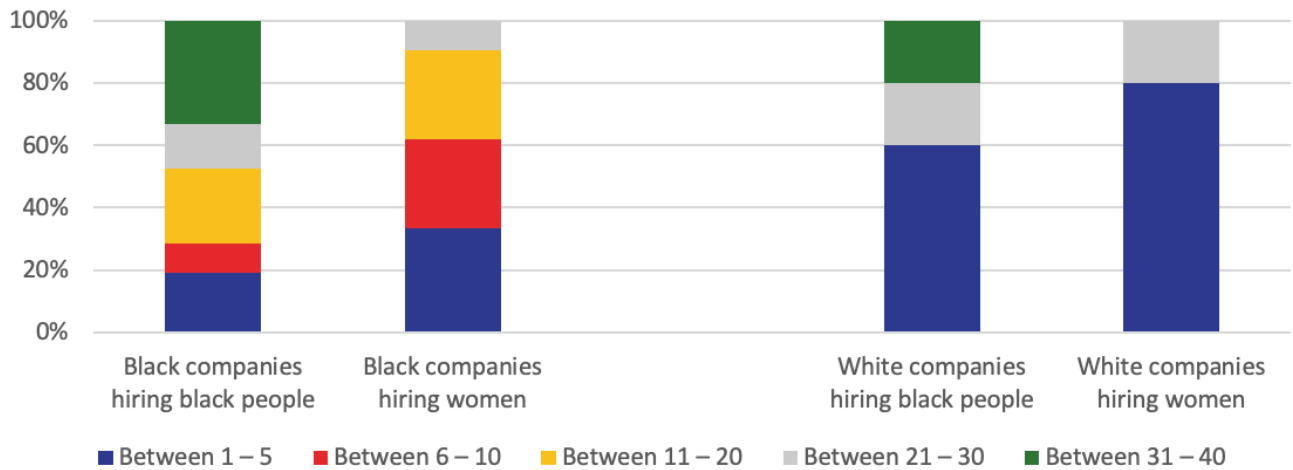


Figure 33 Black and white owned companies' hiring practices. Data from 2021 Survey

Financing of films

Financing has an outsized role to play in the transformation of the film and television industry. As demonstrated above, the survey results point to financing, access to markets and cashflow as the three biggest barriers to growth for companies. For emerging black, woman and youth owned companies this is compounded as they struggle to attain sustainability. Interviewees have outlined several key issues within the financing and funding landscape that are affecting transformation and that, if addressed, have the potential to fast-track transformation.

Income and financing streams for companies in film and TV

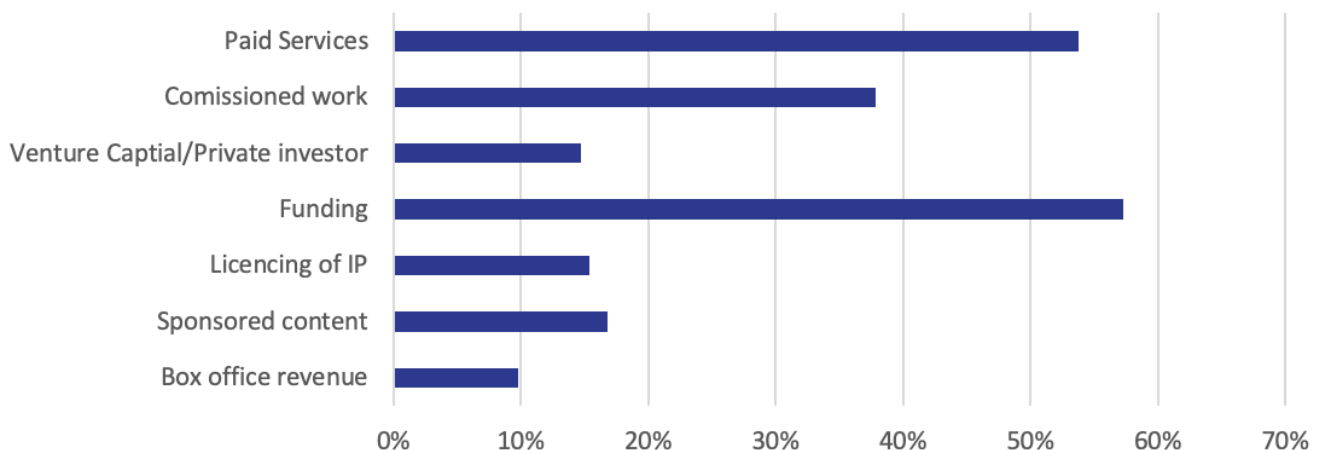


Figure 34 Primary financing channels for companies. Data from 2021 Survey

Across the industry there are three primary income channels: commissioning, paid services and funding. Most companies access financing through more than one of these channels for different projects. As has been discussed above, much of the business to enable this income is sourced through networks and referrals. To access funding, awareness of open calls and knowledge of existing financing schemes is required, assuming other requirements are met. Interviewees indicated that the requirements are often bureaucratic and inaccessible. For some interviewees, the perception was that government funders were more concerned with compliance than transformation – at times imposing strict terms in ways that risked a failure of transformation. This is reflected in the survey data in which 73% of respondents indicated that accessing financing was difficult.

Accessibility of financing for film and TV productions for companies

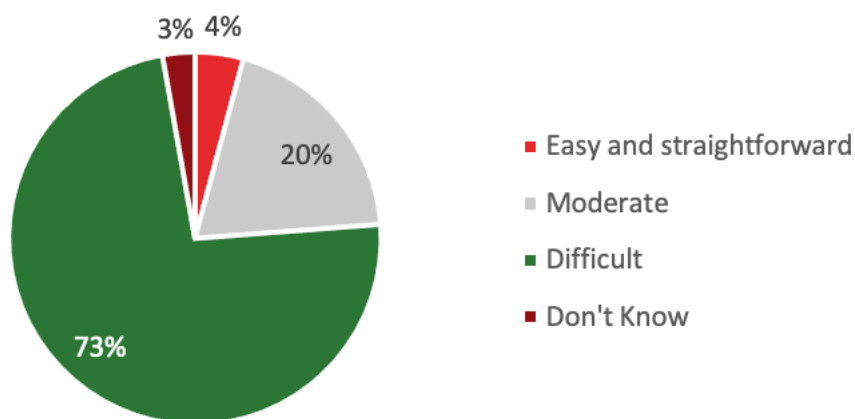


Figure 35 Ease of access to financing. Data from 2021 Survey

Many of the survey respondents said they had not accessed government funding at all. Where funding was obtained, it was primarily from the NFVF, which was seen to be the most approachable funder. By comparison, the DTIC was regarded as a stumbling block to transformation because of the extremely long delays experienced between application and disbursement (as much as five years according to some interviewees). For many, the administrative blockages at the DTIC had sabotaged the potential of the incentives, with South African incentive schemes now regarded as unreliable with stringent requirements. For emerging businesses owned by people from previously disadvantaged backgrounds, these delays and onerous compliance requirements can be devastating for business viability.

