



**A COMPARATIVE GLOBAL DISTRIBUTION TRENDS  
ANALYSIS: SOUTH AFRICA IN RELATION TO  
INTERNATIONAL MARKETS – STUDY 2**

**REPORT**

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## **EXECUTIVE SUMMARY**

This report assesses South Africa's position in the global audiovisual distribution ecosystem and identifies the strategic, structural, and policy interventions needed to improve international competitiveness, market access, and long-term value capture. While South Africa has strong production capability, skilled talent, and globally competitive infrastructure, it continues to underperform in converting this strength into sustained global distribution success.

The study finds that the core challenge is not production capability, but weak distribution systems. In today's platform-driven audiovisual economy, competitiveness depends on how effectively content is packaged, localised, marketed, discovered, licensed, and monetised. South Africa's key challenge is, therefore, converting creative output into sustained global visibility, circulation, and economic value.

### **Key findings**

- 1) Platform-led distribution has reshaped the industry, with discoverability, engagement, and algorithmic performance now driving competitiveness. This implies that success depends not only on producing content, but on performing effectively within digital platform ecosystems.
- 2) Although global demand for South African content exists, weak marketing, fragmented IP ownership, and limited buyer access constrain export growth. As a result, export opportunities are inconsistent and long-term revenue potential remains under-realised.
- 3) Distribution readiness remains a major bottleneck, particularly in rights management, localisation, metadata, and technical compliance. This weakens tradability, bargaining power, and participation in global distribution markets, especially for independent producers.
- 4) South Africa's mobile-first and cost-sensitive environment requires flexible, hybrid distribution models tailored to different market realities. This means distributors, platforms, and policymakers must prioritise affordable, low-data, and ad-supported models, while developing segmented urban, peri-urban, and rural strategies rather than relying on a single national distribution approach.
- 5) Export competitiveness depends on territorial strategies aligned to infrastructure, audience behaviour, and monetisation opportunities across regions. This means industry stakeholders must develop market-specific distribution, pricing, and partnership strategies that leverage African scale opportunities while targeting higher-value international markets for revenue growth and IP value retention.
- 6) Policy instability and production-focused incentives continue to weaken downstream distribution and export competitiveness. Delays and uncertainty in incentive administration

reduce investor confidence, disrupt financing and co-production pipelines, and discourage long-term investment in distribution, export development, and IP retention.

- 7) International benchmarking shows that successful audiovisual industries rely on integrated production-distribution ecosystems, strong export support, and coordinated institutional alignment. This means South Africa must strengthen coordination between industry, government, funders, and distributors while investing more deliberately in export promotion, distribution capability, and IP retention.
- 8) Case evidence confirms that international success is driven primarily by effective distribution strategy, platform alignment, and market positioning rather than production capability alone. Based on this, South Africa must invest more deliberately in distribution partnerships, audience targeting, discoverability, and export market execution to improve global reach and long-term value capture.

### **Strategic priorities**

To progress the industry in terms of improved global positioning and distribution, the report identifies the following priority areas:

- 1) **Transition to a distribution-led industry model:** Embed distribution, rights, and market access decisions at the development stage
- 2) **Strengthen distribution readiness and packaging capability:** Build industry-wide capability in rights, localisation, metadata, and delivery systems
- 3) **Build platform capability and algorithmic literacy:** Strengthen metadata, audience analytics, discoverability, and digital marketing capabilities to improve platform visibility, audience engagement, and monetisation performance
- 4) **Strengthen IP ownership and negotiation capacity:** Improve long-term value capture and reduce dependency on buyout structures
- 5) **Invest in marketing, discoverability, and global visibility:** Reframe marketing as a core economic driver of distribution success
- 6) **Develop and enhance regional and international distribution ecosystems:** Position SADC and Africa as foundational growth markets
- 7) **Align policy and funding with distribution and export outcomes:** Rebalance incentives toward downstream competitiveness
- 8) **Leverage AI as a strategic enabler:** Enhance localisation, discoverability, and scalability while managing platform dependency risks
- 9) **Strengthen institutional coordination across the value chain to reduce fragmentation and improve execution consistency**

To track progress, the study proposes a KPI-driven framework focused on market access, distribution performance, value capture, industry readiness, and audience outcomes. This shifts measurement away from production volume toward commercial performance, export competitiveness, and long-term economic value creation.

The study also proposes a phased implementation roadmap:

- Short-term (0–2 years): Stabilise policy and strengthen export readiness to restore confidence and unlock near-term growth.
- Medium-term (3–5 years): Expand partnerships, co-productions, and regional integration to build scalable distribution pathways.
- Long-term (5+ years): Position South Africa as a globally competitive audiovisual exporter with stronger long-term value retention.

Overall, the report concludes that South Africa's future competitiveness will depend not on how much content it produces, but on how effectively that content is distributed, discovered, monetised, and converted into sustained global market value.

## CHAPTER 1: INTRODUCTION

### 1.1 Background and rationale

South Africa possesses one of the most sophisticated and internationally recognised film and television production ecosystems on the African continent, combining deep creative capability with established technical infrastructure and a long history of servicing both domestic storytelling and international productions (Aon South Africa, 2024; CMF–FMC, 2024). South African films and series continue to secure visibility across major festivals, awards circuits, and global streaming catalogues, reinforcing the international relevance of local storytelling and production competence (Brand South Africa, 2025; CMF–FMC, 2024).

However, global competitiveness in the contemporary audiovisual economy is no longer determined by production capacity alone. Distribution outcomes including how, where, and under what commercial terms content reaches audiences; now drive sustainability, value capture, and long-term industry growth. For South Africa, the translation of creative output into durable global market presence remains uneven, shaped by structural constraints across market access, commercial deal-making, and readiness for platform-based distribution (Aon South Africa, 2024; Mail & Guardian, 2025). Recent industry mobilisation around delays and uncertainty in production incentives further signals how quickly competitiveness and project pipelines can deteriorate when policy and administrative systems falter (Reuters, 2026).

International and local evidence indicates that successful participation in global content markets is shaped by four interrelated dimensions. First, market access pathways, that is, sales agents, international broadcasters, streamers, festivals, and diaspora circuits; mediate visibility and scale. While South African titles have performed strongly in festivals and niche markets, sustained access to high-volume channels remains concentrated among a smaller subset of producers and projects (CMF–FMC, 2024; Spring, 2025). The platform layer is expanding and includes Netflix, Prime Video and Showmax which all carry South African content and have increased local activity. Entry is, however, selective and governed by platform economics, audience targeting, and commissioning logic (Bizcommunity, 2023; NFVF, 2022).

Second, content packaging and distribution readiness increasingly determine acquisition outcomes. Platforms and distributors place high emphasis on rights clarity, deliverables compliance, localisation (subtitling/dubbing), metadata optimisation and security standards; capabilities that directly influence discoverability and licensing viability in digital environments (NFVF, 2022; PRISM, 2021). South African industry commentary highlights persistent

constraints for independent producers, including limited intellectual property (IP) ownership and fragmented rights structures, which reduce tradability and weaken bargaining power in international licensing and syndication negotiations (Spling, 2025; PRISM, 2021).

Third, windowing and deal structures have shifted materially as digital-first strategies, platform exclusives, and hybrid release models displace older sequential patterns (cinema → broadcast → home entertainment). Contemporary distribution relies on a mix of licensing, minimum guarantees, revenue shares, and co-production structures that vary by territory and platform. This often requires sophisticated negotiation capacity and market intelligence to secure equitable value capture (Frontiers in Communication, 2025; Academia.edu, 2023).

Fourth, digital infrastructure realities in target markets shape both consumption and distribution potential. Global demand for digital content is rising, but uptake depends on affordability, broadband quality, and device ecosystems, especially in mobile-first environments across Africa and other emerging markets (Ken Research, 2024; NFVF, 2022). In South Africa specifically, audience evidence confirms structural migration toward home-based viewing: 80% of respondents prefer watching films at home, and distributors overwhelmingly identify streaming/VoD as the fastest-growing viewing channel (92.3% in the distributor/stakeholder survey) (NFVF, 2022). These shifts create export opportunities aligned to digital distribution, but they also raise practical requirements around localisation, platform readiness, and data-sensitive delivery formats (NFVF, 2022; Fabric Data, 2025).

Domestic exhibition trends reinforce why a global distribution orientation is increasingly necessary. NFVF's box office evidence shows that locally produced films have historically held a small theatrical share (for example, 5% market share in 2019) (NFVF, 2019). More recent performance points to continued fragility: mid-year reporting for 2024 indicates declining admissions and revenue concentration around international titles, with local films capturing a marginal share of gross box office in a pressured market (NFVF, 2024). This underscores the limited capacity of theatrical release alone to sustain production volumes and highlights the strategic role of digital platforms and export-oriented distribution models.

Policy and incentive competitiveness therefore remain central to global production and distribution mobility. UNESCO's policy monitoring underscores that many territories deploy audiovisual production incentives (tax relief, rebates, cash reimbursements) as a deliberate competitive lever (UNESCO, n.d.). At the same time, South Africa's own distribution competitiveness depends on aligning funding, market access, and value-chain support

(including post-production and marketing/distribution enablement) to improve export readiness and long-term value retention (NFVF, 2022; PRISM, 2021).

Against this backdrop, there is a clear need for systematic, comparative intelligence that situates South Africa within the global distribution ecosystem and translates platform, market-access, infrastructure, and policy realities into a coherent competitiveness strategy. This study responds directly to that gap by benchmarking South Africa against key international territories, examining export pathways and infrastructure constraints, and analysing evolving platform dynamics to produce decision-grade evidence for NFVF and industry stakeholders to strengthen international visibility, commercial outcomes, and long-term sector sustainability (NFVF, 2022; UNCTAD, 2024).

## **1.2 Problem statement**

The central problem this research addresses is how can South Africa strengthen its international distribution competitiveness across cinema, television, and digital/VOD so that local content achieves greater global visibility, improved market access, and more equitable value capture in an increasingly platform-driven distribution economy. To respond, the study will generate comparative, decision-grade evidence on:

- 1) How South Africa's distribution outcomes and practices compare with key international territories (Africa, Europe, North America, Asia).
- 2) Which global distribution pathways (sales, platforms, broadcasters, festivals, diaspora circuits) offer the strongest export potential for South African content.
- 3) Which constraints most limit performance (rights/IP structures, packaging readiness, localisation, metadata, marketing/discoverability, deal structures).
- 4) How infrastructure realities (data cost, broadband, device ecosystems) affect viable platform strategies in priority markets.
- 5) What policy and industry interventions can measurably improve market access, visibility, and long-term value retention.

## **1.3 Study objectives and research questions**

### **1.3.1 Overall objective**

To benchmark South Africa's distribution performance and enabling conditions against global distribution trends and practices, and to provide data-driven strategies to strengthen the international visibility, market access, and monetisation of South African film and television content across cinema, television, and digital/VOD channels.

### 1.3.2 Specific objectives

#### 1) **Benchmark global distribution models**

- a) Compare South Africa's performance and distribution mix (cinema, television, digital/VOD) with key international markets across Africa, Europe, North America, and Asia.
- b) Identify the dominant distribution pathways and windowing strategies used in comparator territories, including platform-led and hybrid models.

#### 2) **Assess export potential and market access**

- a) Evaluate global demand signals for South African content and identify high-potential export routes including co-productions, licensing, and international partnerships.
- b) Analyse barriers to entry by territory (regulatory, cultural, commercial), and extract lessons from successful export cases.

#### 3) **Evaluate infrastructure and access barriers**

- a) Assess how data affordability, internet penetration, broadband quality, and device ecosystems shape digital distribution viability and platform strategy in target markets.
- b) Evaluate South Africa's platform-readiness for international standards (localisation, metadata, encoding/deliverables), including constraints affecting independent producers.

#### 4) **Inform global strategy development**

- a) Provide practical recommendations to optimise South Africa's global distribution strategy, including priority export markets and channel strategies.
- b) Identify policy and industry interventions that strengthen competitiveness, including incentive alignment and export-promotion mechanisms.
- c) Develop a framework for measuring and tracking international performance over time.

### 1.3.3 Key research questions

- 1) **Benchmarking & positioning:** How does South Africa's distribution performance and channel mix compare with selected markets in Africa, Europe, North America, and Asia?
- 2) **Platform dynamics:** What platform models and discoverability mechanisms most shape international visibility for mid-sized industries, and how should South Africa respond?
- 3) **Export pathways:** Which pathways (sales agents, streamers, broadcasters, festivals, diaspora circuits) generate the strongest and most scalable market access for South African content?
- 4) **Deal structures & value capture:** What deal structures (licensing, MGs, rev-share, co-productions) dominate in target markets, and what mechanisms improve local value retention?

- 5) **Readiness constraints:** Which bottlenecks most constrain international tradability rights/IP, packaging, localisation, metadata, delivery standards, or marketing capability and where should interventions be targeted? (PRISM, 2021; Spling, 2025).
- 6) **Infrastructure feasibility:** How do data costs, broadband penetration, and device ecosystems affect feasible digital distribution strategies in priority export territories?
- 7) **Policy & incentives:** Which policy instruments and incentive designs used internationally most effectively support export competitiveness and distribution outcomes, and what is transferable to South Africa?

## 1.4 Research design and methodology

### 1.4.1 Overall approach

The study adopted a mixed-methods design, combining:

- Structured desk-based comparative analysis of global distribution models and policy frameworks with,
- Purposive expert interviews across the international distribution ecosystem.

This approach enables both cross-market benchmarking and deep contextual insight, ensuring that findings reflect both empirical evidence and real-world industry dynamics.

### 1.4.2 Sampling framework: Purposive expert sampling

Given the specialised nature of the global distribution ecosystem, purposive sampling was used to prioritise functional relevance and expertise over statistical representation (Yin, 2018; Saunders et al., 2019). Sampling ensured:

- Representation across the value chain (platforms, distributors, policymakers, producers)
- Functional diversity (strategic, operational, and analytical roles)
- Geographic coverage across major global regions
- Direct experience in distribution decision-making

A target of 60–70 expert interviews was set to ensure sufficient depth, diversity, and triangulation. Responses were collected from stakeholders across the entire value chain including:

- 1) Policymakers & Regulators
- 2) Global Distributors & Sales Agents
- 3) Streaming Platform Executives
- 4) International Co-production Partners

- 5) SA Producers with International Experience
- 6) Market Analysts & Digital Distribution Specialists
- 7) Global Festival Programmers / Curators
- 8) African Regional Broadcasters / Platforms

### 1.4.3 Data collection and quality controls

Data collection combined secondary research and primary interviews, supported by strong quality controls to ensure reliability and validity. Secondary research provided comparable global benchmarks across distribution models, policy frameworks, and infrastructure conditions. Primary data was collected through semi-structured interviews using a standardised guide aligned to the research objectives.

To ensure robustness, the study applied:

- Triangulation across sources
- Standardised instruments
- Expert respondent selection
- Iterative validation of responses
- Diverse stakeholder representation
- Systematic documentation and coding

These controls ensure that findings are credible, consistent, and decision-grade.

### 1.4.4 Data analysis

The study applied a **multi-layered analytical framework** combining:

- 1) **Thematic analysis:** Systematic coding of qualitative data to identify recurring patterns across distribution pathways, platform dynamics, deal structures, readiness constraints, and policy factors.
- 2) **Comparative benchmarking:** Cross-market analysis of distribution models, export performance, platform integration, and policy competitiveness.
- 3) **Strategic synthesis:** Integration of findings into:
  - a) Constraint mapping
  - b) Opportunity identification
  - c) Actionable recommendations

The analysis prioritises decision utility, ensuring direct applicability to strategy and policy.

## 1.5 Study limitations

While the study was designed to provide robust and decision-grade insights, several limitations should be acknowledged:

- 1) **Non-statistical sampling:** The use of purposive expert sampling prioritises depth and relevance over statistical generalisability. While respondents are highly experienced, findings reflect informed perspectives rather than population-level representation.
- 2) **Market dynamism and platform evolution:** The global audiovisual distribution environment is rapidly evolving, particularly with respect to:
  - a) Streaming platform strategies
  - b) Commissioning models
  - c) Windowing practicesAs a result, some findings may be time-sensitive, requiring periodic updates to remain current.
- 3) **Data availability and comparability constraints:** Secondary data across markets is:
  - a) Uneven in availability and granularity
  - b) Often non-standardised across territoriesThis limits strict quantitative comparability and necessitates interpretive benchmarking.
- 4) **Response bias and commercial sensitivity:** Given the commercially sensitive nature of distribution (deal structures, acquisition strategies, platform performance):
  - a) Some respondents may have provided high-level or selective insights
  - b) Certain proprietary practices may not be fully disclosed
- 5) **Geographic and access constraints:** Although the study covers multiple regions, access to:
  - a) Certain high-level platform executives
  - b) Specific territories with restricted data environments may be limited, potentially affecting completeness in some comparative areas.
- 6) **Rapid policy and incentive shifts: Changes in:**
  - a) National incentive schemes
  - b) Regulatory frameworks can materially affect competitiveness within short timeframes, meaning that policy-related findings should be interpreted within the current regulatory context.

Despite these limitations, the study mitigates risk through strong triangulation, diverse respondent coverage, and integration of global literature. The findings therefore provide a credible, contextually grounded, and strategically actionable evidence base for strengthening South Africa's global distribution competitiveness.

## CHAPTER TWO: LITERATURE REVIEW

### 2.1 Introduction

The literature review establishes the conceptual and empirical basis for assessing South Africa's international audiovisual distribution competitiveness. The central premise of the review is that production capability alone is no longer sufficient to secure long-term sector competitiveness. In the contemporary screen economy, the ability to move content across borders, secure visibility on key platforms, negotiate viable rights arrangements, and retain value over time is increasingly what distinguishes more competitive national industries from less competitive ones (UNCTAD, 2024; UNESCO, 2022). Distribution is therefore not a downstream technical function only; it is a core determinant of whether creative output is converted into market access, audience reach, and export earnings (Cunningham & Craig, 2021; Lobato, 2019).

The review is aligned to the engagement objectives, scope items, and research questions by focusing on four linked concerns:

- 1) How international screen industries structure their market-access pathways,
- 2) How digital platforms, rights systems, and technical delivery requirements shape international circulation
- 3) How infrastructure and affordability conditions influence the feasibility of different distribution models, and
- 4) Which policy and institutional mechanisms strengthen export competitiveness in comparable markets (UNCTAD, 2024; UNESCO, 2023).

These themes reflect the study's broader objective of understanding how South Africa can improve its position within the global audiovisual distribution ecosystem.

The review is organised around a clear analytical thread. It begins by establishing South Africa's current distribution challenge, namely the gap between relatively strong production capability and weaker distribution outcomes. It then examines the global shifts reshaping audiovisual distribution, including "platformisation", new release models, and the growing importance of digital discoverability. Finally, it reviews the principal export pathways and market-access mechanisms through which content reaches international audiences, including sales agents, film markets, broadcasters, streamers, festivals, diaspora circuits, and technical intermediaries (British Film Institute [BFI], 2023; Telefilm Canada, 2022; UNCTAD, 2024).

