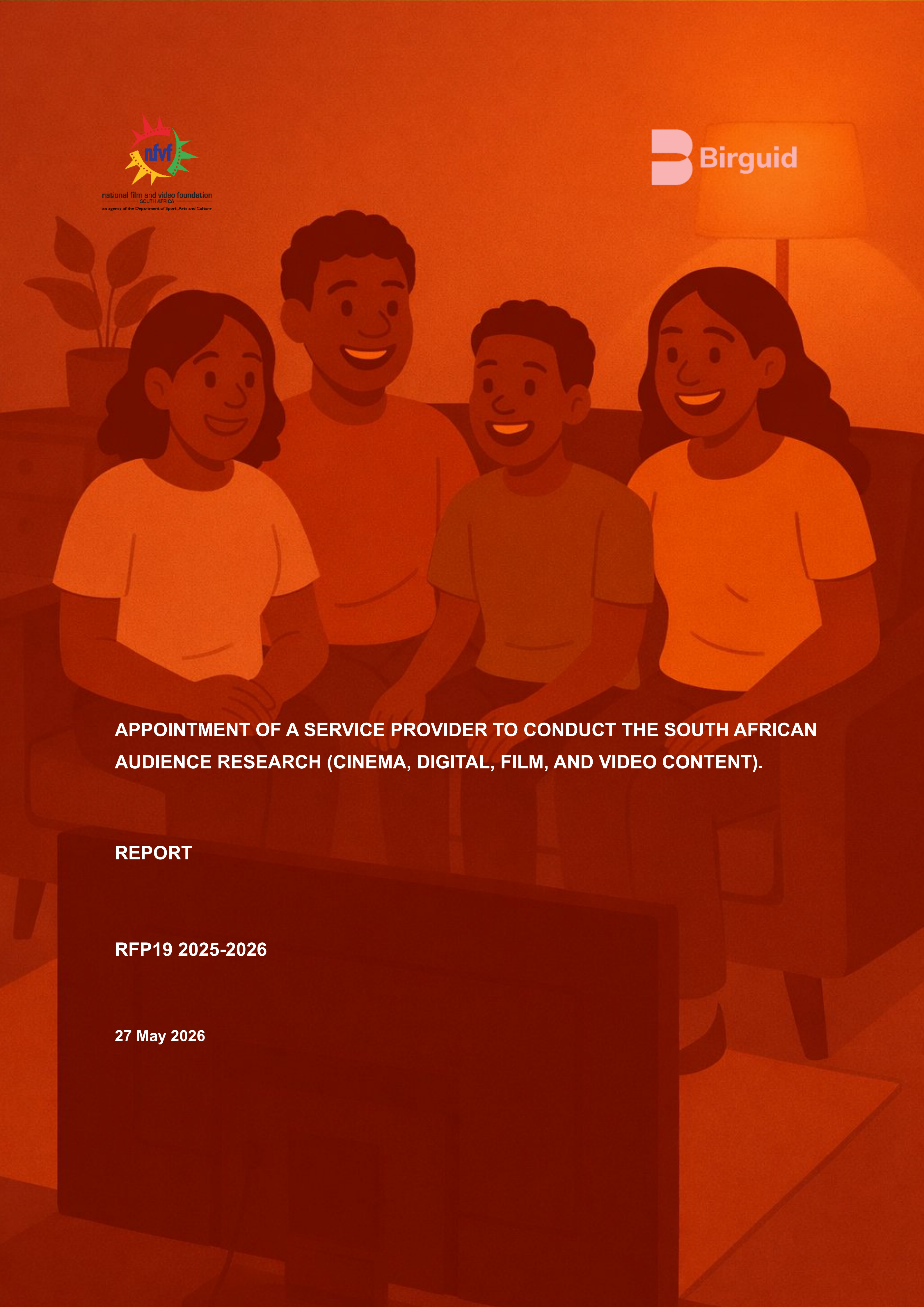

national film and video foundation
SOUTH AFRICA
an agency of the Department of Sport, Arts and Culture

Birguid

# APPOINTMENT OF A SERVICE PROVIDER TO CONDUCT THE SOUTH AFRICAN AUDIENCE RESEARCH (CINEMA, DIGITAL, FILM, AND VIDEO CONTENT).

**REPORT**

**RFP19 2025-2026**

**27 May 2026**

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## EXECUTIVE SUMMARY

This report presents the findings of a national audience research study commissioned in 2026 to provide the National Film and Video Foundation (NFVF) with updated, decision-grade evidence on how South Africans access, consume, and value audiovisual content across film, television, streaming, and online video platforms. The study responds to a central strategic challenge facing the sector: the growing misalignment between legacy production and distribution models and the realities of audience behaviour in an increasingly digital, platform-led, and economically constrained viewing environment.

The primary objective of the study was to build on the 2022 national audience research report to develop a current and evidence-based understanding of audience behaviour, platform usage, and distribution model viability to inform the NFVF's strategy, policy development, and industry interventions. The research was designed to answer key questions relating to content access, platform choice, affordability constraints, local versus international content preferences, and the future role of different distribution channels. A mixed-methods approach was adopted, combining:

- A national quantitative survey across all nine provinces; and
- In-depth stakeholder interviews with filmmakers, broadcasters, distributors, and platform representatives.

This design enabled both measurement of audience behaviour and interpretation of the structural dynamics shaping that behaviour, ensuring that findings reflect both consumer realities and industry context.

**The study's key findings are summarised as follows:**

1) **South Africa is a High-Engagement, Structurally Constrained Viewing Market:** South Africans are highly engaged with audiovisual content, but their behaviour is shaped by structural constraints rather than pure preference. Audiences are active, selective, and increasingly quality-conscious, but operate within conditions defined by affordability, connectivity, device access, and platform availability. Viewing is not concentrated in a single platform. Instead, it is distributed across a hybrid ecosystem, where:
   - Free-to-air television remains the primary mass-reach platform,
   - Streaming and online video are growing rapidly but unevenly
     - Emerging short-form and micro-drama platforms are beginning to form a distinct additional layer within this ecosystem, capturing incremental viewing time rather than replacing traditional or mainstream platforms, and

- Cinema has shifted to an occasional, experience-led channel rather than routine viewing.

This confirms that the central issue is not whether audiences watch content, but how access conditions determine where, how often, and at what cost they watch.

2) **Platform Behaviour is Hybrid, Not Linear:** South African audiences do not transition from one platform to another in a linear way. Instead, they operate within a layered system where platforms serve different roles:
   - **Broadcast television** anchors reach and affordability,
   - **Streaming platforms** provide flexibility and depth where connectivity allows,
   - **Online video (short-form)** dominates daily engagement, particularly among younger audiences, and
   - **Cinema** functions as a premium, social, event-driven experience.

   This hybrid model reflects a structurally unequal environment, where digital growth complements rather than replaces traditional media.
3) **Digital Adoption is Conditional and Affordability-Led:** While internet access is widespread, it is predominantly mobile-based, data-sensitive, and intermittent. As a result:
   - Streaming is often selective rather than continuous,
   - Data costs significantly constrain long-form viewing,
   - Households rely on shared access, subscription cycling, and ad-supported models.

   This means that "digital access" does not equate to full participation in streaming ecosystems. Instead, affordability is the primary determinant of depth of engagement, shaping both consumption frequency and willingness to pay.
4) **Local Content Demand Exists, but Conversion is Weak:** South African content is not rejected by audiences. On the contrary:
   - Audiences recognise its cultural relevance and relatability,
   - There is broad willingness to engage with local stories, and
   - Many believe local content can compete with international content.

   However, competitiveness remains conditional, due to:
   - Lower perceived production polish,
   - Weaker marketing visibility,
   - Limited discoverability on platforms, and
   - Friction in access pathways.

   The key gap is therefore not demand, but conversion, that is, the ability to translate interest into actual viewing and monetisation.
5) **Discovery is Social, Immediate, and Platform-Driven:** Content discovery has shifted decisively toward:
   - Social media platforms,

- Peer recommendation,
- Short-form video, and
- Algorithm-driven exposure.

Traditional drivers such as critics, awards, and formal promotion have declined in influence. However, discovery alone is insufficient. Viewing occurs only when access is simple, affordable, and clearly communicated. This creates a structural disconnect where local content may generate awareness but fail to convert into sustained viewing due to access friction.

6) **Distribution is Multi-Channel, with Diverging Roles:** The study confirms that no single distribution channel can deliver scale. Instead, viability lies in a **portfolio approach**, where each platform plays a distinct role:
   - **Broadcast television**: Most reliable for mass reach and cultural visibility
   - **OTT/streaming and online video**: Strongest growth pathway, but affordability-constrained
   - **Pay-TV**: Viable through hybridisation and premium content
   - **Cinema**: Selective, event-based, and not a primary revenue driver for local films

   Future competitiveness will depend on how effectively these channels are integrated and aligned to audience realities, rather than treated as standalone pathways.

**7)** **Structural Barriers are the Primary Constraint:** Several binding constraints affecting audience participation and market performance:
   - High data costs and affordability limitations
   - Uneven broadband access and reliance on mobile connectivity
   - Weak discoverability and fragmented marketing of local content
   - Geographic limitations affecting cinema access
   - Subscription fatigue and price sensitivity

   Importantly, these barriers affect both what audiences can watch and whether they can pay for it, reinforcing the need for system-level interventions.

**8)** **Production Pipeline Stability is Critical to Market Outcomes:** A key systemic risk identified is the instability of the production pipeline, particularly linked to incentive delays and policy uncertainty. The study finds that:
   - Inconsistent content supply weakens platform planning and audience habits,
   - Irregular release schedules reduce visibility and engagement, and
   - International content fills gaps when local supply is disrupted.

   This highlights that distribution viability and audience development depend fundamentally on production continuity, making policy stability a critical enabler of competitiveness.

The findings imply that South Africa's audiovisual sector is not constrained by lack of audience interest, but by misalignment between production, distribution, and access conditions. To address this, several high-impact strategic priorities are suggested:

1) **Adopt affordability-led distribution models** (bundled data, AVOD, mobile-first pricing, download-to-watch)
2) **Reorient marketing toward social-first discovery and conversion** (short-form content, influencers, clear "where-to-watch" pathways)
3) **Strengthen broadcast as a mass-reach foundation** while integrating digital extensions
4) **Scale multilingual access (subtitles and dubbing)** to expand cross-market reach
5) **Stabilise the production incentive framework** to ensure consistent content supply
6) **Embed audience intelligence into content development** to improve market fit and competitiveness
7) **Institutionalise continuous audience measurement** to support responsive, data-driven decision-making
8) **Integrate emerging and short-form platforms into distribution strategy** (including pilot funding, format innovation, and platform partnerships)
9) **Support content format diversification** (short-form, episodic, mobile-first storytelling alongside traditional formats)
10) Treat free online video and emerging ecosystems as audience development pipelines, not secondary channels

In conclusion, the study demonstrates that South Africa's audiovisual market remains fundamentally viable, but structurally complex. Audience demand for content, including local content, is strong and persistent. However, the ability to convert that demand into sustained viewership, revenue, and competitiveness depends on how effectively the sector aligns with real-world access conditions. The future of the industry will not be defined by a single dominant platform, but by the integration of multiple channels within an affordability-constrained, mobile-first environment. Success will depend on shifting from a production-led model to an audience-aligned system, where content, distribution, pricing, and policy are designed around how South Africans actually live, connect, and consume media. If this alignment is achieved, the sector has the potential to strengthen its cultural impact, expand audience reach, and improve commercial sustainability. If not, the gap between audience interest and local-content performance is likely to persist, driven not by lack of demand, but by structural inefficiencies in how that demand is served.

# CHAPTER ONE: INTRODUCTION

## 1.1 Background and context

South Africa's audiovisual sector occupies an important cultural and economic position within the country's creative economy. The National Film and Video Foundation (NFVF), an agency of the Department of Sport, Arts and Culture (DSAC), is mandated to promote, develop, and sustain the film and video industry through funding, research, skills development, transformation support, and market-facing interventions. As part of this role, the NFVF periodically commissions strategic research to generate evidence that can guide policy, improve industry competitiveness, and strengthen audience development across the value chain (NFVF, 2022, 2025).

South Africa remains one of the most developed screen markets on the African continent, supported by established production capability, technical skills, a comparatively mature service-production base, and concentration of industry infrastructure in Gauteng, the Western Cape, and increasingly KwaZulu-Natal. The sector contributes materially to economic activity, employment creation, tourism linkages, and cultural expression, while also functioning as a platform through which South African stories, languages, and identities are circulated locally and internationally (Aon South Africa, 2024; Who Owns Whom, 2023).

Simultaneously, the sector is undergoing profound structural change. Over the last decade, global audiovisual markets have shifted away from a system centred primarily on cinema exhibition and scheduled broadcasting towards one increasingly shaped by streaming, platform aggregation, mobile viewing, and on-demand access. This shift has altered not only how content is distributed, but also how audiences discover, value, and consume it. International streaming services and digital video platforms now compete directly for audience attention, advertising revenue, subscription spend, and screen time. Their scale, recommendation systems, marketing budgets, and content depth often exceed those available to local producers and distributors (Broadcast Media Africa, 2022; Stats and Research, 2024a, 2024b).

These changes create both opportunity and pressure for South African content. On the one hand, digital platforms potentially widen market access beyond traditional broadcasters and cinema circuits. On the other hand, they intensify competition, increase discoverability challenges, and may weaken the commercial visibility of local content if audiences migrate toward international catalogues that are easier to access, more heavily marketed, or perceived to offer greater variety.

Longstanding structural constraints further complicate this transition. South African films and audiovisual works continue to face limited distribution reach, fragmented monetisation pathways, uneven exhibition opportunities, and persistent barriers to international market penetration. These constraints reduce the commercial lifespan of local productions and weaken the industry's ability to convert creative output into sustainable revenue streams (Research and Markets, 2023; Who Owns Whom, 2023). Industry commentary has also pointed to broader ecosystem pressures, including infrastructure limitations, financing constraints, administrative inefficiencies, and uncertainty around incentives and public funding, all of which affect production activity, investment confidence, and job creation (Aon South Africa, 2024; Daily Maverick, 2026; Reuters, 2026).

Audience-side changes reinforce the urgency of reassessing South Africa's theatrical market using current performance data. According to the NFVF (2024), total gross box office (GBO) revenue for the first half of 2024 declined to approximately R207.8 million, a 28.5% decrease from R290.7 million in H1 2023, while cinema admissions fell by more than 35% to around 2.07 million. Despite 115 films being released, revenue performance remained weak and highly concentrated, with the top 10 films generating approximately R141.7 million, accounting for over 68% of total GBO. This concentration, driven largely by international titles such as *Bad Boys: Ride or Die* and *Inside Out 2*, underscores the growing dominance of global franchise content and reflects how affordability constraints, convenience, and competition from home-based and digital viewing are reshaping theatrical demand (NFVF, 2024).

In contrast, South African films remain structurally constrained within the cinema market, generating only approximately R1.58 million from nine releases, or around 1% of total box office revenue (NFVF, 2024). When read alongside earlier audience research, which shows sustained interest in culturally relevant and accessible local content, this disparity suggests that weak theatrical performance is not primarily a function of low demand. Rather, it reflects systemic constraints in distribution design, marketing visibility, pricing, and platform access that limit audience conversion at the cinema level (NFVF, 2022). Together, these dynamics reinforce the conclusion that cinema is transitioning toward a selective, event-driven platform with limited capacity to serve as a primary commercial pathway for local content without targeted structural intervention.

The central strategic challenge is, therefore, not only whether South Africa can continue producing content, but whether it can align production, distribution, and audience realities in a way that sustains visibility, monetisation, and competitiveness in an increasingly digital, globalised, and platform-led market. This study was commissioned to generate updated, audience-centred evidence on consumption behaviour, platform usage, content preferences, access barriers, and the viability of distribution pathways to inform NFVF strategy and broader industry development.

### 1.2 Problem statement

The core problem addressed by this study is that South Africa's audiovisual sector is operating within a rapidly changing consumption environment, yet decision-making is constrained by incomplete and partially outdated evidence on how audiences currently access, choose, and pay for content. Although South Africa has a comparatively mature production ecosystem and significant creative capability, this supply-side strength does not automatically translate into audience reach, sustainable monetisation, or long-term market competitiveness. The sector faces a structural mismatch between content production and the conditions under which audiences now consume audiovisual media. Specifically, the industry is confronting:

1) A shift away from traditional cinema and scheduled television toward streaming, mobile, and on-demand viewing,
2) Intensifying competition from international platforms and imported content ecosystems,
3) Uneven digital access shaped by data costs, broadband availability, device ownership, and affordability,
4) Limited and fragmented distribution channels for local productions, both domestically and internationally, and
5) Institutional and market constraints that weaken planning certainty, investment confidence, and distribution innovation.

These challenges matter because they influence not only what audiences watch, but also whether South African content is visible, discoverable, affordable, and commercially sustainable. Where local content does not perform well, the explanation may lie less in audience rejection and more in structural barriers relating to platform access, marketing reach, release pathways, content availability, or willingness and ability to pay.

The problem is compounded by the pace of change in the sector. Since the NFVF's previous major audience research (2022), the market has continued to evolve through platform proliferation, shifts in screen behaviour, post-pandemic changes in viewing patterns, and greater integration of digital video into everyday media consumption. In the absence of refreshed, nationally grounded evidence, policy interventions and industry strategies risk responding to assumptions rather than current behavioural realities. Accordingly, the central question addressed by this study is:

**How can South Africa's audiovisual sector better align production, distribution, and policy frameworks with evolving audience behaviour and digital consumption realities to improve reach, competitiveness, and long-term sustainability?**

To answer this question, the study examines:

1) How audiences are currently accessing and consuming film, television, streaming, and online video content,
2) How digital access, affordability, devices, and data constraints shape consumption behaviour,
3) How audiences evaluate and choose between local and international content,
4) Whether current distribution pathways remain viable in an increasingly platform-led environment, and
5) What strategic interventions could improve market access, audience development, and the competitiveness of South African audiovisual content.

The report's golden thread is:

**Changing audience behaviour and access conditions → shifting platform and distribution realities → implications for local content competitiveness → strategic responses for NFVF and the wider industry.**

## 1.3 Study objectives, scope and research questions

### 1.3.1 Study objective

The overall objective of the study is to develop an evidence-based understanding of contemporary audience behaviour, platform usage, and distribution model viability in South Africa to inform NFVF strategy, industry development priorities, and policy interventions that support the competitiveness and sustainability of local audiovisual content.

### 1.3.2 Specific objectives

The study specifically seeks to:

1) **Analyse digital adoption and content consumption drivers**
    a) Assess how internet connectivity, data affordability, device access, and digital readiness influence content consumption,
    b) Identify patterns of usage across cinema, broadcast television, streaming platforms, and online video services,

c) Examine willingness to pay for different content types and delivery formats.

2) **Evaluate distribution model viability**
   a) Assess the relative role and sustainability of cinema, television, and digital distribution pathways,
   b) Examine the extent to which audiences are shifting from scheduled viewing toward on-demand and platform-based consumption.
3) **Assess market competition and audience alignment**
   a) Examine how audiences perceive South African content relative to international content in terms of relevance, quality, language, accessibility, and appeal,
   b) Identify the conditions under which audiences are more likely to choose local content.
4) **Identify behavioural and structural barriers to consumption**
   a) Assess the effects of cost, location, connectivity, discoverability, marketing visibility, and platform accessibility on audience participation,
   b) Identify barriers affecting both digital and traditional modes of content access.
5) **Generate strategic evidence for industry development**
   a) Provide practical recommendations to improve distribution effectiveness, audience engagement, discoverability, and policy alignment,
   b) Support NFVF and sector stakeholders with decision-grade insights for market development and strategic planning.

### 1.3.3 Scope

The study covers the following thematic areas:

1) Audience access to film, television, streaming, and online video content,
2) Patterns of screen behaviour across traditional and digital platforms,
3) Digital readiness, including connectivity, data affordability, and device ecosystems,
4) Audience preferences for local versus international content,
5) Willingness to pay and perceived value across different formats and platforms,
6) The changing role of cinemas relative to home-based and mobile viewing,
7) Distribution barriers affecting audience reach and market access,
8) Industry perspectives on platform economics, distribution dynamics, and audience development; and
9) Strategic implications for NFVF policy, programming, and industry support.

### 1.3.4 Research questions

The study is guided by the following research questions:

1) How are South Africans currently accessing and consuming film, television, streaming, and online video content?

2) What factors shape platform choice and screen behaviour?
3) What influences audience preference for local versus international content?
4) How do affordability, connectivity, data costs, and device ownership affect access to content?
5) What is the evolving role of cinemas within a more digital and home-based viewing environment?
6) Which distribution channels appear most viable for South African content over the medium to long term?
7) What barriers reduce the visibility, accessibility, and competitiveness of local productions?
8) What strategic interventions could strengthen audience engagement and improve the market position of South African audiovisual content?

## 1.4 Research design and methodology

### 1.4.1 Overall approach

The study adopts a mixed-methods design, combining quantitative audience research with qualitative stakeholder insight and secondary review. The purpose of this design is twofold: first, to quantify patterns of audience behaviour, platform use, and access constraints; and second, to explain how these patterns are shaped by broader market, distribution, and industry dynamics.

The methodology is structured to support the report's central analytical pathway:

**Audience access conditions and platform adoption → content choice and consumption behaviour → distribution implications → strategic recommendations for industry development.**

### 1.4.2 Primary research components

The study consists of two main primary-research components.

1) **National audience survey:** A national quantitative survey was undertaken to measure how South Africans consume audiovisual content and how viewing behaviour is shaped by platform access, affordability, and preferences.

**Table 1:** Survey methodology and sample overview

| Attribute | Description |
| --- | --- |
| Method | Face-to-face CAPI intercept interviews |
| Target population | South African residents aged 18+ |
| Sample size | N = 397 |
| Coverage | All 9 provinces |
| Interview duration | Approximately 45 minutes |
| Mode | Tablet-based CAPI with built-in validation, GPS and timestamps |

*Source: Birguid*

To ensure relevance, respondents were required to have consumed film, television, or online video content within the previous three months.

2) **Industry stakeholder interviews:** To contextualise audience findings, the study also included **15 in-depth interviews** with value-chain participants.

**Table 2:** Stakeholder interview sample

| Stakeholder group | Number |
| --- | --- |
| Filmmakers | 5 |
| Broadcasters / platform executives | 5 |
| Distributors / sales agents | 5 |

*Source: Birguid*

These interviews were designed to explore:

1) Distribution economics and monetisation models,
2) Platform strategy and audience-reach considerations,
3) Perceived competitiveness of local content,
4) Market-access constraints, and
5) Sector responses to ongoing digital transformation.

### 1.4.3 Data collection and quality controls

Data collection was undertaken using secure tablet-based CAPI systems and structured qualitative interviewing. Quality controls included:

1) Built-in validation checks within the CAPI instrument,
2) GPS and timestamp recording,
3) Minimum interview-duration thresholds,

4) Daily uploads for monitoring of quotas and completion quality, and
5) Ongoing supervision of fieldwork progress.

For the qualitative component, interviews were recorded where consent was granted, and notes or transcripts were used for subsequent thematic analysis.

**1.4.4 Secondary and documentary analysis**

Primary research was supplemented by review of prior NFVF research, industry studies, market reports, and other documentary sources. Secondary analysis served to:

1) Situate findings within broader market and policy developments,
2) Compare audience evidence with distribution and industry trends,
3) Strengthen triangulation across data sources, and
4) Support interpretation of structural changes affecting the sector.

**1.4.5 Data analysis**

Quantitative data were analysed using descriptive statistics, cross-tabulations, and segmentation-based interpretation, with post-fieldwork weighting applied where necessary to improve alignment with demographic distributions.

Analysis focused on:

1) Platform usage patterns,
2) Screen behaviour across cinema, broadcast, streaming, and online video,
3) Access constraints linked to affordability, data, and devices,
4) Local versus international content preferences, and
5) Willingness-to-pay dynamics and consumption barriers.

Qualitative data were thematically coded to identify patterns in:

1) Distribution economics and bottlenecks,
2) Platform strategy and audience-reach challenges,
3) Perceptions of local-content competitiveness,
4) Discoverability, marketing, and market-access issues, and
5) Strategic implications for the sector.

Findings are integrated across the report to sustain the following analytical thread:

**Access and affordability conditions → platform behaviour → local-content performance and barriers → distribution implications → industry and policy recommendations.**

### 1.5 Study limitations

While the study provides a strong and policy-relevant evidence base, several limitations should be considered in interpretation.

1) **Sample size and representativeness**: The audience survey sample of 397 respondents is robust for directional national insight, but it remains modest relative to the full diversity of South Africa's media-consuming population. Findings therefore support pattern recognition and strategic interpretation rather than extremely granular sub-market generalisation.
2) **Intercept-based recruitment limitations**: Because the quantitative component relied on intercept sampling, some groups may be under-represented, including less mobile individuals, highly time-constrained populations, and people in remote areas with lower footfall.
3) **Self-reported behaviour**: Some findings rely on respondent recall and self-assessment, which may introduce recall bias, social desirability bias, or inconsistencies in how respondents define particular platforms, content types, or viewing frequencies.
4) **Rapidly evolving platform environment**: The digital audiovisual market is changing quickly. Platform offerings, pricing models, and audience behaviours may continue to shift after fieldwork, meaning that findings should be understood as a strong current-period assessment rather than a permanently fixed picture.
5) **Qualitative sample scope**: The stakeholder interviews provide valuable contextual insight but are not intended to represent every segment of the industry. They should therefore be read as explanatory and directional rather than statistically representative.
6) **Access-excluded audiences**: Individuals who are most excluded from digital ecosystems, including those with very limited connectivity or device access, may be harder to capture fully through standard intercept research, which may understate the depth of exclusion in some contexts.

Overall, however, the study's mixed-methods design provides a credible and triangulated foundation for understanding current audience dynamics and their implications for the South African audiovisual sector.

# CHAPTER TWO: LITERATURE REVIEW

## 2.1 Introduction

This literature review provides the evidence base for the audience research survey on film, television, streaming, and online video consumption in South Africa. It is designed to ensure the survey is grounded in what is already known about how audiences discover, access, and value content while clearly identifying where the evidence is outdated, incomplete, or too general to guide current decision-making.

Over the past decade, South Africa's viewing environment has shifted from a largely linear, television-led ecosystem to a mixed, multi-platform market shaped by mobile internet access, global streaming services, and algorithm-driven discovery. NFVF audience research has already confirmed two critical realities: first, there is sustained interest in local storytelling when it is relatable, culturally grounded, and well-packaged; and second, consumption is often constrained less by "lack of demand" than by structural barriers such as affordability, uneven access, and weak visibility of local content (NFVF, 2015, 2022). At the same time, cinema performance data continues to show that theatrical revenues remain heavily concentrated in international releases, highlighting the growing importance of digital and broadcast windows for local content reach and monetisation (NFVF, 2024).

Within this context, the survey is intended to generate updated, decision-grade intelligence on (1) where and how South Africans are consuming content across platforms, (2) how affordability, connectivity, devices, and payment mechanisms shape real viewing behaviour, (3) what drives choices between local and international titles, (4) how audiences discover content in a social and algorithmic environment, and (5) which distribution channels are most viable for South African content over the next five years. The literature review therefore serves two roles: it consolidates the most credible current evidence to inform survey design (question framing, segmentation, variables, and hypotheses), and it defines the specific knowledge gaps the survey must fill, particularly in a post-pandemic market where home viewing, mobile-first access, and streaming competition have accelerated structural change (NFVF, 2022; Statistics South Africa, 2023).

In doing so, the review aligns directly to the study objectives and research questions by linking audience behaviour and preferences to enabling infrastructure and distribution realities, ensuring the survey measures not only "what audiences watch," but also the pathways and constraints that determine whether South African content is found, chosen, paid for, and sustained over time.

## 2.2 Audience access and consumption behaviours

### 2.2.1 The dominant shift: home-based viewing as the default

The literature shows a clear and sustained shift toward home-based viewing as the primary way South Africans consume film and television content. NFVF audience research indicates that approximately 80% of respondents prefer watching films at home rather than attending cinemas, a pattern that accelerated during COVID-19 but has since stabilised as a long-term behavioural norm (NFVF, 2022). This shift mirrors global trends in audience behaviour, where streaming and on-demand access have redefined everyday viewing practices, but in South Africa it is strongly shaped by affordability, access, and infrastructure constraints.

Home-based viewing is driven by a combination of convenience and necessity. Audiences value flexibility, control over viewing time, and the ability to watch across shared household devices, particularly television sets and mobile phones (NFVF, 2022). At the same time, rising transport costs, cinema ticket prices, and competition from lower-cost or shared digital access options have reduced cinema's role in routine viewing (Statistics South Africa, 2023). Academic studies on post-pandemic viewing behaviour confirm that while audiences still value cinema as an experience, it has shifted from a habitual activity to an occasional, event-driven choice (De Valck et al., 2022; Lobato, 2023).

Importantly, cinema has not lost cultural relevance, but its function has changed. It now operates primarily as a social and experiential channel, while broadcast television, streaming platforms, and online video form the backbone of everyday content consumption (NFVF, 2022; National Association of Broadcasters, 2024). This distinction is critical as it requires audience research to differentiate between habitual viewing platforms and occasional or aspirational viewing experiences, rather than treating all platforms as equal substitutes.

### 2.2.2 Who the audience is: youth-weighted, urban-concentrated, but nationally distributed

Prior NFVF audience research revealed that South Africa's film and television audience is predominantly youth-weighted, with the largest consumption group aged 20–34 years (NFVF, 2022). This aligns with national demographic trends, as South Africa remains a young society with a median age below 30 and high levels of engagement with digital and mobile media (Statistics South Africa, 2022). Younger audiences are also more likely to engage with streaming services and online video platforms, often in mobile-first or short-form viewing patterns, consistent with international evidence on audience fragmentation and binge-oriented consumption (Lotz, 2022; Tryon, 2021).

Audience consumption is, however, unevenly distributed across space. Both the 2015 and 2022 NFVF studies show higher levels of consumption in Gauteng, KwaZulu-Natal, and the Western Cape; provinces that also concentrate cinema infrastructure, broadcast production hubs, and higher levels of internet connectivity (NFVF, 2015, 2022). Despite this concentration, national data confirms that access to television and mobile internet extends well beyond major metros, meaning that film and television audiences are nationally distributed even where platform choice and viewing quality differ (Statistics South Africa, 2023).

The literature consistently shows that demographic alignment does not translate into uniform consumption behaviour. Age, income, settlement type, and household structure strongly influence:

- Platform access (free-to-air television versus streaming),
- Frequency and duration of viewing,
- Willingness and ability to pay for content,
- Reliance on shared versus personal devices.

For example, lower-income and rural households remain more reliant on free-to-air television due to affordability, while higher-income and urban audiences are more likely to combine broadcast, streaming, and cinema viewing (NFVF, 2022; Statistics South Africa, 2023). International research confirms that streaming adoption intensifies audience fragmentation rather than replacing older media entirely, especially in unequal markets (Lobato, 2019; Napoli, 2021). In South Africa, this fragmentation is reinforced by economic inequality, even where overall audience interest in content is high.

This evidence implies that demographic variables must be treated as analytical drivers, not background descriptors including:

- Platform choice and substitution between cinema, broadcast, and streaming,
- Digital adoption and drop-off points linked to affordability and access,
- Content discovery pathways and marketing reach,
- Viewing frequency, loyalty, and willingness to pay.

### 2.3 Platform mix: Television anchors reach while digital grows where affordability allows

South Africa's film and television market operates within a structurally mixed platform ecosystem. Traditional broadcast and household television continue to anchor mass reach because they remain the most accessible and cost-effective means of content consumption, particularly for lower- and middle-income households. NFVF audience research confirms that free-to-air and broadcast television remain preferred viewing platforms for a large share of the population, largely due to affordability and reliability relative to paid digital services (NFVF, 2022). In a highly unequal access environment, television therefore continues to function as the primary awareness and reach platform for audiovisual content.

Digital platforms, particularly streaming services and online video have expanded audience choice and viewing diversity, but their growth is strongly conditioned by connectivity and affordability. A critical distinction emerging from both national statistics and industry analysis is that "internet access" does not equate to "home broadband access." While close to three-quarters of South Africans access the internet via mobile devices, fixed home internet penetration remains significantly lower and geographically skewed toward higher-income and urban areas (Statistics South Africa, 2023; Vermeulen, 2025). Independent industry reporting similarly shows that fibre and fixed-line connections remain concentrated among a minority of households, reinforcing mobile networks as the dominant access layer for most consumers (Vermeulen, 2025).

This access structure shapes how digital content is consumed. Rather than continuous, high-bandwidth streaming, digital viewing in South Africa is predominantly mobile-first, data-sensitive, and intermittent. Audiences frequently rely on prepaid data, shared Wi-Fi, or off-peak usage, which limits sustained streaming and encourages selective or short-form viewing behaviours (NFVF, 2022; Nedbank, 2024). As a result, digital platforms tend to complement rather than replace television, supporting on-the-go, personalised, or niche engagement rather than mass, habitual viewing.

The financial implications of this hybrid model are significant. Consumer research shows that the cumulative cost of multiple streaming subscriptions, combined with data expenses, is increasingly scrutinised by households, leading to subscription cycling, shared accounts, or reliance on ad-supported and free platforms (Nedbank, 2024). This reinforces the role of broadcast television as the lowest-friction entry point for local content discovery, while digital platforms deepen engagement among audiences who can afford sustained access. Understanding this hybrid platform mix is essential to assessing the long-term viability of distribution channels and to designing audience and distribution strategies that reflect real consumption conditions rather than assumptions of universal digital readiness.

### 2.4 Discovery drivers are changing: social influence and mood matter more

Evidence from NFVF time-series audience research shows a clear shift in how South Africans discover and choose film and television content. Viewing decisions are increasingly shaped by social cues, *fear of missing out (FOMO)*, and immediate emotional resonance rather than by traditional prestige markers such as awards, critics' reviews, or formal promotion (NFVF, 2015, 2022). Mood, relatability, and social conversation now play a central role in triggering interest, particularly among younger and mobile-first audiences. This shift aligns with global changes in media discovery, where algorithm-driven and social platforms have become the dominant gateways to content. In South Africa, platforms such as TikTok, Instagram, YouTube, and WhatsApp increasingly function as primary discovery engines, surfacing trailers, clips, memes, and peer recommendations that shape what audiences perceive as relevant or "worth watching" (Meltwater, 2025; The Call Sheet, 2025). As of 2025, more than 50 million South Africans are online, spending on average approximately 3 hours and 36 minutes per day on social media, reinforcing the central role of these platforms in everyday content discovery (Meltwater, 2025).

However, the South African literature highlights a critical constraint: discovery alone does not guarantee sustained viewing. Interest generated through social media or word-of-mouth converts into actual consumption only when the access pathway is affordable, simple, and compatible with mobile-first usage patterns (NFVF, 2022; Statistics South Africa, 2023). High data costs, subscription fatigue, and uncertainty about where content is available can interrupt the journey from awareness to viewing. As a result, mobile-friendly formats, ad-supported platforms, shared subscriptions, and bundled or sponsored data models are particularly important in enabling conversion from discovery to consumption (BusinessTech, 2024; The Call Sheet, 2025).

For South African content, this creates a structural gap between *interest* and *realised demand*. Local films and series may generate strong social visibility or positive sentiment yet fail to achieve sustained viewing if audiences face friction in accessing the content. This helps explain why local content can perform well in terms of awareness and cultural relevance while still struggling to compete with international titles that benefit from heavy platform promotion and low-friction access on dominant streaming services (NFVF, 2022).

## 2.5 Content choice, localisation, and monetisation in a global attention market

### 2.5.1 Local relevance is a strong driver, but it competes inside a global attention market

South African audiences consistently respond to relatable characters, familiar settings, and culturally proximate stories, and NFVF evidence indicates that perceptions of local quality have improved over time (NFVF, 2015, 2022). The challenge is that attention is increasingly allocated inside global, platform-led catalogues, where local titles compete not only with Hollywood releases, but with high-volume international series engineered for “always-on” discovery and bingeable consumption. Streaming platforms shape demand through algorithmic recommendations, “taste clusters,” and personalised interfaces. In practice, this means local content does not only need to be “good”, but it also needs to be packaged, positioned, and surfaced in ways that fit how platforms curate choice (Higson, 2021).

Netflix’s model (as a global benchmark) explicitly links audience growth to diversification plus localisation plus personalisation and treats the platform itself as a gatekeeper that structures what audiences see and try next (Higson, 2021). For South Africa, the key implication is strategic: local relevance must be paired with discoverability design. Content that is culturally resonant still needs the right *genre cues, thumbnails/trailers, metadata, and social proof* to win attention in a crowded catalogue (NFVF, 2022; Higson, 2021).

### 2.5.2 Language, subtitles, and cultural proximity expand addressable audiences

Language diversity is not only a segmentation reality, but also a distribution lever. South Africa’s largest home-language group is isiZulu (Statistics South Africa, 2022), and NFVF audience research shows strong openness to subtitles, which reduces language as a hard barrier and enables cross-provincial reach for local titles (NFVF, 2022). What the international streaming literature adds is *why this works*: cross-market viewing is strongly shaped by linguistic proximity and cultural distance, that is, audiences are more likely to adopt shows that feel “near” in language and cultural codes (Jang et al., 2023).

For South Africa, this supports a practical distribution logic:

- Treat subtitles as core market access infrastructure (not a post-production add-on), and
- Use language strategy to support both domestic scale (cross-province) and regional/global reach, where language accessibility materially affects adoption (NFVF, 2022; Jang et al., 2023).

### 2.5.3 Willingness-to-pay exists but conversion depends on frictionless “value and access” design

NFVF findings show real willingness-to-pay in principle, but conversion is shaped by whether access feels easy, affordable, and worth it (NFVF, 2022). The streaming era intensifies this because audiences compare local titles against a perceived “all you can watch” global offer, often bundled into household routines and shared accounts (Higson, 2021).

So the practical question is less “will audiences pay at all?” and more: which price points, bundles, and access models reduce friction (for example, ad-supported tiers, telco bundles, download-to-watch, and mobile-friendly pricing structures), especially in a market where affordability constraints remain decisive (NFVF, 2022; Statistics South Africa, 2023).

### 2.5.4 Localisation of marketing is now a competitiveness requirement and not just a nice-to-have

As distribution becomes platform-led, marketing increasingly functions as *localised digital performance* rather than broad “one-size” campaigns. Evidence from digital localisation research is clear: effective localisation goes beyond translation. It requires cultural relevance, local trend alignment, and adaptation to how different audiences build trust and interpret messaging (Okonkwo et al., 2023). In audience terms, this translates into:

- Culturally specific hooks (humour, local idioms, recognisable social settings).
- Local creator and influencer amplification to “lend trust” and accelerate trial.
- Always-on optimisation using engagement signals (Okonkwo et al., 2023).

South African marketing evidence on influencer dynamics supports this direction. Social media gives influencers a cost-effective channel to shape consumer decision-making, and the literature argues they can materially influence choices in the South African context (Moodley & Machela, 2022). In a streaming-led market, this strengthens the case for creator-led campaigns that build social proof quickly; especially for local releases that need momentum to compete against global franchises.