Furthermore, many interviewees and survey respondents spoke to the absence of coordination across different funders despite their inter-dependence. The industry was fraught with issues such as misaligned deadlines that resulted in an inability to apply for a certain incentive due to a mis-timed response from a funder, with companies owned by previously disadvantaged individuals, who have no safety net, bearing the brunt. Interviewees spoke to misaligned requirements for funding across the different funders, with each requiring slightly different engagement, creating additional administrative labour from already stretched companies. Some interviewees proposed that programmes be coordinated through a shared funding portal with aligned requirements and deadlines. This would provide an opportunity for funding to be used strategically. For companies and individuals based outside of primary cities, the geographical distance from funding agencies and the costs of application were concerns raised. The obstacles posed by an English dominated industry and funding regime were further concerns expressed, despite transformation agendas. These kinds of barriers limit individuals with talent from accessing available funding.

Funding or incentives received by companies in the past 5 years

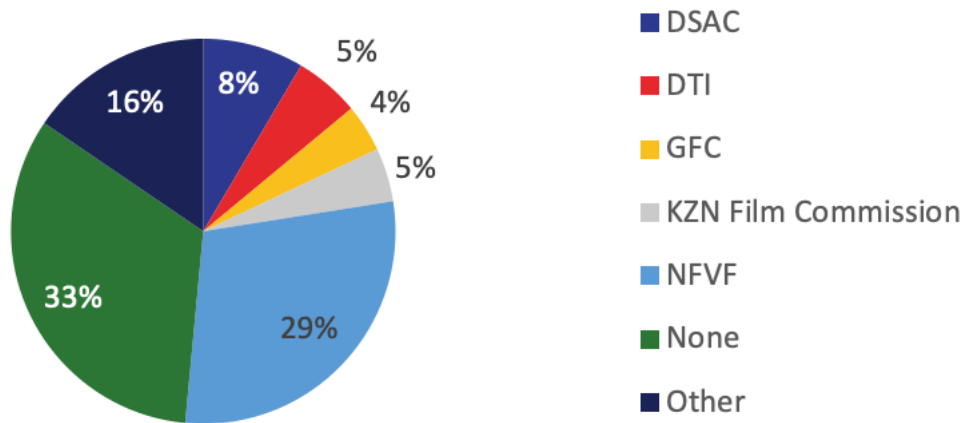


Figure 36 Funding to companies from state funding channels. Data from 2021 Survey

Access to state funding for black owned companies earning over R500k per annum

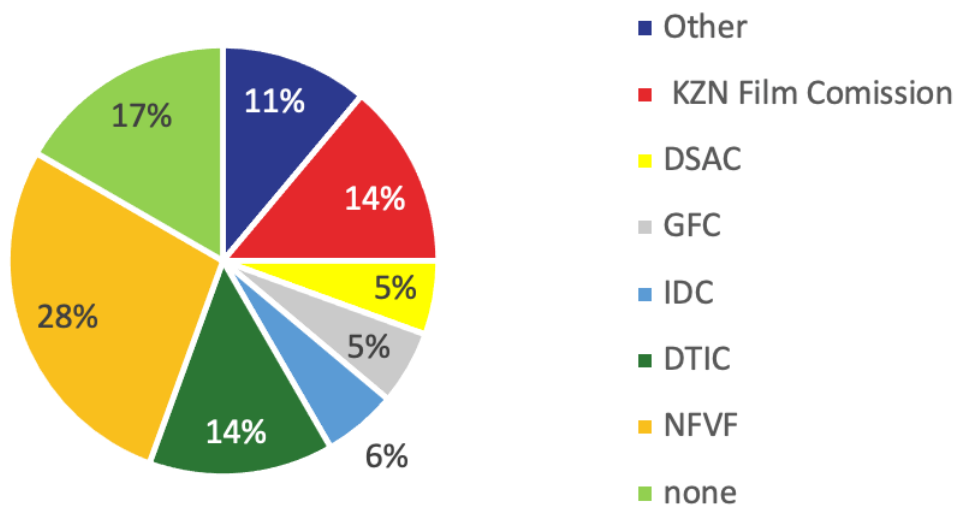


Figure 37 Funding to black owned companies from state funding channels. Data from 2021 Survey

A further critique of the funding landscape is its inadvertent impact on companies owned by previously disadvantaged individuals. Interviewees indicated that because the funding is primarily aimed at production, rather than enhancing access to external financiers, practitioners remain within the orbit of South African funding agencies and are unable to break into other markets to finance their film and television projects. As such, **black owned companies end up exclusively dependent on the various levels of government funding for film and TV projects**. Such companies are likely unable to continue to operate without government funding, leading to the perception that state funding is essential to the viability and sustained development of the film and TV industry. Interviewees indicated that while funding was a necessary catalyst, continuing their work would require sustained investment by the state in order for them to remain viable.

Degree to which black companies over R500k turnover access more than one of the major state film funders

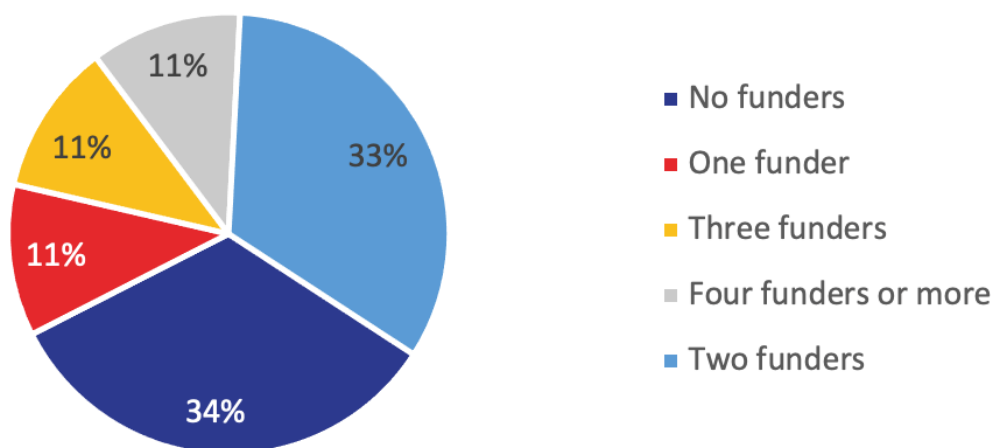


Figure 38 Companies' likelihood of having two or more state funders. Data from 2021 Survey

Perceptions of received funding enabling further opportunities to produce more films and TV shows for companies

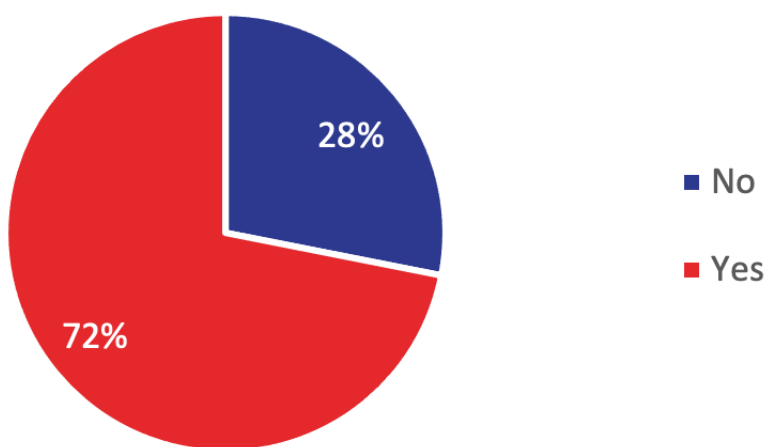


Figure 39 Impact of state funding on facilitating access to further work. Data from 2021 Survey