The evidence base prioritises decision-relevant and verifiable sources. These include NFVF audience and box office reports, DTIC incentive information, and publications from UNESCO, UNCTAD, the International Telecommunication Union (ITU), the European Audiovisual Observatory, and other benchmark-country institutions. Together, these sources provide the conceptual foundation and support the study's central question: how South Africa can convert production strength into stronger international circulation, monetisation, and retained value (NFVF, 2022, 2025; UNCTAD, 2024; UNESCO, 2022).

## **2.2 South Africa baseline and the distribution competitiveness problem**

South Africa is widely recognised as one of the more developed screen industries in Africa, with relatively strong production infrastructure, skilled crews, established service capability, and internationally competitive filming locations (Aon South Africa, 2024; Who Owns Whom, 2023). These strengths have enabled the country to function both as a domestic production base and as a destination for foreign film and television projects, supported by a mix of natural locations, technical facilities, and incentive mechanisms (Brand South Africa, 2025; The DTIC, n.d.). In production terms, South Africa has therefore built a credible industry platform.

However, that production strength has not translated consistently into strong downstream distribution outcomes. The domestic theatrical market remains a weak recoupment channel for local films. NFVF evidence shows that South African films captured only a small share of national box office revenue before and after the COVID-19 period. In 2019, local films accounted for approximately 5% of box office revenue; in 2022, eleven domestic films generated only about 2% of national theatrical revenue; and in 2023, eight local titles accounted for roughly 0.9% of total South African box office gross (NFVF, 2019, 2024, 2025). These figures indicate that theatrical exhibition does not currently provide a sufficiently deep revenue base for most local productions.

At the same time, audience behaviour has shifted decisively toward home-based and digital viewing. NFVF audience research found that about 80% of respondents preferred watching films at home rather than in cinemas, while more than 90% of industry respondents identified streaming and video-on-demand as the dominant growth channels (NFVF, 2022). Other market evidence similarly suggests rising use of subscription streaming services, supported by broader device access and changing consumer habits, although this growth remains uneven across income groups and access conditions (KLA, 2024). South Africa is therefore experiencing the same broad transition seen internationally, but within a more unequal infrastructure and affordability environment.

This matters because the shift to digital distribution does not automatically solve South Africa's distribution problem. Streaming expands potential routes to market, but it also raises new requirements. International circulation increasingly depends on content being commercially packaged, technically compliant, localised, discoverable, and contractually licensable across multiple territories and platforms (Cunningham & Craig, 2021; Lobato, 2019; UNCTAD, 2024). In this environment, competitiveness depends less on whether a country can produce content and more on whether producers and intermediaries can move that content through the systems that govern global discovery and monetisation.

Infrastructure and affordability add another layer to the problem. Although South Africa has stronger digital infrastructure than many African peers, internet affordability, data pricing, broadband quality, and device access continue to shape the viability of streaming-led growth, especially outside higher-income consumer segments (ITU, 2023; PwC South Africa, 2025; UNCTAD, 2024). This helps explain the growing relevance of hybrid distribution models, including subscription video-on-demand (SVOD), advertising-supported video-on-demand (AVOD), and free ad-supported streaming television (FAST), rather than subscription-only models.

Policy and administrative stability are also important to distribution competitiveness. Incentives influence not only production location decisions, but also project finance, co-production structuring, and the credibility of projects in the eyes of international buyers and partners (UNESCO, 2023). In South Africa, recent delays in administering the film and television incentive scheme triggered public concern from industry bodies, with reports warning that uncertainty was disrupting project pipelines and weakening competitiveness relative to alternative jurisdictions (Daily Maverick, 2026; EWN, 2026; Reuters, 2026). Although incentive instability is often discussed as a production issue, it also affects distribution because financing uncertainty can reduce bargaining power in licensing negotiations and undermine confidence among international partners (UNESCO, 2023).

Taken together, these factors define South Africa's distribution competitiveness problem. The issue is not whether South Africa can produce high-quality audiovisual content. Rather, it is whether the country can consistently convert that production capacity into sustained audience reach, stronger licensing outcomes, greater rights retention, and higher export earnings across theatrical, broadcast, streaming, festival, and diaspora pathways (Cunningham & Craig, 2021; Lobato, 2019; NFVF, 2022; UNCTAD, 2024).

### **2.3 Global distribution shifts shaping competitiveness**

The global audiovisual distribution system has changed substantially over the past two decades. Historically, film and television content was released through a relatively structured sequence of windows, moving from cinema to home entertainment, pay television, and then free-to-air broadcasting. This release logic was designed to stagger access and maximise value extraction over time, and in many markets it was reinforced by industry agreements and regulatory norms (European Audiovisual Observatory, 2019, 2023). Under this model, theatrical performance carried strong signalling and revenue importance.

That system has been disrupted by streaming platforms, digital delivery technologies, and changing audience behaviour. Distribution now operates in a more fluid and negotiated environment characterised by shorter theatrical windows, direct-to-streaming releases, simultaneous multi-platform launches, and territory-specific licensing strategies (Cunningham & Craig, 2021; Lobato, 2019). In this environment, platform strategy increasingly shapes release timing, audience targeting, and monetisation logic. Decisions are driven not only by content quality, but also by subscriber acquisition, retention, advertising yield, catalogue balance, and platform profitability (Omdia, 2024).

The scale of this shift is reflected in revenue patterns. The Motion Picture Association (MPA) reported that digital home and mobile entertainment accounted for roughly 72% of the combined global theatrical and home/mobile entertainment market in 2021, excluding pay television, increasing from about US\$45.5 billion in 2019 to US\$71.9 billion in 2021 (MPA, 2022). While theatrical markets remain important in some territories, digital channels have become central to the commercial structure of the global screen economy. For national industries, this means that distribution competitiveness increasingly depends on access to digital pathways, including SVOD, AVOD, TVOD, and FAST services (MPA, 2022; UNCTAD, 2024).

A key feature of this transformation is platformisation. Digital platforms no longer act only as neutral delivery tools; they function as powerful intermediaries that shape discovery, recommendation, and monetisation. In earlier broadcast systems, access to audiences depended heavily on control of transmission infrastructure and spectrum scarcity. In contrast, digital distribution lowers technical barriers to entry, but increases competition for attention and visibility (UNCTAD, 2024). The scarcity problem has, therefore, shifted from transmission capacity to discoverability. Success now depends increasingly on whether content can be surfaced, recommended, and retained within crowded catalogues and highly competitive digital interfaces (Lobato, 2019).

This shift has important operational implications. Distribution readiness now includes strong metadata, accurate rights information, localisation through subtitling and dubbing, and technical compliance with platform delivery standards. These factors influence whether content can be ingested by platforms, made discoverable, and circulated across territories at scale (Amazon Prime Video, 2023; Netflix, 2024). As a result, the distribution function now combines commercial, legal, and technical capabilities more tightly than under earlier release systems.

These changes also sit within a broader expansion of the digital creative economy. UNCTAD reports that global exports of creative services reached approximately US\$1.4 trillion in 2022, accounting for around 19% of world services exports, with digitally enabled services contributing strongly to this growth (UNCTAD, 2024). This matters because it locates audiovisual distribution not only within cultural policy, but also within trade, services exports, and digital industrial strategy. For countries such as South Africa, improving distribution competitiveness is therefore relevant to broader economic policy goals, including export diversification and higher-value participation in the digital economy (South African Cultural Observatory [SACO], 2022; UNCTAD, 2024).

In South Africa, this framing is especially important given the sector's economic significance. SACO estimated that the audiovisual and interactive media subsector contributed approximately R48.4 billion to GDP in 2020, indicating that the sector already has meaningful economic weight (SACO, 2022). Yet continued growth depends not only on production volume, but also on the ability to secure downstream revenue and protect intellectual property in a platform-led market (SACO, 2024). The international literature, therefore, points to a clear conclusion: countries that align production support, distribution capability, digital readiness, and policy coordination are better placed to convert creative capacity into sustainable market outcomes (UNCTAD, 2024; UNESCO, 2023).

### **2.3.1 Trade performance and benchmarking in audiovisual and related services**

Trade data adds an important macro-level perspective to the study of distribution competitiveness because it shows whether national industries are converting capability into measurable cross-border commercial activity. In this context, audiovisual and related services trade is a useful, though imperfect, indicator of international market integration, export reach, and the extent to which countries are supplying content and related services beyond their domestic markets (International Trade Centre [ITC], n.d.; UNCTAD, 2024).

The data used for this study indicates that global audiovisual trade is concentrated among a relatively small group of countries. In 2024, the United States remained the largest exporter of audiovisual and related services at US\$17.64 billion, followed by Sweden (US\$10.18 billion), France (US\$4.59 billion), the United Kingdom (US\$3.59 billion), Germany (US\$2.65 billion), China (US\$2.50 billion), and the Republic of Korea (US\$2.15 billion) (ITC, n.d.). These countries differ in size and structure, but they share strong distribution systems, global market linkages, and relatively mature institutional support environments.

Against this backdrop, South Africa exported US\$0.43 billion in audiovisual and related services in 2024, up from US\$0.20 billion in 2020 (ITC, n.d.). This suggests that South Africa has a real and growing export presence. However, the scale remains modest relative to stronger benchmark markets. South Africa's 2024 export value was roughly five times smaller than Korea's and materially below that of larger European exporters such as the United Kingdom and France (ITC, n.d.). This implies that South Africa is participating in the global system, but not yet at a scale commensurate with its production capabilities and infrastructure base.

Import data adds nuance to this picture. In 2024, South Africa imported US\$0.32 billion in audiovisual and related services, compared with US\$0.12 billion in 2020, meaning the country remained a net exporter by about US\$0.11 billion in 2024 (ITC, n.d.). That is a positive signal, because it indicates the country is supplying services internationally rather than only consuming imported content and services. Even so, the overall scale of both exports and imports remains small compared with major global traders such as the USA, France, China, and Germany (ITC, n.d.). This evidence helps sharpen the study's central problem. The issue is not whether South Africa participates in audiovisual trade but whether it can improve the conditions under which content and related services are packaged, sold, licensed, localised, and monetised across international channels. Trade performance reinforces the argument that distribution competitiveness depends on more than output. It also depends on market access, rights management, deal-making capability, digital readiness, and institutional support (ITC, n.d.; UNCTAD, 2024).

The data also helps position the comparator logic. Stronger exporting countries such as Korea, France, and the United Kingdom show the role of international promotion, institutional support, and market integration. Smaller but strategically positioned markets show that export growth can also come from targeted ecosystem development rather than scale alone. For South Africa, the strategic issue is therefore not how to replicate the absolute size of the largest

exporters, but how to strengthen the distribution conditions that allow a mid-sized industry to improve export performance over time (ITC, n.d.; UNCTAD, 2024).

A note of caution is necessary. Trade statistics for audiovisual and related services may include bundled service activities and do not always isolate content circulation cleanly. Some country values may also be affected by reporting anomalies or definitional differences (ITC, n.d.). Even so, the broader pattern remains useful: global audiovisual trade is concentrated in countries with stronger distribution systems, and South Africa remains a relatively small but growing participant.

## **2.4 Export pathways and market-access mechanisms**

International market access for film and television content is mediated through a layered set of commercial, institutional, and technical pathways. Although digital platforms have changed the balance among these pathways, they have not replaced the need for intermediaries. Producers still depend on a range of actors and environments to secure buyers, structure rights, validate content, and deliver titles into international markets (European Audiovisual Observatory, 2023; Telefilm Canada, 2022). For this reason, export competitiveness should be understood not as access to one channel, but as the ability to navigate several complementary channels.

One of the most established mechanisms remains the sales agent system. Sales agents act as intermediaries between producers and buyers by licensing rights across territories and windows, advising on positioning and pricing, and maintaining ongoing relationships with distributors, broadcasters, and platforms (European Audiovisual Observatory, 2023; Raindance, 2024). In effect, they function as specialised export channels, especially for independent films and projects that do not enter global markets through direct studio or platform pipelines (Media Services, 2024).

Closely connected to the sales-agent system are international film markets, such as the *Marché du Film*, the European Film Market, and the American Film Market. These markets remain central deal-making spaces where producers, financiers, distributors, sales agents, festivals, and platforms negotiate licensing, pre-sales, financing, and co-production arrangements. The *Marché du Film*, for example, hosts more than 15,000 professionals from over 120 countries, illustrating the continued importance of structured face-to-face market environments in international circulation (*Marché du Film*, 2024). For export-oriented industries, these spaces remain important because they connect projects to buyers and intermediaries before, during, and after production.

At the same time, the digital platform layer has become increasingly important for high-volume international circulation. Global and regional OTT services now license, acquire, and commission content for multi-territory distribution, but access is selective and shaped by platform strategy, subscriber priorities, catalogue needs, and cost discipline (Cunningham & Craig, 2021; Lobato, 2019). This makes platform access valuable, but also volatile. As streaming markets mature, commissioning has become more selective and profitability pressures have narrowed acquisition pipelines in some territories (Ajims, 2023; Omdia, 2024). For South Africa, this means platform partnerships are important but should not be treated as the only viable route to international distribution.

Other pathways remain relevant. Film festivals continue to play a major role in validation, signalling, publicity, and distributor discovery, particularly for independent and culturally distinctive work (European Audiovisual Observatory, 2023). Diaspora networks can also provide important channels for niche circulation, especially where films speak to specific linguistic, regional, or cultural communities and can travel through targeted digital or community-based circuits (Curtin & Sanson, 2016). In addition, broader South–South trade trends suggest that emerging markets may increasingly offer viable routes to growth outside traditional Western centres. UNCTAD reports that more than half of developing-country exports are now directed to other developing economies, indicating the growing importance of regional and emerging-market linkages (UNCTAD, 2026).

A further but often overlooked layer is the technical distribution supply chain, including aggregators and other intermediaries that manage quality control, metadata preparation, encoding, localisation, and delivery to digital platforms. For producers without direct technical access to large platforms, these intermediaries provide operational bridges into digital marketplaces and video-on-demand services (Tryon, 2013). In a platform-led environment, this technical layer is increasingly important because market access depends not only on rights and relationships, but also on the ability to meet delivery and discoverability requirements.

Taken together, these mechanisms show that international distribution is not a single route but a portfolio system. Sales agents and film markets remain important for independent exports; broadcasters and streamers offer scale where acquisition is possible; festivals provide validation and visibility; diaspora pathways support niche demand; and aggregators facilitate technical access to digital outlets. For South Africa, this implies that export strategy should be built around multiple complementary routes to market, rather than dependence on a single

channel. That conclusion is consistent with the study's golden thread: stronger international outcomes will depend not only on production, but on how effectively South African content is positioned, packaged, circulated, and monetised across a diversified distribution ecosystem (Cunningham & Craig, 2021; European Audiovisual Observatory, 2023; UNCTAD, 2024).

## **2.5 Distribution readiness: Rights, packaging, localisation, metadata and marketing**

A consistent finding in the literature is that international circulation depends not only on content quality, but on distribution readiness. In practical terms, a title must be legally tradable, technically deliverable, operationally usable across platforms, and commercially packageable for buyers and audiences. This means that rights control, technical deliverables, localisation, metadata, and marketing assets now function as core determinants of whether a project can move efficiently through international distribution pipelines (European Audiovisual Observatory, 2024; Lobato, 2019). For this study, distribution readiness is therefore directly linked to the objectives of identifying export barriers, assessing platform readiness, and determining which interventions could improve South Africa's market access and value capture.

### **2.5.1 Rights clarity and intellectual property control**

Rights clarity is the starting point of tradability. Buyers, distributors, broadcasters, and platforms require a clear chain of title and clearly defined exploitation rights before they can license or invest in content. Where rights are fragmented, undocumented, or encumbered, deals become slower, riskier, or commercially unattractive. In that sense, rights control is not a back-office legal detail; it is a precondition for international circulation and downstream value capture (European Audiovisual Observatory, 2024; Raindance, 2024).

South African evidence points to this as a real structural issue. The NFVF's *National Film Strategy* states explicitly that many local producers and writers do not fully own or exploit their intellectual property, while the NFVF's 2021 economic impact work recommended changes that would allow filmmakers to retain more IP from commissioned work and create wealth from downstream exploitation. This suggests that weak rights retention is not an isolated contractual issue, but a broader competitiveness concern affecting sustainability, bargaining power, and export readiness (NFVF, 2022a, 2021).

For the purposes of this study, rights fragmentation should therefore be treated as a key fieldwork issue. The literature establishes that clean ownership and exploitation rights are essential for tradability, but interviews are needed to determine how frequently South African

projects face chain-of-title problems, which rights are most often ceded, and whether these patterns differ by genre, commissioner, or financing structure.

### **2.5.2 Technical deliverables and platform compliance**

Rights readiness alone is insufficient. Platforms and distributors also require content to be delivered in specific technical formats with complete supporting documentation. Netflix's delivery specifications set out detailed requirements for post-production packages, Interoperable Master Format (IMF) structures, and branded delivery assets, while Amazon Prime Video requires title metadata and asset manifests to conform to MovieLabs specifications such as MovieLabs Entertainment Core (MEC) and Media Manifest Core (MMC). PBS Distribution likewise requires editorially and technically clean masters, captions, and supporting documentation before content can move into release workflows. These requirements show that technical delivery has become part of commercial readiness rather than a purely post-production matter (Amazon Prime Video, 2024a, 2024b; Netflix, 2024a, 2024b; PBS Distribution, 2022).

The strategic implication is clear: delivery capability now functions as a filter in the distribution ecosystem. Producers that can master, package, validate, and deliver content efficiently are better positioned to secure acquisitions and move quickly to market. Those without this capacity face higher transaction costs, more revision cycles, and a greater risk of rejection or delay. For South Africa, this is directly relevant to the study objective of assessing platform readiness and identifying bottlenecks affecting independent producers.

### **2.5.3 Localisation, accessibility and global usability**

Localisation is now a normal part of distribution readiness, not a late-stage optional add-on. Streaming services routinely require subtitles, captions, dubbing assets, and localised title information because these assets increase usability across territories and improve catalogue functionality. Netflix's localisation guidance explicitly links subtitle and dubbing delivery to title readiness, while Amazon's metadata guidance supports the use of localised title information for different markets. Accessibility requirements such as subtitles and captions for hearing-impaired audiences are similarly embedded in platform expectations (Amazon Prime Video, 2024a, 2024b; Netflix, 2024a; PBS Distribution, 2022).

For South African producers, localisation matters for at least two reasons:

- 1) It expands the potential geographic reach of local stories beyond their original language environments.

- 2) It reduces friction in acquisition, indexing, and audience use within international catalogues.

This is especially important in a multilingual production environment where content may need to travel across domestic, regional, and global language contexts. Localisation should therefore be treated as a practical determinant of export performance and not only as a cultural adaptation issue.