Finally, short-form video platforms are increasingly central to attention allocation. Industry synthesis (WARC/TikTok collaboration) emphasises that audiences gravitate toward content and trends that resonate with personal identity and community, that is, “personal and cultural relevance” is not decoration; it is a performance driver in short-form environments (WARC, n.d.). For South African content, the competitive play becomes clearer. Win discovery locally (cultural relevance and creators), reduce access friction (affordable pathways), and then sustain engagement with platform-fit formats and metadata that keep the title surfacing.

### 2.6 Digital adoption drivers and structural barriers

Digital adoption in South Africa is shaped less by abstract notions of “technology readiness” and more by a set of structural conditions that determine whether audiences can move from awareness and interest to sustained digital viewing. The literature converges on three interrelated drivers and constraints, connectivity structure, data affordability, and technology transition which together define the practical limits of digital consumption in the South African context.

#### 2.6.1 Connectivity structure: access is widespread, but not evenly usable

Recent national and industry data indicates that internet access in South Africa is now widespread, with overall penetration reaching approximately 78.9% by early 2025, and more than 50 million people accessing the internet, primarily via mobile devices (DataReportal, 2025; International Trade Administration [ITA], 2024). However, this headline figure masks deep inequalities in where and how access occurs.

Mobile connectivity dominates as the primary access route, while fixed broadband access at home, particularly fibre remains concentrated in urban, higher-income areas, despite rapid growth in fibre-to-the-home (FTTH) subscriptions (ITA, 2024; MyBroadband, 2025). This uneven access structure matters because digital viewing behaviour differs substantially depending on whether users rely on mobile-only access, shared Wi-Fi, or fixed, uncapped broadband. As a result, “streaming adoption” cannot be treated as a single, uniform behaviour. The literature consistently points to at least three distinct usage modes shaped by connectivity conditions:

- **Mobile-first viewing**: With over 99% of internet users owning smartphones, this is the dominant mode for most South Africans. It is highly data-sensitive and often favours short-form, selective, or ad-supported content (DataReportal, 2025; ITA, 2024).

- **Wi-Fi–based binge viewing**: Increasingly associated with FTTH growth in urban and middle- to high-income households, enabling longer-form viewing and series consumption, though often disrupted by electricity outages (load-shedding).
- **Download-to-watch practices**: Used to manage data costs and intermittent connectivity, allowing users to cache content while on Wi-Fi for offline viewing (ITA, 2024).

### 2.6.2 Data affordability and the meaning of “streaming”

Despite expanding 4G and 5G coverage, data affordability remains one of the most binding constraints on digital viewing. While mobile data prices have declined in real terms over the past decade, they remain high relative to income for large segments of the population, forcing users to operate within tight data budgets (Research ICT Africa, 2020; Springer, 2025). This has important consequences for how audiences define and experience “streaming.” For many South Africans, streaming does not mean unlimited, continuous viewing. Instead, it involves managed, cost-aware behaviours, including:

- **Zero-rated or data-inclusive bundles**, often driven by partnerships between streaming platforms and mobile network operators,
- **Ad-supported video-on-demand (AVOD)** options, which reduce or eliminate subscription fees for price-sensitive users,
- **Micro-subscriptions**, such as daily or weekly access passes and low-denomination data bundles, preferred over long-term contracts (Modern Marketing, 2024; Nedbank, 2024).

These behaviours reflect a broader finding in the literature: physical access to digital services does not guarantee continuous or equitable usage, particularly in unequal societies where affordability shapes engagement depth (Van Dijk, 2019).

### 2.6.3 Technology transition, power reliability, and user habits

South Africa’s transition from 3G to 4G and 5G networks is improving streaming quality and expanding potential reach. However, the benefits of this transition are moderated by two contextual factors: electricity reliability and device dependence. Load-shedding has reinforced reliance on mobile devices, which can operate on battery power, rather than fixed routers and home networks (365 Digital, 2024; The Call Sheet, 2025). As a result, successful digital platforms in South Africa increasingly resemble hybrid models balancing high-quality, long-form content for households with stable power and broadband access, alongside lighter, mobile-optimised, or short-form offerings for users navigating power and data constraints. This aligns with broader digital inclusion research, which emphasises that effective adoption depends on usability, reliability, and alignment with everyday constraints, not just infrastructure rollout (Financial Markets Journal, 2024).

### 2.7 Decentralised industry development as an audience-growth lever

Beyond platform shifts and technological adoption, South Africa's audience outcomes are also shaped by the geographic distribution of production capacity, skills development, and market-support infrastructure. The literature indicates that provincial film offices, commissions, and industry hubs play a critical role in reducing structural barriers to production, strengthening local talent pipelines, and increasing the visibility of local content through events, screenings, and community-based access models (Gauteng Film Commission, n.d.; KwaZulu-Natal Film Commission [KZNFC], n.d.).

Provincial decentralisation provides a practical mechanism for translating production activity into local participation and audience engagement. The KwaZulu-Natal Film Commission, for example, is explicitly positioned as a "one-stop-shop" for film and television production, offering facilitation services, location support, and industry coordination intended to attract productions while developing provincial capacity (KZNFC, n.d.). Similarly, the Eastern Cape illustrates how decentralisation can be operationalised through a combination of instruments. The Eastern Cape Film Investment Fund is designed to attract productions shot in the province and stimulate local economic participation, while the Eastern Cape Development Corporation (ECDC), in partnership with the Mandela Bay Development Agency (MBDA), has announced infrastructure investments aimed at establishing film-industry support facilities in Nelson Mandela Bay/Gqeberha (Eastern Cape Development Corporation [ECDC], 2024; Mail & Guardian, 2024). In parallel, the Eastern Cape Film Hub functions as an incubation and acceleration platform, with institutional linkages to both the NFVF and the ECDC, reinforcing the development of home-grown talent and locally rooted content pipelines (EC Film Hub, n.d.).

From an audience research perspective, these decentralised ecosystem interventions have direct analytical relevance. "Local consumption" cannot be understood solely through stated content preferences; it is also shaped by provincial ecosystem exposure, including awareness of locally produced content, proximity to screenings and film-related events, and the degree to which local setting and language increase viewing likelihood. The literature suggests that decentralised hubs can therefore support both inclusion by broadening who participates in production and demand conversion, by strengthening the pathways through which audiences discover and access local titles. This is particularly significant in provinces where affordability constraints and uneven digital access limit the effectiveness of purely platform-based distribution strategies (NFVF, 2022; Statistics South Africa, 2023).

### 2.8 Distribution models and a five-year viability view

South Africa's film and television distribution environment is best understood as a multi-window system under pressure, rather than a linear progression from cinema to broadcast to digital. Over the next five years, the relative viability of each distribution model will be shaped by audience affordability, platform economics, discovery mechanics, and production-pipeline stability, rather than by technology adoption alone.

#### 2.8.1 Cinema (theatrical exhibition): viable as an "event window," fragile as a mass local-content pathway

Recent South African box-office evidence confirms that theatrical exhibition remains operational but structurally constrained. According to the NFVF, total box-office admissions increased modestly from 2022 to 2023, but domestic films accounted for less than 1% of total box-office revenue, underscoring the dominance of international franchises (NFVF, 2025). Preliminary mid-year reporting for 2024 shows renewed pressure, with admissions and gross revenue declining again despite aggressive release schedules and recovery efforts (NFVF, 2024).

Industry commentary and media analysis converge on the same conclusion: cinema in South Africa is increasingly experience-led rather than volume-led. Exhibitors are positioning around premium formats, curated events, and partnerships rather than everyday attendance (The Media Online, 2025; IOL, 2025). While chains such as Nu Metro have reported selective successes through mall-based partnerships and experiential programming, these gains do not fundamentally alter the economics of theatrical exhibition, which continue to favour high-budget, globally marketed titles (Stuff, 2025; MyBroadband, 2025). From a five-year viability perspective, cinema is therefore best understood as:

- A high-visibility, low-certainty window for local content,
- Viable primarily for eventised releases, family titles, and franchise-adjacent films,
- Unsuitable as a mass-reach or primary revenue pathway for most South African features.

For policy and industry planning, theatrical performance should be treated as selective and opportunistic, not assumed as a default benchmark of success.

### 2.8.2 Free-to-air broadcast: likely to remain the widest-reach and most stable channel

Free-to-air (FTA) broadcasting continues to offer the largest and most predictable audience reach in South Africa. Audience research and household data consistently show high television penetration and strong reliance on broadcast viewing, particularly among cost-constrained households and those without fixed broadband access (NFVF, 2022; Statistics South Africa, 2023). Industry assessments of the South African broadcasting sector emphasise that, despite competitive pressure from over-the-top (OTT) platforms, broadcast remains structurally anchored by affordability, habitual viewing patterns, and its role in shaping national conversation (NAB, 2024; The Media Online, 2025). Over the next five years, FTA broadcast is therefore likely to:

- Remain the primary mass-reach funnel for awareness and cultural visibility,
- Continue to support repeat and communal viewing, especially for series and formatted content,
- Serve as a gateway platform, with digital extensions capturing incremental value rather than replacing broadcast reach.

In a highly unequal access environment, broadcast's relevance is not diminishing but recontextualising within a hybrid ecosystem.

### 2.8.3 Pay-TV and broadcaster-owned streaming: viable but structurally pressured

Pay-TV in South Africa occupies an increasingly contested middle ground between free broadcast and global streaming platforms. Industry reporting frames the sector as undergoing sustained pressure from subscriber churn, rising content costs, and the need to fund parallel streaming strategies (NAB, 2024; The Media Online, 2025). However, pay-TV remains viable where it offers bundled value propositions, particularly sport, news, and premium local series. South African media analysis indicates that audiences are less likely to abandon pay-TV entirely than to downgrade packages or supplement them with streaming services, resulting in hybrid consumption patterns (Modern Marketing, 2025).

Over the next five years, the viability of pay-TV is therefore likely to depend on:

- Pricing flexibility and tiered offerings,
- Integration between linear channels and on-demand platforms,
- Continued commissioning of distinctive local content that differentiates the service.

For producers, this window remains strategically important, but increasingly selective and competitive.

#### 2.8.4 OTT, SVoD, AVoD, and online video: strongest growth pathway, constrained by inequality

Across all reviewed sources, OTT and online video platforms represent the fastest-growing distribution pathway in South Africa, particularly among younger and mobile-first audiences (Modern Marketing, 2025; The Media Online, 2025). However, growth is uneven and shaped by affordability, data pricing, and access constraints rather than lack of demand.

South African market commentary highlights a clear shift toward:

1) Ad-supported and hybrid streaming tiers, as platforms seek to expand reach beyond premium subscribers,
2) Telco-bundled access and promotional data offers,
3) Short-form and mobile-optimised content that aligns with usage realities (Modern Marketing, 2025; The Call Sheet, 2025).

At the same time, production-side instability introduces risk into the digital growth narrative. Recent reporting on disruptions to South Africa's film incentive regime illustrates how uncertainty in incentives and delayed payments can divert productions to competing territories, reducing local content supply across all windows including streaming (News24, 2026). From a five-year viability perspective, OTT platforms are likely to deliver the largest incremental audience growth, but success will favour models that:

- Reduce data and price friction,
- Leverage social and algorithmic discovery,
- Maintain a consistent pipeline of local content supported by stable production incentives.

### 2.9 Policy, incentives, and production pipeline stability (cross-cutting enabler)

Across the literature and recent South African evidence, distribution viability is inseparable from production pipeline stability. Audience development, broadcaster scheduling, platform commissioning, and marketing effectiveness all depend on a predictable flow of new local content. Where production volume becomes erratic, audience habits weaken, platform demand softens, and international content fills the gap, regardless of stated audience appetite for local stories.

#### 2.9.1 The incentive framework as a systemic enabler

South Africa's primary production support mechanism, the Department of Trade, Industry and Competition's (dtic) South African Film and Television Production Incentive, is designed as a reimbursable grant based on qualifying South African expenditure, capped at R25 million per project, with additional requirements linked to transformation outcomes and local procurement thresholds (dtic, n.d.-a; dtic, n.d.-b). In policy terms, this incentive functions not only as a cost-offset mechanism, but as a system stabiliser. International film-policy literature consistently shows that incentive regimes derive their real value from predictability, administrative credibility, and payment certainty, rather than from headline rebate percentages alone. Where incentives are reliable, they anchor long-term production planning, skills retention, and co-production confidence; where they are disrupted, production activity rapidly relocates (Olsberg•SPI, 2021; Christopherson & Rightor, 2019).

### 2.9.2 Evidence of recent instability and sector-wide risk

Since late 2024, South Africa's film and television sector has experienced acute instability linked to incentive backlogs and delayed payments. *Daily Maverick* characterises the situation as a "crisis," reporting that the Department of Trade, Industry and Competition (dtic) acknowledged a substantial payment backlog and committed to securing urgent funding to stabilise the incentive programme (Daily Maverick, 2026). Parallel reporting confirms that delayed reimbursements have halted productions mid-cycle, disrupted cash flow for independent producers, and placed thousands of freelance jobs at risk (GroundUp, 2026; IOL, 2026). Industry protests and public mobilisation amplified through social media and industry associations, underscore that the problem is being experienced not as a minor administrative delay, but as an existential threat to production continuity. Parliamentary intervention further highlights the severity of the situation. In February 2026, the Portfolio Committee on Trade, Industry and Competition of the Parliament of South Africa publicly acknowledged the risks to employment and sector sustainability, committing to oversight measures aimed at safeguarding jobs and restoring confidence in the incentive framework (Parliament of South Africa, 2026).

### 2.9.3 Downstream implications for distribution and audiences

From a distribution and audience perspective, incentive instability produces second-order effects that extend well beyond producers:

- Irregular release slates, weakening broadcaster scheduling and platform planning,
- Reduced willingness by OTT platforms and broadcasters to commission or promote South African content, given uncertainty of supply,
- Erosion of audience expectations around the consistent availability of new local titles.

Media economics research emphasises that audience loyalty to domestic content is built through repetition and renewal, not isolated successes (Lotz, 2022). Platforms whether broadcasters or global streamers, prioritise territories that can deliver steady content pipelines, because algorithmic discovery, marketing investment, and catalogue positioning all depend on volume and continuity (Lobato, 2019). In this context, policy instability directly undermines the viability of the distribution models assessed in Section 2.7. Even the most robust broadcast or streaming strategies cannot compensate for gaps in local content supply caused by disrupted production cycles.

### 2.10 Personas of South African film and television audiences (composite archetypes)

Table 1 presents evidence-based audience personas derived from a synthesis of NFVF audience research, national household statistics, and relevant sector literature. The personas do not represent individual viewers; rather, they capture recurring patterns of access, consumption behaviour, and structural constraint observed across South Africa's film and television audience landscape.

**Table 3:** South African Film and Television Audience Personas

| Audience Persona | Access & Platforms | Choice Drivers (Local vs International) | Typical Viewing Behaviour | Key Frictions / Constraints |
|---|---|---|---|---|
| 1. Mobile-first Social Viewer (Youth; lower-to-middle income; urban/peri-urban) | Primarily mobile internet access; combines short-form online video with opportunistic streaming when Wi-Fi or affordable data is available (NFVF, 2022; Statistics South Africa, 2023). | Strongly influenced by social buzz, mood, and peer recommendations; content choice driven by what is visible, shareable, and trending rather than origin alone (NFVF, 2022). | Binge viewing during Wi-Fi access; frequent "snack viewing" on mobile devices; high responsiveness to trailers, clips, and social video. | High mobile data costs and prepaid "poverty premium" constrain sustained long-form streaming (Gillwald, 2020; Mothobi, 2017). |
| 2. Broadcast-first Household (Cost-constrained; small town/rural mix; multi-generational) | Free-to-air television is the primary platform due to affordability; internet access is often mobile-based, intermittent, and not fixed at home (NFVF, 2022; | Preference for local content when language and cultural context align; discovery shaped by channel scheduling, broadcaster promotion, and community word-of-mouth (NFVF, 2022). | Routine evening viewing; shared family co-viewing; limited uptake of paid subscriptions. | Limited fixed home internet restricts adoption of streaming-first consumption models (Statistics South Africa, 2023). |

| Audience Persona | Access & Platforms | Choice Drivers (Local vs International) | Typical Viewing Behaviour | Key Frictions / Constraints |
|---|---|---|---|---|
| | Statistics South Africa, 2023). | | | |
| 3. Cinema-as-Occasion Viewer (Urban; higher discretionary spend; social-outing oriented) | Uses multiple platforms but values cinema for its experiential and social dimension (NFVF, 2022; Ster-Kinekor, n.d.). | Cinema choices dominated by blockbusters and franchises; local titles perform when strongly marketed and positioned as “events” (NFVF, 2022). | Weekend and group outings; preference for premium formats when affordable. | Streaming substitution, travel time, and ticket costs; cinema footprint remains geographically concentrated (Ster-Kinekor, n.d.). |
| 4. Hybrid Subscriber Loyalist (Pay-TV + streaming blend; value-sensitive) | Mixes pay-TV and streaming services; values convenience, content breadth, and bundled access (National Association of Broadcasters [NAB], 2024). | “Both/and” consumption: local series for cultural proximity and familiarity, international content for scale and variety. | Serial and repeat viewing; active household subscription management; high responsiveness to platform exclusives. | Subscription fatigue and increasing price–value scrutiny as OTT competition intensifies (NAB, 2024). |

*Source: Birguid*

Collectively, the personas provide analytical clarity by illustrating how different audience segments access content, make choices between local and international titles, and experience structural barriers related to affordability, connectivity, and platform availability. They offer a practical bridge between aggregate survey findings and actionable insights for content development, distribution strategy, and policy design.

Importantly, the personas are not mutually exclusive. Individuals and households may shift between personas over time or occupy more than one simultaneously, depending on life stage, income stability, connectivity conditions, and content availability. As such, the personas are used in this study as dynamic analytical tools to guide segmentation, questionnaire design, and interpretation of results, rather than as fixed or prescriptive market categories.

**2.11 South Africa's enabling infrastructure for film and television: gaps and opportunities**

The South African film and television ecosystem operates within a hybrid access environment, where strong foundational enablers coexist with persistent structural constraints. The literature shows that audience demand for audiovisual content, particularly local stories exist, but whether that demand translates into sustained viewing and commercial value depends on how effectively the sector navigates infrastructure realities, affordability constraints, and production continuity.

**Enablers: What the system already does well**

A core strength of South Africa's audience environment is the continued centrality of broadcast and household television. NFVF audience research confirms that FTA and broadcast television remain the most accessible and affordable pathway for reaching mass audiences, particularly in a highly unequal income context (NFVF, 2022). Industry assessments similarly position broadcasting as a critical anchor medium, even as it adapts to competition from OTT services (NAB, 2024). High household television penetration ensures that local content retains a reliable national distribution backbone.

In parallel, internet access is widespread across contexts, even if not always at home. National household data shows that a large majority of South Africans can access the internet "somewhere" (via mobile devices, workplaces, educational institutions, or public access points), supporting the expansion of mobile-first and flexible digital distribution models (Statistics South Africa, 2023). While this does not equate to seamless streaming access, it does significantly expand the potential reach of digitally distributed content when designed around real usage conditions.

A further enabling factor is language diversity combined with high subtitle acceptance. NFVF audience research indicates strong openness to subtitles, while census data confirms the scale of major language groups such as isiZulu nationally (NFVF, 2022; Statistics South Africa, 2022). Together, these factors support cross-provincial distribution strategies and position language not as a hard barrier, but as a market-expansion lever for local content.

**Gaps and risks: Structural constraints that limit conversion**

Despite these enablers, the literature consistently identifies low fixed home internet penetration as a binding constraint. While mobile access is widespread, fixed broadband at home remains limited and unevenly distributed, reducing the feasibility of consistent, high-quality streaming for many households (Statistics South Africa, 2023). This reinforces intermittent, data-sensitive viewing patterns and limits the effectiveness of streaming models that assume always-on connectivity.

Data affordability further constrains digital adoption. Research ICT Africa demonstrates that prepaid users who are disproportionately lower-income often pay more per unit of data through small-denomination bundles, creating a “poverty premium” that restricts sustained long-form video viewing (Gillwald, 2020; Mothobi et al., 2018). NFVF audience research mirrors this finding, showing limited willingness to commit to high monthly data spend among large segments of the audience (NFVF, 2022).

A critical systemic risk lies outside the audience itself: production pipeline instability driven by incentive disruption. Recent parliamentary proceedings and media reporting confirm that uncertainty and delays in incentive payments have undermined production volume, weakened investment confidence, and placed employment at risk (Parliament of South Africa, 2026; Reuters, 2026). From an audience perspective, this instability threatens the regular availability of new local titles, which is essential for building viewing habits, platform demand, and long-term loyalty to South African content.

**Opportunities: Where intervention can unlock growth**

The literature points to affordability-native digital strategies as the highest-leverage opportunity. Models such as telco-bundled access, zero-rated or sponsored data for local catalogues, download-to-watch functionality, and aggressive compression align directly with the constraints identified in both audience research and ICT affordability studies (NFVF, 2022; Gillwald, 2020). These approaches reduce friction at the point where discovery converts into viewing. There is also strong evidence for mobile-first marketing and discovery systems. As earlier sections show, social influence, short-form video, and peer recommendation now dominate discovery pathways. Marketing strategies that are designed to move audiences seamlessly from conversation to access rather than relying on traditional awareness-only campaigns are more likely to succeed in a mobile-first environment (NFVF, 2022).

Finally, the literature highlights scope for stronger provincial and community-based access models. Local screenings, partnerships with community venues, mobile cinemas, and integration with public Wi-Fi or digital hubs can extend reach beyond major metros and partially offset infrastructure gaps (Statistics South Africa, 2023). Such models reinforce cultural presence while supporting inclusive access.

**Table 4:** Enablers, Gaps, Opportunities, and Risks in South Africa’s Audience Infrastructure

| Dimension | Key Factors | Evidence Base | Implications for the Sector |
|---|---|---|---|
| **Enablers** | Broadcast & household TV as mass infrastructure | NFVF (2022); NAB (2024) | Reliable, affordable national reach remains possible for local content |
| | Widespread internet access across contexts ("anywhere") | Statistics South Africa (2023) | Enables mobile-first and flexible digital distribution |
| | Language diversity + subtitle openness | NFVF (2022); Statistics South Africa (2022) | Expands cross-provincial and multilingual market reach |
| **Gaps / Risks** | Low fixed home internet penetration | Statistics South Africa (2023) | Limits consistent high-quality streaming |
| | Data affordability & prepaid poverty premium | Gillwald (2020); Mothobi et al. (2018) | Constrains sustained long-form digital viewing |
| | Incentive disruption and pipeline instability | Parliament of South Africa (2026); Reuters (2026) | Threatens production volume, jobs, and content continuity |
| **Opportunities** | Affordability-native digital models (bundles, zero-rating, downloads) | NFVF (2022); Gillwald (2020) | Improves discovery-to-viewing conversion |
| | Mobile-first marketing and short-form discovery | NFVF (2022) | Aligns promotion with actual audience behaviour |
| | Provincial and community access models | Statistics South Africa (2023) | Extends reach beyond metros and improves inclusion |

*Source: Birguid*

Taken together, the evidence suggests that South Africa's audience ecosystem is not constrained by lack of interest in local content, but by the conditions under which access, affordability, and supply intersect. Strengthening the system therefore requires targeted interventions that work with existing enablers, address binding structural gaps, and stabilise the production pipeline rather than attempting to impose one-size-fits-all digital or theatrical solutions.

### 2.12 Applied implications for distribution strategy and funding decisions

The literature indicates that South Africa's distribution landscape will remain multi-channel rather than platform-exclusive over the next five years. However, the role, scale, and economic function of each channel are diverging, with viability increasingly determined by affordability, access conditions, and alignment with audience behaviour rather than legacy norms.

1) **Cinema (theatrical exhibition): viable as a premium event window, structurally limited for local films**
   a) Cinema is expected to remain viable as a premium, experience-led channel, but not as a primary mass pathway for most South African films. NFVF audience and box office evidence shows that theatrical performance is overwhelmingly driven by international franchises, with local titles capturing a very small share of revenue and screen time (NFVF, 2022; NFVF, 2024). Exhibitors continue to invest in differentiated formats and experiences (for example, premium screens, immersive sound, curated events), reinforcing cinema's positioning as an occasional, social outing rather than a routine viewing option (Ster-Kinekor, n.d.; IOL, 2025).
   b) Global and local cinema studies suggest that this pattern is unlikely to reverse, as streaming substitution, household budget pressure, and geographic concentration of cinema infrastructure continue to constrain attendance growth (Deloitte, 2024; MyBroadband, 2025). Over the next five years, cinema viability for local content is therefore selective: strongest for films that can be "eventised" through strong marketing, recognisable IP, community mobilisation, or festival-driven momentum. Treating theatrical release as a default pathway for local films is unlikely to be economically sustainable.
2) **Free-to-air broadcast: most resilient mass-reach channel**
   a) FTA broadcast television is likely to remain the most scalable and resilient distribution channel for South African content over the medium term. NFVF audience research confirms strong audience reliance on broadcast TV, particularly among cost-constrained households, while national household data shows that television access far exceeds fixed internet penetration (NFVF, 2022; Statistics South Africa, 2023).
   b) Industry literature emphasises that in unequal media markets, broadcast retains strategic value not despite digital disruption, but because of it; acting as a baseline access layer that sustains cultural reach and awareness (NAB, 2024; UNESCO, 2023). Over the next five years, broadcast is expected to remain central for local series, films, and factual content, especially when paired with catch-up and digital extensions. Its primary constraint will be advertising pressure and audience fragmentation, rather than loss of relevance.
3) **Pay-TV and broadcaster-owned streaming: viable but under sustained pressure**
   a) Pay-TV and broadcaster-owned streaming platforms are likely to remain viable, but under intensifying competitive and cost pressure. The broadcasting industry

characterises the current period as one of structural adaptation, with subscription erosion, rising content costs, and competition from global OTT platforms forcing business-model recalibration (NAB, 2024; Reuters, 2025).

b) Evidence suggests that sustainability in this segment will depend on hybrid strategies: bundling linear channels with streaming access, tiered pricing, strong local series commissioning, and leveraging sport and news as anchors (Lotz, 2022; Lobato, 2019). For South African content, this window remains strategically important because it offers predictable commissioning, marketing support, and serial viewing, but its growth potential is likely to be incremental rather than expansive.

4) **OTT, SVoD, AVoD, and online video: strongest growth pathway, with binding constraints**

a) Streaming and online video platforms represent the strongest growth pathway for audience reach over the next five years, particularly among younger and urban audiences. NFVF audience research shows growing engagement with VoD, SVoD, and online video, while broader market analysis confirms continued expansion of OTT consumption in South Africa (NFVF, 2022; PwC, 2025).

b) However, the literature is clear that growth will be structurally constrained unless affordability and access frictions are deliberately addressed. Research ICT Africa demonstrates that mobile data pricing and prepaid bundle structures continue to limit sustained long-form streaming for large segments of the population (Gillwald, 2020). National household data further confirms that fixed home broadband remains limited, reinforcing mobile-first and intermittent usage patterns (Statistics South Africa, 2023).

c) As a result, the most viable OTT models over the next five years are likely to be those that:

   i) Reduce data friction (bundled data, zero-rating, downloads, compression),

   ii) Incorporate ad-supported tiers (AVoD) for price-sensitive users, and

   iii) Align marketing and discovery with social and algorithmic pathways rather than traditional promotion alone (NFVF, 2022; Elsevier, 2024).

In conclusion, the evidence supports a portfolio view of distribution viability. No single channel will dominate across all audiences. Instead:

- Broadcast anchors mass reach and cultural presence
- OTT and online video deliver the largest incremental growth where affordability allows,
- Pay-TV remains relevant through hybridisation, and
- Cinema persists as a premium, selective window rather than a scale engine.

For South African content to remain competitive, distribution strategies over the next five years must therefore be platform-fit, affordability-aware, and audience-segmented, rather than driven by legacy release hierarchies.

### 2.13 Priority interventions to strengthen and progress the sector

The literature and evidence reviewed point to a set of high-leverage interventions that address binding constraints across audience development, distribution viability, and production sustainability. These interventions are mutually reinforcing and should be pursued as an integrated strategy rather than as isolated initiatives:

1) **Institutionalise continuous audience measurement:** Audience behaviour, platform usage, and discovery pathways are changing too rapidly for episodic research cycles to remain effective. Comparative NFVF studies (2015; 2022) already demonstrate how significantly consumption patterns can shift within a few years. Continuous or rolling audience measurement such as tracking platform migration, discovery triggers, willingness-to-pay, and access barriers would allow policy, funding, and marketing decisions to respond to real-time market signals rather than retrospective assumptions (NFVF, 2015, 2022). This would also improve accountability and learning across the value chain.
2) **Treat affordability as a core audience development strategy:** Affordability is not a peripheral constraint but a structural determinant of audience participation, particularly in a mobile-first market. Research consistently shows that prepaid data pricing and small-bundle purchasing impose a “poverty premium” that restricts sustained long-form viewing (Gillwald, 2020; Mothobi et al., 2018). Audience development strategies should therefore prioritise partnerships with mobile network operators and platforms to reduce friction through data-inclusive bundles, sponsored or zero-rated access to local catalogues, download-to-watch functionality, and compression-optimised delivery. These measures directly align with national access patterns and audience willingness-to-pay thresholds (Statistics South Africa, 2023).
3) **Reorient marketing toward social proof and discoverability:** NFVF audience evidence shows that content choice is increasingly driven by mood, social conversation, and peer recommendation, rather than traditional prestige markers or passive awareness (NFVF, 2022). Marketing strategies should therefore shift from broad, awareness-led campaigns toward short-form, social-native creative, influencer and community amplification, and clear, frictionless “where to watch” messaging. The objective is not simply visibility, but conversion from conversation to access within the platforms audiences already use to discover content.

4) **Scale multilingual distribution as a deliberate access lever:** South Africa's linguistic diversity, combined with strong audience openness to subtitles, creates a tangible opportunity to expand the addressable market for local content (NFVF, 2022). Census data confirms the scale of major language groups such as isiZulu nationally, reinforcing the case for treating subtitles and selective dubbing where viable as standard distribution infrastructure, not a post-production add-on (Statistics South Africa, 2022). Systematic multilingual distribution can materially improve cross-provincial reach, repeat viewing, and cultural resonance.
5) **Stabilise incentives and restore production pipeline predictability:** Audience development and distribution viability depend on consistent supply. Recent evidence shows that uncertainty and delays in incentive approvals and payments have disrupted production volume, undermined investment confidence, and placed jobs at risk (Parliament of South Africa, 2026; Reuters, 2026). Restoring predictability in the incentive framework administered by the dtic is therefore not only a production issue, but a market-facing intervention. Without stable release pipelines, broadcasters and platforms cannot plan, and audiences cannot form sustained habits of consuming South African content.
6) **Support market-ready development and distribution-first project design:** In a crowded global attention market, local content must be designed from the outset with clear audience segments, genre fit, and primary distribution windows in mind. NFVF research and broadcasting industry analysis highlight the importance of aligning development funding with audience intelligence, platform demand, and realistic release strategies (NFVF, 2022; NAB, 2024). Targeted support for script development, genre labs, packaging, and distribution-oriented development can improve competitiveness and reduce the risk of content being misaligned with market realities.

Collectively, these interventions address the full audience–production–distribution loop. Continuous insight improves decision-making; affordability and discoverability convert demand into viewing; multilingual access expands reach; incentive stability secures supply; and market-ready development improves competitiveness. The evidence suggests that progress will depend less on any single intervention than on the coordinated execution of these priorities within South Africa's specific access and affordability context.

### 2.14 Conclusion

This literature review demonstrates that South Africa possesses a large, receptive, and culturally engaged audience for local film and television content, but that audience demand is mediated by structural conditions of access, affordability, distribution design, and supply continuity. Across multiple sources, the evidence consistently shows that constraints to consumption are not rooted in lack of interest, but in the environments through which audiences discover, access, and pay for content.

The review confirms a decisive shift toward home-based and mobile-first consumption, with broadcast television retaining its role as a mass-reach anchor and digital platforms expanding viewing diversity where affordability allows. At the same time, discovery has become increasingly social and algorithmic, while willingness-to-pay exists within tight economic boundaries. These dynamics challenge legacy assumptions about platform hierarchy, release sequencing, and marketing effectiveness.

Critically, the literature highlights that distribution viability cannot be separated from production pipeline stability. Incentive disruption and policy uncertainty directly affect not only producers, but the regular availability of local content across all platforms, undermining audience habit formation and long-term competitiveness. This reinforces the need for integrated policy and market interventions that align production support, distribution access, and audience development. The evidence, thus, establishes a clear rationale for updated, nationally representative audience research that is post-pandemic, platform-sensitive, and affordability-aware. The gaps identified, particularly around digital access conditions, discovery-to-viewing conversion, and differential audience behaviour across income, age, and geography cannot be resolved through secondary data alone. Accordingly, this study builds on the literature by generating primary audience evidence to answer a central question:

*How can South Africa's audiovisual sector align production, distribution, and policy frameworks with contemporary audience behaviour to ensure sustainable reach, competitiveness, and cultural impact in a digital-first environment?*

**Table 5: South Africa's film and television industry: Current structure vs. required structural shifts for viability**

| Industry Dimension | Traditional / Legacy Structure | Current Pressures (Local & Global) | Emerging / Required Shift to Remain Viable | Evidence Base |
|---|---|---|---|---|
| **Audience consumption model** | Linear, schedule-led viewing dominated by broadcast TV and cinema attendance | Home-based, mobile-first consumption accelerated by COVID-19; declining habitual cinema attendance | Hybrid consumption model anchored by broadcast, complemented by mobile-first and on-demand viewing | NFVF (2015, 2022); Statistics South Africa (2023) |

| Industry Dimension | Traditional / Legacy Structure | Current Pressures (Local & Global) | Emerging / Required Shift to Remain Viable | Evidence Base |
|---|---|---|---|---|
| **Cinema's role** | Primary prestige window and success benchmark for films | International franchises dominate box office; high ticket and transport costs; limited geographic footprint | Cinema repositioned as a selective, event-based window for high-pull local titles | NFVF (2024, 2025); MyBroadband (2025); IOL (2025) |
| **Broadcast television** | Dominant national distribution and monetisation channel | Advertising pressure; OTT competition; audience fragmentation | Broadcast retained as mass-reach anchor, with digital extensions for catch-up and deeper engagement | NFVF (2022); NAB (2024) |
| **Digital / streaming platforms** | Marginal or supplementary to broadcast and cinema | Rapid OTT growth; algorithmic gatekeeping; data and affordability constraints | Affordability-native streaming models (AVoD, bundles, downloads, mobile-first design) | NFVF (2022); Gillwald (2020); Statistics South Africa (2023) |
| **Audience discovery mechanisms** | Broad marketing, trailers, critics, awards, festival prestige | Social platforms, algorithms, FOMO, peer recommendation dominate discovery | Social-first, short-form, influencer- and community-led discovery systems | NFVF (2022); Meltwater (2025); WARC (n.d.) |
| **Local vs international content competition** | Local content protected by broadcast quotas and national scheduling | Global platforms intensify attention competition; catalogue saturation | Local relevance paired with platform-fit packaging, metadata, and discoverability design | Higson (2021); NFVF (2022) |
| **Language and localisation** | Language treated as niche or secondary | Linguistic diversity intersects with national scale and platform distribution | Subtitles and selective dubbing treated as core access infrastructure | NFVF (2022); Statistics South Africa (2022); Jang et al. (2023) |
| **Audience monetisation logic** | Ticket sales, advertising, subscription bundles | Subscription fatigue; price sensitivity; data costs | Flexible pricing, micro-subscriptions, AVOD, and telco-integrated access | Nedbank (2024); Gillwald (2020) |
| **Connectivity assumptions** | Fixed household TV and broadband assumed | Mobile dominates; fixed broadband uneven; load-shedding disrupts usage | Design for intermittent, mobile, power-unstable environments | Statistics South Africa (2023); DataReportal (2025) |
| **Geographic industry structure** | Production concentrated in Gauteng, Western Cape | Provincial exclusion; uneven participation and access | Decentralised provincial hubs (KZN, Eastern Cape, etc.) linking | KZNFC (n.d.); ECDC (2024); NFVF (2022) |

| Industry Dimension | Traditional / Legacy Structure | Current Pressures (Local & Global) | Emerging / Required Shift to Remain Viable | Evidence Base |
|---|---|---|---|---|
| | | | production to local audiences | |
| **Production pipeline** | Stable incentive-backed production cycles | Incentive backlogs; payment delays; production flight risk | Restored incentive predictability as a system stabiliser | Parliament of South Africa (2026); Reuters (2026) |
| **Success metrics** | Cinema box office and awards | Fragmented performance across platforms | Portfolio success metrics across broadcast, digital reach, engagement, and longevity | Lotz (2022); Lobato (2019) |
| **Policy orientation** | Production-centric (supply-first) | Audience access, affordability, and discovery determine outcomes | Integrated policy linking production, distribution, and audience development | NFVF (2022); UNESCO (2023) |

*Source: Birguid analysis*

# CHAPTER 3: SURVEY RESPONDENTS REVIEW

## 3.1 Overview of the study sample

This chapter profiles the respondents who participated in the national audience survey and provides the demographic and geographic context within which the later findings on platform usage, content preferences, screen behaviour, and barriers to access should be interpreted. The quantitative sample was designed as a quota-controlled national audience survey to ensure broad balance across province, gender, age, and settlement type. In line with the study design, interviews were conducted using a face-to-face CAPI intercept approach across a variety of public locations, including:

1) Retail and shopping nodes
2) Transport interchanges
3) CBD and high-street environments
4) Township commercial areas
5) Community institutions such as libraries, campuses, and public events

A systematic intercept method was used, with every third passer-by approached where feasible, to improve randomness and reduce interviewer bias. In addition, the fieldwork design intentionally included urban, township, peri-urban, and rural locations, with at least 30% of interviews targeted for township and rural areas to reduce metro bias and better reflect uneven access conditions across the country.

Respondents were eligible for inclusion if they had consumed film, television, or online video content within the previous three months, ensuring that the sample reflected active audiovisual consumers rather than the broader adult population. The final dataset contains **379 completed interviews**, against an **intended target of 397 respondents** based on the provincial allocation framework. This represents a modest shortfall of 18 interviews (approximately 4.5%) relative to the target.

Despite this variance, the achieved sample remains broadly aligned with the planned geographic and demographic distribution, with representation captured across all nine provinces and across key quotas including gender, age groups, and settlement types. As such, the dataset provides a sufficiently robust basis for descriptive analysis of audience behaviour and platform usage across the national sample.

### 3.2 Structure of the respondent profile

The respondent profile is important because it shapes how the later findings should be read. Audience behaviour is not uniform across the population. Access to streaming, cinema, television, and online video is influenced by geography, age, education, income, employment status, and area type. As a result, this chapter establishes the socio-economic and spatial context of the sample before analysing the substantive findings in later chapters. The final achieved sample reflects a broad cross-section of South African audiovisual consumers across:

1) All nine provinces
2) Multiple age groups
3) Male and female respondents, with limited representation of other gender identities
4) Urban, township, peri-urban, and rural areas
5) Diverse income and employment categories

This profile is particularly important for interpreting later results on:

- Digital access and affordability,
- The relative use of mobile versus traditional screens,
- Platform substitution,
- Local versus international content choices, and
- The practical barriers affecting audience participation.

### 3.3 Target versus achieved sample

The study methodology proposed a nationally distributed quota sample by province. Based on the dataset received, the achieved sample totals **379** interviews.