Beyond filmmaking, the other side of the financing landscape in South Africa is broadcasting. Outside of development, which only the NFVF funds, the production of content for broadcasters is not supported by NFVF, DTI or IDC programmes. Interviewees said that broadcasters had had an outsized impact on the transformation of the industry in recent years, through their facilitation of the production of diverse content from diverse teams. The entertainment corporate Multichoice has commissioned a sizeable number of big and smaller budget productions aimed at diverse audiences and particularly black audiences. Programmes such as Multichoice's Innovation Fund are aimed at providing business support and development to black, female owned, and youth owned companies. There is potential for funders to exert greater strategic interventions within and to facilitate expanded opportunities for transformation within the growing space of transformed broadcasting and commissioning. Many interviewees have pointed to the need for a wider contribution to development (not just NFVF) as one of the key strategic choices that could enable greater meaningful participation and transformation within this framework. The NFVF/Netflix partnership, though primarily a streaming entity rather than formal broadcaster, offers an example of the possibility of strategic engagement to ensure meaningful participation within the framework of opportunities. In this way, funders play a risk mitigation role, by facilitating wider engagement and additional risk taking (such as working with emerging filmmakers) than might otherwise be the case. Finally, many interviewees expressed concerns about an unquestioning embrace of global entities such as Netflix, without knowledge-based, critical engagement with strategies and models for partnership that were in everyone's long term interest (such as IP sharing as just one example).



Growing markets

As has been discussed across the report, broad overall expansion of the industry is key to enabling further transformation. Without growth there are simply too few roles and too little work available to enable healthy competition and advancement. For young people, this means that established practitioners take up all available space within the industry including 'entry level' projects, as there are not enough opportunities at the established end of the industry. Similarly, entry level companies must compete against established businesses for early career work, with established businesses unable to find advanced projects. Interviewees agreed there was an urgent need to grow the market for South African film and TV to enable growth and transformation. For interviewees, expanding and growing the market was fundamental to realising the goal of meaningful participation of the majority across the industry.

As discussed above, stakeholders in the film and television funding arena are tasked with supporting the nation's content producers on the basis of demographic representation, historical redress, creative capacity, and social cohesion, as well as in response to market forces. Public funding agencies must balance their activities across the full spectrum of creative and cultural capacities. In this regard, many interviewees felt that funding should be strategically focused on demand and market dynamics in order to realise its full potential. By elucidating the pain points for transformed participation in the value chain and tracking the career journeys of previously disadvantaged persons, the survey data lay out prospects for targeted intervention and greater impact. Part of this requires attention to be focused on the development of marketing and distribution instruments and their financing.

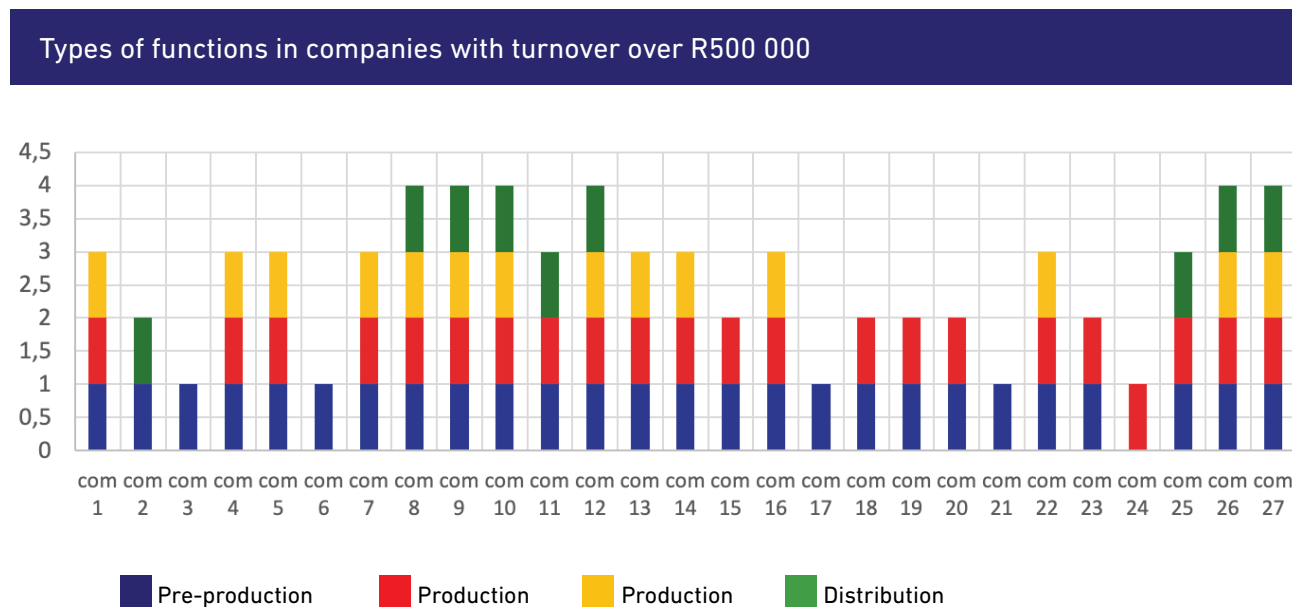


Figure 40 Pre, Production, Post and Distribution functions in companies. Data from 2021 Survey

The graph above (Figure 40) points to a high concentration of pre-production and production functions in South African film and TV companies. There are fewer post-production companies, and a further drop in numbers at the level of distribution. The dearth of distribution companies shown in the data is commensurate with the lack of skills available in the distribution and marketing fields. According to interviewees, the situation was exacerbated by low levels of funding directed to these areas. Some interviewees felt that distribution and marketing plans were often neglected and not sufficiently integrated into proposal requirements. Instead, they were 'half hearted, not always relevant and rarely monitored'. This is evident from the number of projects that received funding between 2016/2017-2020/2022, and the grant allocation approved for marketing and distribution to a total amount of approximately R2.2 million per year in total (NFVF, 2021). Interviewees argued that establishing a distribution slate was a strategy that might address this concern. A slate or ringfenced funding objective towards skills development, company development and greater market access at the level of all state funders would go a long way to addressing this issue. Enhancing skills at the level of packaging and selling products prior to production, as discussed in the skills section above, was a way to mitigate the production focused stance in the industry where distribution was often seen as an after-thought.