#### **2.5.4 Metadata, discoverability and algorithmic distribution**

In platform ecosystems, discoverability is central to monetisation. Viewers increasingly encounter content through search, recommendation engines, thumbnails, synopses, and metadata classification rather than through fixed schedules or linear channel guides. Based on this, metadata is part of how content is made visible and commercially legible inside digital catalogues (Gomez-Uribe & Hunt, 2015; Lobato, 2019). Amazon's use of MovieLabs MEC metadata and MMC manifests reveals that title information, synopsis fields, identifiers, genres, ratings, and localised metadata form part of the formal technical workflow through which content is surfaced to audiences. The Entertainment Identifier Registry similarly highlights the importance of interoperable identifiers in enabling content to move across platforms and systems consistently (Amazon Prime Video, 2024a; Entertainment Identifier Registry [EIDR], 2024).

The implication for South Africa is significant. Improving platform readiness is not only about mastering files correctly; it is also about building repeatable capability in metadata completeness, version control, localisation-linked information management, and quality-assured packaging. Without those capabilities, content may be technically accepted but still commercially disadvantaged inside crowded catalogues.

#### **2.5.5 Marketing assets and route-to-market conversion**

Distribution readiness also includes marketing readiness. Synopses, trailers, stills, poster artwork, key art, audience positioning, and release narratives all help determine whether a title can be sold to buyers and selected by viewers. In digital environments, these materials are part of conversion as much as promotion because they shape click-through, engagement, and title choice (Lobato, 2019).

South African policy practice increasingly reflects this understanding. The NFVF's marketing and distribution funding supports completed film and television products with marketing and distribution strategies, while festival and market support is framed explicitly as part of

improving audience reach and distribution channels. This indicates that distribution is already being understood institutionally as a combination of completion, packaging, promotion, and route-to-market planning rather than as a post-release activity only (NFVF, n.d., 2025).

### **2.5.6 Implications for South Africa**

Taken together, rights clarity, technical deliverables, localisation, metadata, and marketing readiness determine whether content can move efficiently through international distribution systems. For South Africa, strengthening distribution readiness is central to improving export performance, widening market-access pathways, and increasing long-term value capture from local content. The literature also suggests that the problem is systemic rather than purely project-specific. Stronger competitiveness will require industry-wide capability in rights management, chain-of-title discipline, localisation, metadata, technical delivery, and market-facing packaging, especially among independent producers who are most exposed to readiness gaps and most reliant on international circulation to scale revenues.

## **2.6 Infrastructure and affordability constraints shaping viable distribution models**

The viability of SVOD, AVOD, FAST, and hybrid models depends heavily on broadband quality, mobile network performance, device access, affordability, and payment systems. For emerging audiovisual industries, infrastructure and affordability are core determinants of distribution competitiveness (International Telecommunication Union [ITU], 2025; Lobato, 2019; UNCTAD, 2024). Within this study, infrastructure matters because digital platforms may create theoretical access to global audiences, but actual distribution viability depends on whether those audiences can connect reliably and afford sustained streaming use. This is particularly relevant for South Africa, where digital reach is expanding, but unevenly.

### **2.6.1 Affordability and consumer behaviour**

Affordability remains one of the strongest determinants of digital viewing behaviour. NFVF audience research (2022) found that only 22% of respondents were prepared to pay more than R500 per month for internet access, while the same study also found that 80% preferred watching films at home rather than going out to cinemas. The report further showed that 92.3% of distributors surveyed regarded internet streaming VoD as the fastest-growing viewing platform in the South African market. Taken together, these findings show that digital viewing is expanding, but under affordability constraints that shape how people consume and pay for content (NFVF, 2022). As a result, where internet access is costly relative to household income, premium subscription-only models may be more limited, while lower-cost, ad-supported, mobile-first, or hybrid offerings are likely to achieve broader reach. In this sense,

affordability is not just a consumer welfare issue; it shapes the architecture of the distribution ecosystem itself.

### **2.6.2 Connectivity expansion and structural limits**

South Africa has expanded internet access, but structural constraints remain. The Independent Communications Authority of South Africa (ICASA) reports that household internet access from any location increased from 75.3% in 2022 to 78.6% in 2023, indicating continued growth in connectivity. At the same time, the same ICASA report shows that the national average for fixed internet access at home was only 14.5%, which means most households still rely primarily on mobile connections rather than fixed broadband. That distinction matters because mobile access can support digital video consumption, but often under tighter cost and quality constraints than fixed-line connectivity (ICASA, 2025).

In bandwidth-constrained markets, services increasingly rely on adaptive bitrate delivery, lower-resolution options, offline viewing, and mobile-first packaging. Distribution competitiveness in such environments therefore depends not only on content availability, but also on whether delivery models are matched to connection realities.

### **2.6.3 Global connectivity gaps and the relevance for emerging markets**

The South African picture sits within a broader global pattern. ITU reports that 74% of the world's population was using the internet in 2025, meaning more than one-quarter remained offline. The same ITU data reported that connectivity remains strongly associated with income and geography, with Africa lagging well behind the global average. This matters because it reinforces that digital distribution is shaped not only by platform supply, but by unequal conditions of access, quality, and affordability across regions (ITU, 2025).

For emerging markets, the practical implication is that mobile-first and mixed-revenue models are often more feasible than subscription-dominated systems. That is relevant to South Africa's export strategy because target markets across Africa and parts of the Global South may be reachable, but often under different infrastructure conditions from those assumed in higher-income markets.

### **2.6.4 Industry responses and platform adaptation**

Industry strategy is already adapting to these realities. MultiChoice's 2024 reporting on Showmax emphasised the platform's relaunch, technology changes, and stronger digital positioning, while broader market commentary has linked African streaming growth to mobile-first packaging, flexible pricing, and partnerships that reduce user friction. These

developments reflect a broader pattern: in lower-bandwidth and price-sensitive markets, platforms increasingly compete through product design, not only through content libraries (MultiChoice Group, 2024; PwC South Africa, 2025).

For South Africa, this suggests that distribution strategy should not assume one dominant digital model. Instead, viable routes to market are likely to vary by territory, income profile, connectivity structure, and advertising environment. Export strategy should therefore be matched to market conditions, including device use, payment capacity, and broadband quality, rather than being framed in generic streaming terms.

### **2.6.5 Infrastructure, affordability and distribution strategy**

Data affordability and broadband quality are central determinants of distribution strategy. While digital platforms theoretically enable global reach, actual access is constrained by the affordability and reliability of connectivity.

In South Africa, the dominance of mobile internet access combined with relatively low fixed broadband penetration, creates a structurally uneven distribution environment. Lower-income and rural audiences face higher effective costs of streaming, leading to shorter sessions, lower-resolution viewing, and greater reliance on cost-mitigating strategies such as data-free platforms and shared access (NFVF Audience Research Report, 2026).

These conditions have direct implications for viable distribution models. Where affordability constraints are high, advertising-supported video-on-demand (AVOD), free ad-supported streaming television (FAST), and mobile-first distribution strategies are more likely to achieve scale. Conversely, subscription-based models (SVOD) are more viable in higher-income, urban markets with stable broadband access. International evidence supports this segmentation, demonstrating that emerging markets consistently adopt hybrid distribution ecosystems that reflect underlying infrastructure realities (ITU, 2025; UNCTAD, 2024).

### **2.6.6 Territorial implications for distribution strategy**

Infrastructure, affordability, and connectivity conditions vary significantly across South African contexts and comparable emerging markets. These differences materially shape viable distribution models and audience behaviour (ITU, 2025; UNCTAD, 2024).

**Table 1:** Distribution strategy by connectivity and settlement type

Dimension	Rural Markets	Peri-Urban Markets	Urban Markets
<b>Connectivity Type</b>	Mobile-only, intermittent	Mobile + shared Wi-Fi	Fixed broadband + mobile
<b>Data Affordability</b>	High constraint	Moderate constraint	Lower constraint
<b>Device Profile</b>	Smartphone-dominant	Smartphone + some smart TV	Multi-device (TV, laptop, mobile)
<b>Viewing Behaviour</b>	Short-form, episodic, low data usage	Mixed viewing (short + long form)	Long-form, high-frequency streaming
<b>Session Duration</b>	Short, intermittent	Medium	Long, continuous
<b>Preferred Platforms</b>	YouTube, TikTok, AVOD	AVOD + limited SVOD	SVOD, Pay-TV, hybrid
<b>Content Access Mode</b>	Download / offline viewing	Mixed (online + offline)	Real-time streaming
<b>Monetisation Model</b>	AVOD, zero-rated, data-sponsored	Hybrid (AVOD + SVOD)	SVOD, subscription bundles
<b>Key Constraints</b>	Data cost, bandwidth, device limitations	Cost sensitivity, inconsistent quality	Subscription fatigue, competition
<b>Optimal Distribution Strategy</b>	Mobile-first, low-resolution, short-form packaging	Flexible, hybrid distribution models	Premium, high-quality, multi-platform releases

Source: Birguid analysis

In summary:

- **Rural markets** require access-led strategies, prioritising affordability, offline access, and mobile optimisation.
- **Peri-urban markets** represent a transition segment, requiring hybrid distribution models that balance cost and quality.
- **Urban markets** support premium monetisation models but are highly competitive and require strong discoverability and marketing.

This segmentation aligns with global evidence that distribution competitiveness depends not only on content quality, but on alignment with infrastructure realities (Lobato, 2019; ITU, 2025).

### **2.6.7 Implications for South Africa**

Infrastructure, affordability, and connectivity are primary determinants of how, where, and to whom South African audiovisual content can be distributed. The reviewed literature reveals that access is structurally uneven, shaped by mobile-first connectivity, constrained data affordability, and differentiated device ecosystems. As a result, distribution viability is segmented across rural, peri-urban, and urban contexts, each with distinct behavioural and commercial dynamics.

Section 2.6.6 confirms that these differences are fundamental to distribution outcomes. Rural markets require access-led strategies centred on low-bandwidth delivery, short-form formats, and advertising-supported or zero-rated models. Peri-urban markets require hybrid approaches that balance affordability with improving access. Urban markets support premium, multi-device consumption and subscription models, but are more competitive and require stronger discoverability and positioning.

For South Africa's export strategy, this means competitiveness cannot be achieved through a single distribution model. Instead, success depends on aligning content packaging, platform selection, and monetisation models with the infrastructure realities of target markets. This requires a shift from a production-led export mindset to a distribution-led strategy, where connectivity conditions, device usage, and payment capacity are treated as core strategic variables.

This has direct implications for market prioritisation. Many growth markets across Africa and the Global South share characteristics with South Africa's rural and peri-urban segments, offering scale but requiring affordability-led, mobile-first strategies. In contrast, higher-income markets with strong broadband penetration support higher-value distribution, but demand stronger packaging, marketing, and competitive positioning.

Overall, South Africa's distribution competitiveness will depend on its ability to operate across multiple distribution environments simultaneously. This includes:

- Developing mobile-first, low-bandwidth pathways for access-constrained markets
- Building hybrid monetisation models combining advertising and subscription
- Strengthening premium content packaging and discoverability for competitive markets

Ultimately, export success depends on infrastructure realism. Where distribution models are aligned with connectivity conditions, South African content can achieve both reach and

sustainability and where they are not, even strong content may fail to convert into meaningful audience or commercial outcomes.

## **2.7 Device ecosystems and consumption behaviour**

Device availability is a critical structural determinant of audiovisual consumption, shaping not only access to content but also the format, frequency, and monetisation pathways of viewing behaviour. Existing findings confirm that smartphones are the most widely available device across income groups, followed by smart televisions and laptops, reflecting a mobile-first access environment with emerging multi-device ecosystems (NFVF Audience research report, 2026).

However, device availability does not operate as a neutral enabler. Rather, it actively structures how audiences engage with content. Mobile-dominant environments are associated with shorter viewing sessions, higher consumption of short-form video, and greater reliance on free or ad-supported platforms. In contrast, access to smart televisions and larger screens is associated with longer viewing sessions, increased engagement with long-form content, and higher likelihood of subscription-based consumption (Lobato, 2019; Napoli, 2021; NFVF Audience Research Report, 2026). This relationship reflects a broader causal chain within digital media systems:

**Device access → Platform access → Viewing behaviour → Monetisation model**

In bandwidth-constrained and mobile-first environments, this chain tends to favour:

- Short-form and episodic content formats
- Social and algorithm-driven discovery pathways
- Advertising-supported or zero-rated distribution models

Conversely, in multi-device, broadband-enabled environments, the system supports:

- Long-form, high-production-value content
- Subscription-based streaming services
- More stable and predictable monetisation structures

For South Africa, this implies that distribution strategies must be calibrated not only to audience preferences, but to device ecosystems and their associated behavioural patterns. Failure to align content packaging, format, and distribution channels with device realities risks limiting both reach and monetisation potential.

## **2.8 Policy and financing instruments influencing export competitiveness**

Policy and financing instruments play a central role in shaping audiovisual competitiveness. Across the global screen economy, governments use incentives, co-production frameworks, distribution support, and export-promotion tools to stimulate production, improve international market access, build local capability, and strengthen long-term value retention. The literature increasingly reveals that the more competitive audiovisual ecosystems are those that combine investment attraction with circulation support, rather than relying on production incentives alone (European Audiovisual Observatory, 2024; UNESCO, 2022, 2024). Thus, policy matters because it can convert audiovisual activity into durable export performance.

### **2.8.1 Production incentives as competitiveness tools**

Rebates, tax credits, and grants are widely used to attract international productions, stimulate local spend, build skills, and deepen supplier ecosystems. Their strategic value lies in bringing in projects, creating spillovers such as technical upgrading, employment, and exposure to international production systems (UNESCO, 2024). Simultaneously, international experience shows that incentive value alone does not determine competitiveness. Administrative certainty, approval speed, regulatory clarity, and the wider production ecosystem all affect whether a jurisdiction is seen as investable. In practice, producers compare territories on a bundled basis: headline rebate rate, rules, reliability, infrastructure, and ease of execution.

### **2.8.2 South Africa's incentive framework**

South Africa's incentive framework remains broadly competitive in nominal terms. The DTIC's foreign film and television production and post-production incentive provides a 25% rebate on qualifying South African production expenditure for location shooting, with additional uplifts for post-production spend, including an extra 5% where higher post-production thresholds are met. The domestic production incentive provides a 35% rebate on qualifying South African production expenditure, with an additional 5% under specified black participation and procurement conditions. These measures are intended to attract investment, strengthen domestic capability, and support sector development (The DTIC, n.d.). This incentive structure has helped South Africa maintain a reputation as one of Africa's leading production locations. However, in a globally competitive environment, maintaining nominal competitiveness is only part of the challenge. Predictability and implementation quality are equally important.

### **2.8.3 Administrative efficiency and policy credibility**

Recent developments in South Africa show why policy credibility matters. Reuters reported that film industry protests in January 2026 were driven by concerns over delays in the stalled incentive approval system, with industry participants arguing that these delays were

threatening local productions and undermining confidence. Where approvals are delayed or programme administration becomes uncertain, financing risk rises and projects become more vulnerable to relocation or restructuring (Reuters, 2026).

This matters for export competitiveness as well as production attraction. When financing becomes uncertain, producers may have less leverage in negotiations and may surrender rights earlier in the chain to secure cash flow or completion guarantees. In that sense, administrative instability can weaken downstream value capture, not only upstream production activity. Policy credibility is therefore part of distribution competitiveness, because it affects the confidence with which projects are financed, packaged, and taken to market.

#### **2.8.4 Distribution and export-promotion support**

Distribution support and export-promotion mechanisms are needed to help content reach buyers, festivals, markets, and audiences. These measures can include grants for international marketing, festival participation, sales support, subtitling, dubbing, and market-facing packaging. Their importance lies in bridging the gap between content completion and actual circulation (UNESCO, 2022, 2024).

In South Africa, the NFVF already plays an important role here. Its marketing and distribution funding supports South African independent filmmakers and local distributors with strategies to promote and distribute completed products across different platforms, while its festival and market support is explicitly aimed at growing markets and increasing distribution opportunities for South African films. The NFVF also frames its broader mandate as including development, production, marketing, distribution, and international representation of South African work (NFVF, n.d., 2025).

#### **2.8.5 Strategic implications for South Africa**

Stronger audiovisual competitiveness requires a policy mix that combines production incentives, administrative credibility, and targeted circulation support. Production incentives help build capacity and attract projects, but complementary support for marketing, festivals, localisation, sales engagement, and route-to-market development is needed if local content is to generate stronger export outcomes. For South Africa, the strategic issue is, therefore, not whether policy support exists, but whether it is sufficiently integrated across the full value chain from production to international monetisation.

In practical terms, this means that South Africa's policy architecture should be judged not only by the number of projects it attracts, but by whether it improves the country's ability to retain

rights, support export-ready packaging, secure international buyers, and grow downstream revenues over time.

## **2.9 Conclusion**

Across both global and local evidence, a central conclusion emerges. Competitiveness is increasingly determined by how effectively content is distributed, discovered, monetised, and translated into long-term value across international markets (UNCTAD, 2024; UNESCO, 2023). While South Africa has established a credible production ecosystem with recognised creative and technical strengths, this capability has not translated into proportionate distribution outcomes. Weak theatrical performance, uneven digital monetisation, and modest export scale reflect a structural gap between production and circulation.

This gap is reinforced by structural shifts in both global markets and local audience behaviour. The transition to platform-led ecosystems has reshaped distribution from a linear, window-based system into a more complex environment driven by platform economics, algorithmic discoverability, and multi-territory licensing strategies (Cunningham & Craig, 2021; Lobato, 2019). At the same time, South African audiences have shifted decisively toward home-based and digital viewing, increasing reliance on streaming and digital platforms while raising the requirements for content readiness, packaging, and visibility.

The literature further demonstrates that distribution is inherently multi-channel. Sales agents, film markets, broadcasters, streaming platforms, festivals, diaspora networks, and technical intermediaries each play complementary roles in enabling international circulation. As a result, competitiveness depends on the ability to navigate and integrate these pathways, rather than relying on a single route to market. Central to this is distribution readiness, where rights clarity, technical compliance, localisation, metadata, and marketing assets determine whether content can be licensed, delivered, and discovered. Weaknesses in these areas directly constrain tradability and limit value capture.

Recent analysis also highlights that infrastructure, affordability, and device ecosystems are not peripheral constraints, but core determinants of distribution strategy. Uneven connectivity, mobile-first access, and data affordability pressures segment markets into rural, peri-urban, and urban contexts, each requiring distinct distribution approaches. In this environment, viable models range from mobile-first, advertising-supported pathways in access-constrained markets to hybrid and premium subscription models in better-connected segments. This reinforces that distribution strategy must be aligned not only to content and platforms, but to the connectivity and consumption realities of target audiences.

Policy and institutional alignment remains a critical enabling factor. International evidence shows that competitive industries combine production incentives with distribution support, export promotion, and administrative efficiency. In South Africa, policy credibility, particularly the predictability and administration of incentives affects not only production activity, but also downstream distribution outcomes by shaping financing structures, negotiation power, and investor confidence (UNESCO, 2024).