**Table 6: Provincial target versus achieved sample**

| Province | Target (n) | Achieved (n) | Variance |
|---|---|---|---|
| Gauteng | 100 | 104 | +4 |
| KwaZulu-Natal | 73 | 48 | -25 |
| Western Cape | 42 | 37 | -5 |
| Eastern Cape | 50 | 48 | -2 |
| Limpopo | 38 | 38 | 0 |
| Mpumalanga | 31 | 32 | +1 |
| North West | 27 | 31 | +4 |
| Free State | 24 | 25 | +1 |
| Northern Cape | 12 | 16 | +4 |
| **Total** | **397** | **379** | **-18** |

*Source: Birguid respondent survey analysis*

Two observations arise from the achieved sample distribution. The survey completed 379 interviews against a planned national target of 397, resulting in a shortfall of 18 interviews. Despite this variance, the dataset retains broad geographic coverage across all nine provinces and remains closely aligned with the intended provincial allocation. The strongest representation comes from the country's largest population and media market, Gauteng, while smaller provinces are also included, ensuring that perspectives from both major economic centres and more peripheral regions are captured. Overall, the distribution provides a sufficiently balanced foundation for national-level analysis of audience behaviour and content consumption patterns.

### 3.4 Geographic distribution

Respondents were drawn from all nine provinces, providing national coverage of audience experiences. As expected in a population-weighted survey, the distribution is somewhat concentrated in South Africa's principal economic and media hubs. These areas typically have higher population densities, more developed digital infrastructure, and greater access to cinemas, broadcast services, and streaming platforms.

**Table 7:** Provincial distribution of respondents

| Province | n | % |
|---|---|---|
| Gauteng | 104 | 27.4% |
| Eastern Cape | 48 | 12.7% |
| KwaZulu-Natal | 48 | 12.7% |
| Limpopo | 38 | 10.0% |
| Western Cape | 37 | 9.8% |
| Mpumalanga | 32 | 8.4% |
| North West | 31 | 8.2% |
| Free State | 25 | 6.6% |
| Northern Cape | 16 | 4.2% |
| **Total** | **379** | **100.0%** |

*Source: Birguid respondent survey analysis*

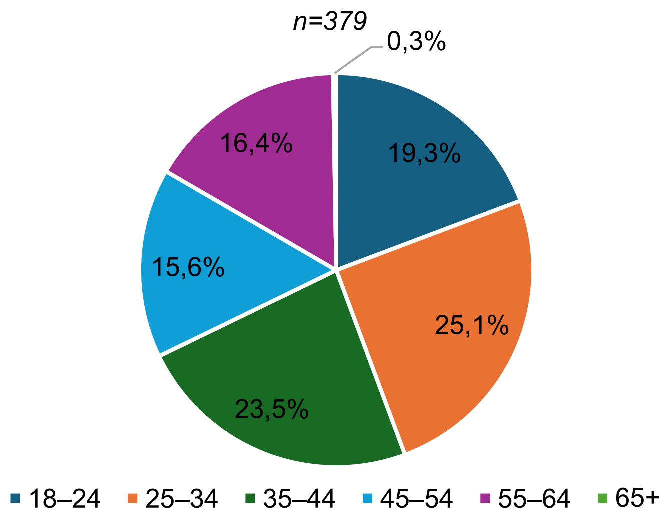
Gauteng represents the largest share of respondents, accounting for just over a quarter of the sample. This reflects the province's central role in South Africa's economy, urban population concentration, and media consumption environment. Eastern Cape and KwaZulu-Natal each contribute 12.7% of respondents, while Limpopo and Western Cape provide additional substantial representation.

Taken together, the provincial distribution captures a meaningful combination of large metropolitan markets and smaller regional contexts. This diversity is analytically important, as patterns of content discovery, platform usage, and screen behaviour may differ significantly between highly connected provinces and those where infrastructure, income levels, or platform access present additional constraints.

### 3.5 Age profile

The sample is concentrated in younger and working-age adult groups, which is analytically useful because these cohorts are typically the most active users of digital and mobile media and are therefore central to understanding changing audience behaviour.

**Figure 1:** Age distribution of respondents



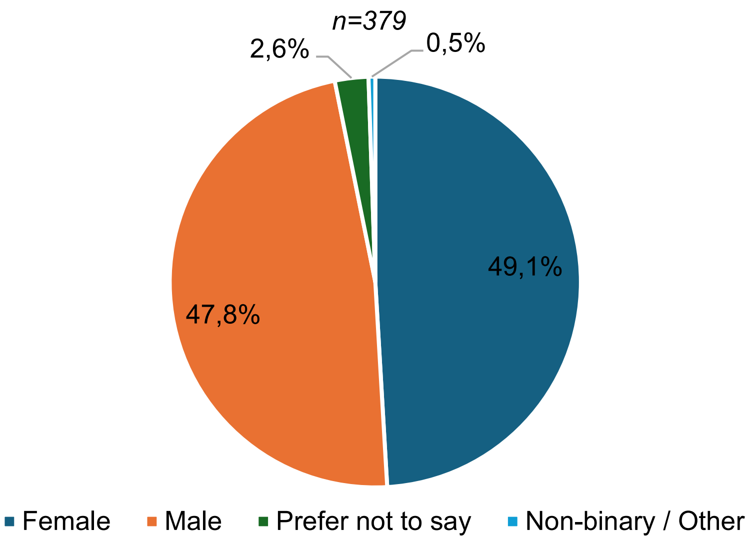

*Source: Birguid respondent survey analysis*

The largest age group is 25–34 years (25.1%), followed closely by 35–44 years (23.5%) and 18–24 years (19.3%). Combined, respondents aged 18–44 account for 67.8% of the sample. This indicates that the dataset is strongly weighted toward the cohorts most likely to drive adoption of streaming, online video, and short-form content. The sample contains relatively fewer respondents aged 65 and above, with only one respondent in this category. As a result, the findings are particularly strong for younger and economically active audiences, but less informative for older viewers who may rely more heavily on traditional broadcast formats.

### 3.6 Gender composition

The achieved sample is close to gender parity, which strengthens the interpretive balance of the study.

**Figure 2:** Gender composition



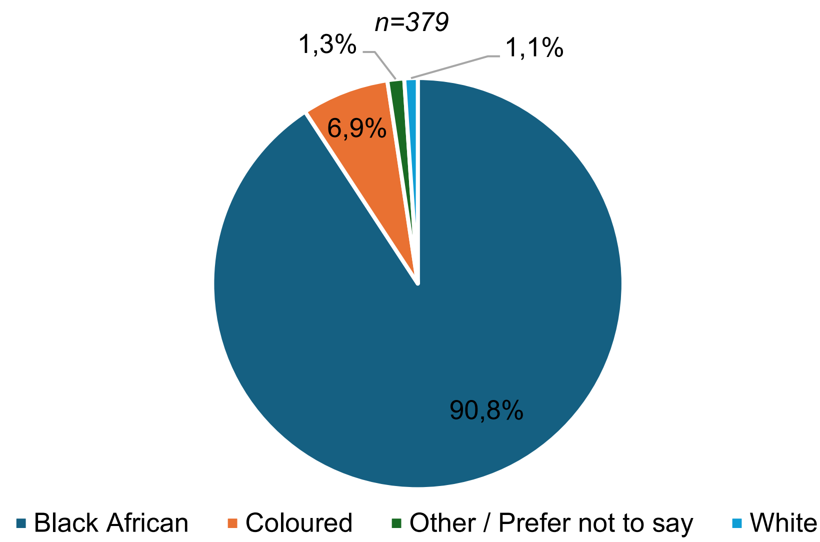

*Source: Birguid respondent survey analysis*

Women account for 49.1% of respondents and men 47.8%, indicating a broadly even sample. This balance is useful for later analysis of viewing behaviour, because it reduces the risk that results are unintentionally skewed toward one gender group. The presence of a small number of respondents identifying outside the binary categories also reflects inclusiveness, although the numbers are too limited for disaggregated analysis.

### 3.7 Racial composition

The racial profile of the sample is heavily concentrated among Black African respondents.

**Figure 3:** Racial composition



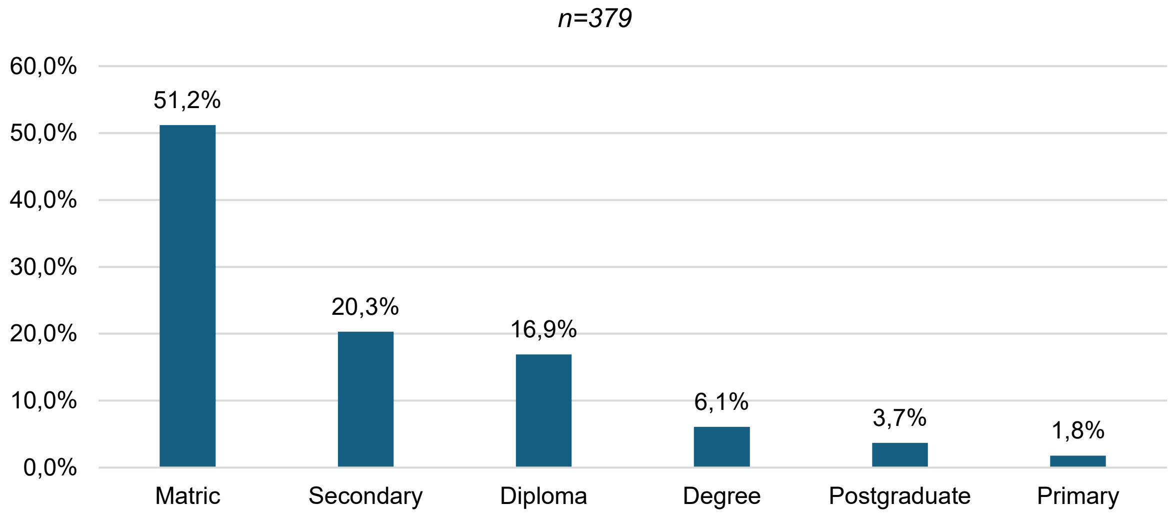

*Source: Birguid respondent survey analysis*

The sample is overwhelmingly Black African (90.8%), with smaller representation from Coloured, White, and Other/Prefer not to say categories. This means the dataset is strongly reflective of the majority market segment, particularly audiences whose media choices are likely to be shaped by affordability, mobile access, language relevance, and uneven digital infrastructure.

### 3.8 Educational profile

Education levels are concentrated in secondary and matric-level attainment, with a smaller proportion of diploma and degree holders.

**Figure 4:** Highest education level



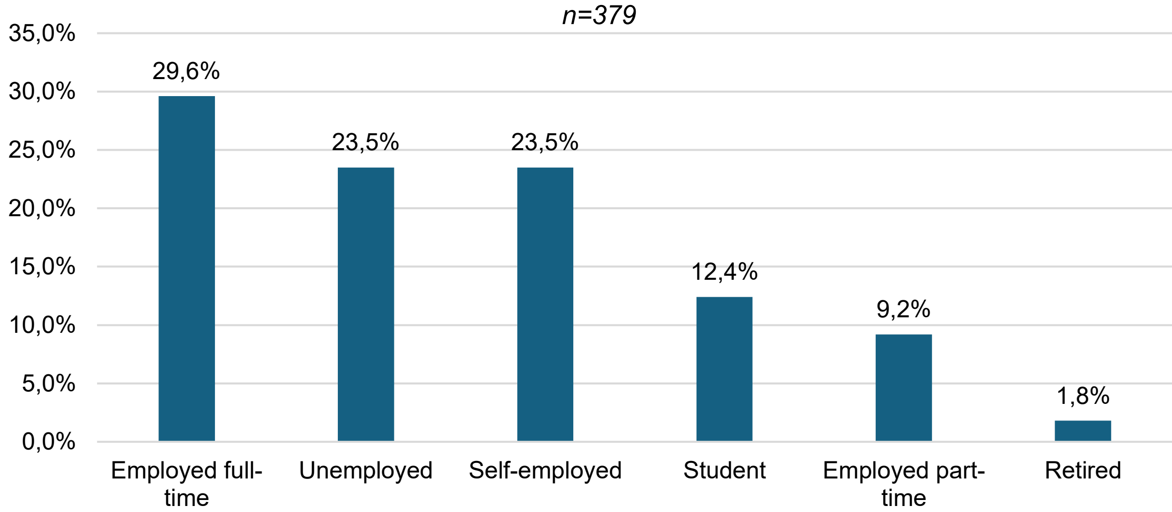

*Source: Birguid respondent survey analysis*

More than half of respondents hold Matric as their highest qualification, while a further 20.3% report Secondary education. Diploma holders account for 16.9%, while degree and postgraduate respondents together account for 9.8%. This profile suggests that the study largely captures mainstream consumers rather than only highly educated urban elites. That is important for interpreting later findings on content discovery, willingness to pay, and barriers to access, since these outcomes are often shaped by income, digital literacy, and familiarity with subscription-based platforms.

### 3.9 Employment status

The employment profile reveals a mixed sample that includes formal workers, self-employed respondents, unemployed participants, and students.

**Figure 5:** Employment status



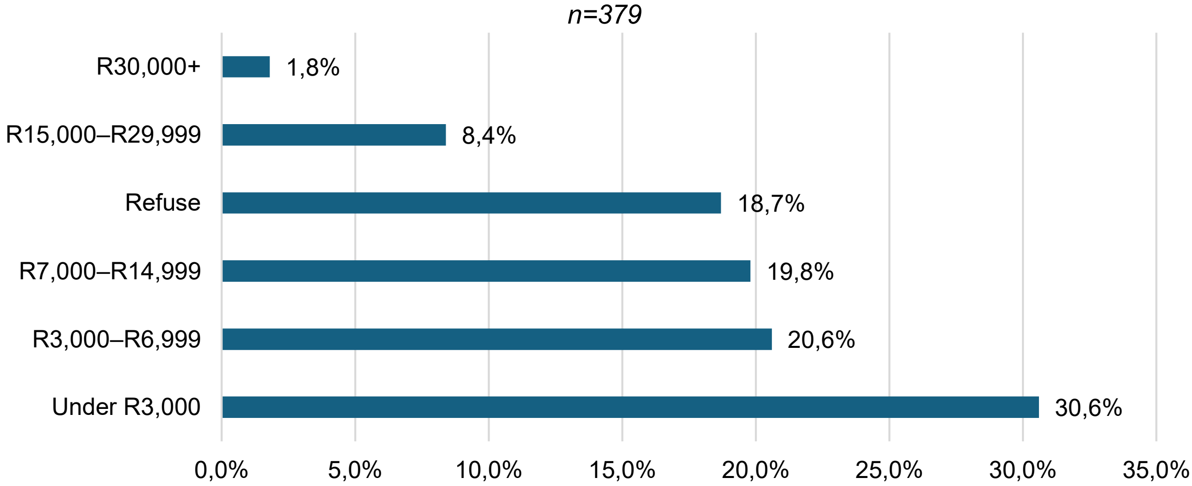

*Source: Birguid respondent survey analysis*

Full-time employment is the largest category at 29.6%. However, the sample also includes substantial proportions of unemployed (23.5%) and self-employed respondents (23.5%), with students accounting for 12.4%. This matters because employment status is likely to influence both ability to pay and content-access choices. Respondents with less stable or irregular income may be more likely to rely on free-to-access platforms, shared accounts, short-form mobile content, or low-cost data-light viewing options. This profile, therefore, reinforces the importance of affordability as a structural variable in later chapters.

### 3.10 Personal monthly income

The income distribution confirms that the sample is concentrated in low- to lower-middle-income bands, with a sizeable proportion of respondents also declining to disclose income.

**Figure 6:** Personal monthly income



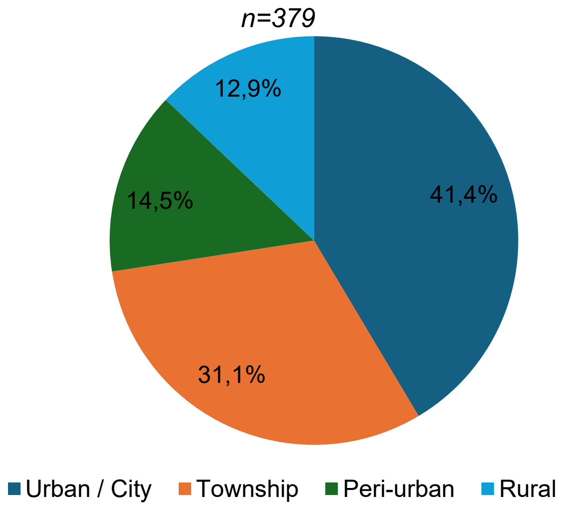

*Source: Birguid respondent survey analysis*

From a monthly income standpoint, the sample is strongly concentrated below the upper-middle-income threshold. Excluding refusals, the largest groups are Under R3,000, R3,000–R6,999, and R7,000–R14,999. Only 1.8% of respondents report earning R30,000 or more per month. This distribution is highly significant for the overall study because it suggests that many respondents are operating within income bands where data costs, subscription charges, transport costs to cinemas, and device affordability are likely to materially shape audience behaviour. In other words, the study is strongly positioned to assess the affordability barriers that affect mass-market audience participation.

### 3.11 Area type and settlement profile

The sample reflects a deliberate spread across urban, township, peri-urban, and rural contexts.

**Figure 7:** Area type




*Source: Birguid respondent survey analysis*

Urban respondents account for 41.4% of the sample, followed by township respondents at 31.1%. Peri-urban and rural respondents together account for 27.4%. This is an important achievement from a fieldwork-design perspective. Township and rural respondents together exceed the minimum intended threshold of 30%, which strengthens the study's ability to capture differences in access conditions beyond major metropolitan centres.

### 3.12 Implications of the respondent profile for the study

Taken together, the respondent profile suggests that the sample is best understood as a broad national cross-section of active audiovisual consumers, but one that is particularly weighted toward:

1) Working-age adults
2) Lower- to lower-middle-income groups
3) Black African respondents
4) Urban and township audiences
5) Consumers facing real affordability and access constraints

This profile is analytically valuable because it aligns closely with the central strategic questions of the study. The future competitiveness of South African content will depend not only on production quality or creative relevance, but also on whether audiences can find, afford, and access content in their everyday lives. Accordingly, the respondent base is well suited to examining:

- How digital access conditions shape viewing behaviour,
- Whether audiences are substituting traditional formats for short-form or on-demand content,
- How affordability affects platform choices, and
- What this means for the reach and competitiveness of local audiovisual content.

**3.13 Concluding summary of the sample**

In summary, the quantitative dataset comprises 379 completed audience interviews drawn from a planned national sample of 397 respondents and distributed across all nine provinces, as well as across diverse demographic and settlement categories. Although the achieved sample falls modestly below the intended target, it retains broad geographic coverage and demographic balance, providing a robust foundation for descriptive and strategic analysis of audience behaviour. Overall, the respondent profile is characterised by a population that is predominantly:

- Young to middle-aged,
- Near gender-balanced,
- Concentrated in low- to middle-income brackets,
- Drawn substantially from urban and township environments, and
- Diverse in employment status, including full-time workers, self-employed individuals, unemployed participants, and students.

This profile provides important context for interpreting the findings presented in subsequent chapters. It suggests that patterns of audiovisual consumption in South Africa are shaped by a combination of digital transition, affordability pressures, uneven infrastructure and access conditions, and evolving platform habits. These structural factors influence not only what audiences watch, but also how easily they are able to access content and which distribution channels remain viable for reaching large segments of the population.

# CHAPTER 4: RECENT CONTENT CONSUMPTION TRENDS

## 4.1 Purpose

Chapter 4 examines recent audiovisual consumption behaviour among South African audiences, focusing on what respondents watched during the three months preceding the survey. In line with the study scope and research questions, the chapter focuses on three linked issues:

1) **Recent content consumption**: What types of audiovisual content audiences watched in the last three months.
2) **Typical viewing format**: Whether audiences now spend more time on short-form video, full-length content, or a mix of both.
3) **Short-form substitution effect**: Whether watching short-form video is reducing time spent watching full-length films or television series.

Prior studies show that South African viewing has become more home-based, more mobile-enabled, and more digitally fragmented, even while television and film remain important categories of consumption (NFVF, 2022). Internationally, scholars similarly argue that platform expansion has not eliminated legacy formats but has instead created more complex and fragmented patterns of attention and choice (Lotz, 2022; Napoli, 2021; Tryon, 2021).

## 4.2 Key data insights

Respondent data shows that South African audiences remain active audiovisual consumers, but they are not consuming content in one uniform way. Instead, three broad patterns are evident:

1) Television programmes and series remain the most widely consumed content type
2) Film consumption remains strong
3) Short-form online video is now fully mainstream

This indicates that the market is not moving in a simple direction from “old” to “new” media. Rather, South African audiences are increasingly operating in a hybrid viewing environment, where television, film and short-form digital video coexist. This hybrid pattern reflects both global and local realities. Internationally, audiences now spread attention across broadcast, streaming, online video and social media feeds (Napoli, 2021; Tryon, 2021). In South Africa, however, these patterns are still shaped by structural conditions such as income inequality, mobile data affordability, uneven broadband access, and device constraints (Statistics South Africa, 2023; NFVF, 2022).

This suggests that the is not whether audiences but rather how audience time is now divided, and how that affects discoverability, distribution design, and local content competitiveness.

### 4.3 Recent content consumption over the last 3 months

**Table 8:** Recent respondent content consumption (Last 3 months)

| Content type | n | % of sample |
|---|---|---|
| TV programmes / series | 272 | 71.8% |
| Films / movies | 236 | 62.3% |
| Online videos / short-form content | 232 | 61.2% |

*Source: Birguid respondent survey analysis*

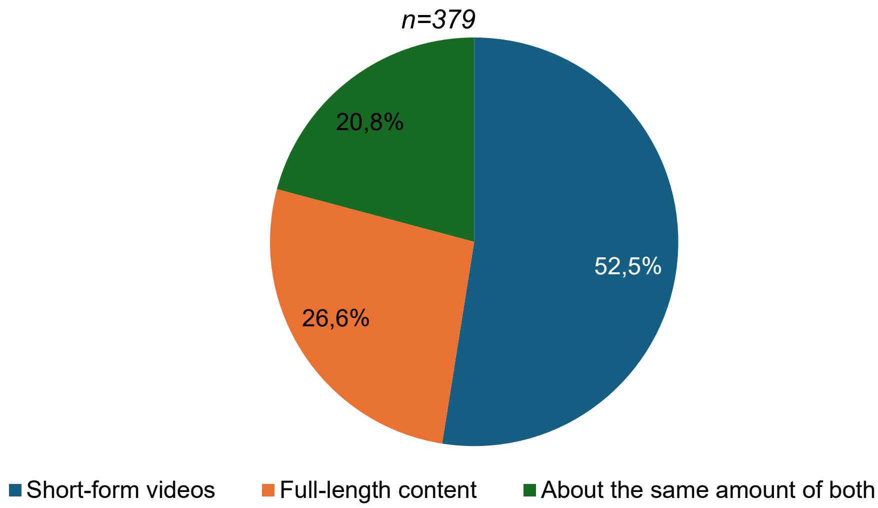
Table 1 presents three key findings:

1) **Television programmes and series remain the most widely consumed format:** At 71.8%, television still anchors everyday viewing. This aligns with the literature review, which showed that television remains a central access point because it is familiar, widely available, and often cheaper to access than paid streaming services (NFVF, 2022).
2) **Film consumption remains robust:** More than six in ten respondents reported that they had watched films or movies in the past three months. This is an important finding because it shows that audience interest in long-form storytelling remains strong. However, as the literature review noted, much of this film consumption now happens outside cinemas, especially through television, streaming and other home-based channels (NFVF, 2022; Tryon, 2021).
3) **Short-form content is no longer peripheral:** Online videos and short-form content reached 61.2% of the sample, placing it almost level with films. This supports the literature review's argument that digital video ecosystems such as YouTube, TikTok, Reels and similar formats have become central to everyday viewing, especially in mobile-first environments (Cunningham & Craig, 2021).

The consumption picture is not one of replacement, but of layering. South African audiences are not simply abandoning television and film; they are adding short-form digital video into their everyday viewing mix.

## 4.4 Typical viewing format

**Figure 8:** Typical viewing format

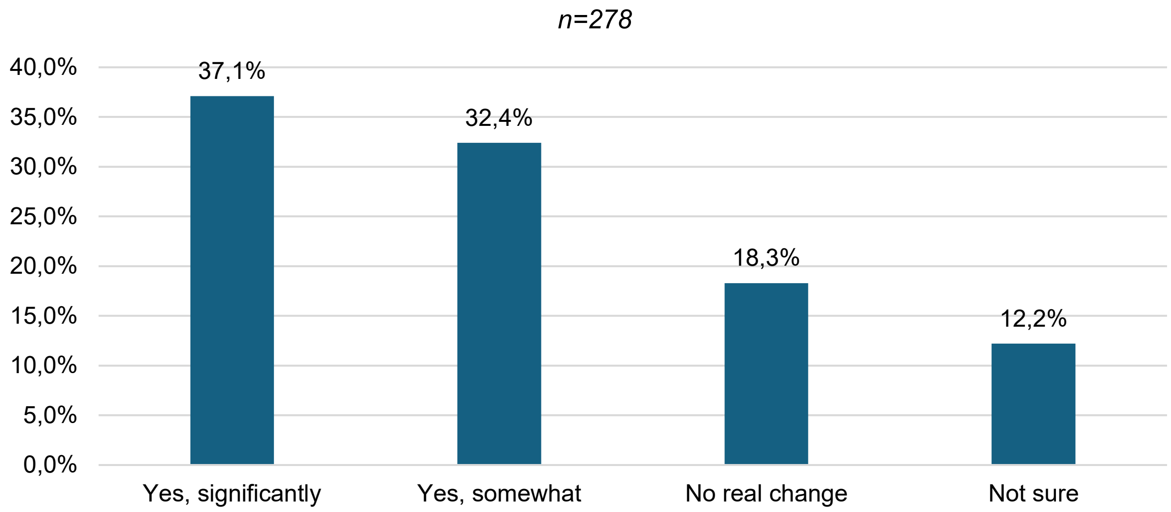



*Source: Birguid respondent survey analysis*

Short-form video is now the dominant everyday viewing format with just over half of the respondents stating that they spend more time on short-form videos than on full-length films or series. This is a major behavioural shift. It suggests that many South Africans now engage with video through short, frequent, mobile-friendly viewing sessions, rather than mainly through longer scheduled viewing blocks. At the same time, the results do not suggest that long-form viewing has collapsed. Nearly half of the respondents either still spend more time on full-length content or divide their time equally. This matters because it confirms that long-form storytelling remains relevant, even as short-form becomes more central in daily attention patterns. The market is, therefore, shifting from a long-form dominant environment to a hybrid attention environment, where short-form increasingly shapes daily viewing behaviour, but does not eliminate longer formats.

### 4.5 Short-form substitution effect

**Figure 9:** Short-form substitution effect (valid responses only)



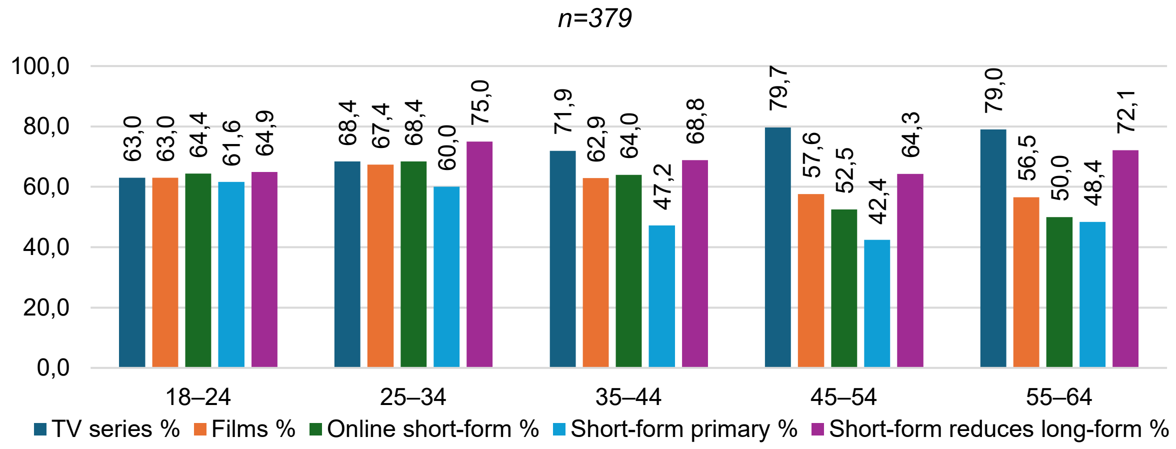

*Source: Birguid respondent survey analysis*

Taken together, 69.4% of valid respondents said that short-form video has reduced the amount of time they spend watching full-length films or series, either somewhat or significantly. This suggests that short-form content is not only a parallel habit; it is increasingly competing for time that might previously have gone to films and television series. However, the effect should not be overstated. Nearly one-third of valid respondents either reported no real change or were unsure. This means that short-form content is not replacing long-form content in a uniform way across the market. Instead, it is creating a more fragmented attention economy, where some audiences are shifting strongly toward short-form while others continue to maintain mixed viewing routines. This aligns with global literature showing that digital platforms often fragment attention rather than fully displacing older content forms (Lotz, 2022; Napoli, 2021). Going forward, the issue will, therefore, not be whether audiences still like film and series but rather that short-form increasingly absorbs time, habit, and attention, making it harder for long-form content to win everyday engagement.

### 4.6 Key category trends

#### 4.6.1 Age

**Figure 10:** Consumption trends broken down by respondent age

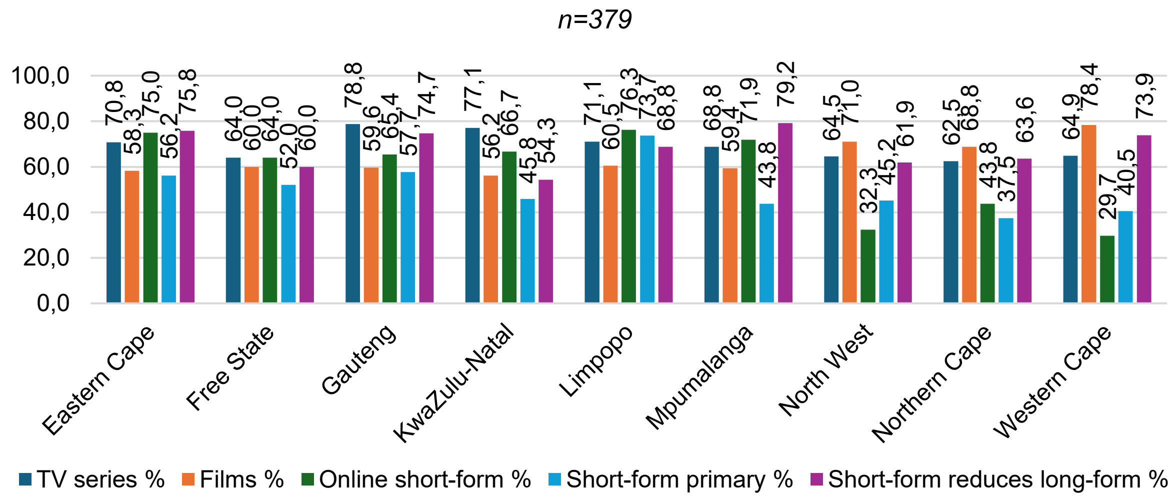



*Source: Birguid respondent survey analysis*

Younger audiences, particularly those aged 18–34, show significantly higher engagement with online short-form video, and are also more likely to report that short-form content has reduced the amount of time they spend watching full-length films or television series. This pattern reflects the growing influence of mobile-first viewing environments and social video platforms among younger viewers. In contrast, older age groups remain more anchored in traditional television viewing, with comparatively lower reliance on short-form digital content. These findings reinforce the broader shift toward a hybrid viewing environment, where generational differences increasingly shape how audiences allocate their viewing time across content formats.

### 4.6.2 Province

**Figure 11:** Consumption trends broken down by respondent province



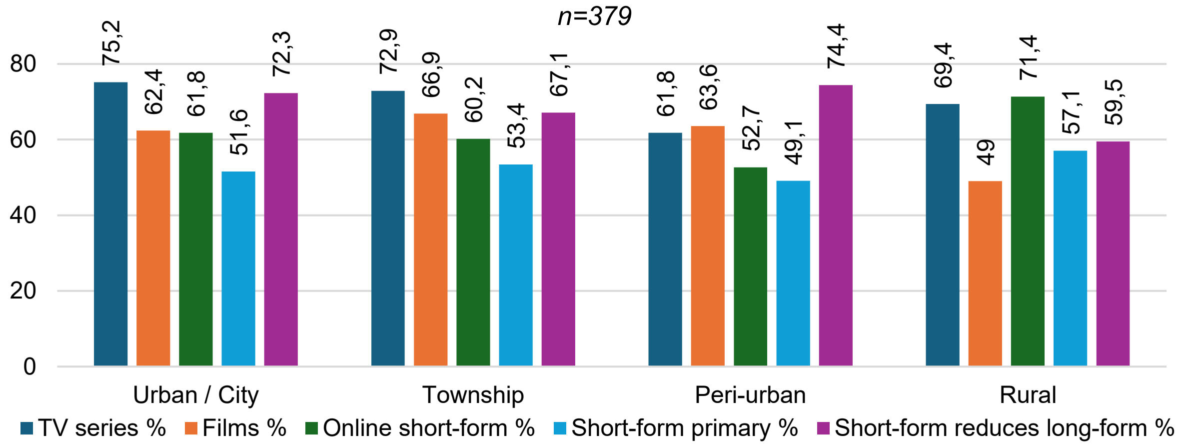

*Source: Birguid respondent survey analysis*

Provinces such as Limpopo, Eastern Cape, Mpumalanga, and Gauteng show particularly high engagement with online short-form video and stronger indications that short-form content is influencing viewing time previously allocated to long-form films or television series. In contrast, respondents in the Western Cape and North West appear relatively more oriented toward film consumption and long-form viewing, suggesting that viewing habits in these provinces may still be somewhat more anchored in traditional formats within this sample.

Overall, the provincial patterns reinforce the broader finding that South Africa's audiovisual market is characterised by regional variation within a hybrid viewing ecosystem, where short-form digital video and traditional long-form content coexist but may play different roles across geographic contexts.

### 4.6.3 Area type

**Figure 12:** Consumption trends broken down by respondent area type

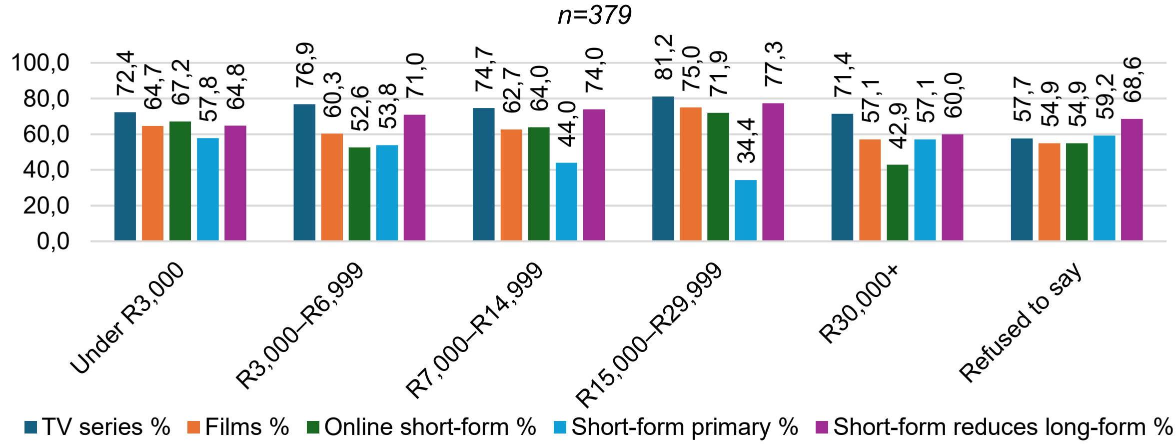



*Source: Birguid respondent survey analysis*

While urban respondents show strong engagement with online video platforms, rural respondents in this sample also demonstrate high levels of short-form viewing. This suggests that digital video participation is increasingly occurring across diverse geographic contexts. These findings support the literature review, which highlights the role of mobile connectivity and smartphone access in expanding digital video participation, even in areas where fixed broadband infrastructure remains uneven (NFVF, 2022; Statistics South Africa, 2023). Overall, the results reinforce the broader conclusion that South Africa's viewing environment is increasingly hybrid and mobile-enabled, with audiences across different area types engaging with a mix of traditional television, film, and short-form digital video.

### 4.6.4 Monthly income

**Figure 13:** Consumption trends broken down by respondent monthly income




*Source: Birguid respondent survey analysis*

Short-form video consumption is present across all income categories, although the role it plays within viewing behaviour varies by income level. Respondents in lower-income groups display particularly strong engagement with short-form video, which likely reflects mobile-led access patterns, where smartphones and mobile data provide the most affordable and accessible pathway to audiovisual content.

Respondents in middle- to upper-middle income groups continue to show strong engagement with films and television series, indicating that long-form viewing remains an important part of their media consumption. However, these groups also report meaningful substitution effects, suggesting that short-form video is beginning to compete with long-form content for viewing time even among audiences with broader platform access.

Overall, the findings reinforce the broader conclusion that short-form viewing cuts across socio-economic segments, but its underlying drivers differ. For lower-income audiences it often reflects access dynamics, while for higher-income audiences it increasingly reflects attention competition within an already diversified viewing environment.

### 4.6.5 Other key category trends

Across employment (student, unemployed, employed part-time, employed full-time, self-employed, and retired) categories, the results suggest that short-form video is particularly embedded in more flexible or mobile-oriented lifestyles. Students and self-employed respondents display especially strong engagement with online short-form content and higher levels of short-form primary viewing, reinforcing the association between short-form platforms and mobile, always-on viewing behaviour. Television and film consumption remain present across all employment groups, including among full-time employees and unemployed respondents, indicating that long-form viewing continues to play a role even where short-form usage is high.

In terms of race, gender, and education, the data points towards a hybrid consumption environment rather than sharply segmented viewing markets. Television, film, and short-form video coexist across most demographic groups, with only modest differences between male and female respondents. Women showed slightly stronger television orientation and men slightly stronger film engagement. Short-form viewing is visible across all education levels, with the substitution effect appearing strongest among respondents with Matric and Diploma qualifications, suggesting that the shift toward short-form video is broad-based rather than confined to a single socio-economic or educational segment. Small sample sizes for some race and education categories should be interpreted with caution, but the overall pattern remains consistent with the chapter's broader finding of fragmented yet hybrid audience viewing behaviour.

### 4.7 Key cross-cutting insights

Based on the survey results, key insights are summarised as follows:

1) **Television still anchors the market:** Television remains the most widely consumed content category across most demographic groups. This confirms that any national distribution strategy that ignores television would overlook an important part of the market.
2) **Films remain relevant, but not necessarily through cinema:** Film consumption is still strong across many groups, especially in some provinces and income categories. However, this does not imply a cinema-led market. The stronger interpretation is that long-form film remains relevant but is now being consumed through home-based and digitally mediated channels.
3) **Short-form is now mainstream, not niche:** Short-form content is now embedded across age, province, income and education categories. It is strongest among younger audiences, but it is not limited to them. This confirms that short-form has moved into the mainstream of audience behaviour.
4) **The strongest divide is behavioural, not purely demographic:** While age matters, the bigger shift is behavioural. South African audiences increasingly divide between:
    a. Those still anchored in television and long-form content, and
    b. Those whose daily viewing is increasingly shaped by short-form platforms.