Genre	2016/17		2017/18		2018/19		2019/20		2020/21		Total count of genre	Total sum of approved amount
	No	Grant	No	Grant	No	Grant	No	Grant	No	Grant		
Animation	0	R0	0	R0	0	R0	1	R165 000	0	R0	1	R165 000
Documentary feature film	0	R0	3	R478 000	2	R270 000	3	R586 375	4	R709 500	12	R2 043 875
Feature film	10	R1 786 560	7	R1 680 000	10	R2 048 500	9	R1 748 000	8	R1 387 748	44	R8 652 208
Short film	1	R120 000	0	R0	0	R0	0	R0	3	R319 500	4	R439 500
Marketing costs	1	R100 000	0	R0	0	R0	0	R0	0	R0	1	R100 000
Grand total	12	R2 006 560	10	R2 158 000	12	R2 318 500	13	R2 499 375	15	R2 418 748	62	R11 401 183

Figure 41 NFVF expenditure on marketing and distribution. Data from NFVF Statistical Report 2021

NFVF spending on marketing and distribution has shifted considerably as previously discussed changes in market interest in black and African content have emerged. For many interviewees, **the market has shifted to a recognition of the worth of content from the African continent and thus the potential of greater market access.** Though Netflix is valuable proof of concept in this area and is enabling the development of new products and growing audiences for South African content, many interviewees indicated that this should be only one aspect of South Africa's approach. For many, the Netflix example provided an indication of the potential African brand familiarity had for 'audience development', both in the sense of expanding public audiences, but also in promoting education and awareness among financiers and international partners. This was a unique moment of opportunity for greater market capture and required targeted and strategic responsiveness.

Developing a feasible marketing agenda requires a wider orientation towards the wider industry, so that production is not the only aspect that receives attention. Interview data suggests that the exploitation of developed content within international markets is one of the key business models of some of the leading black owned companies. This requires network access to international markets but also, to facilitate transformation, a higher rate of conversion from Intellectual Property (IP) to monetisation was required. Survey data point to high levels of IP retention among black owned companies with a turnover of more than R500 000. However, interviewees thought there was room for improvement in the income levels presently generated by IP exploitation. Ownership of IP had little value without exploitation, and it remained a struggle to monetise IP not only in relation to films, but for all content.

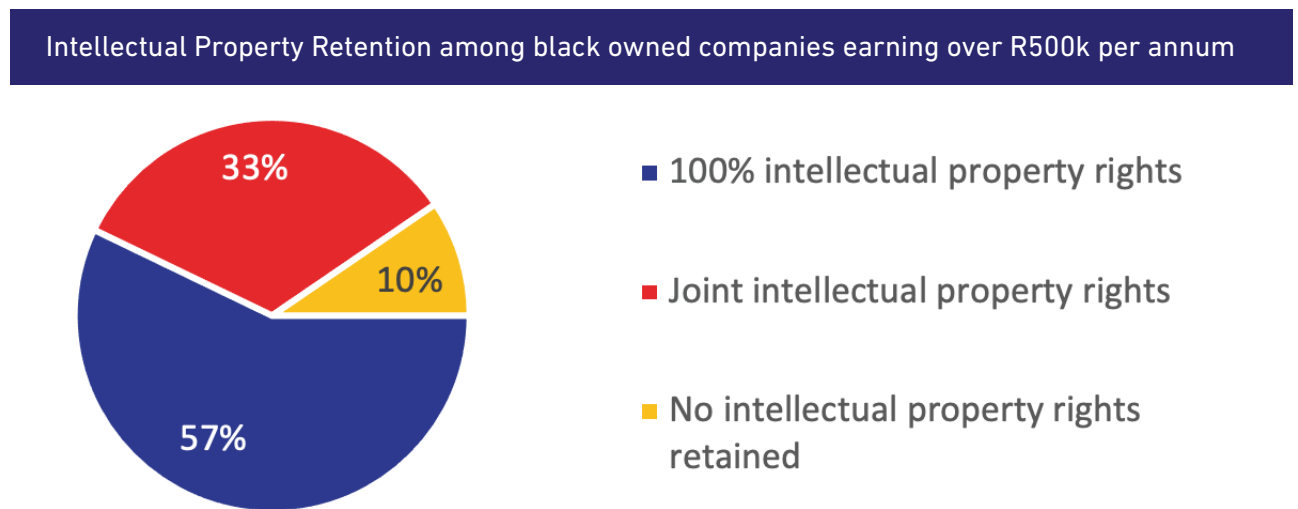


Figure 42 Intellectual property right retention. Data from 2021 Survey

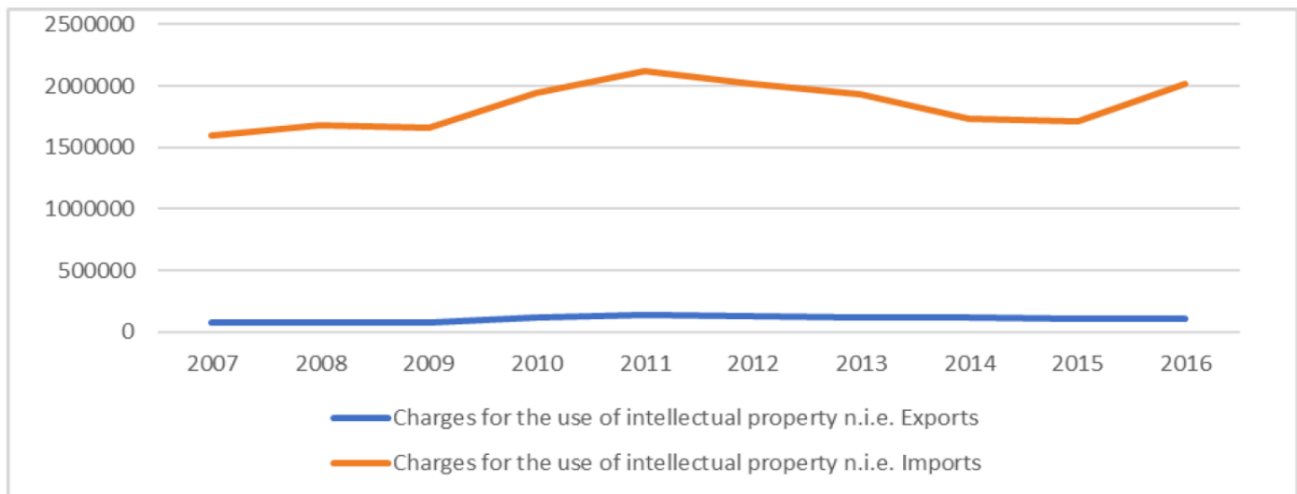


Figure 43 Charges for intellectual property in South Africa, general economy. Data from SACO 2019

Efforts to grow international markets for South African content will need to capitalise on the outputs of new digital media and platforms. While Showmax and Netflix have helped to shift the South African film and TV industry towards technological possibilities, there remains much to be done to take full advantage of the potential. As noted earlier, the industry is poised at a moment of promise and needs to act strategically to benefit from the changes rather than becoming a casualty. Web series and other digital formats remain relatively new territory for film and TV, with YouTube and TikTok entering the South African market with a strong interest in African content. The degree to which South African industry stakeholders are ready to take advantage of these possibilities was a regular concern of interviewees who listed the cost of data and the constraints of electricity outages as exacerbating digital inequality and a barrier to transformation. Within the industry there is limited engagement with digital technologies. For some interviewees this was a direct result of low levels of youth participation in the industry, leading to an inability to engage productively with youth markets and trends. These perceptions are reflected in the data, where white companies show the highest current overall engagement in digital technologies (exploring possibilities and already working within the field). On the other hand, youth owned companies – identified above as largely black and low income – show the greatest overall interest in digital technologies but are hampered by insufficient resources to fully engage. Interestingly, women owned companies show the highest current engagement in digital technologies.