Taken together, South Africa's challenge is not one of production capability, but of **conversion**: the ability to translate creative output into sustained international circulation, stronger licensing outcomes, improved rights retention, and increased export earnings. Addressing this challenge requires an integrated approach that:

- Strengthens multi-channel distribution pathways
- Builds industry-wide distribution readiness capabilities
- Aligns strategy with infrastructure, affordability, and device realities
- Enhances policy coordination and administrative credibility

Ultimately, long-term competitiveness will depend on South Africa's ability to operate as a distribution-led system, where production, readiness, infrastructure, and policy are aligned to convert creative strength into scalable and sustainable market outcomes.

## CHAPTER 3: GLOBAL BENCHMARKING AND COMPARATIVE ANALYSIS

### 3.1 Introduction

International evidence consistently demonstrates that successful audiovisual industries do not rely on a single policy instrument or market mechanism to achieve global competitiveness. Rather, they are characterised by integrated ecosystems in which production incentives, export promotion programmes, sales infrastructure, festival participation, co-production networks, and institutional support mechanisms operate in a coordinated and mutually reinforcing manner (European Audiovisual Observatory, 2023; UNESCO, 2022). Within such systems, distribution is not treated as a downstream activity, but as a strategic function embedded across the value chain, enabling content to move efficiently from production into international markets.

Leading screen industries provide clear evidence of how these coordinated systems function in practice. The United Kingdom's Global Screen Fund, for example, supports international development, co-production, distribution, and promotional activities, thereby strengthening the global reach and commercial performance of UK content (British Film Institute, 2023). Similarly, Telefilm Canada delivers integrated support across festival participation, market access, and international marketing, reinforcing the visibility and tradability of Canadian audiovisual works (Telefilm Canada, 2024). These examples highlight a critical insight: export success is not driven by production volume alone, but by the strength, coherence, and execution of the institutional mechanisms that enable global circulation and market access.

Importantly, the literature also cautions against benchmarking exclusively against large or high-income markets. Emerging and mid-sized screen industries often operate under structural conditions more comparable to those faced by South Africa, including smaller domestic markets, constrained financing environments, and a greater reliance on international partnerships. In this context, countries such as the Republic of Korea demonstrate how deliberate export-oriented strategies, supported by coordinated policy frameworks and institutional alignment, can significantly expand global reach and cultural influence (UNESCO, 2022, 2024). These cases show that scale is not the primary determinant of success; rather, it is the strategic alignment between production capability, distribution systems, and export promotion architecture that drives international competitiveness.

Against this backdrop, this chapter introduces the benchmarking framework used to assess South Africa's position within the global audiovisual distribution ecosystem. The framework evaluates competitiveness across five interrelated dimensions: market access power,

distribution readiness, deal sophistication and value retention, infrastructure feasibility, and policy and ecosystem support. Together, these dimensions provide a structured basis for comparing South Africa with selected international markets and for identifying the systemic strengths and constraints that shape its ability to convert production capacity into sustained international circulation, monetisation, and long-term value capture.

### **3.2 Benchmarking framework for distribution competitiveness**

As mentioned in section 3.1, the benchmarking framework is structured around five interrelated dimensions that correspond directly with the study's research questions:

**1) Market access power:** Assesses the strength and diversity of pathways through which locally produced content can reach international buyers and audiences. These pathways include sales agents, film markets, broadcasters, streaming platforms, festival circuits, and co-production networks. The strength of these pathways determines whether producers can consistently connect projects with international distribution partners. In South Africa, the domestic theatrical market remains dominated by international productions, particularly Hollywood releases, which account for the majority of box office revenue (NFVF, 2025). As a result, local producers depend heavily on international distribution channels, including co-production agreements, international sales agents, and digital platforms. Key indicators for benchmarking this dimension include:

- a) Number of international licensing deals concluded by territory
- b) Participation in major film markets (for example, Cannes Marché du Film, American Film Market, Durban FilmMart)
- c) Presence of national content on global streaming platforms
- d) Strength of international co-production networks

Industry organisations such as the Durban FilmMart Institute emphasise that co-production markets play a critical role in connecting African filmmakers with global buyers and partners (Durban FilmMart Institute, 2025).

**2) Distribution readiness:** Evaluates whether content produced within a national industry is legally and technically prepared for international exploitation. As discussed in Section 2.5, distribution readiness includes rights management, chain-of-title clarity, technical deliverables, localisation workflows, metadata standards, and quality-control compliance. South Africa possesses several strengths in this area, including internationally competitive production infrastructure and post-production capabilities (University of Cape Town, 2020). However, readiness for international distribution also requires institutional systems that ensure projects can consistently meet international delivery standards. Indicators for this dimension include:

- a) Time required to clear chain-of-title and rights documentation

- b) Compliance with international delivery standards (for example, IMF packaging, platform-specific QC requirements)
- c) Availability of localisation services such as subtitling, dubbing, and accessibility
- d) Metadata and digital asset management capabilities

Research on online distribution for South African feature films suggests that legal and technical readiness significantly influences whether projects secure international distribution opportunities (Boshoff & Botha, 2023).

- 3) **Deal sophistication and value retention:** Refers to the ability of producers and rights holders to negotiate favourable licensing arrangements and retain long-term value from intellectual property. This includes ownership structures, exploitation rights across territories and windows, revenue-sharing models, and financing mechanisms that enable producers to maintain IP control. In South Africa, industry stakeholders have frequently highlighted the limited retention of intellectual property by local creators, particularly in projects financed through broadcaster commissions or international partnerships (Trade and Industrial Policy Strategies [TIPS], 2019). Where IP ownership is transferred to external partners, much of the long-term economic value generated by successful productions accrues outside the domestic industry. Indicators for this dimension include:

- a) Percentage of projects retaining locally controlled intellectual property
- b) Distribution of revenues across territories and release windows
- c) Availability of gap-financing mechanisms enabling rights retention
- d) Adoption of emerging monetisation models such as AVOD and FAST platforms

Strengthening deal sophistication is widely recognised as essential for improving long-term economic returns from national audiovisual industries (UNESCO, 2024).

- 4) **Infrastructure feasibility:** Examines whether domestic and target export markets possess the technological infrastructure required for large-scale content distribution and consumption. Key factors include internet penetration, broadband affordability, device ecosystems, and digital payment systems. In South Africa, video streaming accounts for a growing share of internet data consumption, reflecting the increasing importance of digital distribution platforms (PwC South Africa, 2025). However, affordability constraints and uneven connectivity continue to influence the viability of different distribution models. Indicators for this dimension include:

- a) Internet penetration and mobile connectivity rates
- b) Expansion of 4G and 5G networks
- c) Adoption of streaming platforms and mobile-first viewing behaviour
- d) Growth of the national OTT and digital media market

These variables influence which digital distribution models are commercially viable across different markets.

5) **Policy and ecosystem support:** Assesses the strength and reliability of policy instruments and institutional support structures that facilitate international distribution. These include production incentives, co-production treaties, export promotion programmes, distribution funding mechanisms, and industry intelligence systems. South Africa's audiovisual sector benefits from policy instruments such as the Foreign Film and Television Production Incentive administered by the DTIC, which provides rebates for qualifying production expenditure (The DTIC, n.d.). These incentives have helped attract international productions and stimulate domestic industry activity. However, recent industry discussions have highlighted concerns regarding administrative delays in rebate approvals, which can undermine investor confidence and reduce South Africa's competitiveness relative to other production destinations (Reuters, 2026). Benchmark indicators include:

- a) Speed and reliability of incentive disbursement
- b) Number and effectiveness of co-production treaties
- c) Availability of export promotion funding
- d) Institutional capacity for international market intelligence

Policy stability and administrative efficiency therefore represent critical components of a competitive audiovisual ecosystem.

### **3.3 From framework to indicators**

To support comparative analysis, the benchmarking framework must be translated into measurable indicators. Effective benchmarking systems typically combine quantitative metrics with structured qualitative assessment, particularly in industries such as audiovisual distribution where commercial deal structures are often confidential (UNCTAD, 2024).

Indicative indicators for the benchmarking dashboard include:

- 1) Number and value of international licensing deals by territory
- 2) Number of projects supported for international promotion or festival participation
- 3) Proportion of projects retaining exploitable intellectual property rights
- 4) Number of localisation versions delivered per project
- 5) Compliance rates with technical delivery standards
- 6) Platform acquisition rates for locally produced content
- 7) Export revenues from audiovisual and related creative services
- 8) Levels of public funding allocated to international distribution support

These indicators provide a structured basis for comparing distribution competitiveness across benchmark countries and for tracking sector performance over time.

### 3.4 Comparative logic for case studies

Comparator markets were selected to represent a spectrum of distribution competitiveness and market structures:

- 1) **The USA:** global frontier benchmark
- 2) **Republic of Korea:** upper-middle export model
- 3) **Brazil:** Global South comparator slightly above South Africa’s export tier
- 4) **Nigeria:** African peer market

Together, these cases illustrate different pathways to international audiovisual competitiveness. The USA represents the most advanced global distribution ecosystem. Korea demonstrates how coordinated cultural export strategies can expand global reach. Brazil provides a middle-income Global South example of export-promotion architecture. Nigeria illustrates how alternative distribution models can achieve scale under emerging-market conditions.

### 3.5 Country case profiles and applied benchmarking

Building on the framework developed in Section 3.2, this section applies the benchmarking lens to selected comparator countries to identify institutional and market practices most relevant to South Africa’s international distribution ambitions.

**Table 2:** Comparator framework and strategic role

Comparator	Strategic role	Key relevance
USA	Global frontier benchmark	Demonstrates the highest level of ecosystem integration between production, finance, distribution, and IP exploitation
Republic of Korea	Upper-middle export model	Illustrates how coordinated export policy and cultural promotion can build global visibility
Brazil	Global South comparator	Shows how export promotion and co-production architecture can strengthen international circulation
Nigeria	African peer	Demonstrates alternative distribution pathways and large-scale production ecosystems
South Africa	Benchmark subject	Strong production capacity but weaker conversion into export value

Source: Birguid analysis

### **3.5.1 United States of America**

The USA represents the global frontier benchmark for audiovisual distribution competitiveness. While not directly comparable to South Africa in terms of scale, the U.S. ecosystem demonstrates the highest degree of integration between production, finance, distribution networks, and intellectual property exploitation. The Motion Picture Association reported that the global theatrical and home/mobile entertainment market reached approximately US\$99.7 billion in 2021, rising to US\$328.2 billion when pay television is included (Motion Picture Association, 2022). Within this ecosystem, U.S. studios and distributors maintain extensive global networks that enable content to circulate through theatrical, broadcast, and streaming channels simultaneously.

Across the benchmarking dimensions, the U.S. ecosystem demonstrates strong market access power through global distributor networks, high distribution readiness through standardised delivery workflows, and sophisticated deal structures enabling extensive monetisation of intellectual property. The U.S. industry also demonstrates the highest levels of value retention through franchising, syndication, merchandising, and cross-platform licensing.

From a policy perspective, the U.S. model is largely market-driven. Rather than relying heavily on national export promotion programmes, the industry benefits from strong capital markets, robust IP protection frameworks, and extensive state-level production incentives (National Conference of State Legislatures, 2025). For South Africa, the primary lesson is ecosystem integration: successful distribution systems depend on strong connections between finance, rights management, marketing, and global sales infrastructure.

### **3.5.2 Republic of Korea**

The Republic of Korea represents one of the most relevant comparators for South Africa because it demonstrates how coordinated policy support and export promotion can transform a national audiovisual industry into a globally recognised cultural exporter. The Korean Film Council (KOFIC) plays a central role in promoting Korean cinema internationally, supporting film exports, facilitating co-production partnerships, and strengthening global distribution networks (Korean Film Council, n.d.). This institutional support has contributed to the global expansion of Korean cultural industries, often described as the “Korean Wave” or *Hallyu* (UNESCO, 2022).

Korea’s success reflects strong performance across several benchmarking dimensions. Its market access power has expanded through festival circulation, international sales, and global

streaming distribution. Policy and ecosystem support remain particularly strong, with KOFIC providing export promotion, international marketing support, and foreign-location incentives. For South Africa, Korea illustrates how intentional export strategies and institutional coordination can significantly expand global market reach.

### **3.5.3 Brazil**

Brazil represents a Global South comparator that operates under economic conditions more comparable to those faced by South Africa while demonstrating stronger export promotion mechanisms. The programme Cinema do Brasil functions as an international promotion initiative aimed at increasing the visibility of Brazilian films in global markets and supporting Brazilian companies in international distribution activities (Cinema do Brasil, n.d.). UNESCO similarly identifies Brazilian audiovisual policy as an example of how coordinated export promotion initiatives can strengthen international circulation of national content (UNESCO, n.d.).

Brazil provides an example of how middle-income markets can improve global distribution through structured export promotion, international co-production frameworks, and sustained participation in global film markets. For South Africa, the Brazilian experience suggests that targeted institutional support for international promotion and co-production can significantly improve global visibility.

### **3.5.4 Nigeria**

Nigeria serves as the key African peer comparator within the benchmarking framework. UNESCO estimates that Nigeria produces approximately 2,500 films annually, making Nollywood one of the most prolific film industries globally by output (UNESCO, 2023). Historically, Nigeria's industry has relied on alternative distribution pathways, including direct-to-video circulation, informal markets, and increasingly digital streaming platforms. While these systems enabled rapid production growth and widespread audience reach, they also created challenges in terms of rights management and value retention.

Nigeria provides an important lesson for South Africa: strong audience demand and large production volumes do not automatically translate into sustainable economic returns. Effective monetisation requires formal distribution systems, enforceable copyright protections, and institutional support for international licensing.

### **3.6 Initial benchmarking of South Africa against the comparator cases**

#### **3.6.1 South Africa's current position**

South Africa enters the benchmarking exercise with a credible and relatively mature production-services base. It has strong technical capability, attractive filming locations, and formal incentive instruments that continue to support production competitiveness. The DTIC provides a 25% rebate on Qualifying South African Production Expenditure (QSAPE) for foreign location shooting, with an additional 5% available under specified post-production and black-owned service-company conditions. The same framework also provides post-production incentives at higher expenditure thresholds (DTIC, n.d.).

However, the central issue is whether South Africa can convert production strength into sustained distribution, monetisation, and retained value. NFVF audience research found that stakeholders perceived weaker demand for South African film and video content than for foreign content, while the NFVF's South African Box Office Report 2023 shows that local films accounted for only 0.9% of total South African box office gross in 2023 (NFVF, 2022, 2025). This suggests a structural conversion problem: South Africa can produce and service effectively but remains less successful at turning that capability into strong domestic and international distribution outcomes.

The digital environment presents both opportunity and constraint. PwC projects continued OTT growth in South Africa and notes that ad-supported models are helping platforms reach broader and more price-sensitive audiences (PwC South Africa, 2025). This is important because South Africa's digital environment is stronger than that of many African peers, yet affordability still limits the reach of premium subscription-led models. In practical terms, this means that South Africa's future distribution model is likely to depend increasingly on hybrid monetisation rather than premium subscription streaming alone (PwC South Africa, 2025).

An additional complexity within South Africa's digital distribution environment is the growing role of unlicensed and informal digital distribution channels. In a highly price-sensitive and data-constrained market, audiences increasingly rely on free or low-cost access pathways, including open social platforms and informal content circulation. While these channels improve accessibility and audience reach, they also weaken monetisation, reduce IP value retention, and undermine formal distribution revenues, particularly for independent producers.

South Africa, therefore, occupies an intermediate position in the benchmark set. It is stronger than most African peers on technical and formal production capability, but weaker than the

leading comparator markets on systematised export promotion, rights retention, and structured international market-access pathways. Recent industry protests over stalled incentive administration also indicate that reliability and execution risk have become part of the competitiveness problem, rather than remaining peripheral governance concerns (Reuters, 2026).

### **3.6.2 Comparator policies and enablers by country**

To interpret South Africa's position more clearly, it is useful to distinguish between formal policy instruments and broader ecosystem enablers. Policy instruments shape investment, participation, and support, while ecosystem enablers shape the practical ability of content to circulate, secure visibility, and retain value. Table 3 summarises the main comparative insights.

**Table 3:** Policies and ecosystem enablers relevant to the benchmark

Country	Core policies / instruments	Main ecosystem enablers	Relevance to South Africa
USA	State-level film and television incentive programmes; strong IP and contract environment; studio-distributor system	Global studios, sales agencies, streamers, talent agencies, legal depth, metadata and localisation capacity	Shows what mature commercial integration looks like when rights, finance, distribution, and technology are deeply aligned
Republic of Korea	KOFIC support; location incentive programme; overseas market and cultural promotion	Strong export institutions, subtitling and promotion support, co-production facilitation, Hallyu spillovers	Shows how public institutions can intentionally build export readiness, visibility, and IP scaling
Brazil	Cinema do Brasil promotion model; internationalisation support; ANCINE-linked institutional backing	Public-private export coordination, market delegations, producer promotion, and structured internationalisation	Demonstrates how a middle-income market can improve circulation through dedicated export architecture
Nigeria	Creative-economy ministry support; anti-piracy emphasis; growing formalisation	Large domestic and diaspora audience, digital-first circulation, strong cultural resonance, high output volume	Shows African scale potential, but also the risks of weak value capture under informal circulation
South Africa	dtic incentives; NFVF funding and promotion; co-production treaties; local production support	Strong crews, locations, service capability, post-production competence, and continental reputation	Strong on production-side competitiveness, but weaker on export-promotion architecture and rights-value retention

*Note: Synthesised from official and institutional sources, including the Department of Trade, Industry and Competition, the Korean Film Council, Cinema do Brasil, and the Federal Ministry of Arts, Culture, Tourism and Creative Economy (Cinema do Brasil, n.d.; Department of Trade, Industry and Competition, n.d.; Federal Ministry of Arts, Culture, Tourism and Creative Economy, n.d.; Korean Film Council, n.d.; National Conference of State Legislatures, 2025).*

### 3.6.3 Indicator-by-indicator comparison

A key requirement of this study is that benchmarking should move beyond broad descriptors such as “strong” or “weak” and speak directly to the study indicators. Table 4 provides an initial directional benchmark for fieldwork validation rather than a final statistical scorecard. This is

consistent with the caution required when using trade, institutional, and market evidence to assess audiovisual competitiveness across countries (UNCTAD, 2024).

**Table 4:** Initial comparison against the study indicators

Indicator	USA	Republic of Korea	Brazil	Nigeria	South Africa
Number/value of international licensing deals	Very high	High	Moderate	Moderate-high	Moderate
Projects supported for international promotion / festival participation	High (largely market-led)	Very high	High	Moderate	Moderate
Proportion of projects retaining exploitable IP rights	Very high	High	Moderate	Moderate-low	Moderate-low
Localisation versions delivered per project	Very high	High	Moderate	Moderate	Moderate-low
Compliance with technical delivery standards	Very high	High	Moderate-high	Moderate	High in service work; moderate overall
Platform acquisition rates for locally produced content	Very high	Very high	High	High	Moderate-high
Export revenues from audiovisual and related creative services	Very high	High	Moderate	Moderate	Moderate-low
Public funding allocated to international distribution support	Low-moderate direct export support, but strong indirect ecosystem support	High	Moderate-high	Moderate	Moderate

*Note: This is an author synthesis based on comparator evidence and is intended as an initial benchmark pending fieldwork validation. It reflects the relative maturity of the ecosystem surrounding each indicator rather than a final numerical score.*

*Source: Birguid analysis*

### 3.6.4 Heatmap of distribution competitiveness

The heatmap below translates the comparative evidence into a simpler view of structural competitiveness across the five benchmark dimensions.