This means future audience strategy should not rely only on traditional demographic segmentation. It should also account for viewing behaviour segments.

5) **The substitution effect is material:** Short-form content is not just adding viewing options; it is taking time away from long-form content for many respondents. This has direct implications for how films and series are promoted, discovered and distributed.

**4.8 Strategic implications**

The findings produce several strategic implications for the NFVF and the wider audiovisual industry:

1) **Long-form storytelling remains viable but must compete harder for attention:** The results do not show a collapse in interest in films or television series. Rather, they show that long-form content now competes in a more crowded and fragmented attention environment. The implication is that the challenge is not only production quality; it is also attention capture, discoverability and release strategy.
2) **Short-form platforms are now important discovery environments:** If audiences increasingly spend daily time inside short-form ecosystems, then these platforms are no longer optional from a marketing perspective. They should be treated as important tools for:
    a) Promotion,
    b) Audience building,
    c) Teaser content, and
    d) Cultural relevance.
3) **Distribution strategies must reflect hybrid behaviour:** The evidence strongly supports a hybrid distribution logic. Audiences move across television, film and digital video rather than occupying one format only. This suggests that release models should be designed across multiple touchpoints rather than around a single platform.
4) **Audience growth strategies must respond to fragmented attention:** The substitution effect suggests that attracting audiences to long-form South African content will increasingly require:
    a) Stronger hooks,
    b) Better targeting,
    c) Mobile-first promotion, and
    d) More deliberate audience conversion strategies from short-form to long-form viewing.

### 4.9 Conclusion

South African audiences remain active consumers of television, film and digital video, but that their behaviour is increasingly shaped by a hybrid, mobile and fragmented viewing environment. Television still anchors mass viewing. Film remains relevant. But short-form video now occupies a powerful place in everyday audience attention. More importantly, short-form content is not merely coexisting with long-form formats. For many respondents, it is beginning to reduce time spent on films and series. This means the sector's challenge is no longer only about making content available. It is also about winning time, attention, and discoverability in a more competitive viewing environment.

## CHAPTER 5: DIGITAL ADOPTION ENABLERS

### 5.1 Purpose

This chapter examines the structural conditions that enable or constrain digital participation in South Africa's audiovisual market. It assesses whether audiences are practically able to participate in digital viewing on a sustained basis, rather than simply whether digital platforms are available in the market. In the South African context, digital adoption is shaped by a combination of interrelated access factors, including the regularity of internet access, the type of connectivity audiences rely on, the affordability and sufficiency of data, the use of public Wi-Fi to manage viewing costs, the role of zero-rated or data-free access pathways, and the devices available within the home.

The chapter, therefore, addresses the study's broader objectives relating to audience access, platform participation, digital inclusion, and the viability of current and future distribution models. More specifically, it speaks to the engagement's focus on how South African audiences access audiovisual content, what structural barriers affect their participation in streaming and online video environments, and how these conditions shape actual viewing behaviour.

Questions addressed by this chapter include:

1) To what extent are audiences digitally ready for sustained online viewing?
2) What kinds of internet access underpin digital participation?
3) How do affordability, connectivity quality, and household device ecosystems shape adoption? And
4) Why does South Africa continue to exhibit a hybrid viewing environment in which television, mobile viewing, and intermittent streaming coexist?

This analysis is important because the audiovisual sector is evolving toward streaming, online video, mobile-first discovery, and on-demand access, yet the pace and depth of that transition are mediated by affordability, infrastructure, and device conditions.

### 5.2 Headline digital adoption profile

At an aggregate level, respondent data reveals a population that is substantially connected but not uniformly positioned for seamless digital viewing. Weekly internet access is high, but access type, affordability, and device ecosystems remain differentiated. The evidence points to a market in which digital participation is broad yet still shaped by cost-management behaviour and uneven household access conditions.

**Table 9:** Overall digital adoption profile *(n=379)*

| Indicator | Share of respondents (%) |
|---|---|
| Access internet at least weekly | 94.7 |
| Both mobile data and home Wi-Fi | 50.4 |
| Mobile data only | 25.3 |
| Home Wi-Fi only | 20.6 |
| Public Wi-Fi mainly | 3.6 |
| Uncapped/unlimited data access | 56.5 |
| Pay-as-you-go access | 26.5 |
| Data affordable (very + somewhat) | 58.4 |
| Data expensive (very + somewhat) | 30.6 |
| Download over public Wi-Fi often/sometimes | 48.2 |
| Spend under R300 per month | 52.4 |
| Use data-free platforms actively/sometimes | 45.7 |

*Source: Birguid respondent survey analysis*

Three initial findings emerge:

1) Internet access is now widespread in weekly terms.
2) South Africa's access environment is mixed rather than singular: the largest segment combines mobile data and home Wi-Fi, but one-quarter still relies on mobile-only access.
3) Digital participation remains cost-managed. Nearly half of the respondents download content over public Wi-Fi at least sometimes, and nearly half actively use or sometimes use data-free platforms when deciding what to watch.

This is consistent with broader evidence that digital inclusion in South Africa is shaped not only by nominal connectivity, but by affordability, reliability, and usage conditions.

### 5.3 Weekly internet access

Weekly internet access is the most basic indicator of digital readiness because it establishes whether respondents can participate meaningfully in online content ecosystems. Based on this, 94.7% of the respondents reported accessing the internet at least once a week, indicating that digital contact is now widespread.

**Table 10: Weekly internet access by age (%)**

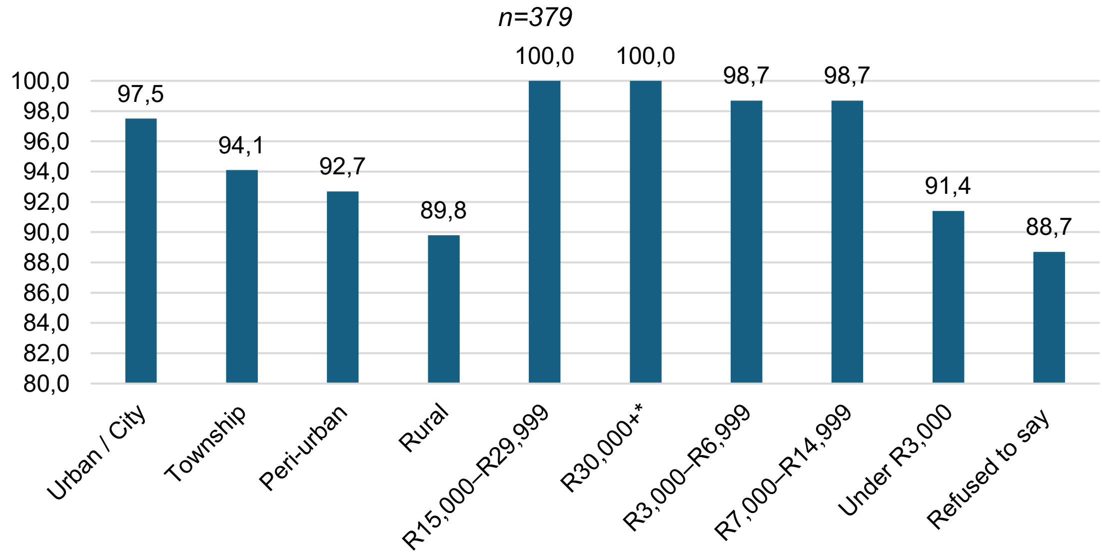
| Age | Yes | No |
|---|---|---|
| 18–24 | 95.9 | 4.1 |
| 25–34 | 92.6 | 7.4 |
| 35–44 | 97.8 | 2.2 |
| 45–54 | 93.2 | 6.8 |
| 55–64 | 93.5 | 6.5 |
| 65+* | 100.0 | 0.0 |

*Note: * Interpret with caution due to very small base.*

*Source: Birguid respondent survey analysis*

Access remains high across all age bands, which indicates that digital participation is no longer confined to youth alone. The strongest weekly access is visible among the core working-age segments, especially 35–44.

**Figure 14:** Weekly internet access by area type and income (% Yes)




*Note: * Small base; interpret cautiously*

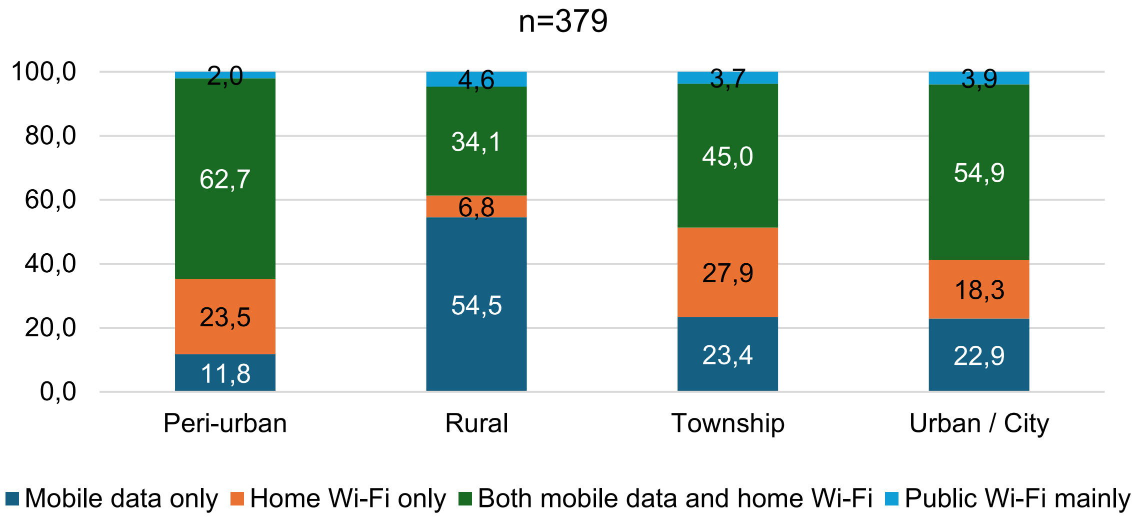
*Source: Birguid respondent survey analysis*

The more important pattern is social stratification rather than absolute exclusion. Weekly access is strongest in urban areas and weakest in rural areas. It is also lower among respondents under R3,000 per month and among those refusing to state income. This supports the chapter’s core argument: high national internet penetration should not be equated with equal digital readiness. As digital inclusion research shows, meaningful participation depends on the regularity, quality, and usability of access, not simply whether one can connect at all.

### 5.4 Access types

The type of internet access available to respondents has direct implications for the kind of digital viewing they can sustain. A household with both home Wi-Fi and mobile data is positioned very differently from a household relying only on prepaid mobile access.

**Figure 15:** Type of access by area type (%)




*Source: Birguid respondent survey analysis*

Rural respondents are far more likely to rely on mobile data only, while urban and peri-urban respondents are more likely to combine home Wi-Fi with mobile access. Mobile-only environments tend to support shorter, more selective, and more cost-managed forms of viewing, whereas mixed access environments are better suited to sustained streaming, downloads, and multi-device use.

Provincial patterns reinforce the same point. Combined mobile-and-home-Wi-Fi access is highest in the Western Cape (61.1%), Limpopo (59.5%), KwaZulu-Natal (54.2%), North West (53.3%), and Gauteng (52.5%), but far lower in Eastern Cape (29.5%) and Free State (36.4%). This aligns with Statistics South Africa's finding that home internet access remains highly uneven by province, with Western Cape and Gauteng materially ahead of poorer or more rural provinces.

## 5.5 Data capacity

Data capacity is a critical enabling factor because it determines whether internet access can support video consumption at scale. In the sample, 56.5% report uncapped or unlimited access, 26.5% rely on pay-as-you-go, 11.1% have capped or limited access, and 5.8% are unsure.

The aggregate picture appears relatively positive, but the crosstabs show that data sufficiency is uneven. Rural respondents are especially constrained: only 25.0% report uncapped access, while 50.0% rely on pay-as-you-go and 13.6% report capped access. By contrast, uncapped access rises to 62.1% in urban areas and 76.5% in peri-urban areas. Income patterns follow a similar logic. Uncapped access is highest among respondents earning R15,000–R29,999 (71.9%) and R7,000–R14,999 (62.2%), compared with 51.9% among those earning under R3,000 and 49.2% among those refusing income disclosure.

Ultimately, limited capacity encourages shorter sessions, selective streaming, lower-resolution viewing, postponement until Wi-Fi is available, and stronger reliance on short-form or free content. This is consistent with Research ICT Africa's work showing that users in data-constrained settings remain online, but often in intermittent and carefully managed ways rather than through seamless, always-on use.

## 5.6 Data affordability

Overall, 58.4% of the respondents describe internet/data for watching video as affordable, 30.6% describe it as expensive, and 10.9% are neutral.

**Table 11:** Data affordability by monthly income (%)

| Income | Affordable (very/somewhat) | Neutral | Expensive (very/somewhat) |
|---|---|---|---|
| R15,000–R29,999 | 68.8 | 6.2 | 25.0 |
| R3,000–R6,999 | 53.3 | 10.4 | 36.4 |
| R30,000+* | 42.9 | 0.0 | 57.1 |
| R7,000–R14,999 | 62.2 | 16.2 | 21.6 |
| Refuse income | 53.9 | 11.1 | 35.0 |
| Under R3,000 | 51.9 | 9.4 | 38.7 |

*Note: * Very small base; interpret cautiously.*

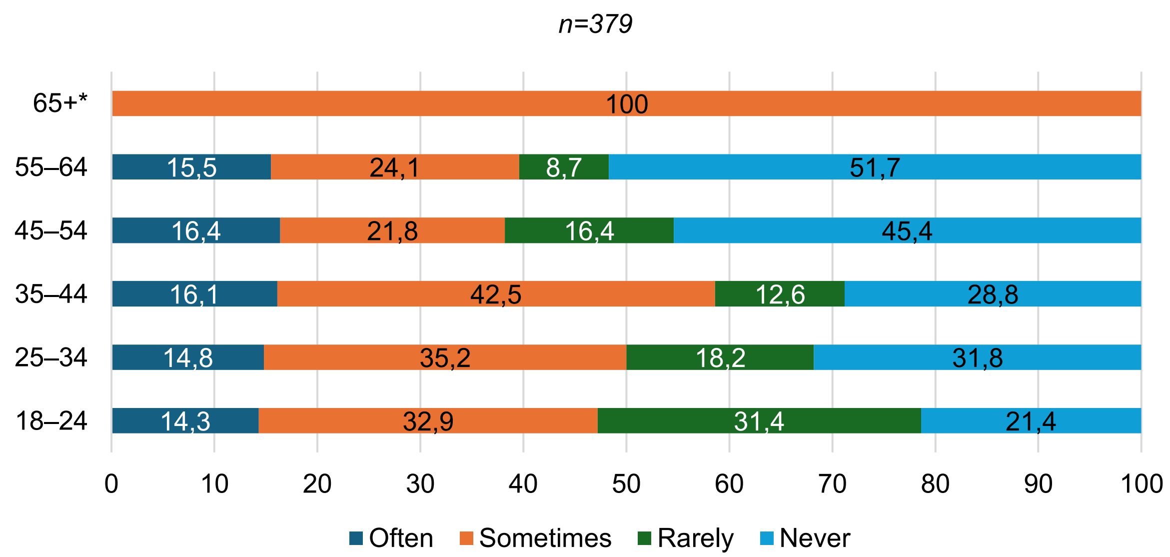
*Source: Birguid respondent survey analysis*

The dominant and more reliable pattern is that affordability pressure remains significant below the R15,000 threshold. Under-R3,000 and R3,000–R6,999 respondents both show affordability stress of around one-third or more. Geographic differences also matter. “Very expensive” responses are notably high in Free State (45.5%), the North West (26.7%), Mpumalanga (23.3%), and Eastern Cape (18.2%), compared with 5.6% in the Western Cape. Overall, the effective cost of audiovisual consumption is not just the subscription fee. It is the combined cost of content plus connectivity. This mirrors national evidence showing that data remains expensive relative to household means for many users, especially those dependent on mobile bundles.

### 5.7 Public wi-fi downloading behaviour

One of the clearest indicators of cost-managed digital behaviour in the dataset is the use of public or shared Wi-Fi to download content for later offline viewing. Overall, 48.2% of respondents report doing this often or sometimes.

**Figure 16:** Public Wi-Fi downloading by age (%)




*Note: * Very small base; interpret cautiously.*

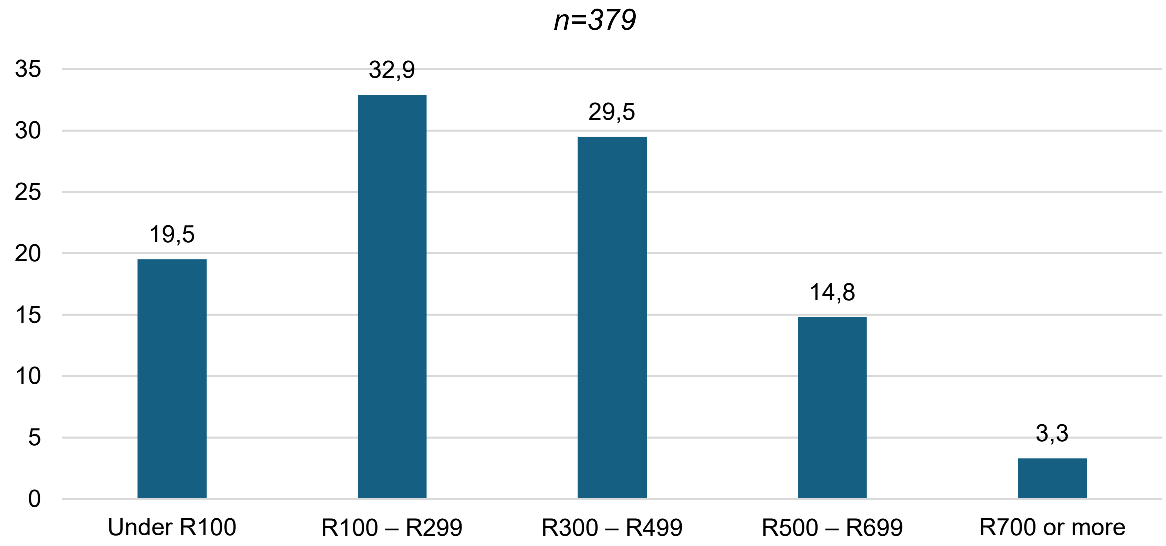
*Source: Birguid respondent survey analysis*

Younger and prime working-age respondents, especially those aged 18–44, show the strongest use of download-to-watch strategies. Income-linked patterns also indicate cost-management behaviour: only 15.6% of the R15,000–R29,999 group say they “sometimes” use this strategy, compared with 35.1% among R3,000–R6,999 and 43.2% among R7,000–R14,999 respondents. Rural and township respondents also show substantial reliance on this practice.

In practical terms, digital participation is often being achieved through workaround strategies rather than through frictionless real-time streaming. For platforms, offline viewing functionality, manageable file sizes, and mobile-optimised downloads are therefore core market requirements, not optional extras.

### 5.8 Monthly spend on data or internet

**Figure 17:** Internet monthly spend (%)




*Source: Birguid respondent survey analysis*

Monthly spend on connectivity helps convert abstract affordability into a more concrete economic measure. More than half the sample spends below R300 per month, indicating a largely budget-constrained connectivity market.

**Table 12:** Monthly spend on internet by province (%)

| Province | Under R100 | R100–R299 | R300–R499 | R500–R699 | R700+ |
|---|---|---|---|---|---|
| Eastern Cape | 27.1 | 41.0 | 18.1 | 11.5 | 2.3 |
| Free State | 40.9 | 36.4 | 13.6 | 9.1 | 0.0 |
| Gauteng | 13.7 | 28.6 | 35.7 | 17.9 | 4.1 |
| KwaZulu-Natal | 11.5 | 29.2 | 33.3 | 22.9 | 3.1 |
| Limpopo | 18.9 | 23.0 | 31.1 | 23.0 | 4.0 |
| Mpumalanga | 25.0 | 28.1 | 28.1 | 15.7 | 3.1 |
| North West | 16.1 | 29.0 | 25.8 | 19.4 | 9.7 |
| Northern Cape | 23.1 | 38.4 | 23.1 | 11.5 | 3.9 |
| Western Cape | 13.5 | 40.5 | 27.0 | 13.5 | 5.5 |

*Source: Birguid respondent survey analysis*

Provincial spending patterns reveal clear differences in connectivity affordability. Lower monthly expenditure is most pronounced in Free State, Eastern Cape, and Northern Cape, where most respondents spend less than R300 per month on internet access. In Free State, 77.3% fall within the under-R300 category (combining under-R100 and R100–R299), compared with 68.1% in Eastern Cape and 61.5% in Northern Cape. By contrast, higher connectivity spending is more common in Gauteng, Western Cape, KwaZulu-Natal, and North West, where a larger share of respondents falls within the R300–R699 range, reflecting stronger purchasing power and more developed connectivity infrastructure.

Income patterns reinforce this trend. Respondents earning below R3,000 per month are concentrated in the lowest spending brackets, while those earning R15,000–R29,999 are more likely to spend R300–R699. Overall, the results indicate that digital participation remains financially constrained. Although internet access is widespread, many households operate within modest connectivity budgets that limit the depth and frequency of online video consumption.

### 5.9 Data-free platforms

**Table 13:** Data-free platform adoption dashboard

| Segment | Actively use (%) | Sometimes (%) | Total users (Active + Sometimes) (%) | No (%) | Not aware (%) |
|---|---|---|---|---|---|
| **Overall sample** | 16.7 | 29.0 | **45.7** | 30.1 | 24.2 |
| **Province – Limpopo** | 24.3 | 35.1 | **59.4** | 21.6 | 18.9 |
| **Province – Free State** | 27.3 | 36.4 | **63.7** | 18.2 | 18.2 |
| **Province – Gauteng** | 16.9 | 31.6 | **48.5** | 26.3 | 25.2 |
| **Province – Western Cape** | 8.3 | 16.7 | **25.0** | **61.1** | 13.9 |
| **Income – Under R3,000** | 18.8 | 28.1 | **46.9** | 28.1 | 25.0 |
| **Income – R3,000–R6,999** | 20.5 | 33.3 | **53.8** | 25.6 | 20.5 |
| **Income – R7,000–R14,999** | 14.7 | 33.3 | **48.0** | 33.3 | 18.7 |
| **Income – R15,000–R29,999** | 12.5 | 31.3 | **43.8** | 37.5 | 18.7 |

*Source: Birguid respondent survey analysis*

The dashboard highlights three structural patterns in the use of data-free platforms:

1) Nearly half of the respondents (45.7%) either actively or occasionally consider data-free access when choosing what to watch, indicating that connectivity costs remain a meaningful factor in platform choice.
2) Reliance on these options varies significantly by geography. Provinces such as Free State and Limpopo show the strongest engagement with data-free pathways, while

Western Cape displays a much higher share of respondents who report not using them.

3) Income patterns indicate that lower- and middle-income groups are somewhat more likely to rely on data-free access as a cost-management strategy.

From a strategic perspective, this reinforces the role of connectivity economics in shaping digital discovery and consumption. Where audiences actively seek cost-relief mechanisms, partnerships between platforms and mobile network operators, data-sponsored content models, and AVOD or zero-rated distribution pathways can play a meaningful role in expanding access to South African audiovisual content.

### 5.10 Devices available at home

Device availability shapes both the accessibility of digital content and the quality of the viewing experience. Across all device mentions captured in the household device question, smartphones are the most widely available device, followed by smart TVs, laptops or PCs, non-smart TVs, and tablets.

**Table 14:** Device availability by monthly income (% of respondents in each income band)

| Income | Smartphone | Smart TV | Laptop / PC | Tablet | Non-smart TV |
|---|---|---|---|---|---|
| R15,000–R29,999 | 96.9 | 59.4 | 53.1 | 25.0 | 31.2 |
| R3,000–R6,999 | 92.3 | 57.7 | 25.6 | 9.0 | 24.4 |
| R30,000+* | 85.7 | 71.4 | 42.9 | 42.9 | 14.3 |
| R7,000–R14,999 | 93.3 | 70.7 | 25.3 | 16.0 | 17.3 |
| Refuse income | 80.3 | 49.3 | 28.2 | 19.7 | 23.9 |
| Under R3,000 | 84.5 | 47.4 | 30.2 | 10.3 | 21.6 |

*Note: * Very small base; interpret cautiously.*

*Source: Birguid respondent survey analysis*

Smartphones clearly serve as the primary gateway to digital content across all income groups. However, more immersive and flexible viewing environments become more common as income increases, particularly through access to smart TVs and laptops.

Geographic differences reinforce this pattern. Smart TV penetration is significantly lower in rural areas (20.4%) compared with urban (62.4%) and peri-urban areas (63.6%). Similarly, laptop or PC ownership in rural areas (18.4%) is considerably lower than in more urbanised settings.

Overall, the findings confirm that South Africa's digital ecosystem is mobile-first but not mobile-only. Smartphones provide the primary point of entry into digital content, while richer and more sustained viewing tends to occur where households have Wi-Fi connectivity, smart TVs, and broader device ecosystems. This helps explain why television and digital video continue to coexist rather than following a simple substitution pattern.

### 5.11 Strategic implications

The analysis points to a digital market that is connected, but still materially shaped by structural inequality:

1) Digital reach is broad, but digital readiness is uneven. Weekly internet access is high across the sample, yet the quality and sustainability of access still vary by geography, income, and household infrastructure.
2) South Africa remains a hybrid access market rather than a uniformly broadband-led one. The dominant pattern is not fixed home internet, but a blend of mobile data and home Wi-Fi, with a significant minority still dependent on mobile-only access. This means that any distribution strategy built around assumptions of stable, uncapped home broadband at scale will overestimate actual streaming readiness.
3) Affordability remains central to adoption depth. The combination of affordability pressure, modest monthly spend, public Wi-Fi downloading, and use of data-free pathways shows that digital participation is often highly cost-managed.
4) Smartphones are the foundation of digital participation, but they are not the whole viewing environment. They provide entry into discovery, social video, and portable viewing, while smart TVs and home Wi-Fi deepen the possibility of longer-form and household-based engagement.
5) Television and digital platforms are likely to coexist rather than substitute cleanly. Television remains important as a mass-reach platform while digital expands through selective, mobile-led, and low-friction pathways.

For the NFVF and the wider industry, the practical implication is that distribution strategies should be built around real audience conditions, specifically, low-data product design, download functionality, mobile-first discovery, AVOD and subsidised-access pathways, and continued use of television for broad reach.

### 5.12 Conclusion

Digital adoption in South Africa is not best understood as a simple shift from offline to online, or from television to streaming. It is better understood as a layered process shaped by connectivity structure, data sufficiency, affordability, shared access practices, and household device ecosystems. Survey results indicate that South Africans are largely connected on a weekly basis, but not all are equally able to convert that connectivity into seamless digital viewing. Mobile-led and mixed-access environments remain dominant. Cost-management behaviour is widespread. Public Wi-Fi downloading, modest monthly spend, and the use of data-free platforms all point to a market in which digital adoption is real but often negotiated around economic and infrastructural constraints.

# CHAPTER 6: PLATFORM USAGE, FREQUENCY AND SCREEN TIME

## 6.1 Purpose

Chapter 6 examines how South African audiences are participating in the country's contemporary audiovisual platform environment. Rather than treating platform use as a simple matter of whether services exist in the market, it assesses how audiences are actually engaging with different viewing platforms in practice. In the South African context, platform participation is shaped by a combination of interrelated structural and behavioural factors, including affordability, access conditions, digital readiness, device ecosystems, and the continuing relevance of traditional television alongside newer digital services.

The chapter, therefore, addresses the study's broader objectives relating to audience access, platform participation, monetisation, and the evolving viability of current and future distribution models. Questions addressed by this chapter include:

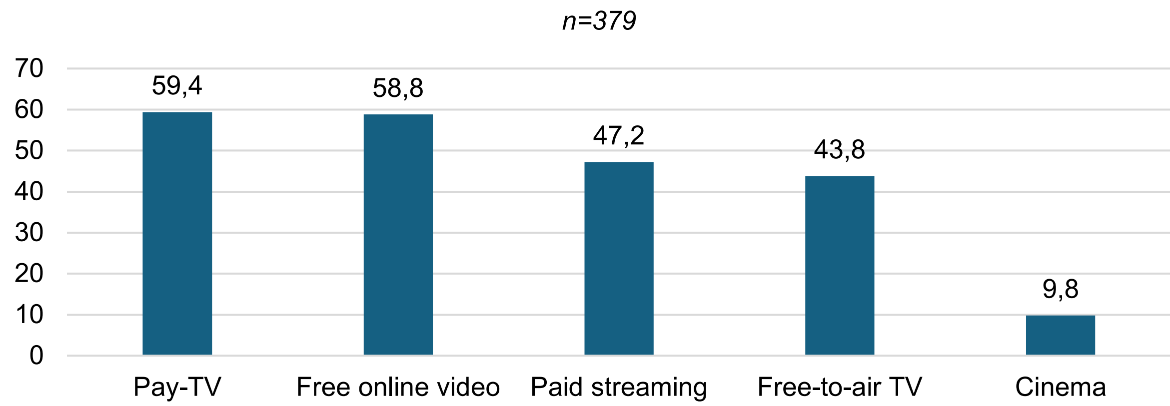
1) Which platforms have audiences used in the last three months?
2) How frequently are these platforms used in everyday viewing behaviour?
3) How much screen time is being allocated to video content across the platform mix?
4) Which services are audiences paying for, and which are accessed for free?
5) Why do audiences choose to pay, or not pay, for different forms of audiovisual access?

This analysis is important because South Africa's audiovisual market continues to evolve toward streaming, online video, mobile-first discovery, and on-demand consumption, yet the pace and depth of platform transition remain uneven. Audience behaviour is still shaped by affordability pressures, unequal digital access, and the coexistence of television, mobile viewing, free online video, and intermittent subscription streaming.

## 6.2 Overall pattern: South Africa remains a hybrid screen market

South African audiences are using a mixed platform ecosystem, not a single dominant channel. Use is spread across pay-TV, free online video, paid streaming, and free-to-air television, while cinema plays a much smaller role in routine viewing.

**Figure 18:** Platforms used in the last 3 months (% of respondents)




*Source: Birguid respondent survey analysis*

Three conclusions emerge:

1) **Digital video is mainstream**, but it has not replaced television.
2) **Television remains structurally important**, particularly through pay-TV and free-to-air TV.
3) **Cinema is now peripheral in routine access terms**, even if it remains symbolically important.

This is consistent with national and industry evidence showing that South Africa's media market is becoming more digital, but in a way that remains shaped by mobile devices, uneven fixed connectivity, and affordability constraints. The overall implication is that the market should not be read as a simple migration from television to streaming. It is better understood as a layered screen ecology in which households combine different routes to content depending on cost, habit, content need, and convenience.

### 6.3 Frequency of platform use

Reach is important, but frequency is more strategically revealing because it shows whether a platform is habitual, occasional, or marginal to everyday life.

**Table 15:** Frequency of use by platform (% of respondents)

| Platform | Never | Rarely | Monthly | Weekly | Daily |
|---|---|---|---|---|---|
| Cinema | 62.3 | 23.7 | 9.2 | 2.6 | 2.1 |
| Free-to-air TV | 24.3 | 19.0 | 7.4 | 10.6 | 38.8 |
| Pay-TV | 20.6 | 12.9 | 13.5 | 8.7 | 44.3 |
| Paid streaming | 29.6 | 10.8 | 9.5 | 15.6 | 34.6 |
| Free online video | 13.5 | 10.6 | 5.5 | 7.9 | 62.5 |

*Source: Birguid respondent survey analysis*

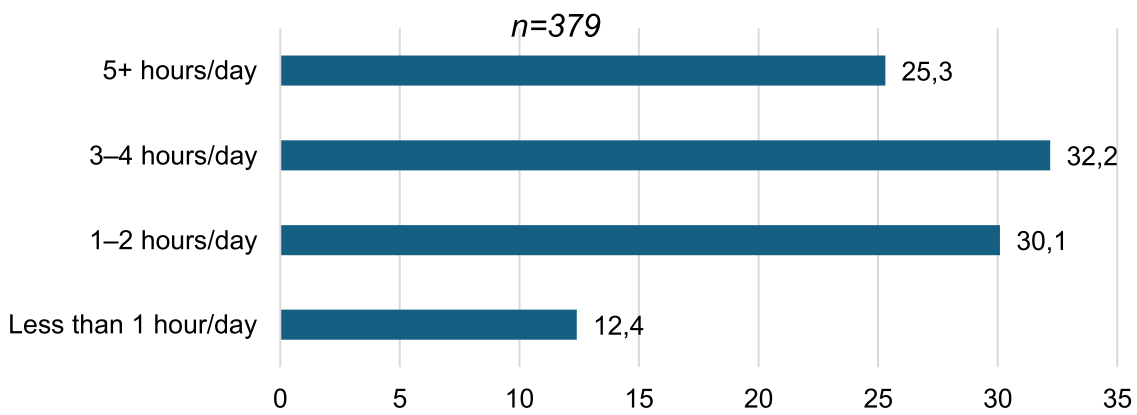
An important deduction is that free online video is the strongest daily-use platform used across the respondents. Nearly two-thirds indicated that they use it daily, making it the most deeply embedded behaviour in everyday screen life. Pay-TV remains highly habitual, and free-to-air TV also retains strong daily relevance. Paid streaming is significant, but still less deeply embedded than free online video and pay-TV.

This pattern aligns closely with the literature. In a market where internet access is widespread but often mobile-first and cost-sensitive, lighter, more flexible, and often free digital formats become especially attractive. At the same time, television continues to offer a low-friction, familiar route to content access. Cinema is the clear outlier. Its low weekly and daily use confirms that it functions as an occasional rather than routine platform.

### 6.4 Average screen time

The data show that video viewing occupies a meaningful share of daily audience attention.

**Figure 19:** Average daily screen time (all video)



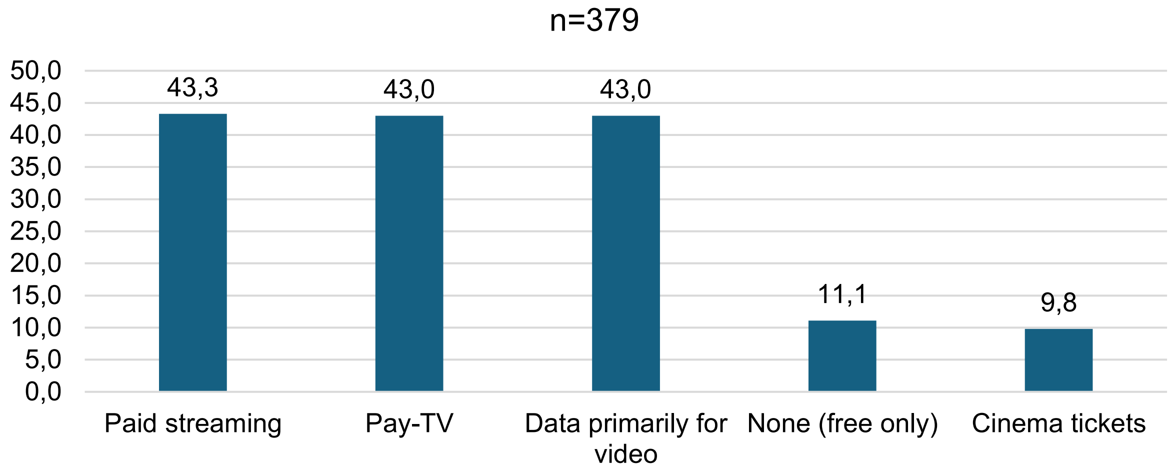

*Source: Birguid respondent survey analysis*

The approximate overall average is 3.0 hours per day. More importantly, 57.5% of respondents report 3 or more hours per day, and one quarter report 5+ hours. This indicates that audience attention to audiovisual content is not weak. The strategic question is therefore not whether South Africans watch enough content, but which platforms capture this attention, under what cost conditions, and with what implications for local-content reach and monetisation. If audiences are already spending substantial time with video, then distribution success depends less on creating basic demand and more on understanding platform fit, affordability barriers, and points of discoverability.

### 6.5 Services paid for

Payment behaviour further confirms the hybrid structure of the market. Audiences are not paying for only one type of access. Many are paying across both content services and connectivity-related access.

**Figure 20: Services paid for**




*Source: Birguid respondent survey analysis*

Respondent results reveal that the cost of viewing is often compounded and not singular. People may pay for the platform, for the data needed to use it, or both. This is exactly why willingness to pay cannot be read as a simple subscription decision. In practice, affordability is experienced as a bundle of costs that includes content, connectivity, and device dependence. The relatively small free-only segment also suggests that a large portion of the audience is prepared to pay for some form of access, even if that payment does not always take the form of a premium streaming subscription.

## 6.6 Why audiences pay and why they do not

### 6.6.1 Why audiences pay

**Table 16:** Main reasons for paying (coded themes among codable responses)

| Reason theme | % of coded responses |
|---|---|
| More choice / desired content | 26.1 |
| Entertainment / leisure | 12.8 |
| Better quality / experience | 9.2 |
| Affordability / value | 8.0 |
| Convenience / flexibility | 5.3 |
| Information / learning | 3.9 |

*Source: Birguid respondent survey analysis*

The strongest driver is access to preferred content. Respondents pay mainly because paid services offer more choice, better quality, flexibility, convenience, and a better entertainment experience. In other words, payment is justified by content access and utility, not platform loyalty alone. This suggests that audiences are willing to pay where the proposition is strong enough: good content, better experience, convenience, and perceived value.

### 6.6.2 Why audiences do not pay

Among non-payers, the reasons are overwhelmingly economic.

**Table 17:** Main reasons for not paying (coded themes among non-payers)

| Reason theme | % of coded responses |
|---|---|
| Cannot afford / no money | 71.4 |
| Low need / low interest | 9.5 |
| Data / connectivity cost | 7.1 |
| Free is sufficient | 2.4 |
| No device / access | 2.4 |

*Source: Birguid respondent survey analysis*

Non-payment is not mainly driven by rejection of content. It is driven by affordability. The implication is that willingness to pay is conditional, not absent. Conversion into paid models depends on price, data burden, and value for money.

## 6.7 Key category trends

### 6.7.1 Age

**Table 18:** Age x platform use, screen time and payment summary

| Age group | n | Free-to-air TV % | Pay-TV % | Paid streaming % | Free online video % | Average hrs/day | 5+ hrs % | Free only % |
|---|---|---|---|---|---|---|---|---|
| 18–24 | 73 | 32.9 | 63.0 | 53.4 | 61.6 | 3.6 | 42.5 | 13.7 |
| 25–34 | 95 | 37.9 | 55.8 | 50.5 | 68.4 | 3.2 | 29.5 | 8.4 |
| 35–44 | 89 | 42.7 | 50.6 | 55.1 | 61.8 | 2.9 | 20.2 | 13.5 |
| 45–54 | 59 | 47.5 | 62.7 | 37.3 | 47.5 | 2.9 | 15.3 | 8.5 |
| 55–64 | 62 | 62.9 | 71.0 | 32.3 | 46.8 | 2.5 | 16.1 | 11.3 |

*Source: Birguid respondent survey analysis*

Younger respondents, especially 18–24 and 25–34, are the most screen-intensive and digitally engaged, with high free online video usage and stronger paid-streaming reach than older cohorts. However, they are not television-free. Even among 18–24-year-olds, pay-TV remains high, which suggests additive viewing rather than outright substitution.