Engagement with new digital technologies in the film and TV industry by ownership

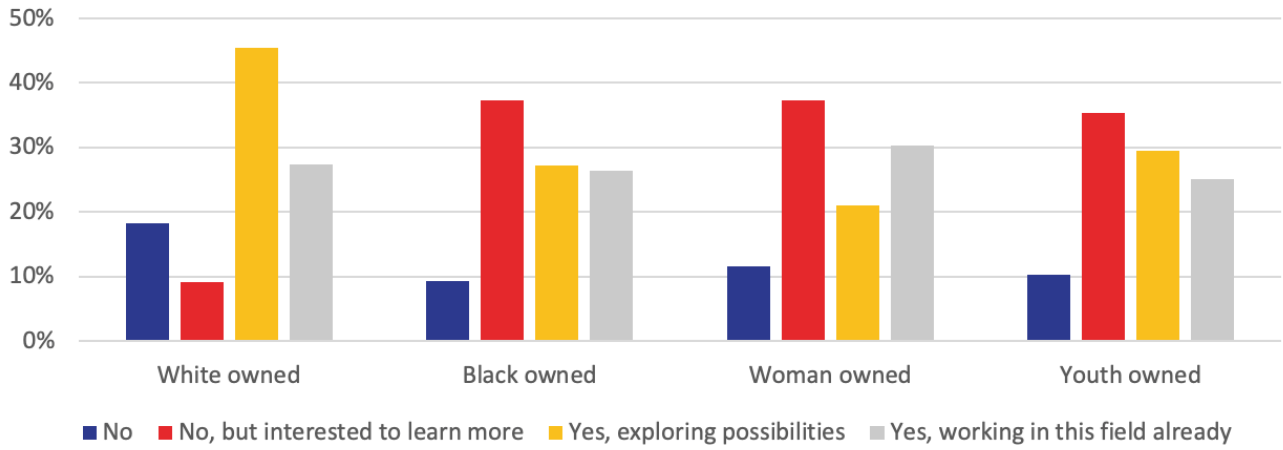
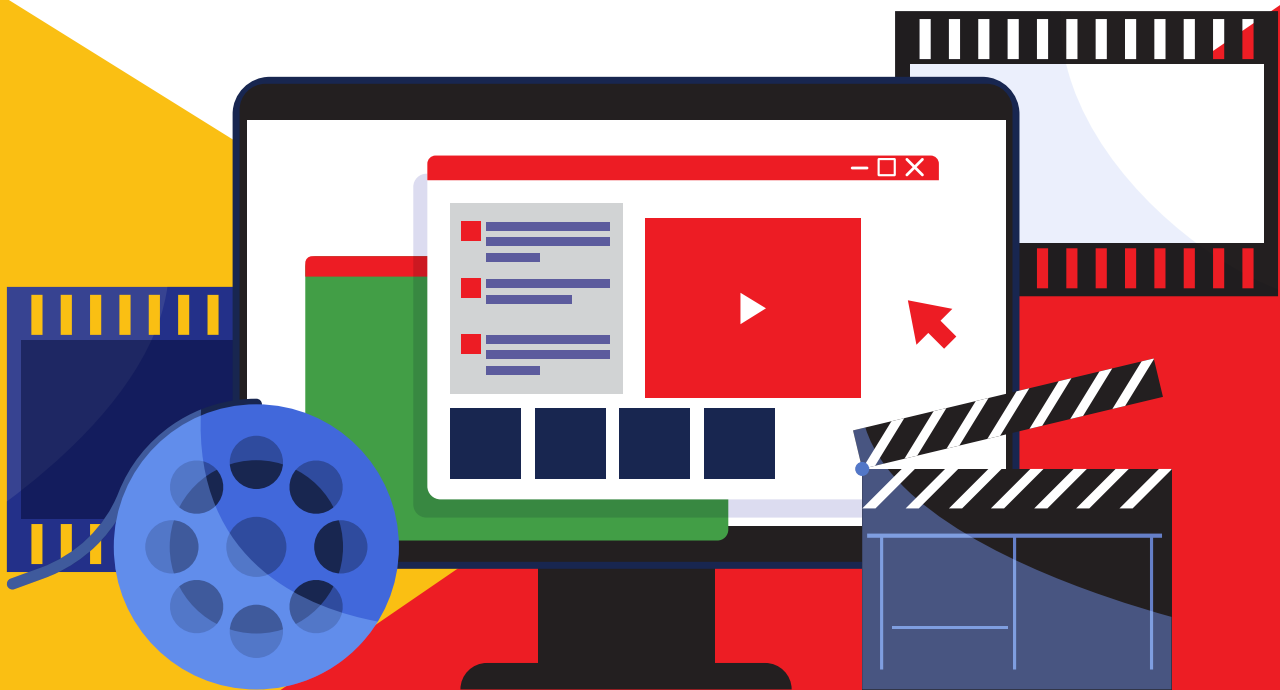


Figure 44 Technology engagement across demographics. Data from 2021 Survey



CONCLUSION

Perceptions of transformation by the industry on a scale of 1-not transformed to 5-fully transformed