**Table 5:** Initial heatmap of distribution competitiveness

Dimension	USA	Republic of Korea	Brazil	Nigeria	South Africa
Market access power	Very high	High	Moderate-high	Moderate-high	Moderate / uneven
Distribution readiness	Very high	High	Moderate	Low-moderate	Moderate / mixed
Deal sophistication and value retention	Very high	High	Moderate	Low-moderate	Moderate-low
Infrastructure feasibility	Very high	Very high	Moderate	Low-moderate	Moderate
Policy and ecosystem support	High	High	Moderate-high	Moderate	Moderate, but reliability risk

#### **Interpretation**

*High = strong structural competitiveness*

*Moderate = moderate competitiveness / partial readiness*

*Low = material constraint or uneven readiness*

*Note: Ratings reflect the maturity of the ecosystem relevant to distribution competitiveness rather than production capability alone.*

*Source: Birguid analysis*

### 3.6.5 South Africa's position by benchmark dimension

Table 6 summarises South Africa's main strengths, its most binding constraints, and the principal lessons that emerge from the comparator cases.

**Table 6:** South Africa’s strengths, constraints, and comparator lessons

Benchmark dimension	South Africa’s relative strength	Main constraint	Comparator lesson
Market access power	Recognised production destination with some platform visibility	Export pathways are not sufficiently systematised across producer tiers	Korea and Brazil show the value of dedicated export-promotion architecture
Distribution readiness	Strong technical servicing base and formal capability	Independent producers face readiness gaps in rights packaging, metadata, localisation, and platform delivery	Korea and Brazil show stronger outward-facing readiness support
Deal sophistication and value retention	Capable producers and service firms exist	Rights fragmentation and weak bargaining power reduce long-term value capture	Korea shows stronger IP-oriented export logic; the United States shows full monetisation ecosystems
Infrastructure feasibility	Better formal connectivity and production infrastructure than many African peers	Consumer affordability constrains premium digital scaling	Nigeria shows the importance of accessible models; PwC points to hybrid and ad-supported growth routes
Policy and ecosystem support	Competitive incentives and a statutory national agency exist	Administrative inconsistency and weaker distribution-side support reduce credibility	Brazil and Korea show that predictability and market mobilisation are themselves competitiveness factors

*Note: Synthesised from NFVF, the dtic, PwC, Reuters, and comparator-country institutional sources (DTIC, n.d.; Korean Film Council, n.d.; NFVF, 2022, 2025; PwC South Africa, 2025; Reuters, 2026; UNESCO, 2022, 2023; UNESCO, n.d.).*

*Source: Birguid analysis*

### 3.7 Comparative synthesis

The initial benchmarking suggests that South Africa has three important comparative strengths:

- 1) It has credible production and servicing capability, including strong infrastructure, skilled crews, post-production competence, and international location attractiveness (DTIC, n.d.).

- 2) It has a real, though under-scaled, export-facing base, which means it is not starting from zero (UNCTAD, 2024).
- 3) It has formal policy instruments that can support production and inward investment (DTIC, n.d.). These are meaningful assets and provide a base for future growth.

At the same time, the benchmark points to three major structural weaknesses:

- 1) South Africa lacks sufficiently systematised export pathways across the producer base.
- 2) South Africa appears weaker on deal sophistication and rights retention, especially where service-led work or platform dependence reduces long-run intellectual property value capture (NFVF, 2022; UNESCO, 2024), and
- 3) South Africa faces an ongoing tension between digital growth potential and affordability constraints, which means that its distribution strategy must be grounded in realistic monetisation models rather than assumptions of premium streaming scale alone (NFVF, 2022; PwC South Africa, 2025).

In summary, South Africa currently performs more strongly as a high-quality production and services hub than as a fully systematised international distribution and export market. The issue, therefore, whether South Africa can produce and can convert its production capability into sustained market access, stronger rights retention, and greater export value.

### **3.8 Initial recommendations for South Africa**

Based on the benchmark analysis, six initial recommendations emerge:

- 1) South Africa should build a more deliberate audiovisual export-promotion architecture focused on sales support, market access, and circulation rather than production support alone. The comparator evidence from Korea and Brazil shows that active market mobilisation, festival support, and co-production facilitation can materially improve international visibility and tradability (Cinema do Brasil, n.d.; Korean Film Council, n.d.; UNESCO, 2022).
- 2) A greater share of public and institutional support should be directed toward rights-bearing and export-ready projects. This would help move South Africa beyond service-led success toward stronger retained value and more durable intellectual property positions. The benchmark cases suggest that long-run competitiveness depends not only on getting projects made, but also on retaining the rights structures that support downstream monetisation across territories and windows (National Film and Video Foundation, 2022; UNESCO, 2024).
- 3) South Africa should establish a distribution-readiness support package for independent producers. This should include support for localisation, metadata preparation, legal

packaging, rights management, sales materials, and platform-compliant delivery. NFVF evidence suggests that readiness for export remains uneven across the independent producer base, and the earlier literature review shows that these gaps directly affect international tradability (National Film and Video Foundation, 2022).

- 4) South Africa should strengthen its regional African distribution strategy. Nigeria demonstrates both the scale and the cultural relevance of African screen markets, but also the risks of weak monetisation under informal or poorly protected distribution systems (Federal Ministry of Arts, Culture, Tourism and Creative Economy, n.d.; UNESCO, 2023). Regional expansion should therefore be accompanied by stronger rights protection, contracting discipline, and payment-enforcement mechanisms.
- 5) South Africa should improve predictability and administrative credibility in the incentive system. Predictability is itself a competitiveness factor, and recent protests suggest that uncertainty in approvals and administration is already weakening investor and industry confidence (Reuters, 2026). A competitive headline incentive loses value if it is not administered consistently and transparently.
- 6) South Africa's distribution strategy should be aligned more explicitly to affordability realities and hybrid consumption patterns. Given continued OTT growth alongside price sensitivity, hybrid models that combine subscription, advertising, mobile-first consumption, transactional access, and regional syndication are likely to be more realistic than reliance on premium subscription streaming alone (PwC South Africa, 2025).

Taken together, these recommendations point to a broader strategic conclusion. South Africa does not need to rebuild its production base from scratch. Rather, it needs to strengthen the institutional and commercial systems that connect production to international circulation, monetisation, and retained value.

### **3.9 Conclusion**

The benchmarking analysis confirms a central finding established in the preceding literature review: distribution competitiveness is a system-level outcome, shaped by the interaction between market access pathways, distribution readiness, deal structures, infrastructure conditions, and policy support. The five-dimensional framework applied in this chapter provides a practical lens through which these interdependencies can be assessed and compared across markets.

Across the comparator cases, a consistent pattern emerges. The most competitive audiovisual ecosystems whether large-scale (United States), export-oriented (Republic of Korea), or strategically positioned mid-sized markets (Brazil) demonstrate strong alignment between

production capability, institutional support, and international distribution systems. These industries are characterised by:

- Systematised access to global markets
- High levels of distribution readiness and technical compliance
- Sophisticated deal-making capabilities with strong intellectual property retention
- Infrastructure-aligned distribution models
- Policy environments that support both production and circulation

By contrast, markets with weaker value capture outcomes, such as Nigeria in its earlier distribution models, illustrate that scale of production and audience reach alone are insufficient without formalised distribution systems and enforceable rights structures.

Positioned within this comparative landscape, South Africa emerges as a mid-tier, partially integrated distribution ecosystem. The country demonstrates clear strengths in production capability, technical infrastructure, and its ability to attract international projects. It also has a credible, though under-scaled, export base and established policy instruments that support production and industry development. However, the benchmarking analysis highlights three binding structural constraints:

- 1) **Limited systematisation of export pathways**, resulting in uneven and project-dependent access to international markets
- 2) **Weaknesses in deal sophistication and rights retention**, constraining long-term value capture from intellectual property
- 3) **A structural tension between digital growth and affordability**, requiring more adaptive and hybrid distribution strategies

These findings reinforce the study's central "conversion challenge": South Africa is effective at producing and servicing content, but less effective at consistently translating that capability into sustained international circulation, monetisation, and retained value.

Importantly, this challenge is addressable. Comparator markets show that improvements in distribution competitiveness do not depend solely on scale or resources, but on strategic coordination. Strengthening export promotion architecture, improving distribution readiness across the producer base, enhancing deal-making capability, aligning distribution models to infrastructure realities, and ensuring policy credibility can collectively shift industry outcomes. The initial recommendations represent elements of a broader system realignment. Taken together, they point toward a more deliberate and integrated distribution strategy in which:

- Export promotion is institutionalised and actively managed

- Rights-bearing, globally tradable content is prioritised
- Producers are supported to meet international readiness standards
- Regional and global market access pathways are expanded
- Policy instruments are implemented with consistency and predictability
- Distribution models are aligned to real-world consumption and affordability conditions

The benchmarking analysis, therefore, confirms that South Africa does not need to rebuild its production base. Rather, it must strengthen the systems that connect production to global markets. The path to improved competitiveness lies in shifting from a production-led model to a distribution- and value-led system, where content is not only created, but effectively positioned, circulated, monetised, and retained within the global audiovisual economy.

## CHAPTER 4: STAKEHOLDER INSIGHTS

### 4.1 Introduction

This chapter presents the primary evidence generated through the study's stakeholder fieldwork and interprets that evidence against the conceptual and comparative frames established in the preceding chapters. Chapter 1 defined the central problem as South Africa's weak international distribution competitiveness despite relatively strong production capability, while Chapters 2 and 3 demonstrated that competitiveness in the contemporary screen economy is determined less by production volume alone than by the strength of the systems that move content into circulation, discoverability, monetisation, and long-term rights value. This chapter tests that proposition against the lived experience of respondents across South Africa's audiovisual value chain.

The analysis is derived from the study's purposively sampled stakeholder interview dataset of 61 respondents. The achieved sample provides adequate breadth for a diagnostic chapter because it covers the principal ecosystem layers relevant to the study: production, broadcasting, distribution, festivals, technical delivery, marketing and analytics, and public support institutions. The purpose of this chapter is explanation, more specifically, why a market that is widely regarded as production-capable continues to struggle to convert capability into repeatable export performance, stronger bargaining outcomes, and durable value capture.

### 4.2 Respondent overview

Table 7 provides the distribution of respondents by sector.

**Table 7:** Respondent distribution by sector

Sector	n	%
Production-side	38	62.3
Broadcasting, platforms and media owners	6	9.8
Analytics, marketing, post-production and technical services	6	9.8
Festival, curation and market access	5	8.2
Public, industry support, infrastructure and education	4	6.6
Distribution, sales and exhibition	2	3.3
<b>Total</b>	<b>61</b>	<b>100.0</b>

*Note: "Production-side" combines production/service companies and independent creators because both occupy content-origination roles within the value chain.*

*Source: Birguid analysis*

The respondent base is clearly weighted toward the production segment, with production-side participants (including production/service companies and independent creators) accounting for 62.3% (n = 38) of the sample. By comparison, downstream and market-facing segments are less represented, with broadcasting/platforms and analytics/technical services each comprising 9.8% (n = 6), followed by festival/market-access stakeholders and public/support institutions at 6.6% each (n = 4), and distribution/sales/exhibition roles at 3.3% (n = 2).

**Table 8:** Detailed respondent categories and value-chain roles

Detailed category	n	%	Primary industry role
Production / services	28	45.9	Content origination, production execution, service production, co-production facilitation
Independent creative	10	16.4	Creator-led production, emerging IP development, self-distribution, audience building
Broadcast / platform	6	9.8	Commissioning, acquisition, aggregation, channel strategy, schedule/platform placement
Analytics / technical	6	9.8	Audience acquisition, campaign execution, metadata, post-production, delivery readiness
Festival / market	5	8.2	Curation, market signalling, festival exposure, access to buyers and partners
Public support / education	4	6.6	Funding facilitation, policy support, infrastructure, training, regional ecosystem support
Distribution / exhibition	2	3.3	Theatrical distribution, documentary circulation, rights exploitation, exhibition interface
Total	61	100.0	

Source: Birguid analysis

Table 8 provides a more granular breakdown of respondent categories and their respective roles across the audiovisual value chain. Again, the sample is anchored by production and content origination functions, with production/service companies accounting for 45.9% (n = 28) and independent creatives a further 16.4% (n = 10). Together, these segments reinforce the dominance of upstream activity within the respondent pool.

Midstream functions are represented by broadcast/platform stakeholders and analytics/technical service providers, each comprising 9.8% (n = 6). These roles are critical

within increasingly platform-driven ecosystems, particularly in commissioning, discoverability, audience targeting, and technical delivery readiness.

Downstream and market-access roles remain comparatively limited, with festival/market intermediaries and public/support institutions each accounting for 8.2% (n = 5), while public/support institutions represent 6.6% (n = 4). Most notably, distribution and exhibition stakeholders account for only 3.3% (n = 2). These categories are critical for circulation, rights exploitation, and market access, yet their smaller representation further underscores the relative thinness of South Africa’s downstream distribution and commercialisation layers.

It is important to note that the respondent pool was purposively sampled to ensure coverage across key value chain functions, and therefore the distribution should not be interpreted as statistically representative of the industry as a whole. However, the comparatively lower representation of downstream roles may itself be indicative of a structural gap within the sector, namely a more limited base of distribution, sales, and market-facing capabilities. This suggests a potential area for strategic intervention, where institutions such as the NFVF may need to prioritise investment in building downstream skills, capabilities, and institutional depth to strengthen overall sector performance and improve long-term distribution and export outcomes.

**Table 9:** Sample profile, metadata completeness, and interpretive limitations

Dimension	Evidence from dataset	Analytical implication
Planned vs achieved fieldwork volume	Target = 60–70; achieved = 61	Target achieved; strong coverage across value chain segments
Unit of analysis	Mixed individual and organisational entries	Respondent entry is the defensible analytic unit
Sector balance	62.3% production-side; 3.3% distribution/exhibition	Strong upstream diagnostic depth; limited buyer-side and sales-agent granularity

Source: Birguid analysis

Taken together, these sample characteristics and limitations frame the interpretation of the findings rather than weaken them. The dataset is intentionally expert-led and purposively constructed to provide explanatory depth across the value chain, rather than statistical generalisability. What is analytically significant is the consistency of perspectives across a structurally diverse respondent base. Despite differences in role, scale, and market positioning, respondents across production, broadcasting, distribution, festivals, public

institutions, and digital intermediaries converge on a common diagnosis: South Africa's primary constraint is not the ability to produce content, but the relative weakness of the systems required to distribute, position, and monetise that content at scale.

This convergence is particularly important in light of the sample composition. While the dataset is stronger on production-side insights and comparatively thinner on downstream distribution roles, the recurrence of this diagnosis across both upstream and downstream actors reinforces its validity as a structural, rather than perception-based, constraint.

### **4.3 Respondent insights**

Across the full interview set, respondents reiterated that the industry does not yet possess a sufficiently coordinated system for packaging, marketing, licensing, discovering, exporting, and monetising content at scale. The subsections below further unpack that diagnosis in relation to the study's objectives.

#### **4.3.1 Distribution models and market dynamics**

Respondents consistently describe South Africa's distribution environment as hybrid and multi-layered, comprising broadcast, streaming, cinema, festivals, and self-distribution pathways. Broadcast remains the domestic foundation because it is still the most affordable and broadly accessible route to mass audiences. Streaming, however, is now the dominant growth layer and the most important route for international reach. Cinema is increasingly selective, event-driven, and commercially fragile for local content. Festivals remain important for visibility, prestige, and access to buyers, while self-distribution via social video platforms and creator ecosystems has become a meaningful route for independent creators where formal gatekeepers are difficult to access. In this sense, distribution is no longer linear. It is stacked, overlapping, and platform-orchestrated.

This finding aligns closely with the wider study context. The literature and benchmarking chapters established that global distribution has shifted away from linear windowing toward platform-led ecosystems, while audience behaviour in South Africa has shifted strongly toward home-based and digital viewing. Stakeholders confirm that this shift has materially restructured the market. Windowing has compressed, territorial exclusivity has weakened in some segments, and monetisation has diversified beyond box office and linear advertising to include subscription streaming, AVOD, FAST, platform licensing, brand-funded content, ad-revenue share, pre-sales, and performance-linked digital monetisation.

A key implication is that market access is no longer sufficient. Respondents stress that value is increasingly determined not simply by whether content is placed on a platform, but by how it performs inside platform ecosystems. Metadata quality, audience targeting, recommendation systems, algorithmic visibility, localisation, and digital marketing now materially shape content performance. This marks a major shift from the older distribution paradigm, where access to a channel was itself a major source of value. Under present conditions, discoverability and performance are as important as access.

**Table 10: Stakeholder view of South Africa’s distribution model**

Layer	Current role	Implication
Broadcast	Domestic foundation	Mass reach, affordability, local monetisation backbone
Streaming / platforms	Growth and export layer	Global reach, younger audiences, platform-led value formation
Cinema	Selective / prestige layer	Limited local viability, strategic rather than default route
Festivals	Visibility and market access layer	Signalling, buyer access, co-production and sales opportunities
Self-distribution / social	Independent fallback and growth route	Important for creators excluded from formal pipelines

Source: Birguid analysis

#### 4.3.2 South Africa’s position in comparative context

Respondents positioned South Africa as a credible mid-tier global production hub, characterised by upper-tier production capability but lower-tier distribution power. Across respondents, the country’s strengths were mostly described as skilled crews, technically capable facilities, strong production management, diverse locations, and a clear cost-to-quality advantage. These attributes underpin South Africa’s continued attractiveness as a service-production hub and co-production partner and explain its sustained integration into global production pipelines.

However, respondents were equally clear that these strengths are structurally upstream-biased. South Africa remains comparatively weaker in the downstream functions that determine long-term competitiveness, including financing depth, deal structuring, rights retention, international sales, marketing capability, metadata discipline, and export system coordination. In practical terms, this creates a structural asymmetry where South Africa

competes effectively as a place where content is produced, but less effectively as a system where content is owned, scaled, repeatedly monetised, and strategically positioned in global markets. As a result, the sector needs to strengthen downstream capabilities otherwise production excellence will continue to translate into limited long-term value capture.