Older groups, especially 55–64, are more television-based, with the highest free-to-air TV and pay-TV usage. Even so, almost half still use free online video. This means older audiences are not digitally absent; they are simply less digitally dominant in their viewing mix.

### 6.7.2 Province

Provincial patterns show that platform behaviour is uneven and likely reflects broader differences in income, infrastructure, and internet access conditions.

**Table 19:** Province x selected platform indicators

| Province | n | Pay-TV % | Paid streaming % | Free online video % | Average hrs/day | Free only % |
|---|---|---|---|---|---|---|
| Eastern Cape | 48 | 52.1 | 39.6 | 56.2 | 2.6 | 16.7 |
| Free State | 25 | 56.0 | 28.0 | 64.0 | 3.4 | 12.0 |
| Gauteng | 104 | 58.7 | 57.7 | 51.9 | 3.1 | 1.9 |
| KwaZulu-Natal | 48 | 68.8 | 41.7 | 75.0 | 3.0 | 10.4 |
| Limpopo | 38 | 73.7 | 52.6 | 71.1 | 2.8 | 13.2 |
| Mpumalanga | 32 | 46.9 | 34.4 | 56.2 | 3.0 | 18.8 |
| North West | 31 | 58.1 | 48.4 | 45.2 | 3.5 | 12.9 |
| Northern Cape | 16 | 75.0 | 43.8 | 50.0 | 3.5 | 18.8 |
| Western Cape | 37 | 51.4 | 54.1 | 62.2 | 2.9 | 16.2 |

*Source: Birguid respondent survey analysis*

Gauteng stands out as the strongest paid-streaming market and the least free-only province in the sample, which fits broader evidence that Gauteng is among the better-connected provinces. KwaZulu-Natal and Limpopo show especially strong free online video use together with high pay-TV, reinforcing the idea of a layered platform environment rather than one dominant route.

### 6.7.3 Area type

**Table 20:** Area type x selected platform indicators

| Area type | n | Pay-TV % | Paid streaming % | Free online video % | Average hrs/day | Data for video % | Free only % |
|---|---|---|---|---|---|---|---|
| Peri-urban | 55 | 67.3 | 45.5 | 52.7 | 3.1 | 32.7 | 18.2 |
| Rural | 49 | 53.1 | 26.5 | 59.2 | 2.5 | 59.2 | 8.2 |
| Township | 118 | 65.3 | 48.3 | 55.9 | 3.0 | 42.4 | 11.0 |
| Urban / City | 157 | 54.1 | 53.5 | 63.1 | 3.2 | 42.0 | 9.6 |

*Source: Birguid respondent survey analysis*

Urban respondents are the most digitally advanced, with the highest paid-streaming reach and the highest free online video use. Rural respondents, by contrast, show much lower paid-streaming reach, but still meaningful free online video usage. They are therefore digitally present but less deeply monetised. This supports the broader literature's argument that digital viewing in South Africa extends beyond core urban markets, but often through lower-cost and mobile-first modes rather than continuous premium streaming. Township and peri-urban areas show particularly strong pay-TV use, again underscoring that television remains central to broad audience reach.

### 6.7.4 Monthly income

**Table 21:** Monthly income x selected platform indicators (n=308)

| Monthly income | n | Pay-TV % | Paid streaming % | Free online video % | Average hrs/day | Paid streaming paid % | Free only % |
|---|---|---|---|---|---|---|---|
| Under R3,000 | 116 | 54.3 | 41.4 | 56.0 | 3.1 | 32.8 | 17.2 |
| R3,000–R6,999 | 78 | 64.1 | 48.7 | 60.3 | 2.9 | 43.6 | 10.3 |
| R7,000–R14,999 | 75 | 52.0 | 56.0 | 62.7 | 3.0 | 50.7 | 5.3 |
| R15,000–R29,999 | 32 | 81.2 | 65.6 | 59.4 | 3.2 | 68.8 | 0.0 |
| R30,000+* | 7 | 85.7 | 42.9 | 42.9 | 3.2 | 57.1 | 0.0 |

Note: *Very small base; interpret with caution.

*Source: Birguid respondent survey analysis*

As income rises, paid-platform depth becomes stronger. The R15,000–R29,999 segment is especially strong on both pay-TV and paid streaming, and none in this group are free-only. However, lower-income audiences are far from inactive. The under-R3,000 segment still shows substantial digital usage and relatively high screen time, but its paid conversion is weaker, and its free-only rate is higher. This suggests that demand for video content exists across income bands, but the form of participation changes with affordability. Lower-income groups still watch, but they do so under more constrained payment conditions.

### 6.7.5 Other key category trends

In terms of other key trends, employed full-time respondents show the strongest overall paid use, with the highest pay-TV (67.0%) and paid streaming (53.6%) penetration, alongside the lowest free-only rate (6.2%). By contrast, students and unemployed respondents recorded some of the highest average screen time levels, at 3.6 and 3.3 hours per day respectively, but weaker paid conversion and higher free-only behaviour, especially among the unemployed (19.1%). This suggests that strong demand for content does not automatically translate into strong monetisation. Self-employed respondents, meanwhile, stand out for combining meaningful paid-platform use with the highest free online video usage (66.3%), indicating a blended and flexible viewing pattern.

Race and gender differences are visible, but should be interpreted with caution, especially where subgroup bases are very small. The main population-weighted pattern remains that Black African respondents, who make up most of the sample, display a hybrid viewing profile with strong pay-TV use (62.5%), meaningful paid streaming (45.3%), and high free online video use (57.3%). Coloured respondents appear especially digitally intensive, with particularly high paid streaming (65.4%) and free online video use (84.6%), although this should be treated directionally given the smaller base.

Gender differences are comparatively modest: female respondents show slightly higher paid-streaming reach and slightly higher average screen time, while male respondents are marginally stronger in free online video use. Overall, gender appears to be a less important differentiator of platform behaviour than factors such as income, area type, and employment status.

## 6.8 Key cross-cutting insights

Several high-level insights emerge:

1) **South Africa is unmistakably a hybrid market:** No major subgroup is organised around only one platform. Even where one route is dominant, audiences are typically combining television, streaming, and free online video.
2) **Free online video is the strongest habitual platform in the market:** This is the clearest everyday behaviour and is strongest among younger adults, urban audiences, and several middle-income groups, but remains meaningful across most segments.
3) **Television remains essential for reach:** Pay-TV is resilient across many groups, and free-to-air TV remains especially relevant among older and more television-oriented audiences. This means television cannot be treated as legacy-only in audience strategy

4) **Paid streaming is important but conditional:** Its reach is meaningful, but its depth depends on income, urbanity, and broader affordability conditions. It is mainstream, but not universal.
5) **Affordability is the decisive monetisation barrier:** The dominant reason for non-payment is simply lack of money. This means the central commercial question is not only whether audiences want content, but whether pricing and data burdens allow them to sustain access.
6) **High screen time does not always equal high paid conversion:** Students and unemployed respondents watch a lot, but are less consistently monetised. This matters for local-content strategy because attention may exist before revenue does.

### 6.8.1 Emerging platforms and micro-drama ecosystems

Emerging platforms such as DramaBox and NetShort are explicitly captured within the dataset under the “free online video” category. Analysis indicates that these platforms are used by an estimated 5%–12% of respondents (n=379), positioning them as niche but meaningful components of the broader content ecosystem.

**Table 22: Platform category usage (indicative ranges)**

| Platform Category | Estimated Usage (%) | Interpretation |
|---|---|---|
| Free online video (YouTube, TikTok, etc.) | 85% – 95% | Near-universal usage |
| Paid streaming (Netflix, Showmax, etc.) | 60% – 75% | Strong but affordability constrained |
| Pay-TV (DStv) | 50% – 65% | Still relevant, especially in households |
| Free-to-air TV | 40% – 60% | Declining but persistent |
| Cinema | 20% – 35% (monthly or less) | Occasional/event-based |

*Note: Dataset is not pre-aggregated; estimates are derived from frequency of mentions across rows.*
*Source: Birguid analysis*

Their usage is strongly associated with:

- High screen time users (3–5+ hours/day)
- Daily short-form content consumption
- Mobile-first viewing behaviour

- Low or no subscription spending

Importantly, these platforms are not used as primary viewing destinations, but rather as complementary platforms within a wider short-form ecosystem dominated by TikTok and YouTube. Their growth reflects a structural shift toward compressed storytelling formats, algorithm-driven discovery, and low-cost consumption models. While current penetration remains limited relative to mainstream platforms, their presence signals the emergence of a third distribution layer, distinct from both traditional streaming and social video. However, the absence of platforms such as Yooko in the dataset indicates a minor coverage gap, suggesting that the full scale of this segment may be underrepresented.

### 6.9 Strategic implications

The findings implications for NFVF and wider industry stakeholders are as follows:

1) **Distribution strategy should remain multi-window:** A platform-exclusive logic would underperform in this market. Television still matters for scale, while digital platforms matter for engagement, repetition, and younger audience access.
2) **Free online video should be treated as strategic, not peripheral:** It is already the strongest daily habit, but the rise of platforms such as micro-drama and short-form ecosystems signals a further shift toward mobile-first, compressed, and algorithm-driven content consumption. Although still niche, these platforms represent an early-stage distribution pathway that can extend reach, particularly among younger, high-frequency users. They should be positioned not as peripheral channels, but as entry points into the content ecosystem and audience development funnel.
3) **Content format innovation is becoming as important as platform selection:** The emergence of short-form and episodic micro-content indicates that distribution competitiveness will increasingly depend on format adaptability, not only platform presence. Local producers and funders should consider supporting a broader range of content formats, including short-form, serialised, and mobile-optimised storytelling, particularly where these align with affordability and consumption patterns.
4) **Pricing architecture matters as much as content quality:** If inability to afford paid access is the main barrier, then monetisation models must account for the compound cost of viewing, including data. Lower-friction routes such as ad-supported, bundled, or mixed-payment models may therefore be especially relevant.
5) **Audience development should be segmented by attention and monetisation potential:** Younger, student, and lower-income audiences are highly engaged but less monetised, often operating within free or low-cost ecosystems. By contrast, urban and

middle-income audiences are more consistently monetisable. Distribution and funding strategies should therefore differentiate between:

a) **High-attention / low-monetisation segments** (requiring reach and engagement strategies), and

b) **Higher-income / higher-conversion segments** (supporting revenue sustainability).

6) **Television remains important for inclusion:** Any local-content strategy that underweights television risks excluding significant portions of the addressable market. The optimal approach is therefore integration, not replacement, positioning television alongside digital platforms within a unified distribution strategy.

### 6.10 Conclusion

South African audiences are deeply engaged with audiovisual content, but this engagement is distributed across a layered and evolving platform ecosystem, rather than concentrated within a single dominant channel. Free online video has emerged as the strongest habitual behaviour, supported by high daily usage and significant screen time. At the same time, television remains structurally important for reach, while paid streaming provides depth and premium access, albeit within affordability constraints.

The inclusion of emerging platforms such as micro-drama and short-form ecosystems further highlights that the market is not only hybrid but also fragmenting across format and engagement types. While these platforms remain niche in scale, they signal a broader shift toward mobile-first, low-cost, and high-frequency content consumption, particularly among younger and digitally intensive users. Their role is not to replace existing platforms, but to reshape how audience attention is distributed across the ecosystem.

The central implication is that the future of South Africa’s audiovisual sector will be determined less by content demand, which is already strong, and more by the structural conditions that enable access and sustained engagement. Affordability, connectivity, device ecosystems, and platform design will continue to shape viewing behaviour, platform choice, and monetisation outcomes. As a result, competitive distribution strategies will need to align with a multi-platform, multi-format, and access-driven market, where success depends on reaching audiences across different layers of the ecosystem, rather than relying on any single dominant channel.

# CHAPTER 7: LOCAL VERSUS INTERNATIONAL CONTENT

## 7.1 Purpose

This chapter assesses how South African audiences engage with local versus international audiovisual content, and how those viewing choices shape discoverability, perceived value, and willingness to pay in an increasingly platform-led market. Where Chapter 5 showed that access to devices, internet, and data affects what audiences can watch, and Chapter 6 showed how audiences use different platforms and how much time they spend watching, this chapter goes one step further by asking what kind of content people choose once access is in place. It, therefore, focuses on the competitive position of South African content within a wider viewing environment where international content is also easy to access and often strongly promoted. This analysis speaks directly to the study's broader objectives, particularly:

- **Objective 1:** To analyse drivers of content consumption and willingness to pay
- **Objective 3:** To assess audience alignment with South African content relative to international content
- **Objective 4:** To identify structural barriers affecting discoverability and access

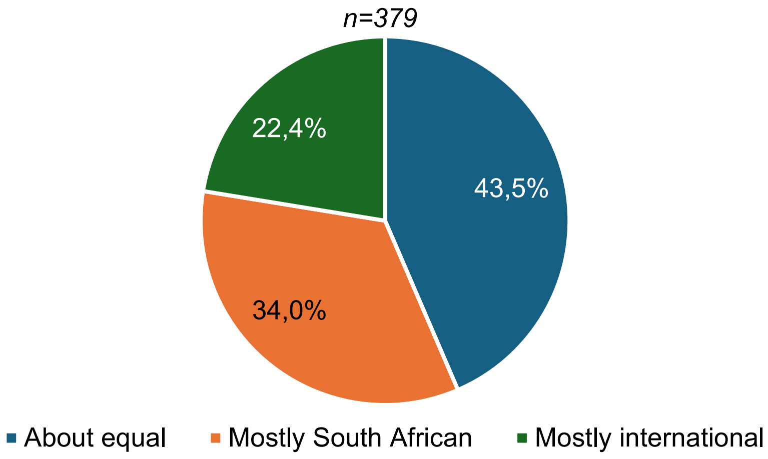
Key questions addressed by the chapter include:

1) Whether audiences mostly watch local content, international content, or a mix of both
2) Why this mix exists
3) Which type of content is usually paid for
4) Whether South African content is easy to find
5) Whether audiences are willing to pay for South African content, and why or why not

### 7.2 Content mix: Local versus international

#### 7.2.1 Overall content mix

**Figure 21:** Overall content mix




*Source: Birguid respondent survey analysis*

Per the results, South African audiences operate in a mixed or hybrid content environment rather than a sharply divided one. The largest share of respondents (43.5%) reported watching local and international content in roughly equal amounts, suggesting that viewing choices are fluid and shaped by mood, platform, recommendations, and availability.

At the same time, 34.0% stated that they watch mostly South African content, confirming that local productions remain relevant and culturally resonant. This is consistent with NFVF findings that audiences respond positively to familiar realities, recognisable accents, local humour, and culturally relevant themes (NFVF, 2022). By comparison, 22.4% reported watching mostly international content, reflecting the influence of global platforms whose larger and more visible catalogues shape viewing in a shared discovery environment where local and international titles compete side by side (Higson, 2021).

South African audiences are therefore not rejecting local content, but neither are they consuming it in isolation. The dominant pattern is one of coexistence: local content remains relevant but competes within a broader viewing environment shaped by international supply.

#### 7.2.2 Why this mix exists

The viewing mix is shaped by two concurrent forces:

1) Cultural pull factors favouring local content, and

2) Platform/catalogue advantages favouring international content.

**Why audiences choose local content**

Respondents who prefer South African content cite:

- Familiar language and accents
- Recognisable settings and lived realities
- Strong cultural and emotional relatability

This aligns with cultural proximity theory, where audiences connect more easily with content that reflects their own environment (Jang et al., 2023).

**Why audiences choose international content**

Those leaning toward international content highlight:

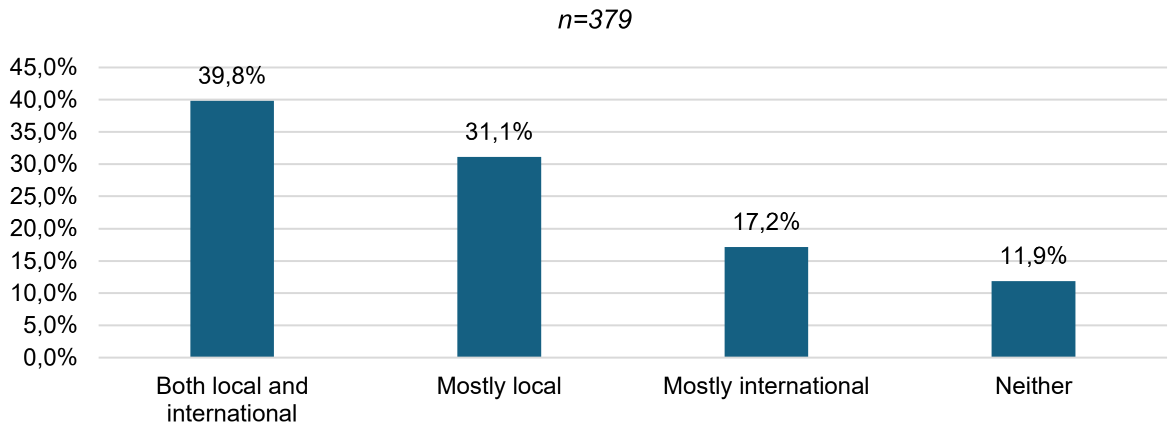
- Larger and more diverse catalogues
- Higher perceived production quality
- Strong global visibility and social buzz
- Broader genre selection

These preferences reflect the structural advantages of global platforms, including scale, promotion, and recommendation systems.

Content choice is, therefore, shaped as much by how content is supplied and surfaced as by preference. Audiences tend to choose local content for relevance and identity, and international content for variety and scale. The resulting mix is therefore structural rather than accidental.

### 7.3 Which content is usually paid for

**Figure 22:** Content usually paid for

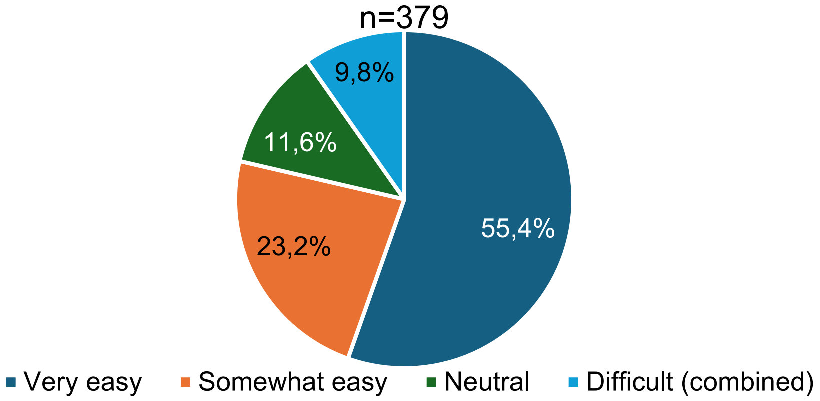



*Source: Birguid respondent survey analysis*

Content payment behaviour is driven more by platform access models than by content origin. The largest group (39.8%) of respondents reported that they pay for both local and international content, indicating that audiences typically subscribe to platforms offering mixed catalogues rather than paying separately by content type. A further 31.1% pay mostly for local content, confirming a meaningful domestic market with monetisation potential where content is relevant, visible, and well-priced. Only 17.1% indicated that they mainly pay for international content, while 11.9% confirmed that they pay for neither. The latter highlights ongoing affordability and access constraints. As shown in earlier chapters, income, data costs, and device access continue to limit participation. Overall, audiences are paying for access ecosystems, meaning monetisation depends not only on content appeal, but also on platform pricing and accessibility.

### 7.4 Discoverability of South African content

**Figure 23:** Discoverability of South African content




*Source: Birguid respondent survey analysis*

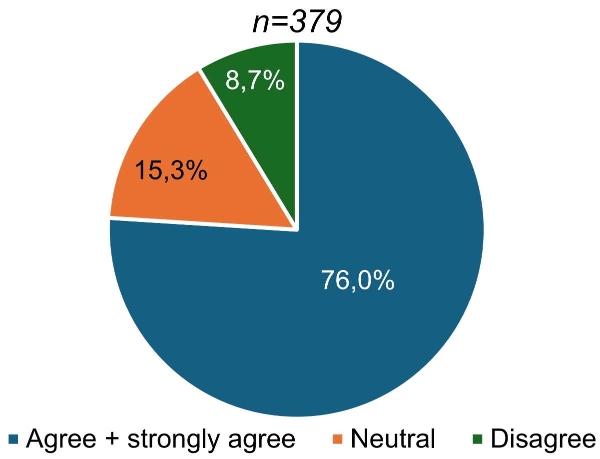
A combined 78.6% of respondents reported that South African content is easy to find, indicating progress in how platforms surface local titles. However, this is not yet consistent across the market, with nearly 1 in 10 still experiencing difficulty and 11.6% remaining neutral. In a platform-led environment, discoverability is shaped by interface design, recommendation systems, metadata, thumbnails, and promotional visibility. As a result, even strong local content can underperform if it is not effectively surfaced (Higson, 2021).

Going forward, the sector challenge will be to ensure audiences see, recognise, and choose local content through stronger metadata optimisation, targeted promotion, improved categorisation, and better integration into platform recommendation systems.

## 7.5 Willingness to pay for South African content

### 7.5.1 Willingness to pay for South African content

**Figure 24:** Willingness to pay for South African content



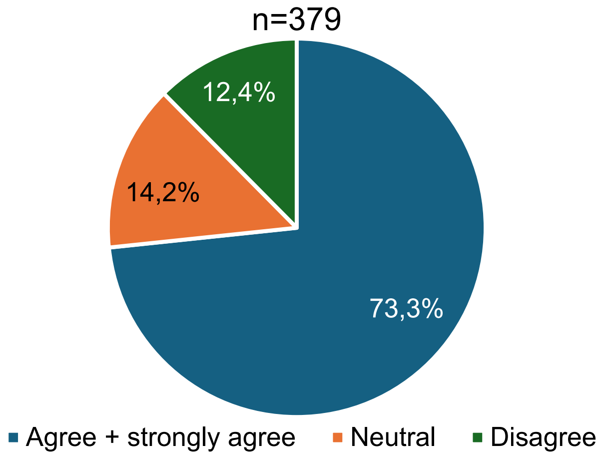

*Source: Birguid respondent survey analysis*

The results indicate strong willingness to pay for South African content, with more than three-quarters of respondents expressing agreement. This suggests that demand is not weak, but conditional, that is, audiences are willing to pay when content is perceived as worth the cost. The issue is, therefore, not a preference for international content, but whether local content meets key expectations, including:

- Perceived quality
- Relevance of story or setting
- Ease of access
- Value for money
- Confidence in the viewing experience

### 7.5.2 Willingness to pay for international content

**Figure 25:** Willingness to pay for international content




*Source: Birguid respondent survey analysis*

Willingness to pay for international content is also strong, though only slightly lower or broadly comparable depending on how audiences interpret "quality" and value. The key point is that both local and international content attract willingness to pay, but for somewhat different reasons.

**Table 23:** Why audiences are willing to pay

| South African content | International content |
|---|---|
| Cultural relatability | Variety of titles |
| Familiar language and identity | Higher perceived production value |
| Story authenticity | Global popularity |
| Strong local relevance | Catalogue depth |

*Source: Birguid respondent survey analysis*

**Why some audiences are not willing to pay**

Where willingness is weaker, key barriers include:

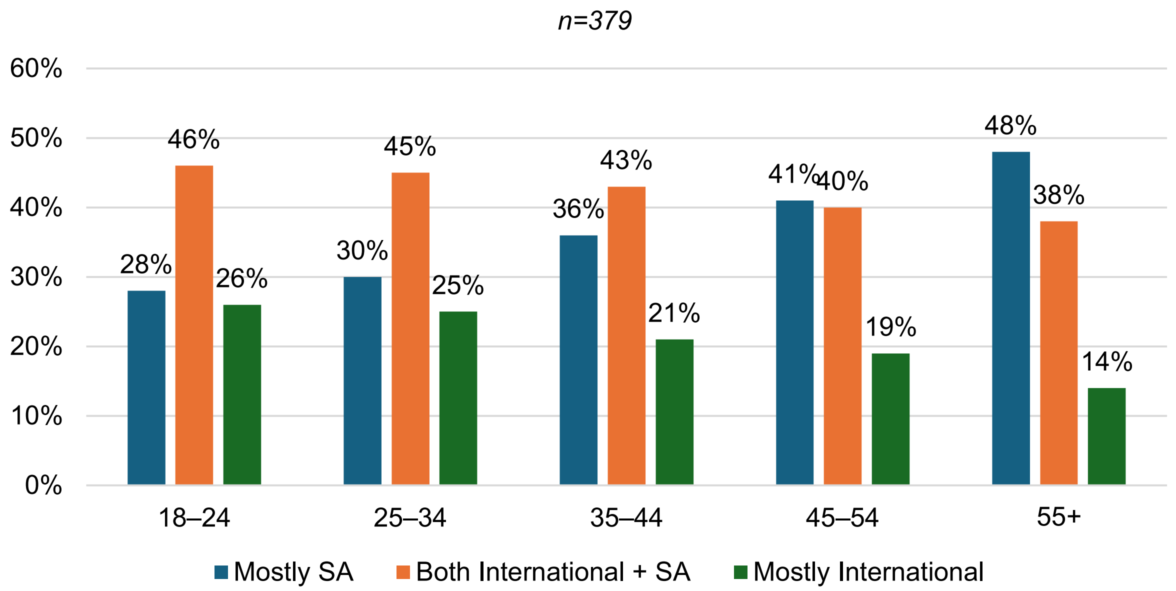
- Affordability constraints
- Access to free alternatives
- Uncertainty about quality
- Limited marketing or awareness
- Low perceived value for money

Based on the evidence, there is no clear demand deficit for South African content. The core issue is whether local content consistently meets expectations on quality, visibility, and convenience.

## 7.6 Key category trends

### 7.6.1 Age

**Figure 26:** Content mix by age




*Source: Birguid respondent survey analysis*

Younger respondents (18–34) are more likely to consume a mixed or international content diet, reflecting greater exposure to digital platforms, global trends, and algorithm-driven recommendations. In contrast, older audiences show a stronger preference for South African content, with nearly half of those aged 55+ watching mostly local content, suggesting a greater emphasis on familiarity, language, and culturally relevant storytelling. Overall, younger audiences are more globally exposed while older audiences are more locally aligned, meaning local content remains relevant across both groups but must work harder to stay visible and compelling among younger viewers.

### 7.6.2 Province

**Table 24:** Content mix by province

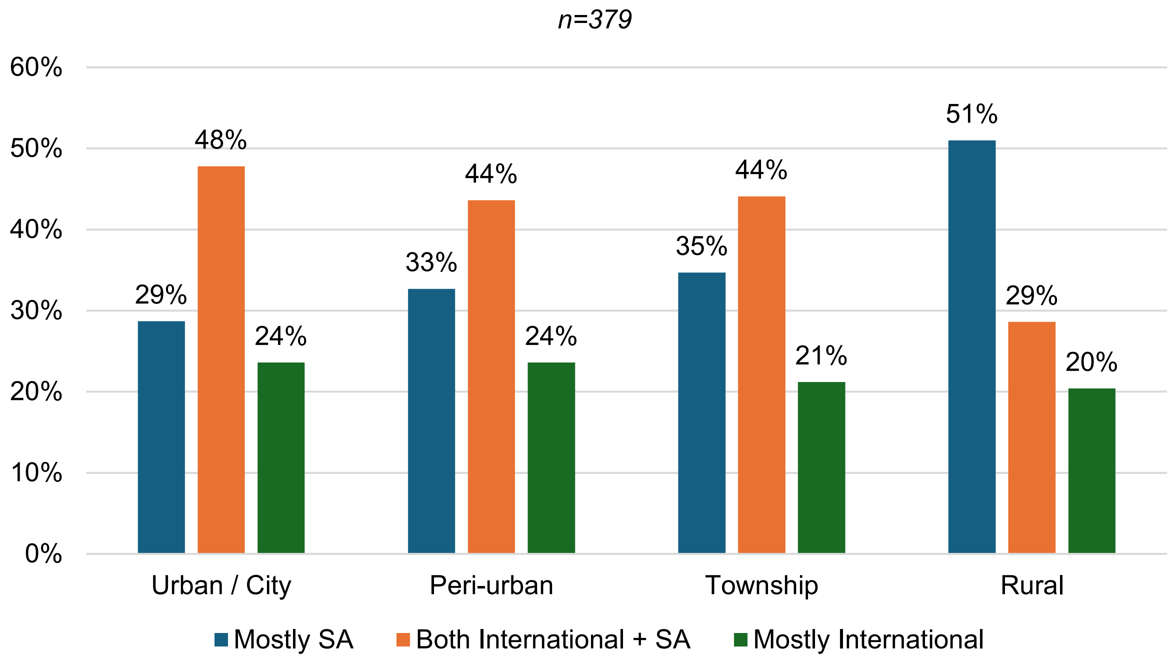
| Province | Mostly SA | Equal | Mostly Int. |
|---|---|---|---|
| Gauteng | 31% | 45% | 24% |
| Western Cape | 29% | 46% | 25% |
| KwaZulu-Natal | 36% | 43% | 21% |
| Eastern Cape | 39% | 41% | 20% |
| Free State | 38% | 42% | 20% |
| Limpopo | 40% | 41% | 19% |
| Mpumalanga | 37% | 43% | 20% |
| North West | 38% | 42% | 20% |
| Northern Cape | 36% | 44% | 20% |

*Source: Birguid respondent survey analysis*

Provincial patterns reinforce a consistent hybrid viewing environment across all nine provinces, with variations driven mainly by levels of urbanisation and digital access. Gauteng and the Western Cape show slightly higher international and mixed consumption, reflecting stronger streaming access, higher subscription penetration, and more reliable connectivity. In contrast, provinces such as Limpopo, Eastern Cape, Free State, and North West show a modestly stronger preference for South African content, likely influenced by cultural proximity, language, and comparatively constrained digital access. However, these differences are not pronounced with most provinces clustering around a balanced mix and indicating that local content maintains broad national relevance, while international exposure increases incrementally with improved platform access. The key insight is that local content resonates across all provinces, but its competitive position is strongest where access conditions do not disproportionately favour global catalogue exposure.

### 7.6.3 Area type

**Figure 27:** Content mix by area type




*Source: Birguid respondent survey analysis*

Area type highlights the role of infrastructure and access in shaping viewing behaviour. Urban audiences are more likely to consume a mixed or slightly international-leaning content diet due to stronger access to streaming platforms and broader digital options, while township and peri-urban audiences reflect a balanced mix as access improves but local content remains relevant. Rural audiences are more likely to favour South African content, driven by both cultural preference and more constrained connectivity and data conditions. Overall, as digital access improves, viewing becomes more mixed and internationally exposed, whereas local content remains central where access is limited.

### 7.6.4 Monthly income

**Table 25:** Content mix by income

| Monthly income | Mostly SA | Both international + SA | Mostly international |
|---|---|---|---|
| Under R3,000 | 42% | 41% | 17% |
| R3,000 – R6,999 | 40% | 42% | 18% |
| R7,000 – R14,999 | 35% | 44% | 21% |
| R15,000 – R29,999 | 32% | 45% | 23% |
| R30,000+ | 28% | 46% | 26% |
| Prefer not to say | 36% | 43% | 21% |

*Source: Birguid respondent survey analysis*

Income shows a clear and consistent gradient in content consumption. Lower-income respondents (under R7,000) are more likely to watch mostly South African content (40–42%), while higher-income groups (R15,000+) increasingly shift toward a mixed or more international viewing profile, with the “both local and international” category rising to 45–46% and international viewing reaching 26% in the highest bracket. This reflects improved access to streaming services, multiple subscriptions, better devices, and more reliable connectivity as income increases. However, this should not be interpreted as a lack of preference for local content among lower-income groups as cultural relevance remains important across all segments. Rather, higher income expands choice, and with it, exposure to international catalogues. Overall, income does not reduce interest in local content, but it broadens access to international alternatives.

### 7.6.5 Other key category trends

Across employment status, gender, race, and education, content mix continues to reflect the interaction between access, exposure, and cultural relevance. Students and employed respondents show higher mixed and international viewing, consistent with greater participation in digital platforms, while unemployed respondents lean more toward local content, reflecting affordability and access constraints.

Gender differences are moderate but indicate a slightly stronger local preference among female audiences, while male audiences show higher international exposure. Race patterns further reinforce cultural proximity, with African respondents showing the strongest alignment to local content, while White and Coloured/Indian respondents display more mixed or internationally oriented viewing profiles.

Education follows a similar gradient to income, with higher levels associated with increased international exposure due to greater digital literacy and platform familiarity. However, across all groups, the “equal mix” category remains dominant, confirming that content consumption is largely hybrid. Ultimately, content choice is shaped first by access and exposure, then filtered through cultural relevance, with local content remaining consistently relevant but competing within increasingly globalised viewing environments.

#### 7.6.6 Discoverability and willingness to pay

Discoverability varies meaningfully by area type, with urban respondents reporting the highest ease of finding South African content (82%), followed by peri-urban (76%) and rural areas (68%). This reflects differences in connectivity, platform usage, and familiarity with search and recommendation systems. While most respondents across all areas report positive discoverability, the higher levels of difficulty in rural areas indicate that local content visibility is not consistently strong across environments. This suggests that discoverability is shaped not only by content availability, but also by access conditions and platform usability.

A similar structural pattern is evident in willingness to pay. Agreement that respondents would pay for South African content increases with income (from 49% in lower-income groups to 63% in higher-income groups) while remaining present across all segments. This suggests that demand for local content is widespread, but the ability to convert that demand into paid behaviour is constrained by affordability. It reinforces that access conditions shape both what audiences see (discoverability) and whether they can pay for it (monetisation), making affordability and platform accessibility as critical as the content itself.

### 7.7 Key cross-cutting insights

Across the respondents, emerging patterns include:

1) Mixed viewing is dominant across nearly all groups
2) Local content is strongest among older, lower-income, rural, and more culturally anchored audiences
3) International exposure rises with age-related digital behaviour, income, education, and urban access
4) Discoverability is generally positive, but less so in rural and less connected environments
5) Willingness to pay exists across the market, but stronger income groups convert that willingness more easily into paid behaviour

Taken together, these findings show that local content demand is real, but it sits inside a layered market where structural conditions shape what audiences see, choose, and pay for.

### 7.8 Strategic implications

Across the stakeholder groups, strategic considerations are summarised as follows:

1) **The market is hybrid, not polarised:** South African audiences do not choose between local and international content in a rigid way. Most move across both. This means local content strategy must be designed for shared catalogues, not separate audience worlds.
2) **Local relevance remains a real competitive strength:** South African content continues to perform strongly where it offers cultural familiarity, language relevance, and recognisable stories. This remains one of the domestic industry's strongest natural advantages.
3) **Discoverability now matters as much as production:** In a platform environment, content that is hard to find is effectively less competitive. Metadata, thumbnails, recommendations, and platform placement now matter alongside script, casting, and production quality.
4) **Willingness to pay exists, but conversion is conditional:** Audiences are open to paying for South African content, but payment depends on value, affordability, quality, and ease of access. The monetisation challenge is, therefore, not primarily audience rejection.
5) **Access conditions still shape competitiveness:** Income, geography, education, and connectivity all affect whether audiences lean more local, more international, or remain mixed. Industry strategy must therefore be tied to real audience access conditions, not only to content supply.

### 7.9 Conclusion

South African audiences consume local and international content within the same broad viewing ecosystem. The dominant pattern is not substitution, but coexistence. Local content remains meaningful and culturally resonant, while international content benefits from larger catalogues, stronger visibility, and wider genre choice.

The findings also show that willingness to pay for South African content is strong, especially where audiences perceive quality and value. This means the main challenge facing local content is not a lack of audience interest, but the broader question of competitiveness inside platform-led environments. Overall, strengthening the position of South African content will depend on more than production alone. It will require better discoverability, stronger positioning within digital platforms, continued focus on culturally resonant storytelling, and access models that align with the economic realities of South African audiences.

## CHAPTER 8: CONTENT CHOICE DRIVERS

### 8.1 Purpose

Chapter 8 reviews the factors that shape how South African audiences decide what film, television, streaming, or online video content to watch. While the preceding chapters focused on platform access, screen behaviour, and patterns of recent content consumption, this chapter shifts the analysis to the decision criteria audiences apply when making viewing choices. This is important because the study is not only concerned with what people watch, but also with why they choose some content over other available options.

In practice, audience choice is not random. It is shaped by a combination of structural constraints and emotional triggers. Some drivers are practical, such as whether content is affordable, easy to access, and easy to navigate. Others are cultural and psychological, such as whether the language feels familiar, whether the story feels relevant, whether the audience sees themselves in the characters, or whether the content appears aspirational or socially visible. This section, therefore, assesses the importance of the following eight drivers of content choice:

1) Price
2) Accessibility
3) Language
4) Cultural relevance
5) User experience
6) Relatability
7) Aspiration, and
8) Marketing visibility

### 8.2 Overall importance of content choice drivers

The results show that content choice in South Africa is multi-dimensional. No single factor explains viewing decisions on its own. Instead, audiences weigh a combination of practical access conditions and deeper emotional or cultural factors.

**Table 26:** Overall importance of content choice drivers

| Driver | Extremely important | Very important | *Top 2 Box (Very + Extremely)* | *Mean score /5* |
|---|---|---|---|---|
| Language | 43.0% | 35.6% | ***78.6%*** | ***4.07*** |
| Accessibility | 30.1% | 42.5% | ***72.6%*** | ***3.90*** |
| Marketing visibility | 37.2% | 32.2% | ***69.4%*** | ***3.82*** |
| Relatability | 32.2% | 36.7% | ***68.9%*** | ***3.83*** |
| Price | 28.0% | 35.6% | ***63.6%*** | ***3.64*** |
| Aspiration | 24.8% | 36.7% | ***61.5%*** | ***3.65*** |
| User experience | 25.6% | 32.7% | ***58.3%*** | ***3.56*** |
| Cultural relevance | 26.4% | 26.9% | ***53.3%*** | ***3.45*** |

*Source: Birguid respondent survey analysis*

The ranking shows that language is the single strongest driver of content choice, followed closely by accessibility, marketing visibility, and relatability. This means audiences are not choosing content only on the basis of cost or platform availability. They are also looking for content that feels linguistically familiar, easy to access, emotionally relevant, and visible enough to be discovered.

This pattern is consistent with the literature. The NFVF's 2022 audience research found strong audience interest in local languages, representative characters, and culturally grounded storytelling, while international research continues to show that language and cultural proximity remain important in cross-market content adoption. At the same time, the digital environment is increasingly shaped by recommendation systems, social platforms, and marketing amplification, which means discoverability itself has become a competitive advantage.