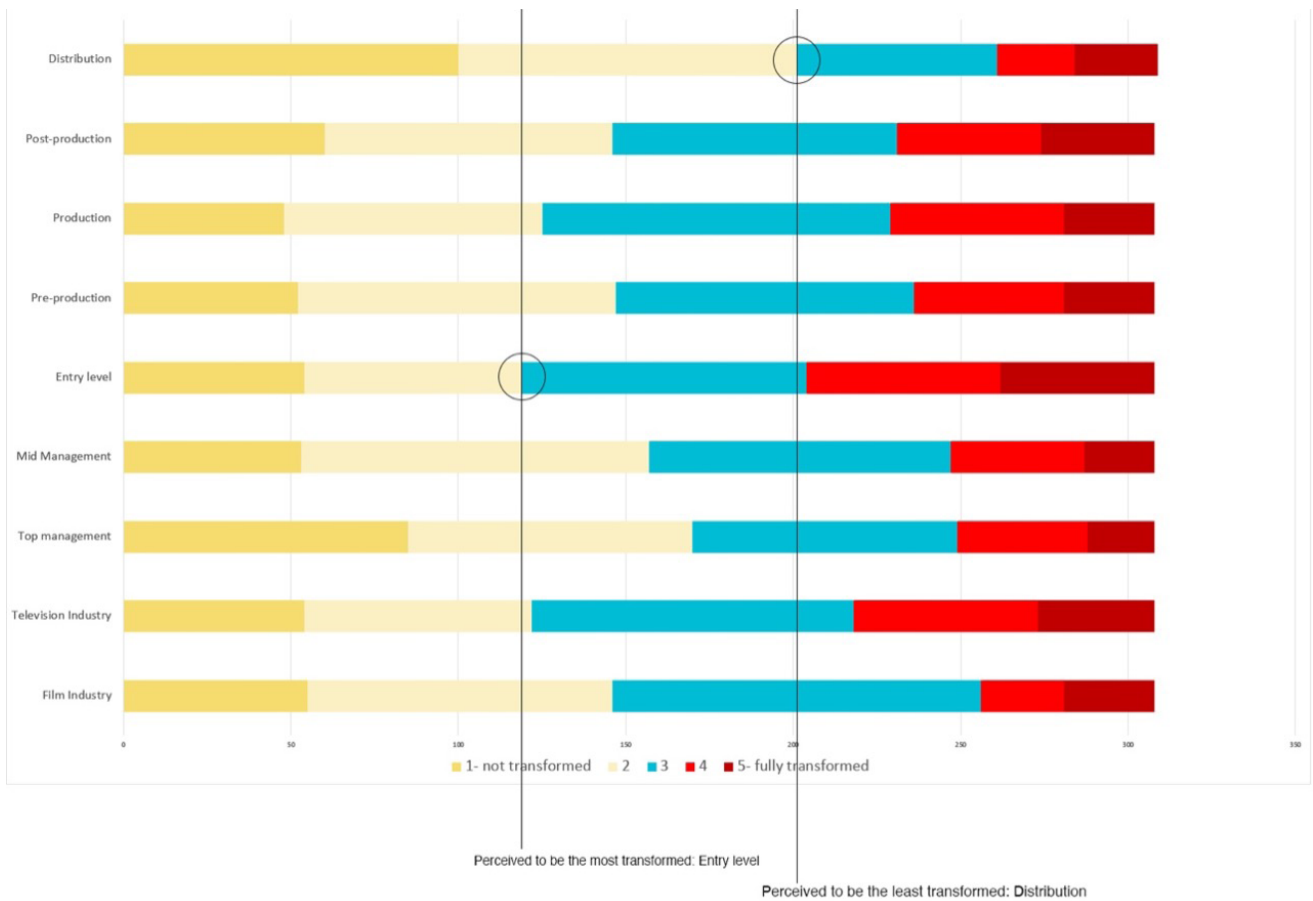


Figure 45 Perceptions of transformation across the industry

The data accumulated in this report point to reasonable progress having been made as regards transformation, as well as exciting trends for further growth and potential for previously disadvantaged individuals to experience meaningful engagement in the film and TV industry. At the same time, there are clear areas of concern and challenge that must be grappled with. Key findings and potential strategies of redress are:

Previously disadvantaged people often find themselves in positions of perpetual juniorisation within the workplace, despite elevated levels of education and experience. At the same time, there are a number of identified skills that are in short supply that would deeply impact transformation agendas if addressed within the projects and companies led and owned by previously disadvantaged individuals.

The shifts in transformation over the past 27 years and in film and TV in the past five years require dynamic and responsive strategies to enable transformation. These need to move from a focus on access to a focus on sustainability, especially for companies owned by previously disadvantaged individuals. This is crucially important as these companies show an outsized commitment to continued transformation within their orbits.

Networks and gatekeepers remain hurdles to transformation in an industry substantially based on relationships, referrals, networks and word of mouth. This is especially challenging in the context of geographies outside of the three primary film and TV cities. Mentorships, and the support of companies owned by previously disadvantaged individuals, have been identified as strategies for addressing this.

Funding has had an impact on transformation and companies operating within the above R500 000 earning bracket are positive about professional potential and access to financing. However, the majority continue to find financing of films difficult. There are a number of key issues that should be addressed to ameliorate this.

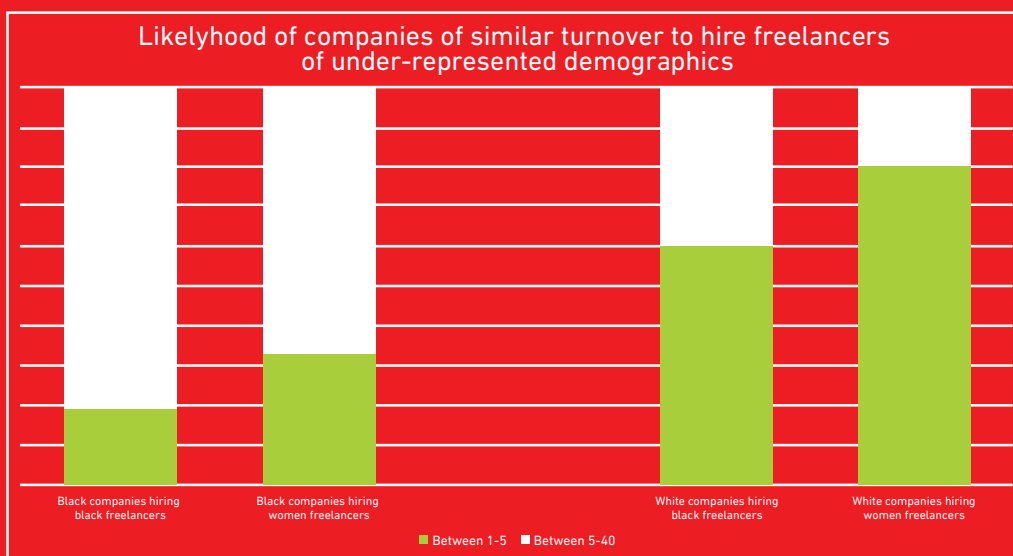
The present moment in South African film and TV offers unique potential that, if supported strategically through funding, can significantly increase meaningful participation in the industry for the majority. The expansion of markets for the film and TV industry – particularly internationally – is of vital importance to grow the industry across the board, and if addressed strategically, this can measurably impact transformation.



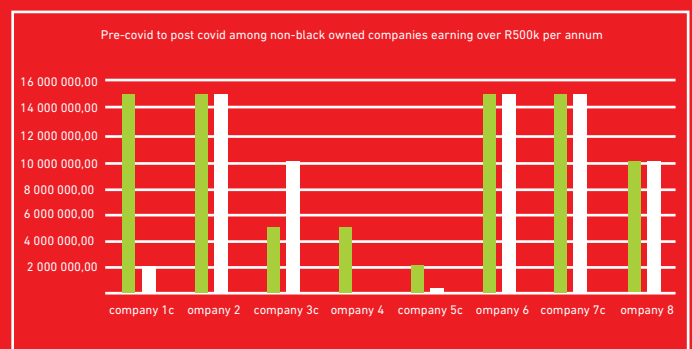
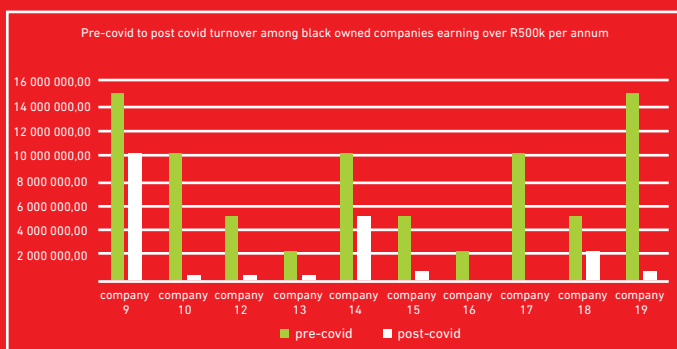
Transforming Film & TV

The argument for black businesses

Investing in black owned businesses proliferates further transformation. Similar findings emerge for women owned and youth owned companies.