**Table 11:** Comparative positioning of South Africa in stakeholder view

Dimension	South Africa's relative position	Main interpretation
Production capability	Strong	Technically credible, cost-competitive, service-ready
Storytelling base	Strong	Distinctive cultural identity with international relevance
Distribution sophistication	Weak to moderate	Limited sales infrastructure, weaker route-to-market control
Financing depth	Weak	Smaller balance sheets, limited equity and bridge finance
Rights retention	Weak	Frequent buyouts and limited backend participation
Export architecture	Underdeveloped	Weak coordination across promotion, sales, and market access

Source: Birguid analysis

### 4.3.3 Bargaining power and deal sophistication

Respondents described South African producers as operating from a structurally weaker bargaining position relative to peers in North America and parts of Europe. This was not framed as a capability deficit at the creative level, but rather as the outcome of systemic constraints embedded within the market structure. Key drivers of this asymmetry include:

- Smaller domestic market scale and limited revenue base
- Weaker capitalisation and constrained access to financing
- Dependence on commissioned or project-based funding models
- Limited leverage over intellectual property ownership
- Restricted access to specialised legal, commercial, and sales expertise
- Reduced proximity to global commissioning hubs and decision-makers
- Weaker institutional protection relative to some comparator markets

Importantly, respondents extended this diagnosis beyond structural factors to include preparedness and negotiation readiness. Producers were reported to enter negotiations without clearly defined rights strategies, strong metadata packages, market intelligence, or pre-sale leverage and were more likely to accept unfavourable deal structures. As a result, weak deal outcomes are not interpreted as isolated commercial decisions, but as the symptom of a broader negotiating infrastructure gap. The consequence is a persistent value-capture problem. In order to secure financing or market access, producers frequently enter:

- Buyout agreements
- Once-off licensing arrangements
- Deals with limited backend participation

While these structures enable short-term project viability, they undermine long-term industry sustainability by constraining:

- IP portfolio development
- Revenue recycling into new projects
- Participation in downstream monetisation

#### **4.3.4 Export potential and international demand**

Respondents did not identify a lack of global demand for South African content. Rather, they consistently emphasised that demand is selective, conditional, and highly dependent on format, positioning, and platform alignment. According to the respondents, South African content is most competitive internationally when it combines:

- Strong local authenticity
- Clear genre positioning
- High production quality
- Platform-compatible storytelling structures

Across respondents, the genres most frequently identified as exportable include:

- Crime and thriller
- Premium drama
- Documentary and factual storytelling
- Youth-oriented content
- Selected animation and family content

A key insight that also emerged was that exportability is not an inherent property of content quality, but the outcome of how effectively content is:

- Packaged

- Positioned
- Timed
- Marketed
- Aligned with platform demand

Content with strong cultural authenticity but weak market-facing preparation may remain underexploited. Conversely, content that combines local specificity with globally recognisable narrative frameworks is more likely to achieve cross-border traction. Respondents also emphasised that international demand must be actively constructed rather than passively accessed. Export success depends on early-stage decisions, including:

- Development aligned to target markets (including diaspora audiences as entry markets)
- Sales representation and market access strategy
- Festival positioning
- Promotional investment
- Platform targeting

**Table 12:** Genres viewed as most internationally competitive

Genre / format	Why stakeholders viewed it as exportable
Crime / thriller	Universal narrative grammar, strong suspense structures, platform fit
Premium drama	Combines local specificity with universal themes and serial potential
Documentary	Lower cultural translation barriers, strong prestige and festival routes
Youth-oriented content	Strong cross-border relatability and platform compatibility
Animation / family	Localisation potential, licensing flexibility, franchise potential
Vernacular-language content	Promising where localisation and dubbing reduce language barriers

Source: *Birguid analysis*

#### 4.3.5 Co-productions and licensing environment

South Africa is widely viewed by respondents as a genuinely attractive co-production and service-production destination. The reasons for this were expressed as technical reliability, strong crews, diverse locations, treaty potential, incentive-linked cost competitiveness, and a strong service-production reputation. These strengths position South Africa well within international co-production and servicing ecosystems.

Respondents also reinforced that although South Africa is frequently welcomed as an execution partner, it is seldom positioned as an equal capital or IP partner. This means that

while co-productions may bring work, skills transfer, and exposure, they do not always generate the degree of rights retention, backend participation, or long-term catalogue value required to build sustainable distribution competitiveness.

In addition, respondents further identified several barriers that limit South Africa’s ability to convert attractiveness into stronger co-production outcomes including administrative delays, rebate uncertainty, financing gaps, limited private capital, weak IP frameworks, uneven producer-side commercial sophistication, and insufficiently efficient co-production administration. As a result, the co-production environment is attractive in principle, but its competitive value is undermined when administrative reliability and ownership positioning are unstable.

**Table 13:** Co-production attractiveness versus constraints

Strengths	Constraints
Skilled crews and production reliability	Incentive instability and delayed rebates
Diverse locations	Financing gaps and limited equity markets
Cost competitiveness	Weak or unclear IP-retention outcomes
Treaty potential	Administrative and regulatory inefficiencies
Service-production reputation	Limited leverage as equal capital partner

Source: Birguid analysis

Respondents described South Africa as a highly attractive co-production and service-production destination, underpinned by:

- Skilled and experienced crews
- Reliable production infrastructure
- Diverse and cost-effective locations
- Competitive incentive frameworks
- Proven execution capability

These strengths position South Africa as an important node within global production networks, particularly for projects seeking cost efficiency and technical reliability. However, a critical structural limitation emerged, that is, South Africa is frequently positioned as an execution partner, but less often as an equal capital or IP-owning partner. This distinction is central to understanding the country’s distribution competitiveness challenge. While co-productions generate:

- Employment
- Skills transfer
- Industry exposure

They do not consistently translate into:

- IP ownership
- Backend revenue participation
- Long-term catalogue value

As a result, South Africa participates in global production flows but captures a disproportionately small share of downstream value.

Respondents also highlighted several constraints that limit the conversion of co-production attractiveness into stronger outcomes:

- Administrative inefficiencies and delays
- Rebate uncertainty and policy instability
- Limited access to private financing and equity markets
- Weak IP frameworks and ownership positioning
- Uneven commercial sophistication among producers
- Fragmented and slow co-production administration systems

These constraints reduce confidence among international partners and weaken South Africa's ability to negotiate from a position of strength. This reinforces the broader pattern of production participation without proportional ownership or monetisation.

#### **4.3.6 Barriers to entry and structural constraints**

Respondents stated limited marketing budgets, weak discoverability, insufficient sales representation, cultural and language translation challenges, fragmented rights structures, high data costs, compliance complexity, and uneven access to international buyers and commissioning networks as the predominant structural barriers constraining South Africa's international market access. In addition, respondents highlighted weaker business and commercial literacy, limited entry pathways for emerging producers, and inconsistent inclusion of youth and township creators within formal distribution ecosystems, as the other barriers limiting the sector.

A critical insight emerging from these findings is that market access does not equate to market performance. Several respondents emphasised that South African content may secure

platform placement or festival exposure yet still underperform commercially if it lacks sufficient marketing investment, localisation depth, metadata optimisation, and sustained promotional support. Visibility alone is, therefore, insufficient with conversion depending on the strength of the surrounding distribution and positioning infrastructure.

Importantly, respondents conceptualised these barriers as cumulative rather than isolated. Weak domestic scale constrains audience data generation and limits iterative learning. High data costs suppress local demand formation, reducing the ability to build momentum prior to export. Limited export promotion weakens international visibility, while thin rights literacy undermines long-term value capture. At the same time, weak discoverability systems reduce the likelihood that content converts exposure into sustained audience engagement.

Taken together, these factors reinforce that even if production quality is competitive, structural weaknesses in distribution, positioning, and market access result in systematically weaker global performance.

**Table 14:** Core structural barriers to international market access

Barrier	Why it matters
Limited marketing spend	Reduces visibility, traction, and conversion in crowded markets
Weak discoverability	Platform presence does not translate automatically into demand
Limited sales representation	Constrains access to buyers and repeat deal flow
Cultural / language translation barriers	Reduces resonance across territories without localisation
High data costs	Limits domestic scale, experimentation, and audience intelligence
Rights fragmentation	Weakens tradability and negotiating leverage
Compliance / licensing complexity	Raises friction and cost of international market entry
Unequal access to buyers	Makes market access relationship-dependent and exclusionary

Source: Birguid analysis

#### 4.3.7 Infrastructure and platform readiness

Respondents characterised South Africa as a mobile-first, data-constrained, and unevenly digitised market. Smartphones are the dominant access device, particularly among lower- and

middle-income segments, while connected televisions remain important for premium viewing but are not universally accessible. Broadband quality and affordability vary significantly across geography and income groups, reinforcing uneven consumption patterns and limiting the scalability of digital-first distribution models.

A critical distinction made by respondents is between consumer-side infrastructure and producer-side readiness. While South Africa is relatively advanced in terms of production infrastructure and technical execution, it is less developed in the technical, analytical, and commercial capabilities required for platform-era distribution. In practice, this creates a structural mismatch where South Africa can produce content to global standards, but does not yet consistently operate with the systems required to distribute and compete effectively within platform ecosystems. Respondents highlighted specific gaps in:

- Metadata discipline and optimisation
- Localisation at scale (subtitling, dubbing, language accessibility)
- Recommendation and algorithm readiness
- Technical delivery consistency across platforms
- Audience analytics and performance tracking
- Integrated “distribution engineering” capabilities

The implication is that the constraint is not limited to consumer access to platforms, but extends to the ecosystem’s ability to position, surface, and monetise content within those platforms. Without strengthening these capabilities, South African content risks remaining technically compliant but commercially under-optimised in increasingly competitive, data-driven global distribution environments.

**Table 15:** Stakeholder assessment of digital distribution readiness

Dimension	Assessment
Broadband capacity	Moderate but uneven
Data affordability	Poor / expensive
Platform penetration	Growing
Device ecosystem	Predominantly mobile
Metadata readiness	Incomplete
Localisation capability	Underdeveloped at scale
Analytics / discoverability capability	Uneven
Production infrastructure	Relatively strong

Source: Birguid analysis

#### 4.3.8 Policy, incentives, and funding models

Across the value chain, respondents argued that South Africa’s policy and support framework remains over-weighted toward production and insufficiently aligned with downstream distribution and circulation outcomes. Importantly, this was not a critique of production incentives themselves. Rather, respondents emphasised that production support is necessary but incomplete unless it is complemented by targeted investment in marketing, distribution, international sales, audience development, localisation, and rights retention.

This diagnosis aligns directly with the comparative findings in Chapter 3, which demonstrate that more competitive audiovisual industries do not rely on production incentives in isolation. Instead, they deploy integrated support systems that extend across the full value chain linking production funding to export promotion, sales infrastructure, festival participation, and coordinated international market development.

Within this context, respondents consistently prioritised downstream intervention as the most immediate gap. Support for distribution, marketing, international sales representation, and broader value-chain enablement was viewed as more urgent than further expansion of production-only funding. Several respondents also emphasised the need for stronger alignment between incentive structures, co-production administration, export strategy, and the operational realities of platform-led, digital-first, and creator-driven ecosystems. Without rebalancing policy toward distribution and export outcomes, increased production investment is unlikely to translate into improved global competitiveness, sustained visibility, or long-term value capture.

**Table 16:** Policy gaps and priority funding shifts

Current bias	Recommended shift
Production-first support	Distribution- and export-linked support
Limited marketing support	Marketing and audience-development funding
Weak sales infrastructure	International sales and representation support
Fragmented institutional coordination	More centralised export architecture
Weak digital-first support	Support for platform-native and creator-led models
Project-only thinking	More company/slate-based thinking

Source: *Birguid analysis*

#### 4.3.9 AI and future distribution competitiveness

Respondents identified artificial intelligence (AI) as an emerging competitive layer in global distribution, with the potential to materially reshape how content is localised, positioned, and monetised. The most frequently cited opportunities included:

- Lower-cost subtitling and dubbing
- Accelerated localisation workflows
- Improved metadata generation
- Enhanced discoverability
- More precise audience targeting, and
- Reduced marketing and campaign costs.

Several respondents further noted that AI-enabled language adaptation could significantly improve the export viability of vernacular South African content by lowering one of the key barriers to cross-border circulation.

However, respondents were equally cautious not to position AI as a standalone solution. A consistent view across the respondents was that AI will amplify existing structural conditions rather than correct them. In a context where South Africa already faces constraints in rights leverage, market intelligence, and dependence on global platforms, the introduction of AI may reinforce rather than reduce existing asymmetries. Key risks identified include:

- Increased platform concentration and gatekeeping
- Western-centric bias in training data and recommendation systems
- Intellectual property risks, including misuse and content replication
- Greater pressure toward standardised, platform-optimised content

AI is, therefore, not a structural equaliser but a capability amplifier. As such, it should be treated as an enabling layer within a broader distribution strategy, rather than a substitute for export architecture, rights strategy, or institutional market access support. When deployed strategically, AI can meaningfully reduce localisation and discoverability barriers. When adopted passively, it is likely to deepen existing power imbalances within global audiovisual markets.

**Table 17:** Stakeholder view of AI opportunities and risks

Opportunities	Risks
Lower-cost subtitling and dubbing	Platform concentration and gatekeeping
Faster localisation	IP misuse and replication
Improved metadata generation	Algorithmic bias favouring larger markets
Better discoverability	Reduced creative control
Audience targeting and campaign automation	Reinforcement of existing asymmetries
Vernacular-content exportability	Dependence on external infrastructures

Source: Birguid analysis

#### 4.4 South African case studies and global comparator market lessons

The cases highlight a critical pattern emerging from the broader stakeholder analysis. While South Africa has demonstrated the ability to produce content that travels, these outcomes remain inconsistent and heavily dependent on specific enabling conditions, including platform alignment, genre clarity, strong packaging, and effective distribution partnerships. In this context, export success is not yet systemic. It is largely project-dependent rather than system-enabled, driven by exceptional alignment of factors rather than a repeatable national distribution capability. As such, the lessons drawn from these cases are intended to inform how the industry can transition from episodic international breakthroughs to a more coordinated, scalable, and repeatable distribution model.

**Table 18:** Selected South African circulation cases and strategic lessons

Case	Route to market	Evidence of traction	Strategic lesson
<i>Blood &amp; Water</i>	Global streamer-led serial distribution	International traction and renewal	Youth drama with clear genre hooks and platform-fit packaging can scale globally
<i>My Octopus Teacher</i>	Documentary plus prestige and platform distribution	Academy Award recognition	Documentary can travel where distribution, legitimacy, and awards align
<i>Headspace</i>	Domestic theatrical release followed by wider territorial circulation	Multi-territory circulation and dubbed versions	Animation and localisation widen export possibilities
<i>Shaka iLembe</i>	Premium regional broadcast/streaming	Strong regional audience traction	African scale can be commercially meaningful when event positioning and platform support align

Source: Birguid analysis

#### 4.4.1 Successful export cases

The successful cases do not follow a single pathway and this diversity is precisely what makes them instructive. *Blood & Water* demonstrates the power of platform-native serial packaging aligned to global streaming demand. *My Octopus Teacher* illustrates a prestige documentary pathway, where distribution is reinforced through a combination of platform reach, institutional legitimacy, and awards recognition. *Headspace* highlights the export potential of animation and family-oriented content, particularly where localisation expands accessibility across markets. *Shaka iLembe* demonstrates that premium African historical drama can achieve meaningful regional scale when supported by strong commissioning, event-based positioning, and integrated platform ecosystems.

What unifies these cases is not production quality alone. Rather, success is driven by the alignment of genre clarity, platform fit, partnership structure, localisation, and a clearly defined route-to-audience strategy. This reinforces that while South African content can and does succeed internationally, these outcomes remain dependent on exceptional alignment of conditions rather than a consistent, system-enabled export model.

#### **4.4.2 Failed attempts and structural constraints**

The most consistently cited example is the theatrical route. Stakeholders emphasised that while South Africa has established cinema infrastructure, it lacks a consistently functional commercial ecosystem capable of supporting local productions at scale. Limited screen allocation, audience fragmentation, and competition from international titles constrain revenue potential. The implication is not that cinema is irrelevant, but that it is no longer a viable primary growth engine for most local content, and should instead be positioned as a selective, event-driven channel within a broader distribution strategy.

A second underperforming pathway is the festival-without-conversion model. Respondents stressed that festival selection and exposure, while valuable for signalling and visibility, do not reliably translate into distribution outcomes. Without strong packaging, attached sales representation, clear rights structures, and follow-on financing, projects often fail to convert festival traction into sustained market access or commercial deals.

A third structural weakness lies within the incentive pipeline itself. Administrative instability, delays, and uncertainty in incentive disbursement were identified as material constraints. These issues reduce investor confidence, disrupt project timelines, and weaken the credibility of South African projects in international negotiations. In a highly competitive global market, where reliability and speed are critical, such inefficiencies can directly undermine both financing and distribution outcomes.

Taken together, these failed or constrained pathways reinforce a broader structural insight. Access to channels (cinema, festivals, or incentives) does not guarantee performance. What matters is the system's ability to convert that access into consistent circulation, deal-making, and monetisation outcomes.

#### **4.4.3 Lessons from comparator markets**

The comparator cases (examined in detail in Chapter 3) do not suggest that South Africa should replicate any single foreign model. Rather, they demonstrate that competitiveness is achieved by systematically reducing the gap between production and export through deliberate institutional design.

Across successful markets, the common thread is not production scale alone, but the presence of coordinated systems that link production to international circulation, market access, and value capture. For example, the United Kingdom and Canada illustrate the impact of structured international business development, co-production frameworks, export

promotion, and dedicated distribution support. Brazil demonstrates how a middle-income market can strengthen global circulation by building explicit export architecture, rather than relying on production incentives in isolation. Nigeria highlights the power of regional scale and audience demand, while also underscoring the risks associated with weak formal monetisation systems and rights leakage. South Korea, in turn, illustrates how sustained policy alignment and institutional coordination can convert national production capability into consistent global reach and repeatable export success.

Based on the comparator cases, the South African constraint is not the absence of models, but the absence of an integrated system that connects production to distribution, export, and long-term value capture. Production strength must, therefore, be matched by distribution architecture if it is to translate into sustained global competitiveness.

**Table 19:** Comparator-market lessons most relevant to South Africa

Comparator market	Core institutional lesson for South Africa
United Kingdom	Extend public support beyond production into international positioning and distribution
Canada	Support producers and distributors to convert visibility into sales pathways
Brazil	Build dedicated export architecture for circulation and negotiation
Nigeria	Regional scale is valuable, but rights retention and monetisation remain critical
Republic of Korea	Coordinated, export-oriented institution-building drives global reach

Source: Birguid analysis

#### 4.5 Strategic implications

The cumulative implication of the respondent evidence is that South Africa does not require a wholly new audiovisual industry. It requires a better-connected one. The country already has enough production capability, technical competence, and storytelling depth to participate more strongly in international markets. What it lacks is repeatable distribution architecture. That architecture includes dealmaking capability, rights literacy, metadata discipline, localisation pipelines, sales support, audience intelligence, and policy instruments weighted toward export performance rather than production volume alone.