The results suggest that South African audiences choose content through two linked filters:

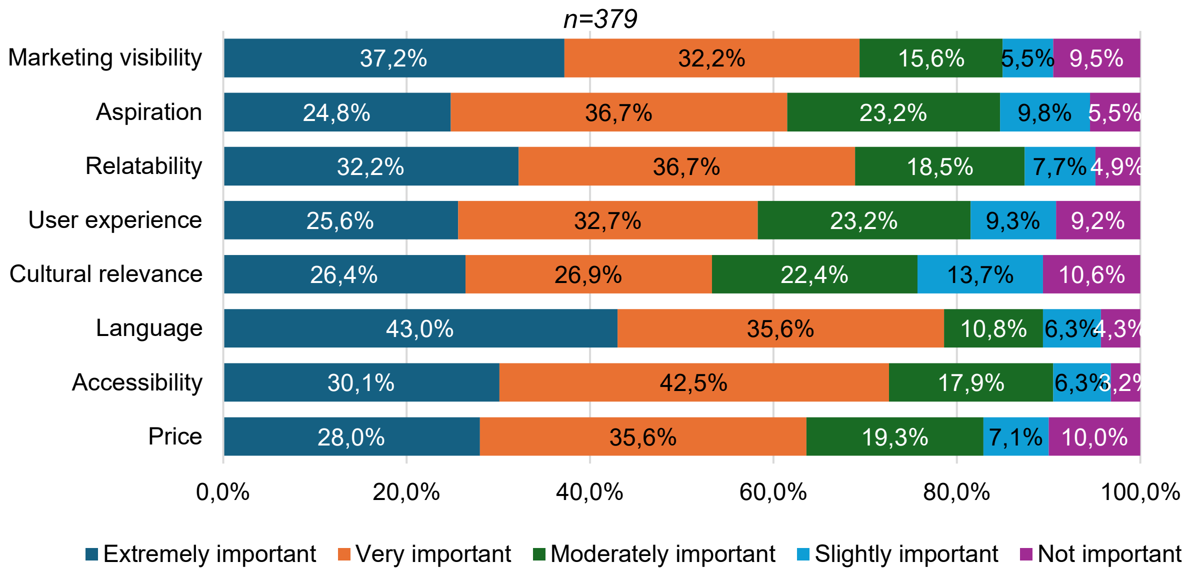
1) **Access filter**: Can I afford it? Can I find it? Can I watch it easily?
2) **Connection filter**: Does it sound familiar? Does it reflect me? Does it feel relevant or inspiring?

Content succeeds when it passes through both filters. Good content that is hard to find, expensive to access, or linguistically distant will struggle. Equally, content that is cheap and widely available but lacks emotional or cultural resonance may still fail to convert attention into sustained viewing. In the South African market, choice is, therefore, shaped by a mix of:

- Structural affordability,
- Platform and distribution efficiency,
- Cultural-linguistic fit,
- Emotional relevance, and
- Promotional visibility.

### 8.3 Content choice drivers

**Figure 28:** Importance of content choice drivers when deciding what to watch




*Source: Birguid respondent survey analysis*

#### 8.3.1 Language

Language is the strongest content choice driver with 78.6% rating it very or extremely important. This demonstrates that language is not a secondary preference, but a central mechanism through which audiences assess whether content feels understandable, familiar, and worth choosing. Language shapes comprehension, comfort, identity, and cultural nuance. It often determines whether humour, emotion, and dialogue feel natural and engaging. The strength of this result suggests that audiences may tolerate some cost or platform friction if content speaks to them in a familiar register but may disengage if it feels linguistically distant. For the industry, this reinforces the importance of multilingual production, subtitling, dubbing, localisation, and metadata strategies that improve both relevance and reach.

### 8.3.2 Accessibility

Accessibility is one of the strongest overall drivers, with 72.6% rating it very or extremely important. Audiences place high value on content that is easy to find, easy to open, and easy to watch across the devices and platforms they already use. Accessibility includes platform availability, search and recommendation efficiency, streaming reliability, and the simplicity of the journey from awareness to actual viewing. In a crowded content environment, friction matters. Even strong content can be bypassed if it is difficult to locate or stream. This means accessibility is not only a technical matter, but a central distribution issue. For local content especially, success depends not just on being made, but on being present where audiences already are.

### 8.3.3 Marketing visibility

Marketing visibility scored highly with 69.4% rating it very or extremely important. This confirms that audiences do not choose only from what exists; they choose from what they actually see. Visibility matters because content must first enter the viewer’s awareness before any other factor can influence selection. In highly competitive media environments, discoverability has become a first-order issue. If content is not promoted effectively, it may never reach the consideration stage regardless of quality or relevance. This is especially important for South African content competing against globally marketed titles with stronger platform support and larger promotional budgets. Marketing needs to be treated as part of content strategy from the outset, including social amplification, trailer strategy, cast visibility, influencer support, and strong cross-platform discoverability planning.

### 8.3.4 Relatability

Relatability is one of the strongest emotional drivers of choice, with 68.9% rating it very or extremely important. This shows that audiences place significant value on stories, characters, and situations that feel understandable, believable, and emotionally close to their own lives. Relatability strengthens audience connection because it turns cultural familiarity into personal relevance. A story may be local in setting, but if the emotional world feels unconvincing, the audience may still not connect with it. For producers, this means relatability should be treated as a deliberate creative principle influencing writing, casting, dialogue, setting, and character development. Even highly aspirational or genre-based content benefits from having recognisable emotional anchors.

### 8.3.5 Price

Price remains a major determinant of content choice, with 63.6% of respondents rating it as very or extremely important. This confirms that content decisions in South Africa are still strongly shaped by affordability. Price should be understood broadly to include subscription fees, mobile data costs, device access, pay-TV affordability, cinema spending, and wider household budget trade-offs.

In practical terms, price functions not only as a preference issue, but as an access condition that determines what audiences can realistically consume. This helps explain continued reliance on free-to-air television, free online video, shared subscriptions, and promotional bundles. The implication is clear: growth in audience reach will be strongest where distribution models reduce cost friction through ad-supported services, low-cost bundles, or mobile-first pricing approaches.

#### 8.3.6 Aspiration

Aspiration is important to 61.5% of respondents, indicating that audiences are not only drawn to content that reflects their reality, but also to content that projects possibility, growth, success, or a desirable way of life. This suggests that content choice is shaped by both recognition and imagination. Viewers often want stories that feel familiar, but that also offer emotional uplift or a sense of movement beyond present conditions. Aspiration also works alongside relatability rather than against it. The most compelling content is often that which balances realism with possibility and local relevance with broader appeal. For creators and platforms, aspirational elements can strengthen audience interest when they are grounded in believable characters and settings.

#### 8.3.7 User experience

User experience is also an important influence with 58.3% rating it very or extremely important and more than four-fifths rating it at least moderately important. This highlights the role of platform design in shaping viewing behaviour. Before audiences engage with the story itself, they encounter menus, thumbnails, recommendations, search functions, and playback systems. These features influence how easily users can browse, compare, and select content. A strong content catalogue can underperform if the platform experience is poor, while a better-designed service can improve content discovery and conversion. As South African audiences continue to navigate a hybrid media system of television, streaming, and online video, user experience increasingly forms part of content competitiveness rather than sitting outside it.

#### 8.3.8 Cultural relevance

Cultural relevance is important, though less uniformly dominant than language or accessibility. Overall, 53.3% of respondents rate it as very or extremely important, while a further 22.4% regard it as moderately important. This indicates that audiences do value stories that reflect familiar social realities, identities, and settings, but often respond to cultural relevance through more concrete elements such as language, character familiarity, and recognisable environments rather than as an abstract concept on its own. The finding suggests that "local" in itself is not enough. Cultural relevance works best when it is translated into compelling storytelling and supported by strong visibility and distribution. The challenge for producers is, therefore, not merely to create local content, but to make that local relevance feel authentic, engaging, and broadly watchable.

Taken together, these results show that South African audiences choose content through a combination of access logic, identity and emotional connection, and market visibility. Language, accessibility, marketing visibility, and relatability emerge as the strongest individual drivers, but the broader lesson is that content succeeds when it is simultaneously reachable, meaningful, and visible.

### 8.4 Key category trends

#### 8.4.1 Age

**Table 27:** Drivers of content choice by age (% Very + Extremely important)

| Age group | n | Price | Access | Language | Cultural relevance | UX | Relatability | Aspiration | Marketing visibility |
|---|---|---|---|---|---|---|---|---|---|
| 18–24 | 73 | 65.8 | 69.9 | 78.1 | 52.1 | 53.4 | 68.5 | 67.1 | 64.4 |
| 25–34 | 95 | 51.6 | 66.3 | 69.5 | 55.8 | 53.7 | 64.2 | 60.0 | 74.7 |
| 35–44 | 89 | 64.0 | 76.4 | 77.5 | 42.7 | 62.9 | 73.0 | 64.0 | 66.3 |
| 45–54 | 59 | 64.4 | 67.8 | 81.4 | 50.8 | 55.9 | 62.7 | 54.2 | 67.8 |
| 55–64 | 62 | 77.4 | 83.9 | 91.9 | 69.4 | 66.1 | 75.8 | 61.3 | 74.2 |

*Source: Birguid respondent survey analysis*

Older groups, especially 55–64, attach stronger importance to price, accessibility, language, cultural relevance, and relatability than younger groups. This suggests a more deliberate and values-based content choice pattern among older viewers. By contrast, 18–24 and 25–34 remain highly responsive to marketing visibility and aspiration, indicating that younger audiences are more exposed to socially mediated discovery and image-driven content environments. The weaker price score among 25–34 is notable and may reflect a segment that is more accustomed to multi-platform experimentation, even if not necessarily less constrained overall.

### 8.4.2 Province

**Table 8.11: Drivers of content choice by province (% Very + Extremely important)**

| Province | n | Price | Access | Language | Cultural relevance | UX | Relatability | Aspiration | Marketing visibility |
|---|---|---|---|---|---|---|---|---|---|
| Gauteng | 104 | 62.5 | 68.3 | 84.6 | 55.8 | 53.8 | 73.1 | 64.4 | 84.6 |
| Eastern Cape | 48 | 58.3 | 75.0 | 87.5 | 62.5 | 66.7 | 68.8 | 75.0 | 62.5 |
| KwaZulu-Natal | 48 | 64.6 | 85.4 | 64.6 | 58.3 | 72.9 | 79.2 | 52.1 | 72.9 |
| Limpopo | 38 | 71.1 | 84.2 | 89.5 | 65.8 | 68.4 | 63.2 | 76.3 | 71.1 |
| Western Cape | 37 | 51.4 | 56.8 | 59.5 | 37.8 | 54.1 | 62.2 | 51.4 | 45.9 |
| Mpumalanga | 32 | 75.0 | 59.4 | 75.0 | 43.8 | 50.0 | 56.2 | 65.6 | 71.9 |
| North West | 31 | 80.6 | 83.9 | 71.0 | 38.7 | 48.4 | 71.0 | 51.6 | 58.1 |
| Free State | 25 | 52.0 | 64.0 | 84.0 | 56.0 | 48.0 | 68.0 | 48.0 | 60.0 |
| Northern Cape | 16 | 56.2 | 81.2 | 87.5 | 43.8 | 56.2 | 62.5 | 50.0 | 62.5 |

*Source: Birguid respondent survey analysis*

Provincial variation is pronounced. Language emerges as a particularly strong driver in Limpopo, Eastern Cape, Gauteng, Northern Cape, and Free State, while accessibility is especially important in KwaZulu-Natal, Limpopo, North West, and Northern Cape. Gauteng also stands out for exceptionally high marketing visibility, pointing to a more promotion-intensive and discovery-driven media environment. By contrast, the Western Cape records lower scores across several drivers, particularly language, cultural relevance, and marketing visibility, suggesting a more fragmented or differentiated pattern of content choice in that province.

### 8.4.3 Area type

**Table 28:** Drivers of content choice by area type (% Very + Extremely important)

| Area type | n | Price | Access | Language | Cultural relevance | UX | Relatability | Aspiration | Marketing visibility |
|---|---|---|---|---|---|---|---|---|---|
| Urban / City | 157 | 64.3 | 73.9 | 79.6 | 47.1 | 54.1 | 72.0 | 56.1 | 67.5 |
| Township | 118 | 56.8 | 69.5 | 77.1 | 60.2 | 67.8 | 66.9 | 71.2 | 73.7 |
| Peri-urban | 55 | 67.3 | 67.3 | 76.4 | 49.1 | 49.1 | 67.3 | 65.5 | 72.7 |
| Rural | 49 | 73.5 | 81.6 | 81.6 | 61.2 | 59.2 | 65.3 | 51.0 | 61.2 |

*Source: Birguid respondent survey analysis*

Area type reveals a clear structural pattern. Rural respondents place the greatest emphasis on price, accessibility, and language, indicating that content choice outside major urban areas is more strongly shaped by affordability constraints, access conditions, and cultural familiarity. Township respondents, by contrast, stand out for higher importance placed on cultural relevance, user experience, aspiration, and marketing visibility, suggesting a segment that combines strong identity-driven preferences with heightened sensitivity to platform quality and promotional exposure. Urban audiences remain strongly influenced by relatability and language, but their comparatively lower emphasis on cultural relevance suggests a more blended viewing pattern across both local and international content.

### 8.4.4 Monthly income

**Table 29:** Drivers of content choice by monthly income (% Very + Extremely important)

| Monthly income | n | Price | Access | Language | Cultural relevance | UX | Relatability | Aspiration | Marketing visibility |
|---|---|---|---|---|---|---|---|---|---|
| Under R3,000 | 116 | 62.9 | 75.9 | 80.2 | 60.3 | 54.3 | 67.2 | 61.2 | 64.7 |
| R3,000–R6,999 | 78 | 62.8 | 73.1 | 82.1 | 52.6 | 59.0 | 66.7 | 60.3 | 71.8 |
| R7,000–R14,999 | 75 | 66.7 | 62.7 | 73.3 | 41.3 | 62.7 | 65.3 | 57.3 | 73.3 |
| R15,000–R29,999 | 32 | 81.2 | 78.1 | 78.1 | 53.1 | 62.5 | 81.2 | 68.8 | 81.2 |
| R30,000+* | 7 | 42.9 | 100.0 | 57.1 | 57.1 | 57.1 | 57.1 | 42.9 | 71.4 |
| Refuse | 71 | 56.3 | 71.8 | 80.3 | 54.9 | 57.7 | 73.2 | 66.2 | 64.8 |

*Note: *Very small base; interpret with caution.*

*Source: Birguid respondent survey analysis*

The income pattern is more nuanced than the assumption that only lower-income groups prioritise price. Price remains important across nearly all income categories, with the highest Top 2 Box score observed in the R15,000–R29,999 segment, indicating that active management of media spending extends beyond the lowest income tiers. Lower-income groups place particularly strong emphasis on accessibility, language, and cultural relevance, reinforcing that constrained audiences seek not only affordability, but also ease of access and meaningful, relatable content. By contrast, the middle-income band (R7,000–R14,999) places relatively less emphasis on cultural relevance and greater importance on user experience and marketing visibility, suggesting a more platform-driven and discovery-oriented consumption pattern.

### 8.4.5 Other key category trends

Employment status highlights the role of economic stability and life stage in shaping content choice. Unemployed respondents place stronger emphasis on accessibility (77.5%), cultural relevance (62.9%), and relatability (70.8%), indicating that both structural constraints and the need for meaningful connection influence their viewing decisions. Employed full-time respondents, by contrast, show higher responsiveness to marketing visibility (74.1%) and aspiration (67.0%), suggesting greater exposure to promotional environments and stronger attraction to aspirational or lifestyle-driven content. Students stand out for high accessibility (76.6%) and language importance (76.6%), but lower marketing visibility (53.2%), implying a more peer-driven or habitual discovery process rather than reliance on formal promotion.

Across race groups (interpreted cautiously due to sample skew) language, accessibility, and marketing visibility remain consistently strong among Black African respondents, while relatability stands out among Coloured respondents. Overall, these patterns reinforce that content choice is shaped by both structural access realities and varying levels of exposure to commercial media environments.

Gender and education further refine these dynamics. While gender differences are not extreme, female respondents consistently place higher importance on accessibility (77.4%), cultural relevance (58.6%), relatability (72.6%), aspiration (62.9%), and marketing visibility (72.0), indicating stronger responsiveness to a combination of identity, emotional, and discovery-driven factors. Male respondents show slightly higher emphasis on user experience (60.8%), pointing to a marginally more interface-oriented approach to content selection.

Education introduces a shift in how these drivers are balanced. Language remains strong across all education levels, particularly among Secondary and Diploma groups, while accessibility increases among Diploma, Degree, and Postgraduate respondents, reflecting higher expectations of seamless digital experiences. Relatability peaks among Diploma respondents (75.0%), while aspiration is relatively lower among Degree holders (47.8%). Overall, education does not diminish the importance of cultural and emotional drivers, but rather reshapes how audiences weigh access, usability, and identity in their content choices.

### 8.5 Key cross-cutting insights

Taken together, the category analysis projects five major patterns.

1) **Language is the most consistently strong driver across the market:** Language remains high across almost all segments. Whether by age, province, income, or education, language repeatedly emerges as one of the strongest determinants of choice.
2) **Accessibility and price matter most where structural constraints are strongest:** Rural audiences, lower-income segments, unemployed respondents, and several provinces outside the largest metros place especially high importance on accessibility and price. This confirms that structural conditions remain central to audience behaviour.
3) **Cultural relevance is important, but less universal than language and relatability:** Cultural relevance matters, but its intensity varies more across segments. It is stronger among rural, township, lower-income, and unemployed groups than among some urban

and middle-income groups. This suggests that cultural relevance is highly meaningful, but not identically felt across all audiences.

4) **Marketing visibility is strongest in more commercially saturated and socially connected segments:** Marketing visibility is particularly strong among respondents in Gauteng, employed full-time groups, township audiences, and younger-to-mid adult segments. This shows that discovery is increasingly shaped by the wider promotional environment.
5) **Relatability and aspiration work together rather than against each other:** Audiences want both recognition and possibility. Some segments emphasise relatability more strongly, others aspiration, but both remain important. This means content strategy should not assume that realism and aspiration are opposites. The strongest content often combines both.

### 8.6 Strategic implications

1) **Access remains the first gatekeeper of audience conversion:** Even when demand exists, audiences cannot choose content they cannot afford, find, or stream easily. For that reason, access conditions remain foundational to content growth.
2) **Language is not a secondary feature; it is a market-expansion tool:** Language should be treated as a strategic distribution and audience-development lever. It is one of the clearest pathways to connection, especially in a multilingual market such as South Africa.
3) **Local relevance must be made legible, not just produced:** Culturally relevant content still needs strong packaging, platform placement, and discovery support. Relevance without visibility will underperform.
4) **Marketing is now part of audience development:** The high score for marketing visibility shows that promotion is not merely a support function. It is one of the drivers of content choice itself.
5) **Platform design has become part of content competitiveness:** Good user experience improves the chances that content will be chosen, especially in crowded digital environments. Search, recommendation, and usability should be viewed as audience strategy issues.
6) **Audience choice is shaped by both lived reality and desired future:** Relatability and aspiration both matter. This means that strong content strategy should connect with who audiences are now while also speaking to who they want to become.

### 8.7 Conclusion

South African audiences do not choose content on the basis of one factor alone. Instead, content choice emerges from a layered process in which structural access, cultural fit, emotional engagement, and market visibility all interact. The strongest overall drivers are language, accessibility, marketing visibility, and relatability. Together, these findings indicate that content succeeds not merely when it is well made, but when it is:

1) Easy to access,
2) Easy to discover,
3) Linguistically familiar, and
4) Emotionally meaningful.

Price remains important, confirming that the South African market continues to operate under affordability constraints. However, affordability on its own does not explain audience behaviour. Viewers are equally concerned with whether content feels relevant, visible, and worth choosing from within a crowded media environment. The broader implication is that the path from content creation to audience reach is not linear. It depends on whether content can move successfully through three filters:

1) Can I access it?
2) Can I relate to it?
3) Did I see it in time to choose it?

Only when those three conditions are met does content move from awareness to choice, from choice to viewing, and from viewing to sustained audience value.

# CHAPTER 9: CINEMA BEHAVIOUR AND ECONOMICS

## 9.1 Purpose

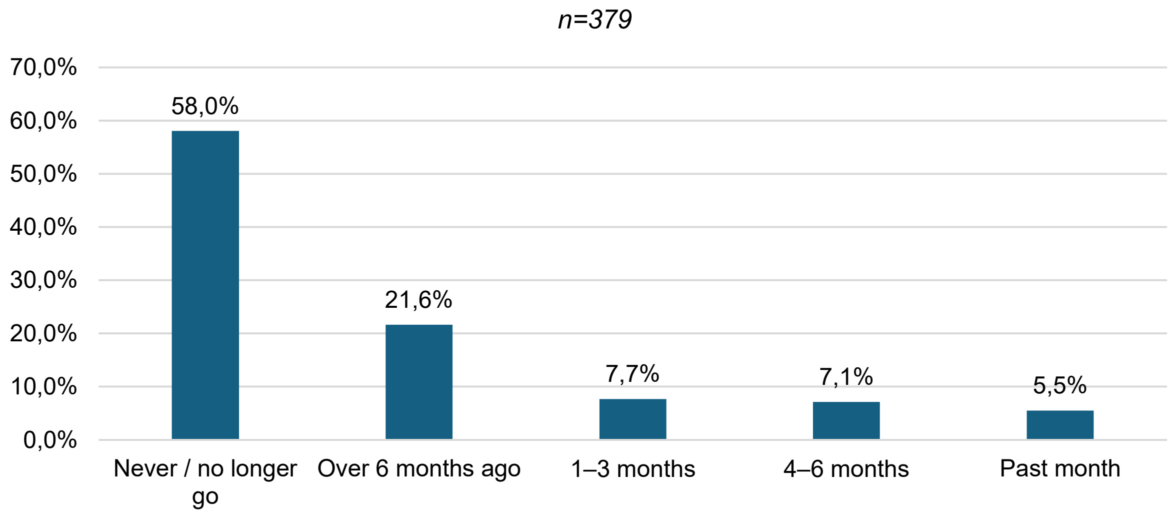
This chapter examines cinema within South Africa's changing audiovisual ecosystem, with specific attention to audience behaviour, economic participation, and the structural conditions that shape theatrical exhibition. While earlier chapters showed that film and television consumption has become increasingly home-based, mobile, and digitally mediated, this section considers whether cinema still operates as a meaningful viewing platform or whether it has become a more occasional, socially driven, and premium leisure activity.

The chapter supports **Objective 1**, which seeks to analyse content consumption drivers and platform participation, by assessing whether cinema remains part of everyday audience behaviour or has become peripheral. It also addresses **Objective 2**, which evaluates the viability of distribution pathways, by examining whether theatrical exhibition still functions as a commercially meaningful release route. Lastly, it responds to **Objective 4**, which focuses on structural barriers affecting participation, by considering affordability, geographic access, and substitution by more convenient home-based alternatives.

The chapter contributes directly to **Research Question 5**: *What is the evolving role of cinemas within a more digital and home-based viewing environment?* The literature review suggests that cinema has not disappeared, but its role has changed materially. According to the review, theatrical exhibition increasingly functions as an event-based release window rather than a routine mass-consumption channel, particularly in markets where affordability pressures, transport costs, digital substitution, and mobile-first behaviour reshape audience choice (Lobato, 2019; NFVF, 2022; UNESCO, 2024).

## 9.2 Recency of cinema attendance

**Figure 29:** When respondents last went to the cinema



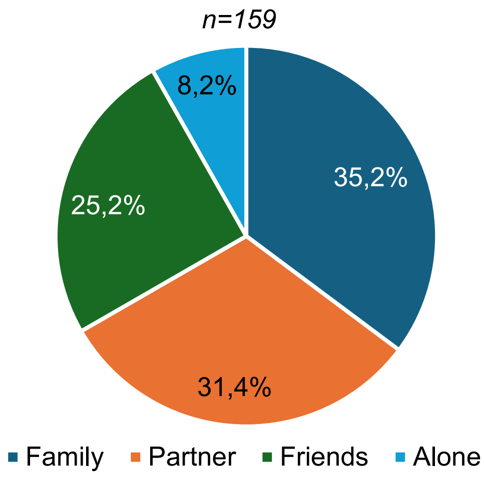

*Source: Birguid respondent survey analysis*

Cinema participation is structurally low. A combined 79.6% of respondents either no longer attend cinema or last attended more than six months ago, while only 13.2% attended within the past three months and just 5.5% within the past month. This confirms that cinema is no longer part of routine viewing behaviour for most audiences. Instead, it sits outside the dominant consumption pattern identified in earlier chapters, where television, streaming, and online video anchor more frequent, home-based viewing.

This pattern reflects that audience behaviour is shaped by the interaction of affordability, accessibility, and convenience. Cinema now competes not only with other leisure choices, but with easily accessible home- and mobile-based alternatives such as short-form video, pay-TV, subscription streaming, and free online video. As a result, the threshold for cinema attendance is higher, since the outing must justify the added cost, travel, time, and effort. Consistent with NFVF evidence that home-based viewing has become the default mode of entertainment in South Africa (NFVF, 2022), cinema has shifted from a routine participation channel to an occasional, conditional, and experience-led one.

### 9.3 Social context of cinema attendance

**Figure 30:** Who respondents go to the cinema with



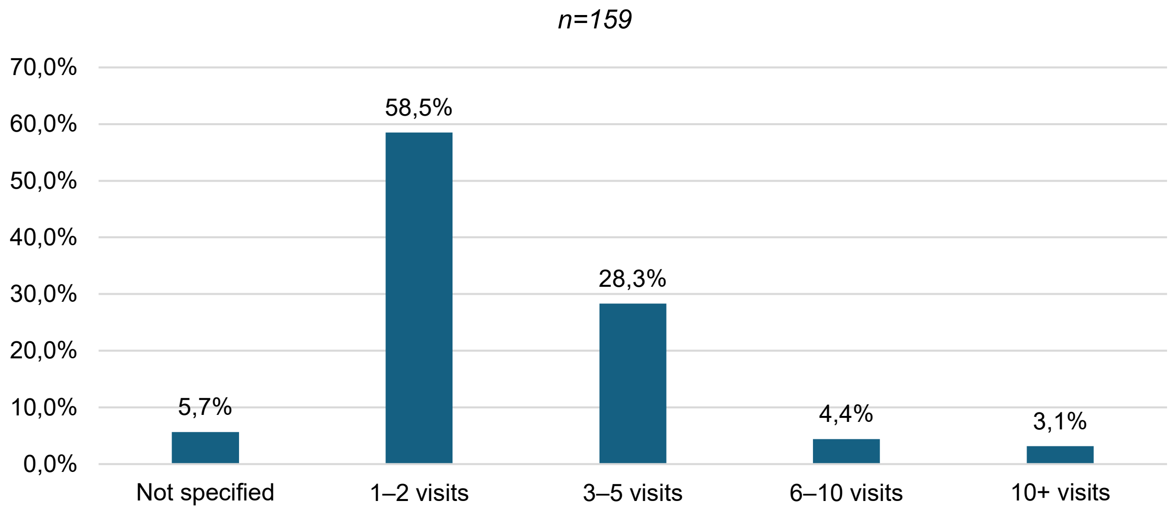

*Source: Birguid respondent survey analysis*

Among respondents who attended cinema *(n=159)*, most (~36%) reported going with family, followed by partners (~31%) and friends (~25%), while solo attendance remained limited (~8%). This reinforces that cinema is increasingly valued as a shared leisure experience rather than simply a content access point, with the outing itself carrying added value through time out, refreshments, and collective entertainment.

As a result, cinema now competes on experience rather than convenience, particularly as home-based platforms dominate routine viewing. Its commercial viability therefore depends on titles and formats that can drive group attendance, including family films, major franchises, culturally resonant releases, and special screenings. Consistent with international evidence (Cunningham & Craig, 2021), cinema's value proposition has shifted toward shared experience, not just content access.

### 9.4 Cinema visits per year

**Figure 31: Cinema visits per year**

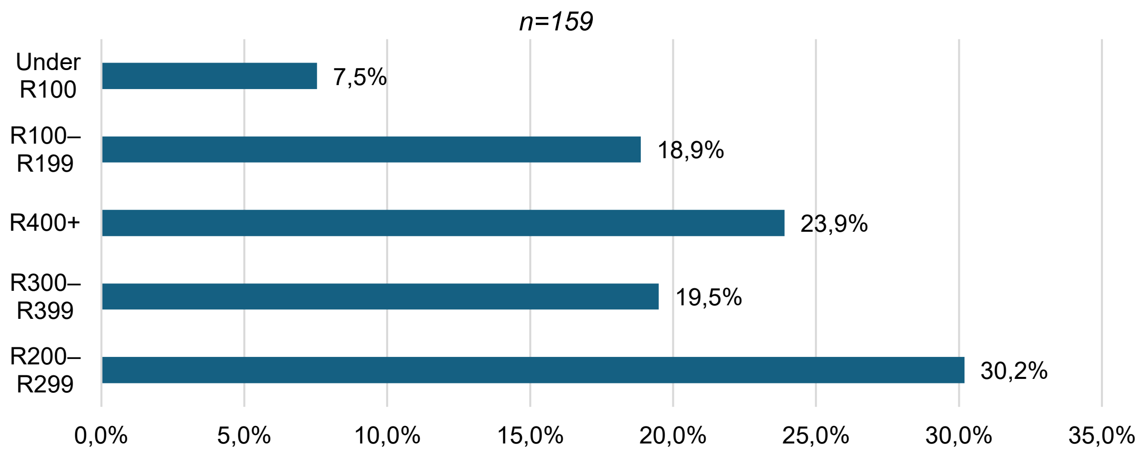



*Source: Birguid respondent survey analysis*

Cinema attendance is more episodic than habitual, with most respondents attending only 1–2 times per year (58.5%), a smaller share attending 3–5 times (28.3%), and very few attending more frequently. This indicates limited repeat behaviour and confirms that cinema is not embedded as a regular viewing habit. From a commercial perspective, this constrains cinema's role as a consistent monetisation channel, with attendance concentrated around peak moments such as major releases, holidays, and socially driven outings.

### 9.5 Average spend per visit

**Figure 32:** Average spend per cinema visit



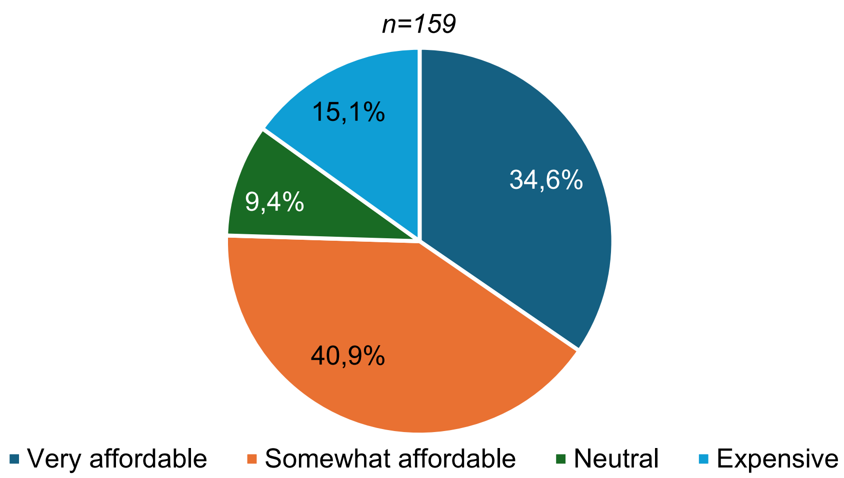

*Source: Birguid respondent survey analysis*

Cinema is a relatively expensive outing for many South African households, with most active respondents spending R200+ per visit and a significant share R300+. When tickets, snacks, and transport are included, cinema becomes a meaningful discretionary expense rather than a low-cost option, which helps explain why participation remains occasional even among interested audiences. This cost profile positions cinema as a premium leisure category, competing directly with essential and repeat-value expenses such as mobile data, transport, groceries, and subscription services.

As a result, attendance tends to cluster around special occasions, social outings, or high-visibility releases, where the perceived value justifies the total spend. Cinema's premium cost structure therefore limits frequency and reinforces its role as an occasional, event-driven experience.

### 9.6 Cinema affordability

**Figure 33:** Perceived affordability

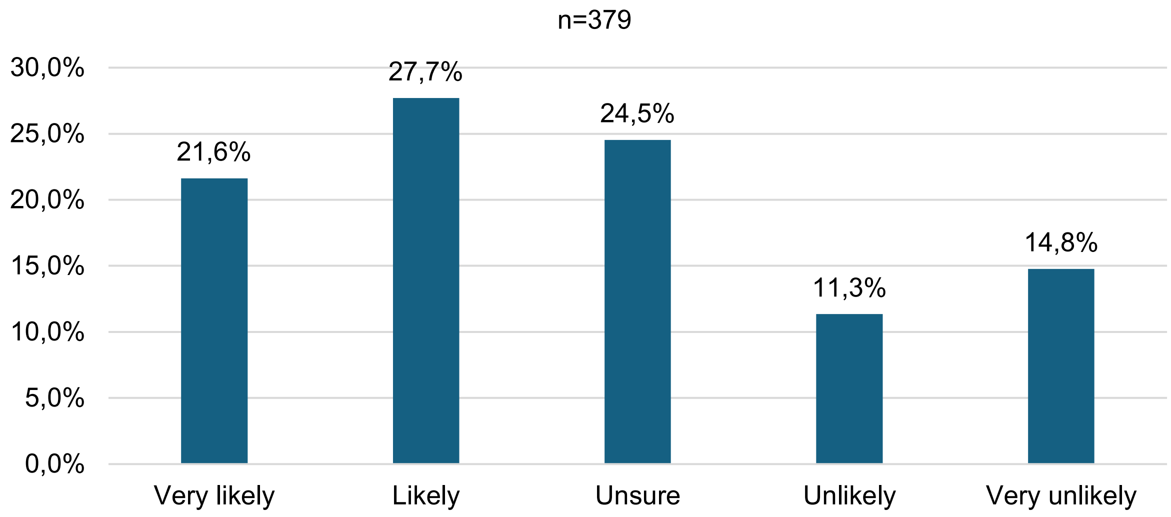



*Source: Birguid respondent survey analysis*

Among cinema-goers, affordability perceptions are generally positive, with 75.5% describing cinema as very or somewhat affordable, compared to 15.1% who view it as expensive. However, this does not translate into frequent attendance, indicating that price alone is not the primary barrier. Instead, participation reflects that attendance is impacted by a combination of affordability, accessibility, and convenience, where cinema must compete with home-based alternatives, transport costs, time, and coordination effort. As a result, attendance remains conditional and driven by the total value of the experience, not affordability alone. Cinema attendance is, therefore, shaped as much by convenience and alternatives as by price.

### 9.7 Likelihood of future visits

**Figure 34:** Likelihood of future cinema attendance



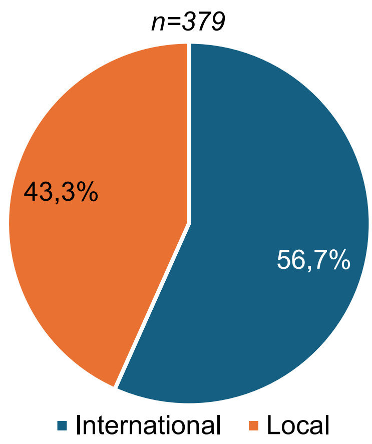

*Source: Birguid respondent survey analysis*

Cinema retains meaningful latent demand, with nearly half of the respondents indicating they are likely or very likely to attend in future. This suggests that theatrical exhibition remains relevant, but participation is conditional rather than habitual. Audiences have not abandoned cinema; instead, many require stronger reasons such as compelling content, social value, or perceived worth to justify attendance.

The large “unsure” segment is particularly significant, as it indicates that future behaviour is still open to influence. This positions cinema revival as a value challenge rather than a demand problem. Reducing friction (cost, access, convenience) and increasing perceived value through better films, stronger marketing of local content, targeted promotions, and improved accessibility could convert uncertainty into active participation.

### 9.8 Last film watched

**Figure 35:** Last film watched



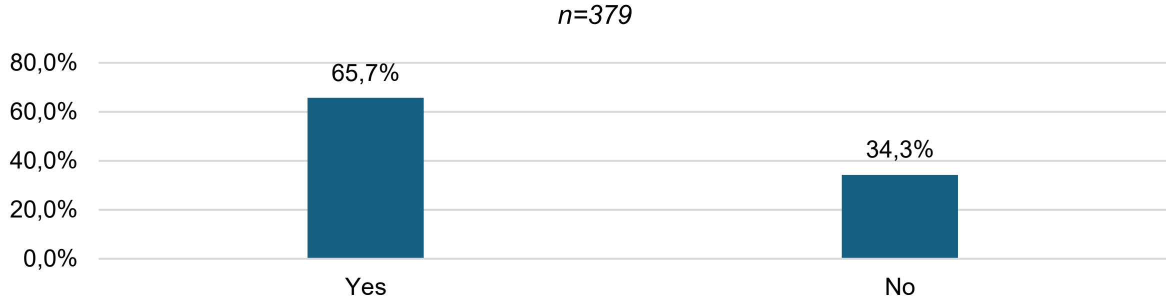

*Source: Birguid respondent survey analysis*

International films continue to dominate the cinema experience, reflecting global distribution dynamics that favour large studios, established franchises, and strong marketing visibility (Lobato, 2019). These titles benefit from built-in awareness and coordinated releases, giving them a clear advantage in attracting audiences within an already constrained theatrical environment.

However, the significant share for South African films indicates that audiences are not resistant to local content. Performance is shaped less by demand and more by visibility, accessibility, and perceived value. Where local films are discoverable, relevant, and well-positioned, audiences do engage. The constraint is not willingness to watch, but the ability of local films to compete on awareness, trust, and release strength. The key issue is not demand, but whether local films are sufficiently visible and positioned to win attention.

### 9.9 Price parity: Local vs international films

**Figure 36:** Would you pay the same price (international vs SA film)?



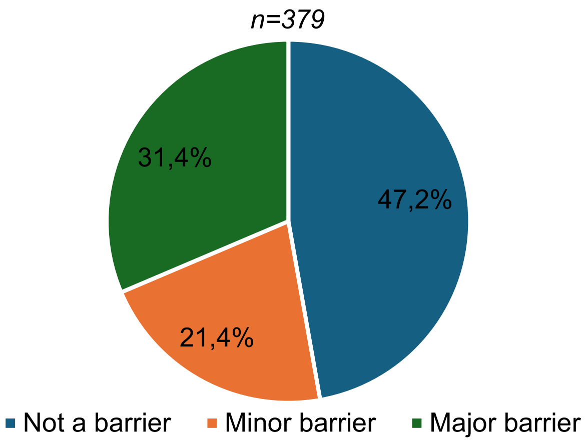

*Source: Birguid respondent survey analysis*

Most respondents indicate they would pay the same ticket price for a South African film as for an international one, suggesting that pricing is not the primary barrier to local theatrical performance. Audiences are willing to assess films based on value, quality, and relevance, rather than origin alone.

Qualitative responses show that willingness to pay is linked to confidence in the product. Those in favour cite fairness and support for local stories, while those opposed point to concerns around quality, trust, and awareness. This indicates that the constraint is not price, but visibility, credibility, and positioning. Local films are not excluded from premium pricing but must compete by strengthening audience trust and perceived quality. The key barrier is, thus, not price equivalence, but confidence in local film value and visibility.

### 9.10 Cinema location as a barrier

**Figure 37:** Is cinema location a barrier?




*Source: Birguid respondent survey analysis*

Location remains a major structural constraint, with 52.8% of respondents reporting cinema location as a minor or major barrier. This highlights that participation is shaped not only by preference, but by practical access, as cinemas are largely concentrated in urban malls while many audiences live in township, peri-urban, and rural areas where travel adds cost, time, and coordination. Even where interest and willingness to pay exist, attendance is limited if access is difficult. This narrows cinema's reach as a mass platform and underscores the need for more decentralised and accessible exhibition models.