Black owned companies are twice as likely to hire black freelancers and three times more likely to hire women freelancers than white owned companies of the same size.



But they remain substantially more susceptible to major market shocks than white owned companies of the same size.

Recommendation: invest in transformed film and TV companies

NFVF 2021 Study on the State of Transformation in the South Africa Film and Television Industry Research report
*All statistics available in the research report. Report compiled by Andani.Africa

Transforming Film & TV

Capitalising on international interest

Black and women owned companies indicate increased interest from international companies looking for untold stories and diverse teams. Are we making the most of this shift in the market?

The world is watching



1:26

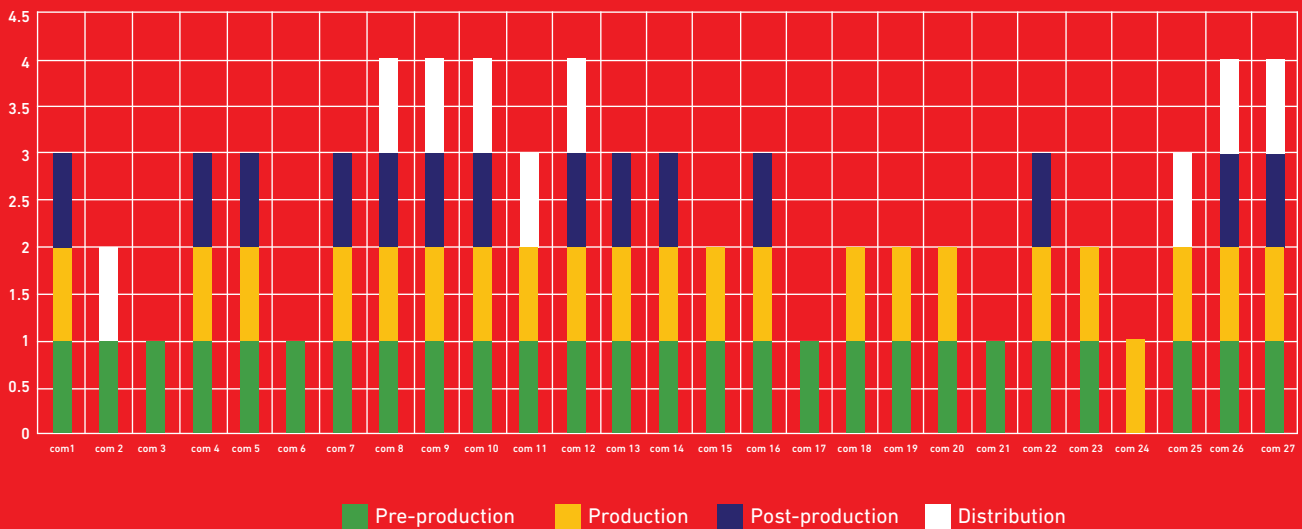
A recent McKinsey report found that 'by addressing the persistent racial inequities [in Hollywood], the industry could reap an additional \$10 billion in annual revenues - about 7% more each year.'

For every 1 household in SA watching a South African show on Netflix, there are 26 more households across the world.

But only 1 in 3 film and TV companies works in distribution

Transforming Film & TV

Types of functions in companies with turnover over R500 000



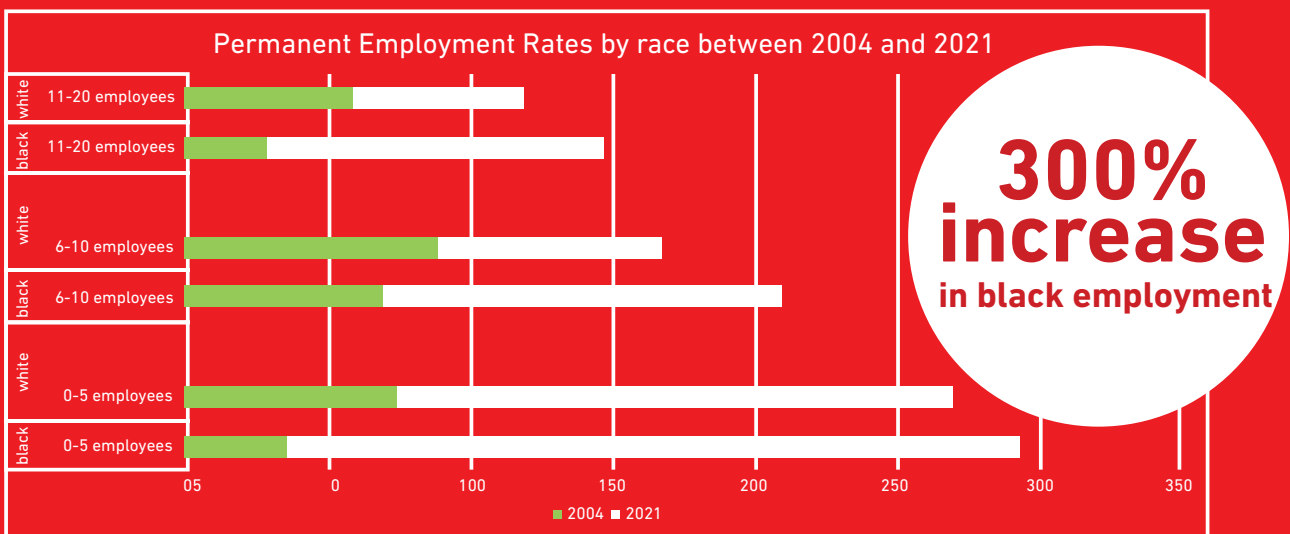
Recommendation: invest in distribution and market access specialisation

NFVF 2021 Study on the State of Transformation in the South Africa Film and Television Industry Research report
 *All statistics available in the research report. Report compiled by Andani.Africa

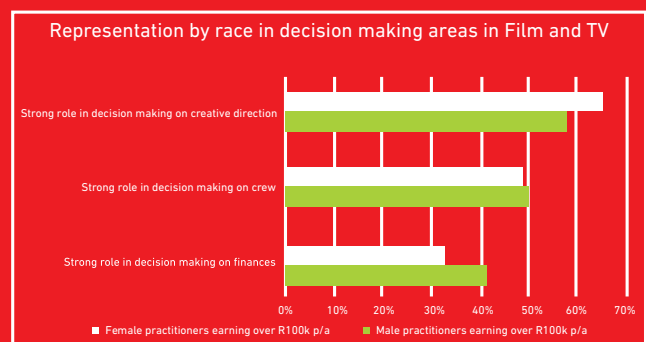
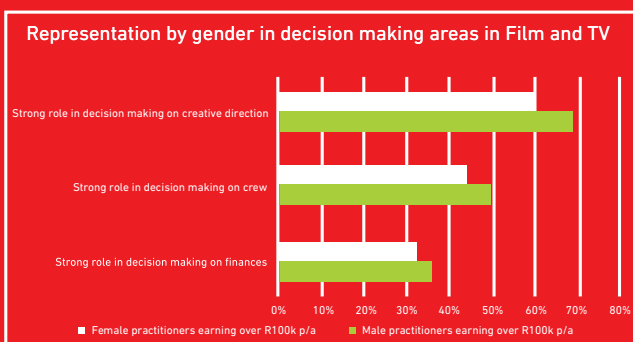
Transforming Film & TV

The argument for transformation

The film and TV industry in South Africa has come a long way better represent the country since the democratic dispensation, but there is still more work to do.