The strategic shift implied by the stakeholder data is therefore from a production-first logic to a distribution-, export-, and value-capture logic. In practical terms, this requires a reweighting

of support across the value chain. Public support should follow content further downstream into marketing, sales representation, festival conversion, dubbing and subtitling, and platform readiness. Company and slate development should receive greater emphasis so that buyers can transact with stable firms rather than atomised project entities. Rights negotiation, deal structuring, packaging, and legal literacy should be treated as industrial capability rather than peripheral training. Discoverability should be resourced as seriously as production. AI should be used as a strategic capability layer inside a wider export architecture rather than as a stand-alone fix.

**Table 20:** Strategic implications emerging from stakeholder evidence

Strategic implication	Why it matters
Shift from production-led to distribution-led strategy	Distribution must be embedded earlier in the value chain
Build domestic sales and market access capability	Stronger dealmaking and repeatable route-to-market systems
Strengthen platform readiness	Metadata, analytics, localisation, and packaging drive performance
Improve IP retention and negotiation capacity	Stronger long-term value capture and portfolio building
Invest in marketing and international visibility	Visibility is a competitiveness input, not a discretionary add-on
Expand co-production and export support	Stronger international integration and structured market access
Build regional scale before global scale	Regional circulation strengthens leverage and learning
Leverage AI strategically	Reduces localisation and discoverability barriers if used within a wider system

Source: Birguid analysis

#### 4.5.1 Priority market sequencing and strategic positioning

Stakeholder feedback supports a sequenced market-development strategy rather than a one-step global ambition. Regional Africa and the African diaspora were viewed as the most immediate growth space because of cultural proximity, mobile-first consumption patterns, lower translation distance, and stronger relevance for broadcaster, AVOD, and FAST models. Europe was stated as the most useful next step because of co-production structures, festivals, and greater openness to subtitled or culturally distinctive work. North America remained the highest-value but most competitive territory, best approached through selected genres,

prestige routes, or platform-backed projects rather than broad-based entry. Asia was framed as high-upside but longer-term, requiring deeper localisation and stronger partner strategy.

**Table 21:** Priority market sequencing and strategic positioning

Priority tier	Market focus	Why prioritised	Most suitable routes	Capability requirement
First	Regional Africa and the African diaspora	Cultural fit, lower translation distance, faster market learning	Regional broadcasters, pay-TV, AVOD, FAST, diasporic targeting, selected festivals	Rights discipline, localisation, regional sales networks
Second	Europe	Stronger co-production ecosystems and festival pathways	Co-productions, festival launches, sales agents, public-fund-linked market access	Treaty literacy, legal packaging, promotion support
Third	North America	Highest upside but very high barriers	Streamer commissions, prestige documentary, genre-led series/films, festival breakout	Strong IP packaging, specialist reps, publicity support
Fourth	Asia	High upside, higher localisation and relationship costs	Co-productions, dubbed distribution, genre exports, platform partnerships	Strong localisation, partner selection, multi-year development

Source: Birguid analysis

The stakeholder evidence suggests that regional scale is one of the most plausible pathways toward stronger global competitiveness. A stronger African and diasporic distribution base would generate reusable audience intelligence, strengthen catalogue monetisation, improve learning-by-doing in distribution, and ultimately improve leverage in higher-value international negotiations.

## **4.6 Conclusion**

Based on respondent feedback, South Africa's principal constraint is not creative but structural. The country already demonstrates the capability to produce, service, and package audiovisual content at a level that is internationally relevant. However, it does not yet do so within a system that consistently enables rights retention, market access financing, discoverability engineering, localisation at scale, or the conversion of visibility into repeatable monetisation.

Respondents, therefore, locate the limitation not in content quality, but in the systems that sit around content. Export potential is constrained by a combination of hybrid but undercoordinated distribution pathways, structurally weak bargaining power, underdeveloped export support mechanisms, unstable incentive administration, incomplete platform readiness, and insufficient investment in downstream functions. In addition, the case evidence reinforces this diagnosis. While South African content has demonstrated the ability to travel, these successes remain episodic and contingent, relying on exceptional projects, strong partners, or favourable platform alignment, rather than on a repeatable, system-enabled export model.

Without strengthening the systems that connect production to distribution and monetisation, increased output will not translate into sustained global competitiveness. To address this, the evidence points toward a distribution-led future, in which competitiveness is driven by deliberate investment in rights strategy, marketing capability, localisation systems, sales infrastructure, and coordinated export institutions. Strengthening these layers will enable South Africa to convert its existing production capability into durable global presence, improved value capture, and long-term sector growth.

## CHAPTER 5: CONCLUSION

### 5.1 Introduction

This chapter consolidates the findings of the study and translates them into a coherent strategic direction for strengthening South Africa's global audiovisual distribution competitiveness. The central premise of the study is that production capability alone is no longer sufficient to sustain global competitiveness. Instead, competitiveness is increasingly determined by how effectively content is distributed, discovered, monetised, and translated into long-term value across international markets (UNCTAD, 2024; UNESCO, 2023). Building on Chapter 4's stakeholder evidence, this conclusion confirms that South Africa's constraint is not creative capability, but systemic underperformance in distribution, deal-making, and value capture mechanisms.

Accordingly, this chapter reinforces the need for a systemic shift from production-led growth toward distribution-led competitiveness, where market access, visibility, and value capture are treated as core strategic priorities. This shift is not conceptual but operational, requiring coordinated intervention across rights systems, platform readiness, export pathways, and policy and institutional alignment.

### 5.2 Synthesis of key findings

Across the study, a consistent and reinforcing narrative emerges. South Africa has developed a credible and competitive production ecosystem, supported by strong infrastructure, skilled talent, and cost competitiveness. However, this strength has not translated into proportional distribution outcomes, export scale, or long-term value retention. Critically, Chapter 4 confirms that this gap is systemic and persistent across the value chain, rather than isolated to specific firms or projects.

- 1) **Production strength versus distribution weakness:** South Africa demonstrates strong production capability but underperforms in distribution sophistication, platform leverage, and sustained market access. Stakeholder evidence shows this asymmetry manifests as participation in global production without proportional ownership, monetisation, or repeatable export outcomes.
- 2) **Platformisation has redefined competitiveness:** The global shift toward platform-led distribution has fundamentally altered how content reaches audiences. Visibility is now shaped by algorithms, metadata, and engagement metrics rather than by access to distribution channels alone. As a result, content must be designed not only for production quality, but for discoverability and performance within platform ecosystems.

- 3) **Export demand exists, but conversion is constrained (conversion gap):** There is strong global demand for South African and African content, particularly for culturally authentic and genre-driven narratives. However, this demand is not consistently translated into export success due to barriers such as limited marketing investment, weak discoverability, localisation constraints, and restricted access to international buyers. This highlights a structural gap between potential demand and realised outcomes.
- 4) **Distribution readiness is a systemic constraint:** The study identifies persistent weaknesses in distribution readiness, including fragmented IP ownership, limited rights retention, inconsistent technical delivery capability, and insufficient metadata optimisation. These constraints reduce tradability, limit platform acquisition, and weaken long-term revenue generation.
- 5) **Infrastructure and affordability shape viable strategies (segmented market reality):** Distribution viability is segmented across rural, peri-urban, and urban contexts, driven by mobile-first access, affordability constraints, and device availability. These factors determine viewing behaviour, platform usage, and monetisation models, requiring differentiated distribution strategies rather than a one-size-fits-all approach.
- 6) **Territorial strategy is critical to competitiveness:** Effective distribution depends on aligning content formats, delivery models, and monetisation strategies to connectivity conditions and audience realities. Mobile-first, hybrid, and premium models must coexist within a multi-tiered system.
- 7) **Policy misalignment limits competitiveness:** While South Africa has competitive production incentives, policy support remains skewed toward content creation, with insufficient investment in distribution, marketing, and export promotion. Global evidence shows that competitive industries integrate support across the entire value chain, aligning policy with distribution and export outcomes.
- 8) **AI presents both opportunity and structural risk:** AI introduces new efficiencies in localisation, marketing, and scalability, but also risks reinforcing platform dominance and algorithmic bias. Its impact will depend on how strategically it is deployed within South Africa's distribution ecosystem.
- 9) **Case evidence reinforces the distribution gap:** South Africa's most successful exports are those that align with global distribution dynamics, particularly platform-led release strategies, strong genre positioning, and international partnerships. Conversely, failures are concentrated in projects that rely on outdated distribution models, lack scalability, or are affected by policy instability. Comparative analysis confirms that countries such as Nigeria, India, South Korea, and Brazil have achieved global competitiveness through deliberate alignment of production, distribution, and policy systems, particularly with respect to IP ownership, export promotion, and regional market development.

### 5.3 Strategic transition requirements

Based on the findings, the following strategic interventions are proposed to support a transition toward distribution-led competitiveness:

- 1) **Shift to a distribution-led industry strategy:** Embed distribution, rights, and market access considerations at the development stage, not post-production.
- 2) **Build export readiness and packaging capability:** Institutionalise industry-wide capability in rights management, localisation, metadata, and platform delivery.
- 3) **Adopt a territorial distribution strategy:** Align distribution models to infrastructure realities:
  - a) Mobile-first (rural / low-income markets)
  - b) Hybrid (peri-urban / transitional markets)
  - c) Premium (urban / high-connectivity markets)
  - d) Explicitly align content formats and monetisation models to each segment.
- 4) **Strengthen market access pathways:** Expand engagement with sales agents, co-production partners, festivals, and global platforms through a diversified (“portfolio”) distribution approach.
- 5) **Invest in marketing and discoverability:** Allocate targeted resources toward digital marketing, audience development, and platform optimisation to improve global visibility. Reframe marketing as a core component of distribution economics, not a discretionary cost.
- 6) **Enhance IP ownership and deal sophistication:** Support producers to retain rights, improve negotiation outcomes, and access financing without premature IP loss. Shift from project financing dependency toward rights-based value creation and long-term revenue participation.
- 7) **Develop regional distribution ecosystems:** Enhance positioning of South Africa as a regional hub by strengthening SADC content circulation, partnerships, and market integration.
- 8) **Align policy and funding with distribution outcomes:** Rebalance public investment toward distribution, marketing, and export promotion, while improving administrative efficiency and policy coordination.
- 9) **Leverage AI as a strategic enabler:** Use AI to enhance localisation, metadata, and marketing, while mitigating platform dependency risks.
- 10) **Strengthen IP ownership and reduce dependence on service production:** South Africa should transition from a service-production model toward one that prioritises ownership of intellectual property. This will increase long-term revenue streams, improve bargaining power, and enable participation in global licensing ecosystems.

**11) Align content strategy with genre performance and market demand:** South Africa should adopt a more targeted content development strategy aligned with global demand patterns by:

- a) Prioritising high-performing export genres such as drama, thriller/crime, and documentary
- b) Expanding investment in high-growth segments such as animation and youth content
- c) Strengthening genre-specific development pipelines linked to platform demand
- d) Integrating audience and market intelligence into early-stage content development
- e) Shift from supply-driven to demand-informed production systems
- f) This approach will improve the conversion of production output into internationally competitive, platform-ready content.

#### **5.4 Strategic framework and System architecture**

To operationalise these requirements, a strategy structured around four integrated pillars is suggested with each pillar supported by targeted programmes and institutional mechanisms.

##### **1) Distribution readiness and Packaging capability**

a) **Objective:** To ensure South African content is globally tradable, platform-ready, and discoverable

**b) Strategic Focus Areas:**

- i) Rights structuring and IP clarity
- ii) Technical delivery compliance
- iii) Localisation (subtitling, dubbing)
- iv) Metadata optimisation and discoverability
- v) Market-facing packaging

**c) Core Programmes:**

- i) National Export Readiness Programme – A national programme that equips producers and distributors with the capabilities, tools, and advisory support needed to ensure South African content is export-ready, platform-compliant, and optimised for international distribution.
- ii) Localisation & Metadata Support Fund – A targeted fund that supports subtitling, dubbing, and metadata optimisation to enhance the global accessibility, discoverability, and commercial performance of South African content.
- iii) Content Packaging & Market Access Hub – A centralised platform that strengthens the commercial positioning of South African content and facilitates connections with buyers to improve visibility and increase international deal conversion.

##### **2) Market access and Export activation**

- a) **Objective:** To expand and institutionalise **sustained access to global markets**
  - b) **Strategic Focus Areas:**
    - i) Platform partnerships
    - ii) Co-production networks
    - iii) Festival and market participation
    - iv) Buyer engagement and deal facilitation
  - c) **Core Programmes:**
    - i) South African Screen Export Office (SASEO) – A dedicated export-focused institution responsible for facilitating international sales, building buyer networks, and coordinating South Africa’s global market presence to drive sustained export growth and deal flow.
    - ii) Strategic Market Access Programme – A targeted initiative that prioritises high-potential international markets and establishes structured pathways through partnerships, co-productions, and distribution agreements to expand South Africa’s global reach.
    - iii) Festival & Market Conversion Programme – A results-driven programme that optimises participation in international festivals and markets by focusing on buyer engagement, deal-making, and measurable commercial outcomes rather than attendance alone.
- 3) **IP retention and Value capture**
- a) **Objective:** To strengthen ownership, bargaining power, and long-term revenue participation
  - b) **Strategic Focus Areas:**
    - i) IP retention
    - ii) Deal structuring
    - iii) Licensing and rights management
    - iv) Financing models linked to ownership
  - c) **Core Programmes:**
    - i) IP Retention Incentive Scheme - A targeted incentive mechanism that rewards projects retaining partial or full intellectual property ownership by offering financial uplifts or funding advantages to strengthen long-term value capture and reduce reliance on full buyout models.
    - ii) Deal Structuring & Negotiation Support - A specialised support function providing legal, commercial, and financial advisory services to producers to improve contract terms, strengthen bargaining power, and enable more equitable participation in international licensing and distribution deals.

- iii) Rights & Licensing Registry – A centralised system for recording and tracking ownership structures, licensing agreements, and revenue flows to improve transparency, support data-driven decision-making, and strengthen the management of intellectual property across the industry.

#### 4) **Policy alignment and Ecosystem coordination**

- a) **Objective:** To align incentives, funding, and institutions toward distribution outcomes
- b) **Strategic Focus Areas:**
  - i) Incentive efficiency and credibility
  - ii) Distribution-focused funding
  - iii) Institutional coordination
  - iv) Policy alignment across the value chain
- c) **Core Programmes:**
  - i) Incentive System Stabilisation Programme – A reform initiative aimed at improving the predictability, efficiency, and turnaround times of incentive approvals and disbursements to restore investor confidence and ensure continuity in production and distribution pipelines.
  - ii) Distribution Funding Reform – A policy intervention that rebalances public funding toward marketing, distribution, and export readiness to ensure content is not only produced but effectively positioned, circulated, and monetised in global markets.
  - iii) Industry Coordination Platform – A formal governance mechanism that aligns NFVF, dtic, industry stakeholders, and private sector partners to coordinate strategy, reduce fragmentation, and ensure consistent execution of distribution-led initiatives across the value chain.

### **5.5 Performance measurement and monitoring framework**

To support evidence-based decision-making and continuous sector development, a structured Performance Measurement and Monitoring Framework is required. International best practice demonstrates that successful audiovisual sectors embed measurable performance systems that track market access, competitiveness, and value capture over time. The KPI dashboard (Table 22) is expected to enable longitudinal tracking of export performance, platform presence, and industry capability, ensuring accountability and strategic alignment.

**Table 22: NFVF distribution performance KPI dashboard**

KPI Category	Indicator	Definition	Baseline (2025)	Target (3–5 Years)	Frequency	Data Source	Responsible Entity
<b>Market Access</b>	No. of international distribution deals	Total number of formal distribution agreements across territories	To be established	+50% growth	Annual	NFVF, distributors	NFVF
	No. of active export territories	Countries where SA content is commercially distributed	To be established	Expand to 15+ key markets	Annual	TradeMap, distributors	NFVF / dtic
<b>Distribution Performance</b>	Total international viewership / admissions	Aggregate audience reach across platforms	To be established	+40% growth	Annual	Platforms, broadcasters	NFVF
	Platform penetration (titles on major platforms)	No. of SA titles available on Netflix, Amazon, etc.	Low–Medium	High presence across top 5 platforms	Annual	Platform catalogues	NFVF
<b>Value Capture</b>	% IP retained by SA producers	Share of projects where local producers retain ownership rights	Low	Increase to 40–60%	Annual	Producer surveys	NFVF / Industry
	Export revenue (ZAR)	Total revenue generated from international distribution	<US\$0.5bn tier	Double export value	Annual	SARS, TradeMap	dtic / NFVF
<b>Readiness</b>	% productions meeting international delivery standards	Compliance with metadata, localisation, technical specs	Medium	>80% compliance	Annual	NFVF audits	NFVF

KPI Category	Indicator	Definition	Baseline (2025)	Target (3–5 Years)	Frequency	Data Source	Responsible Entity
	No. of co-productions	Projects developed through international partnerships	Limited	+100% increase	Annual	NFVF, treaties	NFVF
<b>Audience Outcomes</b>	Local content share of viewing (%)	Share of SA content in total consumption	Moderate	+10–15% increase	Annual	Audience surveys	NFVF
	Willingness to pay for SA content	% of audiences willing to pay for local content	Moderate	+15% increase	Biennial	NFVF research	NFVF

Source: Birguid analysis

In terms of implementation, it is suggested that KPIs should be tracked on an annual basis, with a comprehensive review conducted every three to five years to assess progress and recalibrate targets where necessary. To support this, a centralised NFVF dashboard should be developed to consolidate data inputs across stakeholders and enable consistent monitoring and reporting. Baseline values will be refined using the final audience dataset, complemented by industry validation to ensure accuracy, relevance, and alignment with market realities.

## 5.6 Implementation priorities

To operationalise the recommendations, a phased, distribution-led implementation approach is required, aligned to improving conversion, visibility, and value capture.

### Short-term (0–2 years): Stabilisation and capability building

- **Focus:** Restore confidence and build distribution capability
  - Establish structured export readiness programmes (packaging, rights, platform delivery)
  - Increase funding for marketing, distribution, and discoverability
  - Expand participation in international festivals and markets
  - Improve localisation capability (subtitling, dubbing, metadata optimisation)
  - Develop industry guidelines for IP ownership and packaging
  - Build platform and algorithmic literacy (training, toolkits)

- Stabilise policy frameworks, including improving dtic incentive efficiency and predictability

- **Aligned pillars:** 1 and 4

### **Medium-term (3–5 years): Market integration and scaling**

- **Focus:** Expand market access and strengthen distribution systems
  - Strengthen co-production frameworks and global partnerships
  - Build formal, sustainable and mutually beneficial relationships with global platforms
  - Develop regional distribution ecosystems:
    - SADC as the foundation
    - Expansion into Nigeria and Kenya as growth markets
  - Establish regional licensing and content circulation systems
  - Enhance institutional coordination (NFVF, dtic, industry)
  - Develop market intelligence systems (demand, performance, platform insights)
  - Strengthen IP retention and negotiation capability
- **Aligned pillars:** 2 and 3

### **Long-term (5+ years): System transformation and global positioning**

- **Focus:** Establish South Africa as a global exporter
  - Position South Africa as a global audiovisual export hub
  - Build a sustainable, distribution-led export ecosystem
  - Increase share of global audiovisual trade and platform presence
  - Strengthen IP ownership and long-term value retention
  - Institutionalise global partnerships and co-production pipelines
  - Leverage AI and digital technologies for scalability and localisation
- **Aligned pillars:** All (1-4)

### **Implementation enablers**

Successful execution depends on four system enablers:

#### **1) Institutional coordination**

- a) NFVF as lead coordinating body
- b) Establishment of an export office
- c) Cross-agency alignment with dtic

#### **2) Blended funding model**

- a) Public funding (NFVF, dtic)
- b) Private sector participation
- c) International co-production capital

#### **3) Capability development**

- a) Industry-wide training
- b) Toolkits and standards
- c) Platform and data literacy

**4) Continuous measurement**

- a) KPI dashboard
- b) Annual reporting
- c) Adaptive strategy refinement

This study demonstrates that South Africa possesses the creative capability, infrastructure, and global relevance required to compete internationally. However, realising this potential will depend on a strategic shift toward distribution-led competitiveness. The future of South Africa's audiovisual sector will, therefore, be determined by how effectively its content is distributed, discovered, and monetised in an increasingly complex and platform-driven global ecosystem.