### 9.11 What would revive South African cinema

**Key themes from open-ended responses**

- Lower ticket prices
- Better-quality films
- More diverse and relevant content
- Stronger marketing, especially for local films, and
- Improved cinema experience

The open-ended responses indicate that cinema demand remains present, but participation is conditional on improved value. While lower prices are important, audiences also emphasise better-quality films, greater variety, stronger visibility of local content, and an enhanced overall experience. Going forward, cinema must compete on total value, not price alone, as audiences weigh cost, convenience, and relevance against home-based alternatives. This implies recovery depends on both improving the product and reducing participation friction, ensuring the experience is worth the time, travel, and spend. Ultimately, cinema revival hinges on strengthening the total value proposition, not simply lowering ticket prices.

## 9.12 Key category trends

### 9.12.1 Age

**Table 30: Cinema behaviour and economics by age (%)**

| Age group | n | Recent attendance | 3+ visits per year | Spend R200+ | Cinema affordable | Likely future visit | Last film South African | Would pay same price | Any location barrier |
|---|---|---|---|---|---|---|---|---|---|
| 18–24 | 73 | 19.2 | 13.7 | 21.9 | 27.4 | 53.4 | 35.6 | 53.4 | 46.6 |
| 25–34 | 95 | 9.5 | 13.7 | 36.8 | 34.7 | 46.3 | 35.8 | 71.6 | 48.4 |
| 35–44 | 89 | 13.5 | 14.6 | 34.8 | 36.0 | 52.8 | 42.7 | 77.5 | 60.7 |
| 45–54 | 59 | 20.3 | 23.7 | 39.0 | 40.7 | 57.6 | 52.5 | 61.0 | 47.5 |
| 55–64 | 62 | 4.8 | 11.3 | 19.4 | 17.7 | 37.1 | 56.5 | 58.1 | 59.7 |

*Source: Birguid respondent survey analysis*

Age reveals a differentiated but non-linear cinema pattern. Younger adults (18–24) show relatively higher recent attendance, indicating continued experiential relevance, but lower spend and weaker willingness to pay for local films, suggesting more price-sensitive and selective behaviour. By contrast, the 25–44 cohorts are more commercially important, with higher spend and stronger acceptance of price parity, indicating greater willingness to pay where value is clear. The 45–54 group stands out with stronger repeat attendance, affordability, future intent, and engagement with South African films, while 55–64 respondents show lower participation and weaker intent. Overall, cinema remains relevant across age groups, but participation is shaped by value, affordability, and life-stage dynamics, with mid-life segments offering the strongest commercial opportunity.

### 9.12.2 Province

**Table 31: Cinema behaviour and economics by province (%)**

| Province | n | Recent attendance | 3+ visits per year | Spend R200+ | Cinema affordable | Likely future visit | Last film South African | Would pay same price | Any location barrier |
|---|---|---|---|---|---|---|---|---|---|
| Gauteng | 104 | 11.5 | 11.5 | 32.7 | 36.5 | 44.2 | 33.7 | 71.2 | 55.8 |
| Eastern Cape | 48 | 2.1 | 0.0 | 12.5 | 12.5 | 50.0 | 37.5 | 52.1 | 66.7 |
| KwaZulu-Natal | 48 | 12.5 | 18.8 | 25.0 | 29.2 | 45.8 | 45.8 | 68.8 | 58.3 |
| Limpopo | 38 | 21.1 | 21.1 | 44.7 | 52.6 | 68.4 | 34.2 | 63.2 | 57.9 |
| Western Cape | 37 | 5.4 | 2.7 | 16.2 | 10.8 | 21.6 | 45.9 | 56.8 | 21.6 |
| Mpumalanga | 32 | 18.8 | 21.9 | 34.4 | 46.9 | 75.0 | 62.5 | 68.8 | 53.1 |
| North West | 31 | 32.3 | 35.5 | 64.5 | 38.7 | 45.2 | 58.1 | 67.7 | 45.2 |
| Free State | 25 | 20.0 | 20.0 | 24.0 | 24.0 | 52.0 | 48.0 | 72.0 | 52.0 |
| Northern Cape* | 16 | 0.0 | 25.0 | 31.2 | 31.2 | 62.5 | 56.2 | 68.8 | 50.0 |

*Note: *Small base; interpret with caution.*

*Source: Birguid respondent survey analysis*

Provincial variation is pronounced, reinforcing that cinema participation is structurally shaped rather than uniform. Provinces such as the North West, Limpopo, Mpumalanga, and Free State show relatively strong attendance, repeat visits, or future intent, indicating that demand can remain active outside major metros where access and perceived value align. The North West stands out for strong attendance and spend, while Mpumalanga shows particularly high future intent and engagement with South African films.

By contrast, the Eastern Cape and Western Cape recorded weaker participation, with the Eastern Cape also showing high location barriers, underscoring the role of geographic access. Gauteng, while commercially central, reflects a more complex dynamic, combining strong price parity acceptance with notable access constraints and moderate future intent. Overall, cinema operates as a fragmented, location-dependent market, shaped by infrastructure, local economics, and access conditions rather than a consistent national pattern.

### 9.12.3 Area type

**Table 32:** Cinema behaviour and economics by area type (%)

| Area type | n | Recent attendance | 3+ visits per year | Spend R200+ | Cinema affordable | Likely future visit | Last film South African | Would pay same price | Any location barrier |
|---|---|---|---|---|---|---|---|---|---|
| Urban / City | 157 | 17.8 | 20.4 | 41.4 | 39.5 | 52.2 | 40.8 | 68.2 | 51.0 |
| Township | 118 | 7.6 | 8.5 | 21.2 | 26.3 | 47.5 | 42.4 | 57.6 | 54.2 |
| Peri-urban | 55 | 16.4 | 18.2 | 27.3 | 25.5 | 38.2 | 47.3 | 72.7 | 47.3 |
| Rural | 49 | 8.2 | 10.2 | 24.5 | 26.5 | 57.1 | 49.0 | 69.4 | 61.2 |

*Source: Birguid respondent survey analysis*

Urban respondents show the strongest recent attendance, highest repeat participation, and highest spend, reflecting the concentration of cinemas in malls and formal retail nodes. With fewer logistical barriers, urban audiences are better able to convert interest into actual attendance, positioning cinema as part of the broader leisure ecosystem. By contrast, township and rural respondents face more constrained participation, with lower attendance, reduced higher-spend engagement, and stronger location barriers. Notably, rural areas still show relatively strong future interest, highlighting a gap between demand and access rather than lack of appeal. Peri-urban areas sit between these extremes. From an are type standpoint, cinema remains a structurally uneven platform, where participation is shaped primarily by accessibility and infrastructure, not just audience preference.

### 9.12.4 Monthly income

**Table 33:** Cinema behaviour and economics by monthly income (%)

| Monthly income | n | Recent attendance | 3+ visits per year | Spend R200+ | Cinema affordable | Likely future visit | Last film South African | Would pay same price | Any location barrier |
|---|---|---|---|---|---|---|---|---|---|
| Under R3,000 | 116 | 10.3 | 11.2 | 25.0 | 25.9 | 49.1 | 46.6 | 60.3 | 50.9 |
| R3,000–R6,999 | 78 | 12.8 | 16.7 | 38.5 | 35.9 | 43.6 | 44.9 | 67.9 | 59.0 |
| R7,000–R14,999 | 75 | 14.7 | 21.3 | 36.0 | 38.7 | 45.3 | 45.3 | 78.7 | 57.3 |
| R15,000–R29,999 | 32 | 18.8 | 15.6 | 43.8 | 43.8 | 50.0 | 53.1 | 75.0 | 46.9 |
| R30,000+* | 7 | 42.9 | 28.6 | 71.4 | 71.4 | 85.7 | 0.0 | 71.4 | 42.9 |
| Refused to say | 71 | 11.3 | 11.3 | 16.9 | 19.7 | 56.3 | 33.8 | 53.5 | 47.9 |

*Note: *Very small base; interpret with caution.*

*Source: Birguid respondent survey analysis*

Income shapes cinema participation, though not in a strictly linear way. As income increases, cinema becomes easier to absorb as a discretionary expense, reflected in higher spend, stronger affordability, and, in some cases, higher attendance. The R15,000–R29,999 segment stands out with strong spend and price parity acceptance, while the R7,000–R14,999 group is also commercially important due to relatively higher repeat visits and willingness to pay for local content.

At lower income levels, participation is more constrained but not absent. These respondents still show meaningful future interest and openness to South African films, indicating that the challenge is not demand but conversion under pressure. Overall, cinema demand exists across the income spectrum, but requires more adaptive pricing, promotion, and access models to unlock participation consistently.

### 9.12.5 Other key category trends

Employment status highlights the role of economic flexibility in cinema participation. Self-employed, student, and part-time employed respondents show stronger recent attendance or future intent than unemployed respondents, who report weaker affordability and lower repeat visits. This suggests that participation is shaped not only by income level, but by how secure and discretionary that income feels. Students remain interested but selective due to cost, while self-employed respondents show relatively strong engagement despite facing location barriers. Overall, cinema performs best where some degree of financial flexibility exists.

Race and gender patterns provide directional insight but are less pronounced. Black African respondents show moderate attendance and strong acceptance of price parity for South African films, indicating broad-based openness to local content where value is evident. Gender differences are limited, though females show slightly higher acceptance of local pricing and engagement with local titles, while males show marginally stronger repeat attendance. Across both groups cinema is infrequent, value-sensitive, and context-dependent.

Education introduces further nuance. Diploma and degree holders show stronger affordability perceptions, higher willingness to pay, and more positive future intent, suggesting greater confidence in cinema where quality and value are clear. By contrast, secondary-level respondents face more structural constraints, including lower attendance and higher location barriers. Overall, education does not determine participation directly, but influences how audiences assess value, trust, and accessibility, reinforcing that cinema behaviour is shaped by the interaction of economic, structural, and perceptual factors.

## 9.13 Key cross-cutting insights

Taken together, the cinema findings project five major patterns.

1) **Cinema is no longer a routine platform:** Attendance is now occasional rather than habitual, with most respondents either not attending or going only once or twice a year. This confirms a structural shift away from cinema as an everyday viewing mode.
2) **Social value outweighs convenience:** Cinema is primarily a shared activity, dominated by family and group attendance. Its value lies in the experience and outing, not simple content access.
3) **Total value matters more than price:** While cinema is a premium expense, affordability alone does not drive behaviour. Attendance depends on the full value equation comprising cost, convenience, relevance, and experience.

4) **Location is a key structural constraint:** Over half of the respondents face access barriers, particularly outside urban areas, reinforcing cinema's geographically uneven reach.
5) **Local films are not price-constrained:** Most respondents are willing to pay the same for South African films, indicating that the real barriers are quality perception, trust, and visibility, not pricing.

### 9.14 Strategic implications

Five key implications emerge:

1) **Position cinema as an event platform:** Focus on titles that justify the outing such as premieres, family films, culturally resonant content, limited releases, and special screenings.
2) **Adopt hybrid distribution models:** Use cinema for visibility and impact, supported by streaming, TV, mobile, and community channels for scale and accessibility.
3) **Strengthen local film marketing:** Prioritise building confidence and visibility, not discounting through stronger promotion, targeting, partnerships, and social amplification.
4) **Expand alternative exhibition models:** Address access gaps through township screenings, pop-up cinemas, mobile exhibition, and community-based venues.
5) **Enhance the total value proposition:** Drive recovery by improving content quality, accessibility, and experience, ensuring cinema feels worth the time, travel, and spend.

### 9.15 Conclusion

Cinema in South Africa remains relevant, but its role has fundamentally shifted. It is no longer a routine access platform, but an occasional, premium, and socially driven experience within an ecosystem dominated by home-based and digital viewing. Its future depends on redefining value rather than restoring past habits. Where cinemas offer compelling content, strong local relevance, visibility, and easier access, demand can be activated; where cost, distance, and weak promotion persist, audiences default to more convenient alternatives. Cinema is, therefore, best positioned as a targeted, event-based component within hybrid distribution models, not a mass-reach channel.

# CHAPTER 10: TELEVISION

## 10.1 Purpose

Chapter 10 assesses the continuing role of television in South Africa's audiovisual ecosystem. It assesses whether television remains a meaningful platform for access, routine viewing, content discovery, local-content exposure, and monetisation in a market increasingly shaped by streaming, social media, mobile access, and affordability pressure. In line with the study's overall objectives, the chapter evaluates television not as an isolated legacy medium, but as part of a hybrid viewing environment in which broadcast, smart TV functionality, subscription services, and social discovery increasingly overlap.

The chapter speaks directly to the study's core questions on platform usage, distribution viability, local versus international competition, willingness to pay, and barriers to monetisation. The evidence confirms that television still matters at scale, but that its future value depends increasingly on connected access, discoverability, localisation, and pricing fit. This is consistent with the literature showing that television remains important in unequal access markets, even as digital functionality, social influence, and platform competition reshape how audiences find and consume screen content in practice.

## 10.2 Overall television profile

**Table 34:** Overall television access and usage profile

| Indicator | Base (n) | Response | n | % |
|---|---|---|---|---|
| Own a TV | 379 | Yes | 295 | 77.8 |
| Own a TV | 379 | No | 84 | 22.2 |
| Smart TV | 295 | Yes | 214 | 72.5 |
| Smart TV | 295 | No | 81 | 27.5 |
| TV viewing frequency | 167 | Daily | 105 | 62.9 |
| TV viewing frequency | 167 | Weekly | 30 | 18.0 |
| TV viewing frequency | 167 | Less often | 32 | 19.2 |
| Hours watched per week | 167 | Under 5 hours | 71 | 42.5 |
| Hours watched per week | 167 | 5–10 hours | 58 | 34.7 |
| Hours watched per week | 167 | 11–20 hours | 16 | 9.6 |
| Hours watched per week | 167 | 20+ hours | 22 | 13.2 |

*Source: Birguid respondent survey analysis*

The results confirm that television remains materially embedded in household media life. Overall, 77.8% of respondents report owning a television. Among those who answered the smart-TV question, 72.5% indicate that the television is smart-enabled. This is a significant finding because it suggests that television in South Africa is no longer functioning only as a traditional linear broadcast device. It is increasingly a connected screen that can carry broadcast, streaming, catch-up viewing, app-based video, and other on-demand content in the same household environment.

Viewing remains frequent, but not universally heavy. Among routed respondents, 62.9% watch television daily, while 18.0% watch weekly and 19.2% watch less often. In terms of time spent, 42.5% watch fewer than five hours per week, 34.7% watch five to ten hours, and 22.8% watch eleven hours or more. This indicates that television remains routine and familiar, but that attention is increasingly shared across multiple screens and services rather than concentrated exclusively in linear TV behaviour. This pattern aligns with prior evidence which shows that South African households remain deeply screen-oriented, but operate within a hybrid access environment shaped by unequal connectivity, device access, and budget constraints

Television, thus, remains a high-reach household screen, but it now operates inside a connected, multi-platform viewing environment rather than as a stand-alone medium.

### 10.3 Content watched on television

**Table 35:** Most watched content categories on television

| Content category | n | % of routed respondents |
| --- | --- | --- |
| Dramas / soaps | 106 | 63.5 |
| News | 98 | 58.7 |
| Films | 96 | 57.5 |
| Action | 91 | 54.5 |
| Reality | 81 | 48.5 |
| Comedy | 68 | 40.7 |
| Documentary | 64 | 38.3 |
| Thriller / Crime | 56 | 33.5 |
| Romance | 51 | 30.5 |
| Animation | 46 | 27.5 |

*Note: Multi-select item; totals exceed 100%. Base: Routed respondents, n = 167.*

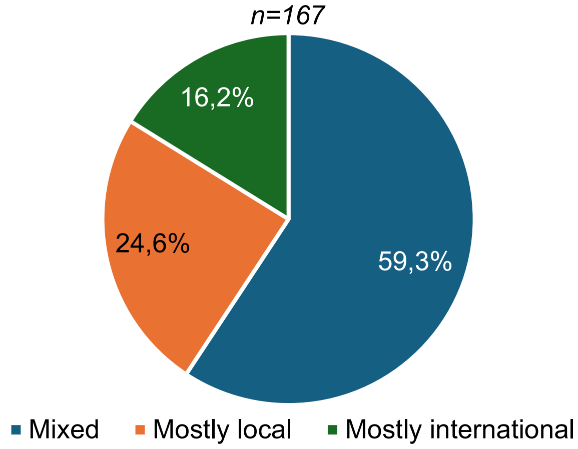
*Source: Birguid respondent survey analysis*

Television content consumption remains broad-based rather than niche, with the most frequently watched genres including dramas/soaps (63.5%), news (58.7%), films (57.5%), action (54.5%), and reality programming (48.5%), alongside meaningful viewing of comedy, documentary, thriller/crime, romance, animation, short-form episodic content, and children's programming. This pattern shows that television continues to function as a wide-spectrum household platform that serves multiple needs at once, including routine information, family viewing, serialised storytelling, and light entertainment, rather than relying on a single dominant genre. Strategically, this breadth reinforces television's continued relevance in South Africa's audiovisual ecosystem, as its value lies not in niche specialisation but in its ability to provide familiarity, scale, repeat exposure, news access, and mixed-genre audience development, even as digital alternatives continue to expand.

## 10.4 Local versus international split, language preference, and subtitles

### 10.4.1 Local versus international split

**Figure 38:** Local versus international split

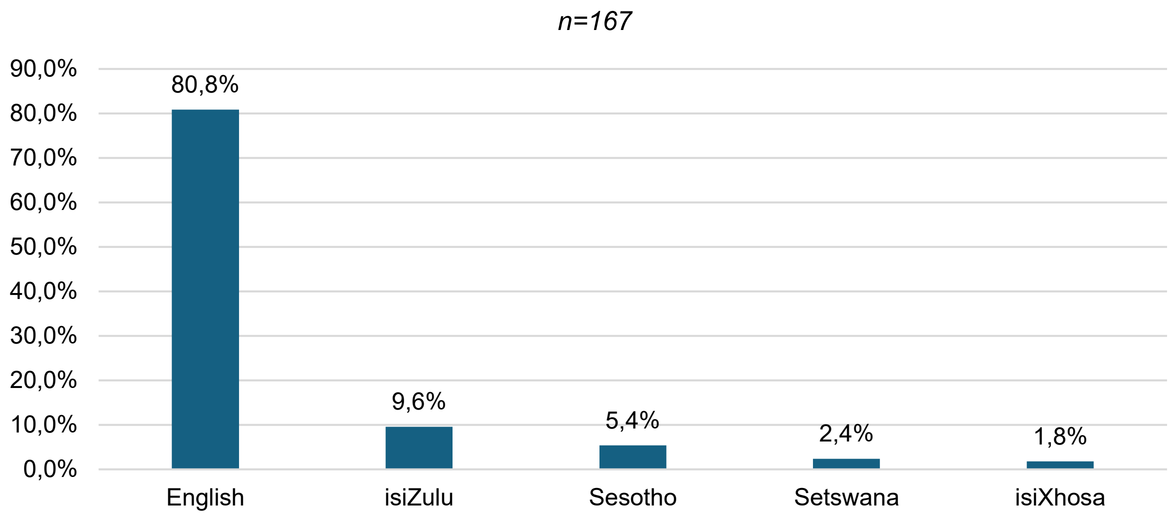



*Source: Birguid respondent survey analysis*

A mixed viewing diet clearly dominates television behaviour. Among routed respondents, 59.3% report watching a combination of local and international content, while 24.6% watch mostly local content and 16.2% mostly international. This is a critical finding, as it demonstrates that local content is not marginal or absent from audience choice, but is instead consumed within a broader, highly competitive content environment rather than in isolation.

### 10.4.2 Language preference

**Figure 39:** Language preference

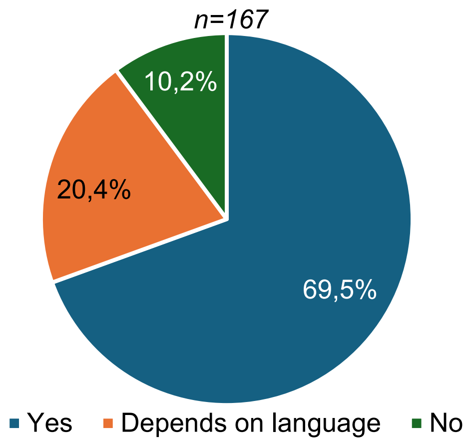



*Source: Birguid respondent survey analysis*

Language preferences further reinforce the pattern of mixed and accessible viewing. English remains the dominant viewing language (80.8%), reflecting its role as a widely understood and cross-regional medium of communication. However, indigenous-language consumption remains meaningfully present, including isiZulu (9.6%), Sesotho (5.4%), Setswana (2.4%), and isiXhosa (1.8%). This indicates that while English functions as a default access language, there is still clear demand for culturally and linguistically relevant content. The coexistence of English and indigenous-language viewing suggests that audiences are navigating content across languages depending on availability, relevance, and ease of access, rather than adhering to a single-language preference.

### 10.4.3 Subtitle comfort

**Figure 40:** Subtitle acceptance

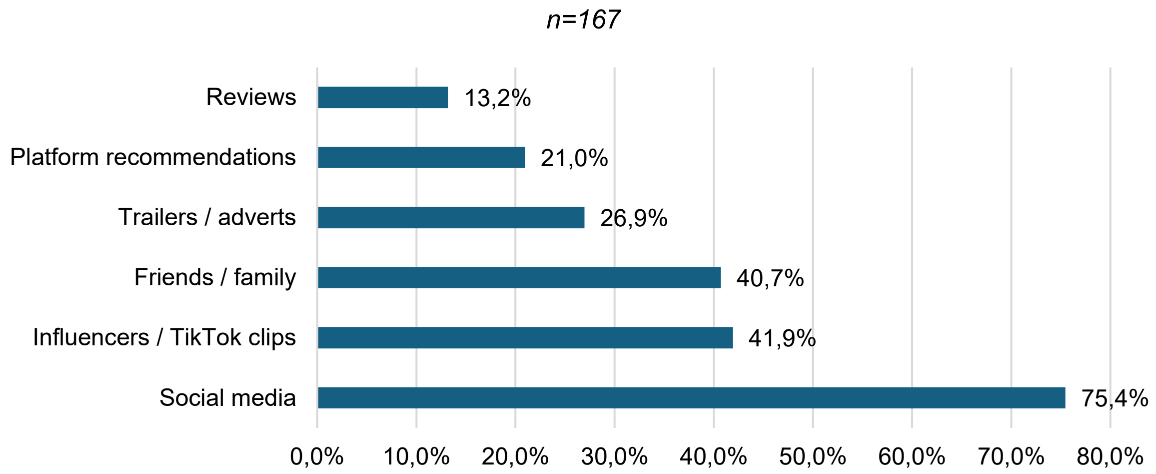



*Source: Birguid respondent survey analysis*

Subtitle acceptance is high, with 69.5% of respondents comfortable watching subtitled content and a further 20.4% indicating that their comfort depends on the language, while only 10.2% reject subtitles outright. This suggests that subtitles should be treated not as a technical add-on, but as a core element of access design and audience expansion strategy. Research on captioning and subtitling shows that they can enhance accessibility, improve comprehension, and enable multilingual content to circulate more effectively across diverse audiences. In this context, the strategic issue is not whether audiences choose local or international content in a binary way, but whether local content is sufficiently visible, easy to access, linguistically flexible, and able to compete effectively within mixed viewing habits.

### 10.5 Discovery pathways

**Figure 41:** TV content discovery pathways




*Source: Birguid respondent survey analysis*

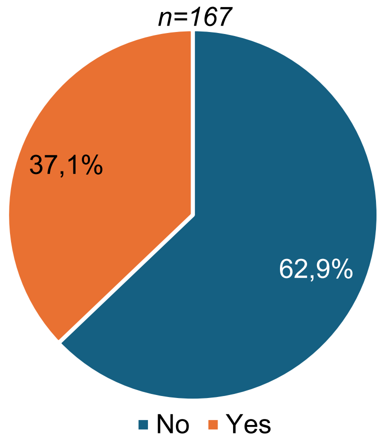
Television discovery is now predominantly social and digitally mediated. The leading pathway is social media (75.4%), followed by influencers and TikTok clips (41.9%), friends and family (40.7%), trailers and adverts (26.9%), platform recommendations (21.0%), and reviews (13.2%). This indicates that television content is increasingly discovered before the screen is even switched on, with audience awareness shaped based on social feeds, peer networks, short-form clips, and digitally driven recommendation environments.

This shift means that television distribution and marketing can no longer be treated as separate functions. Content competitiveness now depends on effective short-form amplification, social proof, creator-led visibility, and clear pathways from awareness to viewing. In practice, while television viewing remains largely home-based, the decision of what to watch is increasingly shaped outside the television environment itself.

## 10.6 TV licence, paid subscriptions, sharing, value for money, and advertising tolerance

### 10.6.1 TV licence

**Figure 42:** TV licence status




*Source: Birguid respondent survey analysis*

The monetisation profile reveals a television market under real affordability and legitimacy pressure. Among routed respondents, 62.9% do not have a TV licence, while 37.1% do. Open-ended responses suggest that non-payment is driven mainly by affordability, non-ownership, low perceived value, or the view that other paid services already meet viewing needs. Those who do pay tend to frame it as a requirement, a compliance issue, or as the right thing to do, rather than as a strong expression of value attachment.

### 10.6.2 Paid subscriptions

**Table 36:** Number of paid subscriptions

| Number of paid subscriptions | n | % |
|---|---|---|
| None | 63 | 37.7 |
| 1 | 40 | 24.0 |
| 2 | 32 | 19.2 |
| 3+ | 32 | 19.2 |

*Source: Birguid respondent survey analysis*

Paid subscription behaviour is significant, but unevenly distributed. While 37.7% of the respondents report having no paid subscriptions, 24.0% have one, and a further 38.4% have two or more, meaning that 62.3% maintain at least one paid service. This indicates that willingness to pay is present, but not universal, and is likely shaped by affordability and perceived value. Subscription sharing is also evident, though not dominant. Just under a third (32.3%) reported sharing subscriptions, compared to 67.7% who do not. Where sharing occurs, it is primarily driven by cost-saving and household access considerations. Conversely, those who do not share tend to emphasise privacy, control, independence, or simply the lack of a subscription to share.

#### 10.6.3 Value for money

**Table 37:** Indicative platforms seen as best value for money

| Platform category | n | % |
|---|---|---|
| Social / free social video | 43 | 25.7 |
| Netflix | 33 | 19.8 |
| Other / unclear | 24 | 14.4 |
| DStv | 19 | 11.4 |
| YouTube | 16 | 9.6 |
| Free-to-air / TV | 13 | 7.8 |
| Showmax | 10 | 6.0 |

*Note: Value-for-money responses were normalised from open text and should be interpreted directionally.*

*Source: Birguid respondent survey analysis*

Perceived value for money is distributed across a range of platforms, with the strongest mentions including social/free social video, Netflix, DStv, YouTube, free-to-air TV, and Showmax. This indicates that audiences do not assess value solely on the depth or prestige of a content catalogue. Instead, value is judged through a combination of affordability, relevance, frequency of use, convenience, and how well a platform fits into everyday household routines. Overall, willingness to pay is evident but conditional, with audiences adopting a selective approach, actively managing costs, and evaluating value in practical, everyday terms.

### 10.7 Key category trends

#### 10.7.1 Age

**Table 38:** Television attributes by age

| Age | n | Own TV % | Smart TV % | Daily viewing % | 11+ hrs/week % | Mostly local % | Mixed split % | Subtitle comfort % | 2+ paid subs % | Sharing yes % |
|---|---|---|---|---|---|---|---|---|---|---|
| 18–24 | 73 | 60.3 | 88.6 | 61.8 | 17.6 | 23.5 | 55.9 | 67.6 | 35.3 | 35.3 |
| 25–34 | 95 | 74.7 | 70.4 | 54.9 | 21.6 | 25.5 | 54.9 | 78.4 | 39.2 | 31.4 |
| 35–44 | 89 | 80.9 | 69.4 | 60.5 | 23.3 | 14.0 | 69.8 | 74.4 | 41.9 | 37.2 |
| 45–54 | 59 | 91.5 | 77.8 | 70.0 | 20.0 | 30.0 | 65.0 | 45.0 | 45.0 | 40.0 |
| 55–64 | 62 | 85.5 | 60.4 | 84.2 | 36.8 | 42.1 | 47.4 | 63.2 | 26.3 | 10.5 |

*Source: Birguid respondent survey analysis*

TV ownership increases markedly with age, while smart TV penetration among those who own a TV is highest among younger adults. Older respondents, particularly those aged 55–64, are the most consistent daily viewers and display the strongest preference for local content. In contrast, younger adults are more comfortable with subtitles and more likely to maintain multiple subscriptions, indicating a more connected and platform-diverse viewing approach.

### 10.7.2 Province

**Table 39:** Television attributes by province

| Province | n | Own TV % | Smart TV % | Daily viewing % | 11+ hrs/week % | Mostly local % | Mixed split % | Subtitle comfort % | 2+ paid subs % | Sharing yes % |
|---|---|---|---|---|---|---|---|---|---|---|
| Eastern Cape | 48 | 75.0 | 66.7 | 62.5 | 50.0 | 18.8 | 56.2 | 75.0 | 18.8 | 18.8 |
| Free State | 25 | 76.0 | 68.4 | 63.6 | 27.3 | 36.4 | 63.6 | 72.7 | 45.5 | 0.0 |
| Gauteng | 104 | 86.5 | 76.7 | 70.3 | 25.0 | 21.9 | 62.5 | 62.5 | 53.1 | 45.3 |
| KwaZulu-Natal | 48 | 66.7 | 62.5 | 42.9 | 14.3 | 25.0 | 71.4 | 67.9 | 25.0 | 50.0 |
| Limpopo | 38 | 68.4 | 73.1 | 63.6 | 0.0 | 18.2 | 54.5 | 81.8 | 54.5 | 18.2 |
| Mpumalanga | 32 | 81.2 | 46.2 | 71.4 | 7.1 | 42.9 | 28.6 | 85.7 | 7.1 | 0.0 |
| North West | 31 | 74.2 | 91.3 | 55.6 | 44.4 | 22.2 | 66.7 | 88.9 | 44.4 | 55.6 |
| Northern Cape | 16 | 75.0 | 58.3 | 71.4 | 14.3 | 42.9 | 42.9 | 57.1 | 28.6 | 0.0 |
| Western Cape | 37 | 83.8 | 93.5 | 57.1 | 14.3 | 0.0 | 57.1 | 57.1 | 28.6 | 14.3 |

*Source: Birguid respondent survey analysis*

Gauteng stands out as the most commercially active television market, with the highest ownership, strong daily viewing, and the deepest paid-subscription footprint. The Western Cape and North West show particularly high smart TV penetration, reflecting stronger integration into connected viewing environments, while KwaZulu-Natal displays lower daily viewing but higher sharing, indicating more household-based access. Limpopo and Mpumalanga show strong subtitle comfort, with Mpumalanga and Northern Cape also leaning more toward local content, and the Eastern Cape reflecting heavier viewing intensity. Overall, these patterns confirm that television remains widely relevant across provinces, but its role varies based on local conditions such as connectivity, affordability, and cultural preferences.

### 10.7.3 Area type

**Table 40:** Television attributes by area type

| Area type | n | Own TV % | Smart TV % | Daily viewing % | 11+ hrs/week % | Mostly local % | Mixed split % | Subtitle comfort % | 2+ paid subs % | Sharing yes % |
|---|---|---|---|---|---|---|---|---|---|---|
| Peri-urban | 55 | 78.2 | 76.7 | 75.0 | 35.0 | 35.0 | 60.0 | 55.0 | 40.0 | 30.0 |
| Rural | 49 | 67.3 | 48.5 | 65.4 | 30.8 | 26.9 | 61.5 | 80.8 | 30.8 | 23.1 |
| Township | 118 | 78.0 | 72.8 | 60.3 | 20.7 | 24.1 | 48.3 | 70.7 | 34.5 | 32.8 |
| Urban / City | 157 | 80.9 | 77.2 | 60.3 | 17.5 | 20.6 | 68.3 | 68.3 | 44.4 | 36.5 |

*Source: Birguid respondent survey analysis*

Urban and peri-urban areas demonstrate stronger smart TV access and deeper paid subscription penetration, reflecting better connectivity and higher purchasing capacity. However, rural respondents remain strongly oriented toward television and show particularly high levels of subtitle comfort. This indicates that television continues to play a critical role outside major urban centres, even where connected-device quality and digital infrastructure are more limited.

### 10.7.4 Monthly income

**Table 41:** Television attributes by monthly income

| Monthly income | n | Own TV % | Smart TV % | Daily viewing % | 11+ hrs/week % | Mostly local % | Mixed split % | Subtitle comfort % | 2+ paid subs % | Sharing yes % |
|---|---|---|---|---|---|---|---|---|---|---|
| Under R3,000 | 116 | 69.8 | 69.1 | 61.2 | 28.6 | 22.4 | 61.2 | 67.3 | 34.7 | 30.6 |
| R3,000–R6,999 | 78 | 84.6 | 78.8 | 79.5 | 23.1 | 23.1 | 51.3 | 66.7 | 51.3 | 41.0 |
| R7,000–R14,999 | 75 | 84.0 | 79.4 | 51.4 | 22.9 | 20.0 | 68.6 | 68.6 | 37.1 | 48.6 |
| R15,000–R29,999 | 32 | 90.6 | 65.5 | 77.8 | 33.3 | 66.7 | 33.3 | 66.7 | 55.6 | 33.3 |
| R30,000+ | 7 | 85.7 | 100.0 | 50.0 | 0.0 | 0.0 | 100.0 | 50.0 | 50.0 | 0.0 |
| Refused | 71 | 70.4 | 62.0 | 54.5 | 12.1 | 24.2 | 60.6 | 78.8 | 24.2 | 9.1 |

*Source: Birguid respondent survey analysis*

Income plays a significant role in ownership and monetisation but is less decisive in determining whether people watch television at all. Lower- and middle-income groups remain active viewers, reinforcing television's role as a relatively accessible household platform. The most pronounced affordability divide is evident in subscription depth, rather than in overall viewing participation.

### 10.7.5 Other key category trends

Employment status highlights the interaction between access, time availability, and monetisation. Employed respondents, particularly full-time and part-time, show the highest levels of TV ownership and stronger subscription depth, while self-employed viewers display balanced engagement across access and usage. Students are less likely to own a television, but when they do, it is typically smart-enabled, indicating a more connected and platform-integrated viewing approach. Unemployed respondents demonstrate relatively high daily viewing and strong subtitle comfort, suggesting that greater time availability coexists with affordability constraints. Across groups, this reinforces a consistent pattern: demand for television content remains strong but does not always translate into monetised participation.

Gender and race trends further emphasise the uneven but enduring role of television. Women report higher ownership, more frequent daily viewing, and greater viewing intensity than men, indicating that television usage is not gender-neutral and remains particularly important in routine and serialised viewing contexts. Race findings should be interpreted cautiously due to sample concentration but directionally confirm television's central role among the black audience. Overall, television retains mass relevance, but its function varies by segment with more habitual and local-facing among time-rich or older audiences, and more connected, hybrid, and subscription-driven among younger and economically active groups.

## 10.8 Strategic implications

Five key implications emerge for television within South Africa's evolving audiovisual ecosystem:

1) **Position television as a hybrid reach platform:** Maintain its role as a high-reach, familiar household screen, while recognising that it now operates as a connected gateway into streaming, apps, and on-demand ecosystems rather than a purely broadcast endpoint.
2) **Adopt integrated distribution models:** Leverage television for scale and repeat exposure, supported by digital platforms, streaming services, and mobile channels to extend accessibility and sustain engagement across touchpoints.
3) **Strengthen local content competitiveness:** Focus on improving visibility, packaging, and discoverability within mixed viewing environments, ensuring local content can compete effectively alongside international offerings through stronger promotion and social amplification.
4) **Leverage language and accessibility as growth drivers:** Use subtitles and multilingual strategies to expand reach across diverse audiences, treating language not as a constraint but as a practical tool for audience development and cross-market accessibility.

5) **Enhance value and monetisation models:** Address affordability constraints through flexible pricing, bundled offerings, and potential ad-supported models, while recognising that audiences are paying selectively and expect clear, everyday value.

### 10.9 Conclusion

The television findings confirm that South African audiovisual consumption is not shifting from one platform to another in a simple linear way. Instead, audiences operate within a hybrid system in which television remains highly relevant, while increasingly intersecting with smart-TV functionality, streaming behaviour, social discovery, multilingual access, and household budget management. Television continues to deliver reach, routine, and broad genre appeal, maintaining its role as a foundational household screen. However, its future competitiveness will depend less on legacy strength and more on how effectively it is integrated into connected-device ecosystems, language-access strategies, social-first marketing, and value-sensitive monetisation models. Television therefore remains viable, but in a fundamentally different form with its future value lying in integration rather than isolation.

# CHAPTER 11: FUTURE TRENDS, QUALITY, IMPROVING LOCAL CONTENT, AND AI IN THE FILM INDUSTRY

## 11.1 Purpose

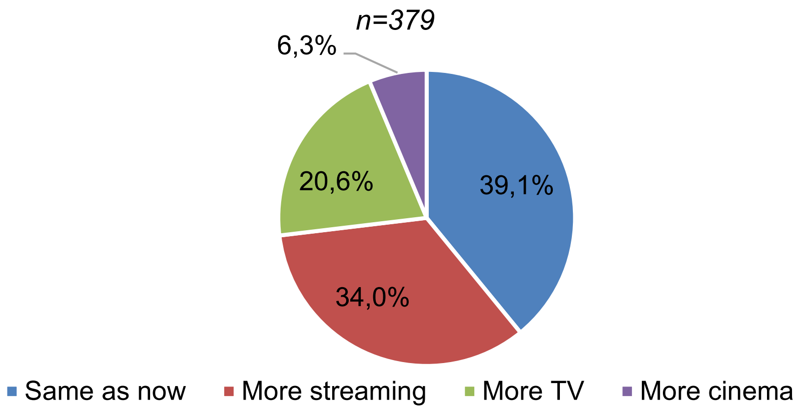
Chapter 11 examines how South African audiences think their viewing habits will change over the next two to three years, how they rate the quality of local content relative to international content, what they believe would make them watch more South African productions, and how they feel about the use of artificial intelligence (AI) in film. The chapter builds on the broader argument that South African audiovisual consumption is already hybrid, uneven, and shaped by affordability, access, language, and discoverability. In that context, future competitiveness will not be determined by technology alone, but by whether content, distribution, and industry systems are aligned to how audiences actually watch. This chapter therefore moves from current viewing behaviour toward forward-looking market signals, showing where audience demand may shift, where local content remains under pressure, and what practical improvements are most likely to strengthen future uptake.

The chapter supports the following objectives:

- **Objective 2**: Examine the viability of distribution pathways, by assessing whether audiences expect to move further toward streaming, remain television-oriented, or change very little.
- **Objective 3**: Assess market competitiveness and audience alignment, by comparing how local and international content are perceived across core quality dimensions
- **Objective 5**: Seek strategic evidence for industry development, by identifying what audiences want improved in South African content and how they interpret the opportunities and risks associated with AI in film.

### 11.2 Future viewing behaviour

**Figure 43:** Expected future viewing in the next 2–3 years




*Source: Birguid respondent survey analysis*

Future viewing is more evolutionary than disruptive. While streaming is the strongest growth direction, the largest single group expects their viewing habits to remain broadly the same. This suggests that South African audiences do not anticipate a full shift from one platform to another, but rather a continuation of existing habits with streaming growing within an already mixed viewing environment. The finding reinforces that South Africa is not moving toward a single-platform future. Instead, it is moving toward a hybrid system in which streaming expands where income, connectivity, and device access allow, television remains important where affordability and familiarity matter, and cinema stays peripheral to routine viewing.