Permanent employment numbers tell a good story about improvements in transformation in film and TV. However, this remains primarily in lower ranking roles with limited influence.

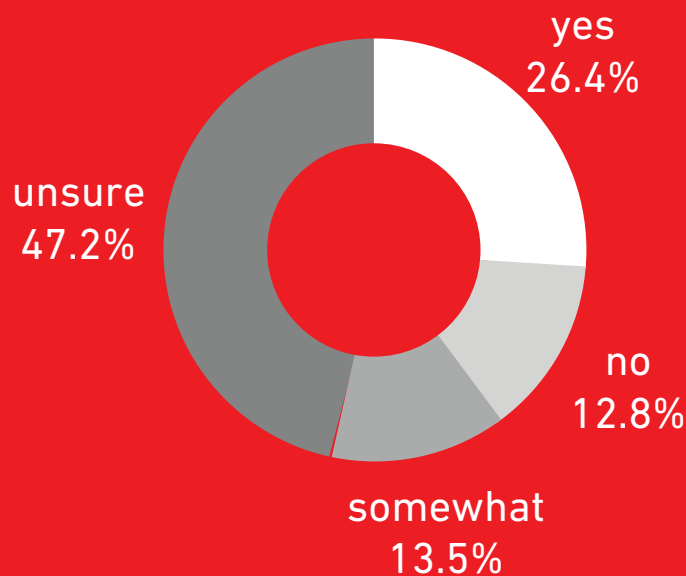


Women and black people in the film and TV industry show lower levels of influence within their jobs than white people and men, particularly as regards decisions on finances and hiring.

Transforming Film &TV

Does the industry take transformation seriously?

Only 26% feel their representative associations take transformation seriously



Recommendation: invest in distribution and market access specialisation

NFVF 2021 Study on the State of Transformation in the South Africa Film and Television Industry Research report
*All statistics available in the research report. Report compiled by Andani.Africa

RECOMMENDATIONS

Recommendation 1	Film Funding Coordination and Restructuring of film fund to
Responsible party	Audio-Visual Forum
Other key role players	DTIC, NFVF, IDC, provincial film commissions
Recommendation detail	<p>There is a need for better coordination between film and television funding among government agencies. The Audio-Visual Forum has been identified as a strategic platform that requires a focus and elevated status that is continuously attuned to the development of the industry, making collective decisions on strategic policy adjustments. The Forum needs to develop a process that will streamline funding deadlines, funding requirements across all members of the forum, potentially in line with the DCDT's draft white paper on audio and audio-visual content services. This streamlining could be enabled through a universal film funding portal. This portal will also be a repository of funding data of the industry, with up-to-date transformation data. It is recommended that funding/financing awardees use this portal for reporting.</p> <p>Government and enabling bodies need to adjust some of their funding so that it is strategically attuned to the specific nuances of the value chain and addresses blockages in pathways (development for IP exploitation not only for production; distribution support especially for international markets, not just visiting festivals). This could be further directed by the proposed international market access strategy.</p> <p>As black owned companies are identified as key drivers of transformation, a portion of funding needs to be steered towards development of black owned companies rather than solely on access. This funding can go towards legal and financial guidance, diversifying skills sets based on identified gaps in business models, market failure/ cash flow support, capital and infrastructure funding.</p>
Key considerations	<ul style="list-style-type: none"> Funding coordination Identification of value chain funding Funding support to black businesses Funding being agile in response to international market demands Development of a film funding portal
Timeframe	Short (coordination), Medium (platform)
Cost	Low (coordination), Medium (platform)

Recommendation 2	Towards a Film and TV Transformation Framework
Responsible party	DSAC - South African Audio-Visual Reference Group
Other key role players	NFVF, DTIC, industry associations, film commissions
Recommendation detail	There has been considerable work done by the DSAC Audio-Visual Reference Group on transformation. Through this working group, particular attention needs to be given to the development of transformation codes for the industry, with specific matrices of evaluation. Sector charters with both legal and non-legal consequences in the form of Sections 9 and 12 need to be explored as a way to enable greater transformation of the sector. Furthermore, there is a need to define transformation in relation to the sector.
Key considerations	Development of transformation charter Development of transformation codes and matrices of evaluation Should be industry led
Timeframe	Medium
Cost	Low

Recommendation 3	International Market Access Strategy
Responsible party	NFVF
Other key role players	Audio-Visual Forum
Recommendation detail	While there have been international market access strategies developed in the past, there needs to be a revision and re-imagining of an international market access strategy that takes into consideration opportunities in the servicing industries, and more importantly, the rise of international streamers into the market. The South African film and TV industry needs to imagine how it can best position itself both in content creation and distribution, as well as how it can provide unique competitive services to the global streaming market.
Key considerations	Unique global positioning for South African film and TV industry Development of an international market access strategy document Competitiveness of local content in international markets
Timeframe	Medium
Cost	Medium

Recommendation 4	Further Research
Responsible party	NFVF
Other key role players	Members of the Audio-Visual Forum
Recommendation detail	<p>Deeper understanding of pathways for career trajectories in the film and TV industry. This should include a focus on the sustainability of black, woman and youth owned companies to ensure a clearer appreciation of what is required to support new entrants to grow into sustainable companies. This should include a better understanding of the impact of financing through SPVs as well as greater markers of company viability than turnover, which has been used as a single measure within this report.</p> <p>Deeper focus on new digital markets and content production. This should include understanding streaming and its impact on African film and television and especially on intellectual property. Furthermore, this should enable a better understanding of online content creation, web series development and the arrival of YouTube/TikTok and other platforms. This research should inform the international market access strategy.</p> <p>Emergent areas for future transformation overview reports. Through the development of measurement metrics for this report several gaps emerged in our understanding of transformation, which have not been adequately addressed in this report. Some gaps to address in future iterations include a deeper understanding of SPV impacts and nuanced metrics for measuring company health, and improved metrics for assessment of income disparity between practitioners of the same kind and level across different demographics (for example, wage disparities between men and women practitioners).</p>
Key considerations	<ul style="list-style-type: none"> • Further research on market access • Content creation developments • Understanding of SPVs • Understanding of pathways
Timeframe	Medium
Cost	Medium-High

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