The small share expecting to watch more cinema is especially significant, as it suggests that theatrical exhibition is unlikely to become a broad-based growth channel in the medium term. Strategically, this means future audience growth will depend less on assuming universal streaming adoption and more on recognising that different segments will continue to shift at different speeds.

### 11.3 Future viewing by key audience segments

**Table 42:** Future viewing by key segments (selected crosstab highlights)

| Segment | Strongest Trend | % | Secondary Trend | % |
|---|---|---|---|---|
| Age 18–24 | More streaming | ~60%+ | Same as now | ~25–30% |
| Age 25–34 | More streaming | ~50–55% | Same as now | ~30% |
| Age 45–54 | More TV | ~25–30% | Same as now | ~35–40% |
| Age 55–64 | More TV | ~30–35% | Same as now | ~35–40% |
| Urban areas | More streaming | ~50–55% | Same as now | ~30% |
| Rural areas | Same / TV | ~45–55% combined | Streaming | ~35–40% |
| Income R15k–R29k | More streaming | ~60–65% | Same as now | ~25% |
| Low income (<R3k) | Same / TV | ~50–60% combined | Streaming | ~30–35% |

*Source: Birguid respondent survey analysis*

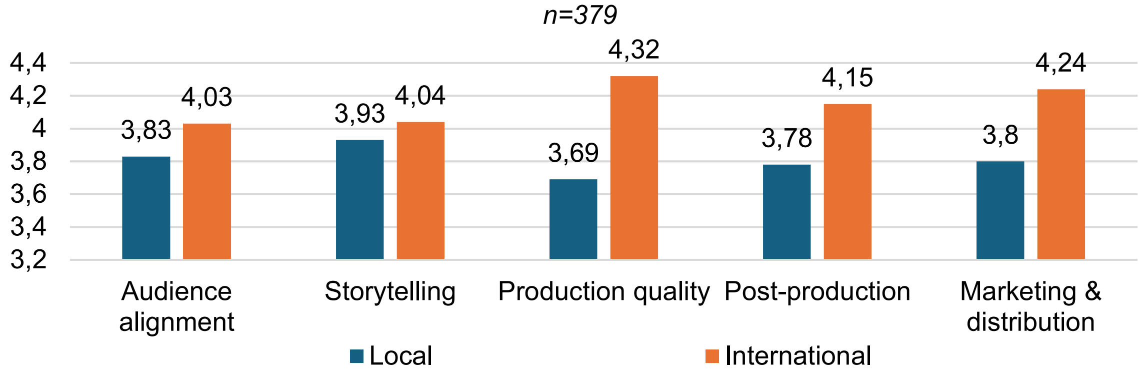
The crosstab results reveal that future viewing behaviour will be uneven and shaped by structural factors such as age, income, and geography. Streaming growth will be concentrated among younger and more enabled audiences, particularly those aged 18–34, urban residents, and middle-income groups (R15,000–R29,999), where around half or more expect to increase streaming. This indicates that digital migration is strongest where connectivity, device access, and discretionary income support sustained engagement.

By contrast, older, rural, and lower-income segments show greater continuity or a stronger orientation toward television. Respondents aged 45–64, as well as those in rural areas and lower-income brackets, stated that they will be more likely to maintain current habits or shift toward TV, reflecting affordability constraints and lower-friction access. In these segments, television remains structurally important not simply by preference, but because it is the most accessible and reliable platform.

Overall, the findings confirm a dual-track future: a growth segment moving toward streaming and a continuity segment anchored in television and existing behaviours. This reinforces that platform evolution in South Africa will remain segmented, requiring strategies that serve both digitally enabled audiences and those constrained by access and affordability.

### 11.4 Quality ratings: South African versus international content

**Figure 44:** Mean quality ratings (Local vs International)




*Source: Birguid respondent survey analysis*

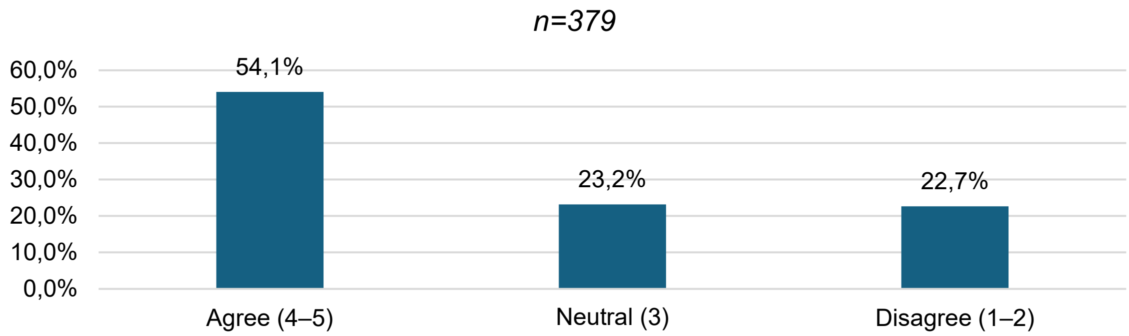
The ratings suggest that South African content is well positioned to remain relevant, but only under certain conditions. As streaming grows particularly among younger, urban, and middle-income audiences, the competitive benchmark will increasingly be set by international content. In this context, the relatively small gaps in storytelling and audience alignment are significant, as they indicate that local content is already strong where cultural resonance and narrative connection matter most. This provides a solid foundation for future competitiveness in a more globalised viewing environment.

However, the larger gaps in production quality, post-production, and marketing and distribution point to the key constraint shaping future performance. As audiences become more exposed to global platforms and higher production standards, expectations around polish, finishing, and visibility will increase. The results show that streaming-oriented audiences who represent the primary growth segment are also the most quality-sensitive. This implies that the shift toward streaming will not automatically benefit local content unless these execution gaps are addressed.

Looking ahead, South African content will remain competitive in a hybrid future only if it strengthens its industrial capabilities alongside its creative strengths. The challenge is not one of relevance, but of consistency, packaging, and market readiness. As viewing continues to shift toward digitally enabled environments, the ability to meet higher technical and promotional standards will determine whether local content can convert existing audience affinity into sustained, competitive performance.

### 11.5 South African content competitiveness

**Figure 45:** Does SA content competes well with international content?




*Source: Birguid respondent survey analysis*

Perceptions of South African content competitiveness are **moderately positive**. While a majority of respondents agree that local content can compete with international offerings, a substantial neutral and disagreeing segment indicates that this confidence is not yet fully established. This positions competitiveness as **present, but conditional**. audiences are open to local content, but do not assume consistent quality across all productions.

From a future viewing perspective, these findings suggest that South African content enters an increasingly competitive environment with **baseline audience goodwill**, but must continuously prove its value. As streaming grows and audiences become more exposed to global content standards, expectations around quality, consistency, and visibility will increase. This means that competitiveness will not be sustained by cultural relevance alone, but by the ability to deliver consistently strong, well-packaged content across platforms.

**Table 43: Competitiveness by key audience segments (mean scores)**

| Segment | Mean Score | Insight |
|---|---|---|
| Income R15k–R29k | **3.97** | Highest confidence, key conversion market |
| Peri-urban | ~3.7–3.8 | Positive but access-dependent |
| Age 45–54 | ~3.6–3.7 | Strong engagement and trust |
| Female | ~3.6+ | Slightly more positive than male |
| Higher education (degree+) | ~3.6–3.8 | More confident, quality-aware |
| Lower income / rural | ~3.3–3.5 | More cautious |

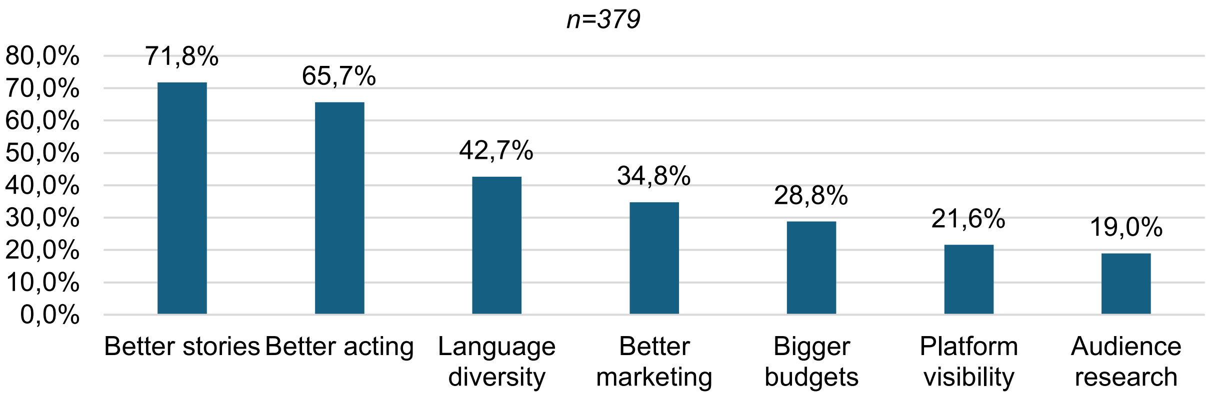
*Source: Birguid respondent survey analysis*

Select crosstab results reveal that competitiveness perceptions are strongest among mid-income, peri-urban, and more educated audiences, particularly those with some discretionary spending power. The R15,000–R29,999 segment stands out with a mean score of 3.97, indicating that audiences with access and choice are not rejecting local content, but are actively evaluating it on quality, trust, and value. By contrast, more constrained segments, particularly lower-income and rural audiences; show more cautious perceptions, reflecting lower exposure, weaker discoverability, and potentially higher perceived quality gaps. This reinforces the broader finding that competitiveness is shaped not only by content itself, but by access, exposure, and viewing context.

In conclusion, South African content is not rejected, but selectively accepted. While competitiveness exists, it remains dependent on consistent execution, particularly in quality, production and post-production standards, marketing visibility, and audience trust. As the market evolves, success will depend less on proving that local content can compete, and more on delivering it consistently, visibly, and at a standard that meets rising audience expectations.

### 11.6 Improving local content

**Figure 46:** What would make respondents watch more South African content?




*Note: Multi-response question; percentages do not sum to 100%.*

*Source: Birguid respondent survey analysis*

Going forward, the key drivers for improving South African content centre on better stories and better acting, highlighting that audiences prioritise the creative core. Future viewing will favour content that is more compelling, better written, and more convincingly performed. At the same time, language diversity, marketing, and platform visibility emerge as important enablers, indicating that content must not only be strong, but also easy to find, understand, and engage with. This points to a dual requirement: stronger content and stronger market access.

Segment patterns reinforce this dynamic. Lower-income and student audiences place greater emphasis on story quality, while language diversity becomes more important in linguistically varied contexts. Marketing and visibility matter more in areas where discoverability is weaker, particularly outside major urban centres. Overall, the findings confirm that demand for local content already exists, but future growth will depend on improving both the quality of content and how effectively it is positioned and delivered to audiences.

### 11.7 AI in film: sensitivity, perception, and acceptable use

**Table 44:** AI in film audience responses (n = 379)

| Indicator | Response | % |
|---|---|---|
| AI sensitivity | Not less likely to watch | 49.3 |
| | Less likely to watch | 29.6 |
| | Not sure | 21.1 |
| Overall view of AI | Mixed | 50.4 |
| | Mostly negative | 36.4 |
| | Mostly positive | 13.2 |
| Acceptable uses of AI | Not acceptable at all | 38.3 |
| | Marketing | 19.3 |
| | Script development | 16.4 |
| | Subtitling / dubbing | 13.2 |
| | Cost reduction | 12.1 |
| | Visual effects | 0.8 |

*Source: Birguid respondent survey analysis*

Audience views on AI are cautious, conditional, and largely mixed. While nearly half of the respondents indicated that AI would not reduce their likelihood to watch, a substantial share remain either resistant or uncertain, confirming that AI is not yet neutral in audience perception. This is reinforced by overall sentiment, where the dominant position is mixed (50.4%), followed by a sizeable negative segment (36.4%). Qualitative responses revealed that this caution is driven primarily by concerns around authenticity, emotional depth, originality, and job displacement, with many respondents describing AI-generated content as “fake” or lacking human connection.

From a future viewing perspective, this indicates that acceptance of AI will depend less on technological capability and more on how it is used within the creative process. Audiences are more open to AI where it enhances efficiency or supports production but remain resistant where it replaces visible human elements such as acting, voice, and storytelling. This is reflected in the acceptance patterns, where AI is more tolerated in support functions such as marketing, script development, and subtitling, but strongly rejected as a core creative substitute, with 38.3% stating it is not acceptable at all.

Overall, the findings suggest that audiences are not anti-AI, but are drawing a clear boundary: AI is acceptable as a tool, not as a creator. This boundary cuts across segments, including younger audiences, indicating that digital familiarity does not automatically translate into acceptance. For the industry, the implication is future adoption of AI must be carefully governed to preserve human-centred storytelling, cultural authenticity, and employment, while leveraging AI only in ways that support rather than replace the creative core.

### 11.8 Key category trends

The crosstab patterns confirm that future viewing, quality perceptions, and improvement priorities are structurally determined rather than uniformly distributed. Age and access remain primary drivers. Younger and economically active segments (especially 18–34) show the strongest shift toward streaming, while older cohorts (45+) remain more television-oriented and continuity-driven. However, confidence in South African content is not limited to younger audiences. Mid-life segments (45–54) often reveal stronger competitiveness perceptions, indicating that local relevance extends beyond digitally native groups and into more stable, value-conscious audiences.

Geography and income reinforce this structural divide. Urban and peri-urban respondents (particularly in Gauteng) showcase stronger streaming momentum and more positive quality and competitiveness assessments, reflecting better infrastructure, device access, and affordability. By contrast, rural and lower-income segments remain anchored in television or unchanged viewing patterns, not due to preference alone but because of access constraints. Mid-income groups (R15,000–R29,999) emerge as a critical “conversion segment,” combining higher streaming intent with relatively positive perceptions of local content quality and competitiveness.

Other demographic factors add nuance but follow the same structural logic. Employment and education correlate with streaming adoption and more favourable competitiveness perceptions, reflecting greater exposure to digital ecosystems. Women show slightly stronger alignment with local content, while Black African respondents remain broadly receptive but quality-sensitive. Overall, the evidence confirms a segmented market in which future behaviour is shaped by capability (access, income, infrastructure) as much as by preference.

### 11.9 Key cross-cutting insights

Key findings converge around five core patterns:

1) **The future remains hybrid and uneven:** Streaming will grow, but within structurally enabled segments, while television persists as the default in constrained environments. Cinema remains selective and event-based rather than a scalable growth channel.
2) **The competitiveness gap is primarily structural, not cultural:** Local content performs strongly on storytelling and audience alignment but lags on production quality, post-production, and marketing; confirming that the challenge lies in execution, packaging, and visibility rather than relevance. This is reinforced by audience improvement priorities, where better stories and acting dominate but are consistently paired with calls for stronger marketing, language accessibility, and discoverability.
3) **Growth depends on conversion, not demand creation:** Audiences are already open to local content, but that demand under-converts due to uneven quality, weak visibility, and access barriers.
4) **AI is conditionally accepted:** Audiences support assistive uses but resist creative substitution, particularly where authenticity, emotional credibility, and employment are perceived to be at risk.
5) **Competitiveness requires system alignment:** Success will depend on integrating strong storytelling with production quality, multilingual accessibility, consistent pipelines, and effective route-to-market strategies. Without this alignment, audience appetite will remain present but inconsistently realised in actual viewing behaviour.

### 11.10 Strategic implications

Several practical implications follow from the findings:

1) **Prioritise story and performance**:
   a) Focus investment on writing quality, character depth, and acting
   b) Strengthen development and refinement before release
2) **Treat quality as an industrial challenge:**
   a) Close gaps in production, post-production, and marketing
   b) Improve finishing, packaging, and release strategies
3) **Leverage multilingual accessibility**
   a) Expand subtitling, dubbing, and language-sensitive positioning
   b) Use language to improve reach and relatability

4) **Strengthen discoverability**
    a) Invest more in marketing and platform visibility
    b) Ensure audiences can easily find and access content
5) **Position AI as assistive, not substitutive**
    a) Use AI to support production, not replace core creativity
    b) Protect authenticity, jobs, and transparency
6) **Ensure pipeline consistency**
    a) Maintain a steady flow of quality releases
    b) Build sustained audience engagement through continuity

### 11.11 Conclusion

South African audiences are not disengaging from audiovisual content; they are becoming more selective, practical, and quality-conscious. Future viewing points to growth in streaming, but within a market that remains hybrid, uneven, and shaped by access conditions. Television continues to anchor mass reach, cinema remains selective and event-based, and a large share of audiences expect their habits to remain broadly unchanged. Within this context, South African content is not rejected. Audiences recognise its strengths in storytelling and cultural relevance, and a majority believe it can compete with international content. However, that competitiveness is conditional, as local productions still lag in production quality, post-production, and marketing visibility.

AI is viewed cautiously but not outright rejected. Audiences are open to its use where it supports efficiency and production but remain resistant where it replaces visible human creativity. Authenticity, emotional credibility, originality, and job protection remain central to audience expectations. Overall, competitiveness will depend on strengthening the creative core, improving production and finishing quality, expanding language accessibility, enhancing discoverability, and ensuring AI is used as a supportive tool, with all these facets being aligned to the realities of how South Africans access and consume content.

## CHAPTER 12: OTHER STAKEHOLDER SYNTHESIS AND STRATEGIC IMPLICATIONS

### 12.1 Introduction

To complement the national audience survey and strengthen interpretation of observed consumer behaviour, the study incorporated in-depth interviews with stakeholders across South Africa's audiovisual value chain, including broadcasters, distributors, filmmakers, producers, digital distributors, and market intelligence specialists. These interviews were undertaken to contextualise audience findings, test industry perceptions against consumer realities, and identify strategic and structural factors influencing the competitiveness and sustainability of South African audiovisual content. This aligns directly with the study's objective of combining audience-side and supply-side evidence to assess distribution viability, local-content competitiveness, and strategic interventions for industry development. Overall, the stakeholder interviews reinforce the report's central analytical thread:

Changing audience behaviour and access conditions → shifting platform and distribution realities → implications for local-content competitiveness → strategic responses for NFVF and the wider industry.

### 12.2 Overview of stakeholder interview sample

The study included stakeholder interviews with 17 participants drawn from across South Africa's audiovisual value chain. Respondents were purposively selected to ensure representation across the core functional components of the industry. The interview sample was designed to provide insight into how different parts of the value chain experience and respond to changing audience behaviour, platform shifts, market constraints, and evolving distribution dynamics. Collectively, respondents offered perspectives spanning both upstream content creation and downstream market-facing functions.

**Table 45:** Key stakeholder interview sample overview

| Stakeholder Category | Number of Respondents | Role / Function Across Value Chain | Strategic Relevance to Study |
|---|---|---|---|
| Broadcasters / Platform Executives | 6 | Responsible for commissioning, scheduling, platform strategy, audience performance monitoring, and content operations | Provide insight into platform strategy, audience migration, commissioning decisions, broadcaster economics, and platform evolution |
| Distributors / Sales Agents / Digital Distributors | 5 | Manage theatrical, digital, platform, and sales distribution of content into market | Provide insight into release strategies, discoverability, platform economics, cinema performance, and monetisation |
| Independent Filmmakers / Producers | 5 | Develop, finance, produce, and in some cases self-distribute local audiovisual content | Provide perspective on content creation, audience targeting, production constraints, and platform access barriers |
| Market Intelligence / Benchmarking Specialist | 1 | Tracks market performance, platform benchmarks, audience metrics, and industry performance indicators | Provides analytical insight into market trends, performance benchmarking, and strategic industry shifts |
| **Total** | **17** | — | — |

*Source: Birguid analysis*

While the interview sample is not statistically representative of the full industry, it provides robust directional insight from experienced market participants operating at critical points within the South African audiovisual ecosystem. As such, findings should be interpreted as strategic and explanatory in nature, complementing the nationally representative audience survey rather than substituting for it.

### 12.3 Audience behaviour and consumption trends

Respondents indicated that South Africa's audiovisual market is undergoing structural behavioural change rather than cyclical disruption. Audiences are increasingly migrating away from appointment-based and single-platform consumption toward fragmented, on-demand, and personalised viewing behaviours. Key themes raised include:

- Declining reliance on traditional scheduled television among younger audiences,
- Increased preference for on-demand and mobile-first consumption,

- Fragmentation of viewing across multiple platforms within the same household,
- Growth of short-form and social video as a discovery and engagement layer, and
- Shift from communal/family viewing toward personalised and individual consumption.

These observations strongly align with the national survey findings, which confirm that South African audiences now operate within a hybrid, multi-platform viewing ecosystem rather than a linear platform hierarchy. The survey similarly found that content consumption is highly distributed across television, streaming, online video, and short-form digital platforms. Audience engagement, therefore, remains high but the conditions under which audiences consume content have materially changed. Distribution and audience-development strategies must adapt to fragmented, non-linear, and mobile-led consumption realities.

### 12.4 Digital adoption and access constraints

Stakeholders broadly agreed that digital adoption is increasing but remains structurally constrained by affordability and access conditions. While digital migration is evident, respondents cautioned against overstating the maturity of South Africa's streaming market due to persistent affordability and infrastructure barriers. Primary digital constraints identified include:

- High mobile data costs for lower-income consumers,
- Uneven access to stable broadband/Wi-Fi,
- Continued dependence on mobile-first viewing,
- Device quality and screen limitations, and
- Subscription fatigue and cost sensitivity.

These observations align with the survey's digital adoption findings which show that internet access is widespread but predominantly mobile, intermittent, and cost-managed rather than fixed, unlimited, or always-on. Digital growth in South Africa is real but conditional. For stronger and more sustainable content consumption, future digital distribution models must be affordability-aware, mobile-optimised, and designed around intermittent access realities.

### 12.5 Distribution model viability

Respondents described South Africa's distribution environment as increasingly multi-channel, with no single platform capable of delivering universal reach or viability.

**Table 46:** Stakeholder perspectives on distribution model viability

| Distribution Channel | Stakeholder Perspective | Key Strengths / Opportunities | Key Constraints / Risks | Strategic Implication |
|---|---|---|---|---|
| Television | Remains highly relevant despite structural long-term pressure | • Strongest mass-reach platform<br>• High accessibility for broad audience segments<br>• Supports habitual and routine viewing<br>• Particularly effective for news, sports, and daily programming | • Youth migration toward digital/on-demand platforms<br>• Long-term decline in strategic centrality among younger audiences | Television remains foundational for broad accessibility and audience reach, particularly among older and lower-income demographics, but is increasingly one component of a wider distribution mix |
| Streaming and Digital Platforms | Viewed as the strongest long-term growth pathway | • Appeals strongly to younger/mobile-first audiences<br>• Supports flexible and on-demand consumption<br>• Creates opportunities for independent and digital-first creators<br>• Expands direct-to-audience distribution options | • Affordability and data constraints limit scale<br>• Platform gatekeeping restricts access<br>• Discoverability increasingly dependent on algorithms/platform promotion | Streaming and digital represent the most significant growth opportunity, but require affordability-aware and discoverability-led strategies to realise full potential |
| Cinema | Increasingly viewed as structurally pressured and selectively viable | • Retains value for premium/event-driven viewing<br>• Supports social and experiential consumption<br>• Can work for select high-profile or genre-aligned releases | • High attendance costs Geographic inaccessibility<br>• Competition from home/streaming<br>• Weak demand for most local theatrical releases outside select genres/brands | Cinema is no longer a primary mass-market pathway for most local productions and should be treated as a selective/event-driven release channel |

*Source: Birguid analysis*

Stakeholder findings reinforce the audience survey's conclusion that South Africa operates as a hybrid distribution market, where different platforms serve distinct roles rather than replacing one another. Broadcast television remains the most reliable mass-reach platform, particularly for older and lower-income audiences, while streaming and digital platforms represent the strongest growth pathway but remain affordability- and access-constrained. Cinema retains selective relevance as an event-driven channel but is no longer viewed as a primary mass-market route for most local productions. Overall, both stakeholder and audience evidence indicate that distribution viability in South Africa increasingly depends on coordinated multi-platform strategies rather than reliance on any single channel, with successful distribution requiring alignment between platform choice, audience segment, affordability realities, and content type.

### 12.6 Local content competitiveness

Stakeholders rejected the notion that South African audiences inherently prefer international content over local content. Instead, respondents argued that local content remains structurally disadvantaged despite strong cultural relevance and audience resonance. Perceived strengths of local content include:

- Authenticity and relatability,
- Indigenous language representation,
- Cultural relevance, and
- Distinctive storytelling rooted in local realities.

Perceived weaknesses include:

- Inconsistent production quality,
- Budget limitations,
- Weak marketing and discoverability,
- Lower production polish relative to international benchmarks, and
- Limited access to large-scale distribution support.

These findings align with the audience survey, which found that audiences generally perceive South African content as culturally relevant and competitive in principle, but weaker than international alternatives in visibility, polish, and consistency. The competitiveness gap is driven less by audience rejection of local content and more by structural execution and ecosystem limitations. Improving competitiveness will require support across production quality, discoverability, marketing, and distribution.

## 12.7 Choice drivers and discoverability

Stakeholders identified the following as primary drivers of audience content choice:

- Price and affordability,
- Accessibility and convenience,
- Language and cultural relevance,
- Relatability/authenticity,
- Marketing visibility,
- Social media and peer recommendation, and
- Perceived production quality.

Stakeholders noted that discoverability has become increasingly social and algorithmic, with audiences frequently discovering content via:

- TikTok
- Instagram
- YouTube clips
- Influencers and creators
- Peer sharing and word-of-mouth

This aligns directly with the survey's findings that content choice is driven by affordability, language, accessibility, relatability, and social/platform-driven discovery rather than formal marketing alone. Competitiveness, therefore, increasingly depends not only on content quality but on how effectively content is surfaced, packaged, and promoted within digital/social discovery ecosystems.

## 12.8 Future industry trends and AI

Stakeholders broadly anticipate continued structural transformation over the medium term, including:

- Further migration toward streaming and digital consumption,
- Continued decline in linear television centrality among younger audiences,
- Greater importance of short-form and creator-led ecosystems,
- Increased pressure on traditional broadcasters and cinemas, and
- Greater use of AI across production and operational workflows.

AI is viewed cautiously but pragmatically. Respondents support AI where it:

- Improves efficiency,
- Reduces costs,
- Supports subtitling, transcription, and ideation, and

- Enhances analytics and workflow automation

However, concerns remained regarding:

- Job displacement,
- Reduced originality,
- Ethical use and ownership, and
- Over-automation of creative processes.

These views align with audience findings showing cautious acceptance of AI where supportive rather than substitutive of human creativity.

### 12.9 Triangulation with survey findings

Overall, there is strong convergence between stakeholder and audience findings. Both data streams consistently indicate that:

1. South Africans remain highly engaged with audiovisual content,
2. Viewing is increasingly hybrid and fragmented,
3. Affordability and accessibility shape platform participation,
4. Local content demand exists but conversion remains weak,
5. Discoverability and marketing are major structural barriers,
6. Cinema is becoming increasingly selective and event-driven,
7. Television remains foundational for broad reach, and
8. Future viability depends on integrated, multi-platform distribution strategies.

### 12.10 Conclusion and Strategic implications

Stakeholder interview findings reinforce the study's central conclusion that South Africa's audiovisual sector is not constrained by lack of audience demand, but by structural misalignment between how audiences now consume content and how the industry continues to produce, distribute, and monetise it. Similar to the survey's results, the stakeholder evidence demonstrates that:

1) Audience behaviour has shifted decisively toward hybrid, fragmented, and digital-led consumption
2) Distribution models remain viable, but in differentiated and evolving roles
3) Local content remains culturally relevant and in demand, but structurally disadvantaged in conversion
4) Affordability, discoverability, and accessibility remain binding market constraints
5) Production, marketing, and distribution systems have not fully adapted to contemporary audience realities

Accordingly, the most important strategic implication is that future competitiveness will depend less on producing more content in isolation, and more on building an audience-aligned ecosystem in which:

- Content development is informed by audience intelligence
- Distribution strategies are multi-platform and affordability-aware
- Marketing is social-first and discovery-driven
- Platform access is broadened for independent creators
- Production funding supports both quality and continuity
- Industry systems evolve alongside changing audience realities

In practical terms, the stakeholder evidence suggests that the sector's next phase of growth will require a transition from a production-led model toward an audience-and-distribution-led model, where success is measured not only by content creation, but by the ability to connect that content to audiences efficiently, affordably, and at scale across an increasingly fragmented platform ecosystem.

## CHAPTER 13: CONCLUSION

This study set out to assess how South African audiences access, consume, and evaluate audiovisual content across cinema, television, streaming, and digital platforms, and to determine the implications of these behaviours for the future competitiveness and sustainability of the South African audiovisual sector. The findings demonstrate that South Africa's audiovisual market remains fundamentally viable and characterised by strong audience engagement. South Africans continue to consume substantial volumes of audiovisual content across multiple platforms, and there remains clear appetite for local storytelling when it is relevant, visible, and accessible. However, the study also finds that audience demand is operating within a structurally constrained environment shaped by affordability pressures, fragmented attention, uneven digital access, and evolving platform dynamics.

The evidence consistently indicates that the sector's primary challenge is not insufficient audience interest, but rather the growing misalignment between audience realities and how the industry continues to produce, package, distribute, and monetise content.

1) **Audience Behaviour Has Shifted Structurally:** Audience consumption has moved decisively away from linear, appointment-based, and single-platform viewing toward a fragmented, hybrid, and increasingly mobile-led ecosystem. Platform choice is contextual and layered rather than substitutive, with audiences using different platforms for different purposes depending on affordability, convenience, and content type.
2) **Distribution Models Remain Viable, but in Evolving Roles:** Cinema, television, streaming, and online video all remain relevant, but their roles have differentiated materially. Television remains foundational for mass reach, streaming and digital platforms provide the strongest long-term growth opportunity, and cinema is increasingly selective and event-driven. No single channel can independently deliver broad-based reach and sustainability.
3) **Local Content Competitiveness Is Constrained by Conversion, Not Demand:** Audiences continue to value South African content for its authenticity, relatability, and cultural relevance. However, local content underperforms commercially not because of weak demand, but because structural barriers inhibit conversion of interest into sustained viewing and monetisation.
4) **Structural Constraints Are Suppressing Market Efficiency:** Affordability, data costs, device access, platform gatekeeping, geographic limitations, and policy instability collectively constrain both audience participation and producer competitiveness. These

factors materially shape what audiences can watch, how often they can watch, and whether local content can compete effectively for attention.

The strongest overarching conclusion of this study is that South Africa's audiovisual sector must evolve from a production-led model to an audience-and-distribution-led model if it is to improve long-term competitiveness and sustainability. Future success will depend less on increasing production volume in isolation, and more on building an integrated ecosystem in which:

- Audience intelligence informs content development and commissioning,
- Distribution strategies reflect hybrid and affordability-constrained viewing realities,
- Discoverability and marketing are treated as core competitiveness levers,
- Distribution pathways are designed as coordinated multi-platform journeys,
- Policy and incentive frameworks support consistent content pipeline stability, and
- Industry support mechanisms evolve in line with changing platform economics and audience behaviour.

If these structural shifts are implemented, South Africa's audiovisual sector is well positioned to deepen audience engagement, improve the competitiveness of local content, and strengthen the commercial sustainability of the wider industry. If not, the gap between audience interest and local-content performance is likely to persist, not because South Africans do not want local content, but because the system remains insufficiently aligned to how audiences now live, connect, and consume media.

## APPENDICES

### Appendix A: Abbreviations and acronyms

| Acronym / Term | Full Term | Description / Usage in This Study |
|---|---|---|
| **AI** | Artificial Intelligence | Refers to machine-based tools and systems capable of supporting or automating parts of creative, production, post-production, and distribution processes. In this study, AI is examined in relation to audience attitudes, acceptable uses in film, and concerns about authenticity, jobs, and creative integrity. |
| **AVoD / AVOD** | Advertising Video-on-Demand | A video distribution model in which audiences access content at low or no direct subscription cost, with revenue supported primarily through advertising. |
| **CAPI** | Computer-Assisted Personal Interviewing | A tablet-based survey method used in the national audience survey. In this study, CAPI was used for face-to-face intercept interviews with built-in validation, GPS, and timestamp controls. |
| **COVID-19** | Coronavirus Disease 2019 | The pandemic referenced in the literature review as an accelerator of home-based viewing, streaming growth, and changed cinema-going behaviour. |
| **DSAC** | Department of Sport, Arts and Culture | The South African government department under which the NFVF operates. DSAC is referenced in relation to the NFVF's institutional mandate within the creative economy. |
| **dtic** | Department of Trade, Industry and Competition | The South African department responsible for the film and television production incentive. It is referenced as a key institution affecting production pipeline stability, sector confidence, and local content supply. |
| **ECDC** | Eastern Cape Development Corporation | A provincial development institution referenced in the literature review in relation to infrastructure investment and support for film-industry development in the Eastern Cape. |
| **FTA** | Free-to-Air | Refers to broadcast television services available without subscription fees. In this study, FTA television is identified as the most accessible and resilient mass-reach platform for South African audiences, especially in cost-constrained households. |
| **FTTH** | Fibre-to-the-Home | A fixed broadband infrastructure model delivering fibre internet directly to households. |
| **GDP** | Gross Domestic Product | A macroeconomic measure of total economic output. |
| **ITA** | International Trade Administration | The institution cited in the literature review as a source on internet access, digital infrastructure, and connectivity structure in South Africa. |
| **KZNFC** | KwaZulu-Natal Film Commission | A provincial film commission referenced as an example of decentralised industry development and regional support for production, facilitation, and local audience growth. |
| **MBDA** | Mandela Bay Development Agency | An agency referenced in the report in relation to Eastern Cape film-support infrastructure and local ecosystem development initiatives. |

| Acronym / Term | Full Term | Description / Usage in This Study |
|---|---|---|
| **NAB** | National Association of Broadcasters | An industry body cited in the literature review in relation to broadcasting trends, pay-TV pressures, and the continued strategic role of television in South Africa's hybrid media ecosystem. |
| **NFVF** | National Film and Video Foundation | The South African public entity that commissioned this research. NFVF is the central institutional actor concerned with audience development, distribution viability, policy alignment, and the competitiveness of local audiovisual content. |
| **Online Video** | Online video content platforms and services | A broad term used to refer to video consumed through internet-enabled platforms, including both long-form and short-form formats. It includes streaming platforms, social video, and other digital viewing pathways. |
| **OTT** | Over-the-Top | A content delivery model in which video services are delivered directly over the internet rather than through traditional broadcast or cable systems. |
| **Pay-TV** | Pay Television | Subscription-based television services offered through packages or tiers. |
| **PC** | Personal Computer | Refers to a desktop or laptop computer. |
| **SVoD** | Subscription Video-on-Demand | A video service model in which users pay a recurring subscription fee to access content libraries on demand. |
| **Smart TV** | Smart Television | A television set with built-in internet connectivity and application functionality. |
| **TV** | Television | Refers to television as a screen/device and to television as a content-distribution environment, including free-to-air, broadcast, and pay-TV consumption. |
| **VoD** | Video-on-Demand | A general term for content made available for viewing at the user's chosen time rather than on a fixed broadcast schedule. |
| **Wi-Fi** | Wireless Fidelity / wireless internet network access | Commonly used to describe wireless internet connectivity. |

## Appendix B: Glossary of key technical and industry terms

**A**

- **Access (to content)**: The ability of audiences to find, reach, and consume audiovisual content.
- **Affordability (in media consumption)**: The extent to which audiences can sustainably pay for content, data, subscriptions, or transport to viewing locations.
- **Algorithmic discovery**: The use of platform-driven recommendation systems to surface content based on user behaviour, preferences, and engagement patterns.
- **Audience development**: Strategic interventions aimed at increasing audience reach, engagement, and participation in local content.

**B**

- **Broadcast television**: Traditional scheduled television delivered through free-to-air or subscription-based channels.
- **Bundled access (content + data)**: A distribution model in which content access is combined with mobile data or connectivity packages. Highlighted as a key strategy to reduce affordability barriers.

**C**

- **Cinema (theatrical exhibition)**: The public exhibition of films in dedicated venues.
- **Content discovery**: The process through which audiences become aware of content.
- **Content competitiveness**: The ability of local content to attract and retain audience attention relative to international content. Determined by quality, visibility, accessibility, and platform positioning.
- **Conversion (awareness to viewing)**: The process through which audience awareness translates into actual consumption.

**D**

- **Data affordability**: The relative cost of internet data compared to income levels.
- **Digital adoption**: The uptake and sustained use of digital platforms and services.
- **Download-to-watch**: A consumption behaviour where users download content while connected to Wi-Fi for later offline viewing.

**E**

- **Event-based viewing**: A form of consumption in which audiences engage with content as a planned or social experience (e.g., cinema visits, premieres).

**F**

- **Friction (access friction)**: Any barrier that interrupts or prevents audiences from accessing content after discovery. Includes cost, unclear availability, platform fragmentation, and technical limitations.

**H**

- **Hybrid platform ecosystem**: A system in which multiple platforms (broadcast, streaming, online video, cinema) coexist and serve different roles.
- **Hybrid consumption behaviour**: Audience behaviour characterised by the use of multiple platforms depending on context, affordability, and content type.

**I**

- **Intermittent connectivity**: Irregular or non-continuous internet access, often due to cost, infrastructure, or power constraints.

**L**

- **Local content**: Audiovisual content produced in South Africa or reflecting South African stories, languages, and cultural contexts.
- **Long-form content**: Extended-duration content such as films and full-length television episodes.

**M**

- **Mobile-first consumption**: A viewing pattern where smartphones are the primary device for accessing content.
- **Monetisation (of content)**: The ability to generate revenue from content through subscriptions, advertising, licensing, or other models.

**O**

- **Online video**: Video content accessed via internet platforms, including both long-form streaming and short-form social video.
- **On-demand viewing**: Content consumption that occurs at a time chosen by the viewer rather than a fixed broadcast schedule.

**P**

- **Platform (content platform)**: A distribution environment through which audiences access content (e.g., television, streaming services, social media platforms).
- **Platform economics**: The financial and operational dynamics governing how platforms acquire, distribute, and monetise content.
- **Platform-led market**: A media environment in which digital platforms play a dominant role in shaping content visibility, access, and consumption patterns.
- **Production pipeline**: The continuous flow of content from development through production to distribution.

**S**

- **Short-form content**: Video content typically under 10 minutes in duration, commonly consumed on social platforms.
- **Social discovery**: Content discovery driven by social media platforms, influencers, and peer networks.
- **Streaming**: The delivery of audiovisual content over the internet in real time, without requiring full download prior to viewing.
- **Subscription fatigue**: A condition in which consumers reduce or rotate subscriptions due to cost pressures or perceived lack of value.

**U**

- **User experience (UX)**: The overall experience of accessing and interacting with content on a platform, including ease of navigation, playback quality, and interface design.

**V**

- **Value-for-money perception**: Audience assessment of whether the cost of content or subscriptions is justified by the quality and quantity of available content.
- **Viewing behaviour**: Patterns of how audiences consume content, including frequency, duration, platform choice, and content type.

**W**

- **Willingness to pay**: The extent to which audiences are prepared to spend money on content or access.

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