## 5.7 Implementation roadmap: South Africa audiovisual industry distribution competitiveness

**Table 23:** Short-term (0–2 Years) – Stabilisation & capability building

Priority Area	Key Actions	Outputs	Outcomes	Impact	KPIs	Lead Stakeholders
<b>Export readiness</b>	Establish structured export readiness programmes (packaging, rights, platform delivery)	National export readiness programme (training, toolkits, advisory support)	Improved producer capability in packaging, delivery, rights management, and platform compliance	Increased pipeline of globally competitive, export-ready content	# of projects export-ready; % meeting platform standards; # of trained producers	NFVF, national and regional industry bodies
<b>Marketing &amp; distribution funding</b>	Allocate and ring-fence funding for marketing, distribution, and discoverability (incl. digital campaigns)	Distribution & marketing fund established/enhanced with dedicated export allocation	Increased global visibility and discoverability of SA content across platforms	Higher platform acquisition rates and audience reach	# of funded campaigns; platform acquisitions; audience reach metrics	NFVF, dtic
<b>Festival &amp; market access</b>	Expand coordinated participation in international festivals and markets (Cannes, MIPCOM, etc.)	Structured national presence and market engagement strategy	Increased buyer exposure, deal-making opportunities, and partnerships	Growth in international sales and co-production opportunities	# of deals signed; # of festival selections; # of co-production agreements	NFVF
<b>Localisation capability</b>	Invest in localisation (subtitling, dubbing, AI-enabled tools, metadata optimisation)	Localisation hubs, standards, and technical capability frameworks	Reduced localisation costs and improved accessibility across markets	Increased exports to non-English and multi-language markets	# of titles localised; cost reduction %; # of markets accessed	NFVF, private sector
<b>IP &amp; packaging guidelines</b>	Develop industry standards for IP ownership, packaging, and platform compliance	Published guidelines, templates, and advisory/legal support mechanisms	Improved deal structures, negotiation capacity, and rights retention	Increased long-term value capture and revenue streams	% of projects retaining IP; improved contract terms; # of advisory interventions	NFVF, legal bodies, industry associations
<b>Platform &amp; algorithmic capability</b>	Build platform literacy (metadata, analytics, discoverability, algorithm performance) through training and toolkits	Industry training programmes and digital capability toolkits	Improved ability to position and optimise content within platform ecosystems	Increased discoverability and performance on global platforms	# of participants trained; content performance metrics (CTR, completion rates)	NFVF, private sector, platforms
<b>Policy stabilisation</b>	Stabilise dtic incentives (predictability, timeliness, reduced bottlenecks)	Improved rebate system performance and administrative efficiency	Restored investor confidence and improved production continuity	Recovery and stabilisation of production pipeline and investment flows	Payment turnaround time; investment levels; project completion rates	dtic

*Note: Strategic objective - Restore industry confidence and build foundational distribution capability, with a specific focus on improving export readiness, visibility, and conversion into global markets.*

*Source: Birguid analysis*

**Table 24: Medium-Term (3–5 Years) – Market integration & scaling**

Priority Area	Key Actions	Outputs	Outcomes	Impact	KPIs	Lead Stakeholders
<b>Co-production frameworks</b>	Expand treaties and strategic co-production partnerships (regional and global)	Active co-production agreements and financing structures	Increased access to funding, skills transfer, and distribution channels	Higher volume of globally distributed and platform-ready content	# of co-productions; % with international distribution; co-production funding value	dtic, NFVF
<b>Platform partnerships</b>	Formalise relationships with global and regional platforms (licensing, commissioning, co-development)	Strategic platform agreements and content pipelines	Improved acquisition rates, visibility, and repeat commissioning	Increased and sustained platform presence of SA content	# of platform deals; repeat acquisitions; platform share of SA titles	NFVF, private sector
<b>Regional distribution ecosystems (SADC + Africa growth markets)</b>	Develop and enhance regional licensing, distribution networks, and cross-border content exchange (SADC foundation & Nigeria and Kenya expansion)	Integrated regional distribution ecosystem and agreements	Increased intra-African circulation and audience reach	Regional scale, improved monetisation, and stronger negotiating leverage globally	# of regional deals; audience reach (SADC, Nigeria, Kenya); revenue from regional markets	NFVF, broadcasters, regional partners
<b>Market intelligence systems</b>	Build data systems to track demand, platform performance, audience insights, and export trends	Centralised industry intelligence platform and dashboards	Improved decision-making, targeting, and content development alignment	Higher export success rates and reduced market-entry risk	Use of data in greenlighting; export success ratio; audience engagement metrics	NFVF
<b>Institutional coordination</b>	Align NFVF, dtic, and industry stakeholders around a unified distribution and export strategy	Coordinated governance and delivery framework	Reduced duplication, improved efficiency, and aligned execution	Stronger ecosystem performance and policy impact	Programme alignment; delivery timelines; cross-agency initiatives	NFVF, dtic
<b>IP retention &amp; negotiation capacity</b>	Strengthen legal, commercial, and financing support for IP ownership and deal-making	Advisory services, standard contracts, and financing tools	Improved rights retention and negotiation outcomes	Increased long-term value capture and licensing revenues	% IP retained; improved deal terms; licensing revenue growth	NFVF, legal bodies, private sector

*Note: Strategic objective – Strengthen market access, partnerships, and regional scale, enabling South Africa to transition from production capability to sustained distribution performance and export growth.*

*Source: Birguid analysis*

**Table 25: Long-Term (5+ Years) – System transformation & global positioning**

Priority Area	Key Actions	Outputs	Outcomes	Impact	KPIs	Lead Stakeholders
<b>Global positioning</b>	Develop and implement a national brand and positioning strategy for South African content (aligned to global platforms and festivals)	Global SA content positioning strategy and campaigns	Increased international recognition and differentiation of SA content	Strong and sustained global demand for SA content	Brand recognition metrics; global rankings; festival presence	NFVF
<b>Export ecosystem</b>	Build a fully integrated, distribution-led export ecosystem (production–distribution–market access alignment)	Fully functional export ecosystem with coordinated institutions and pipelines	Continuous pipeline of export-ready, globally distributed content	Increased and sustained export revenues and industry growth	Export value (R); export growth rate; # of internationally distributed titles	NFVF, dtic
<b>IP ownership strengthening</b>	Increase IP retention through improved financing models, legal frameworks, and industry practices	Enhanced ownership and financing structures supporting IP retention	Greater value capture across licensing, syndication, and downstream revenues	Long-term industry sustainability and reduced dependence on service production	% IP retained; licensing revenues; share of downstream income	Industry, NFVF
<b>Global market share</b>	Expand participation and competitiveness across global platforms, markets, and territories	Increased and sustained SA presence across major platforms and markets	Higher share of global content flows and improved competitiveness	Strong global positioning and influence in international content markets	% of global titles; platform share; audience reach across key markets	NFVF, private sector
<b>Global partnerships &amp; co-production pipelines</b>	Institutionalise long-term global partnerships, co-production pipelines, and distribution agreements	Established global partnership networks and recurring co-production pipelines	Increased access to financing, distribution, and international audiences	Scalable and resilient global integration of SA content	# of long-term partnerships; repeat co-productions; international deal value	NFVF, dtic, private sector
<b>Digital &amp; AI-enabled competitiveness</b>	Leverage AI and digital technologies for localisation, discoverability, audience targeting, and scalability	Integrated AI-enabled distribution and marketing capabilities	Improved efficiency, reduced costs, and enhanced global reach	Increased competitiveness in platform-driven global markets	Cost reduction % (localisation/marketing); engagement metrics; market expansion	NFVF, private sector

*Note: Strategic objective – Establish South Africa as a globally competitive, distribution-led audiovisual exporter, with strong IP ownership, sustained market presence, and increasing share of global content flows.*

*Source: Birguid analysis*

## 5.8 Conclusion

South Africa's audiovisual sector does not face a creativity but conversion constraint. The country has already demonstrated that it can produce content that is internationally relevant.

What it has not yet done consistently is convert that capability into:

- Scalable distribution
- Sustained global visibility
- Stronger bargaining outcomes
- Long-term value capture

This is a structural, system-level challenge. Global evidence confirms that competitiveness is determined not by production alone, but by control over:

- Distribution pathways
- Market access
- Rights systems
- Value capture mechanisms

South Africa's opportunity is to reposition itself within the global distribution architecture. This requires a deliberate transition toward a distribution-led model, where:

- Rights are retained
- Markets are strategically targeted
- Platforms are optimised
- Value is captured

If executed effectively, this framework will enable South Africa to move from a capable production market to a competitive, distribution-driven global exporter.

## APPENDICES

### APPENDIX A: Acronyms and abbreviations

Acronym / Abbreviation	Full term	Meaning / use in the report
AI	Artificial Intelligence	Refers to machine-based tools and systems used to support functions such as localisation, discoverability, metadata optimisation, and scalability in distribution.
AFM	American Film Market	A major international film market referenced as an example of a global deal-making platform for licensing, sales, financing, and partnerships.
AVOD	Advertising Video on Demand	A video distribution model where audiences access content without a direct subscription fee, while revenue is generated through advertising.
BFI	British Film Institute	UK screen-sector institution referenced as an example of export-promotion and international distribution support.
Bizcommunity	Bizcommunity	Industry/media source cited in the report in relation to platform activity and South African content distribution.
CMF-FMC	Canada Media Fund / Fonds des médias du Canada	Referenced source relating to international screen-sector and distribution support insights.
COVID-19	Coronavirus Disease 2019	Used to contextualise post-pandemic changes in theatrical performance and distribution conditions.
DTIC / the dtic	Department of Trade, Industry and Competition	South African government department administering film and television incentives referenced throughout the report.
EIDR	Entertainment Identifier Registry	A standardised identifier system used to support interoperable content tracking and metadata management across platforms and systems.
EWN	Eyewitness News	Media source referenced in relation to South African incentive delays and industry concerns.
FAST	Free Ad-Supported Streaming Television	A digital distribution model combining free audience access with advertising-funded monetisation, usually through linear-style streaming channels.
GDP	Gross Domestic Product	Used in relation to the economic contribution of the audiovisual and interactive media subsector.
Hallyu	Korean Wave	Widely used term describing the global spread of Korean cultural exports, referenced in relation to Korea's audiovisual export strategy.
ICASA	Independent Communications Authority of South Africa	South African communications regulator referenced for connectivity and household internet access data.
IMF	Interoperable Master Format	A professional media packaging standard used for versioning and delivery of audiovisual content to platforms and distributors.
IP	Intellectual Property	Legal rights attached to creative works and content assets; central to value retention, licensing, and long-term monetisation.

Acronym / Abbreviation	Full term	Meaning / use in the report
ITC	International Trade Centre	Source used for trade data on audiovisual and related services exports and imports.
ITU	International Telecommunication Union	Source used for global and regional connectivity and internet-use data relevant to digital distribution feasibility.
KLA	KLA	Source cited in relation to streaming-service usage and market behaviour.
KOFIC	Korean Film Council	Korean screen-sector institution used as an example of coordinated export promotion and international support.
MEC	MovieLabs Entertainment Core	Metadata specification referenced in relation to technical delivery, asset management, and platform compliance.
MG / MGs	Minimum Guarantee / Minimum Guarantees	Upfront payments or guaranteed revenue commitments often used in licensing and distribution deals.
MMC	Media Manifest Core	MovieLabs specification referenced for packaging and managing media assets and metadata for platform delivery.
MPA	Motion Picture Association	Source referenced for global entertainment market size and digital/home entertainment trends.
NFVF	National Film and Video Foundation	The commissioning/client institution in the report context and a central South African audiovisual industry support body.
OTT	Over-the-Top	Internet-delivered audiovisual services distributed directly over broadband/mobile networks rather than traditional broadcast or cable infrastructure.
PBS	Public Broadcasting Service	Referenced via PBS Distribution as an example of technical delivery and compliance requirements.
PRISM	PRISM	Referenced source relating to distribution readiness, rights, and industry constraints.
PwC	PricewaterhouseCoopers	Source referenced for market and digital media industry insights, including OTT and infrastructure-related trends.
QC	Quality Control	Technical and editorial checks required before content can be accepted for platform or distributor delivery workflows.
R	South African Rand	Currency used in the report for sector contribution, affordability, and implementation-cost references.
SACO	South African Cultural Observatory	Source referenced for the economic contribution of the audiovisual and interactive media subsector.
SADC	Southern African Development Community	Regional market bloc referenced in strategic recommendations and growth-market considerations.
SA	South Africa / South African	General country abbreviation used throughout the report.
SVOD	Subscription Video on Demand	A paid recurring-subscription streaming model where audiences access a catalogue of content for a monthly or periodic fee.
TIPS	Trade and Industrial Policy Strategies	South African policy research organisation referenced in relation to IP retention and industry economics.
TV	Television	Used throughout the report in relation to channel mix, distribution pathways, and audience access.

Acronym / Abbreviation	Full term	Meaning / use in the report
TVOD	Transactional Video on Demand	A model in which users pay per title, rental, or transaction rather than via subscription or advertising-only access.
UK	United Kingdom	Comparator market and source-country context used in benchmarking examples.
UNCTAD	United Nations Conference on Trade and Development	Major source used for creative economy, digital trade, and South–South trade insights.
UNESCO	United Nations Educational, Scientific and Cultural Organization	Major source used for policy, culture, and audiovisual-sector competitiveness insights.
USA / U.S.	United States of America / United States	Benchmark comparator country used as the global frontier case.
VoD / VOD	Video on Demand	Broad category of digital audiovisual services where audiences access content at a time of their choosing.

## APPENDIX B: Glossary of terms

Term	Definition for this report
<b>Administrative efficiency</b>	The speed, reliability, and predictability with which policy tools, approvals, and incentives are implemented. In the report, this is especially relevant to the credibility of the dtic incentive system.
<b>Affordability constraints</b>	Economic limits that affect whether audiences can sustainably access digital content, including the cost of data, subscriptions, devices, and related internet use.
<b>Aggregators</b>	Intermediaries that help producers deliver content to digital platforms by managing packaging, metadata, encoding, localisation, and other technical requirements.
<b>Algorithmic distribution</b>	Platform-led content circulation shaped by recommendation systems, search tools, ranking logic, and metadata-driven discoverability.
<b>Algorithmic literacy</b>	The capability to understand and respond strategically to how platforms surface, recommend, and prioritise content.
<b>Audience reach</b>	The extent to which content is able to access and engage viewers across domestic or international markets.
<b>Audiovisual distribution</b>	The process through which film, television, and related screen content is packaged, licensed, delivered, marketed, and made available to audiences across theatrical, broadcast, and digital channels.
<b>Audiovisual ecosystem</b>	The full system of institutions, policies, firms, platforms, creators, financiers, distributors, and enabling infrastructure that shapes the production and circulation of screen content.
<b>Benchmarking</b>	A comparative method used to assess South Africa's distribution performance and enabling conditions against selected international markets or best-practice systems.
<b>Chain of title</b>	The documented legal history showing who owns the intellectual property and which rights have been assigned, licensed, or retained. It is essential for tradability and licensing.
<b>Commercial readiness</b>	The degree to which a project is prepared to attract buyers and move through the market, including rights clarity, marketing materials, technical compliance, and packaging quality.
<b>Comparator market / comparator country</b>	A selected country used as a reference point in benchmarking South Africa's distribution competitiveness. In the report these include the USA, Republic of Korea, Brazil, and Nigeria.
<b>Connectivity expansion</b>	Growth in internet and network access across households and devices, relevant to the viability of streaming and digital distribution.
<b>Content packaging</b>	The preparation of a title for market and platform use through the assembly of deliverables, rights documentation, artwork, synopsis, metadata, trailers, and related assets.
<b>Co-production</b>	A collaborative production arrangement involving partners from more than one territory, often used to pool finance, access incentives, and improve market access.
<b>Co-production network</b>	The institutional and market relationships that support international co-productions, including treaties, financiers, producers, markets, and policy support.
<b>Deal sophistication</b>	The degree to which producers and rights holders can negotiate favourable commercial arrangements, retain value, and structure rights and revenues strategically across territories and windows.
<b>Deal structure</b>	The commercial arrangement governing how a title is financed, licensed, distributed, and monetised, such as licensing, minimum guarantees, revenue shares, or co-production models.
<b>Deliverables</b>	The technical, editorial, legal, and promotional materials required by distributors or platforms before a title can be accepted and released.
<b>Diaspora circuit / diaspora pathway</b>	A route to market focused on audiences living outside their country of origin who may form niche but valuable demand for culturally specific content.
<b>Digital discoverability</b>	The ability of content to be found, surfaced, and selected within digital catalogues through search, metadata, recommendations, thumbnails, synopses, and ranking systems.
<b>Digital infrastructure</b>	The connectivity environment that supports digital content access and delivery, including broadband, mobile networks, devices, and payment systems.
<b>Digital platform</b>	An internet-based service that distributes content to audiences, including streamers, OTT services, and other video-on-demand environments.
<b>Distribution capability</b>	The combined commercial, technical, legal, and strategic ability to move content from production into markets and to audiences.
<b>Distribution competitiveness</b>	The capacity of a national audiovisual industry to secure international market access, achieve discoverability, negotiate viable deals, retain value, and generate sustained export outcomes.

Term	Definition for this report
<b>Distribution ecosystem</b>	The wider system of channels, institutions, technologies, partners, and support mechanisms through which content is circulated and monetised.
<b>Distribution-led strategy</b>	A strategic approach that prioritises market access, platform fit, discoverability, licensing, and monetisation rather than focusing primarily on production volume.
<b>Distribution model</b>	The channel or combination of channels used to release and monetise content, such as theatrical, broadcast, SVOD, AVOD, FAST, or hybrid models.
<b>Distribution readiness</b>	The state of being legally tradable, technically deliverable, operationally usable, and commercially packageable for international circulation. The report treats rights, localisation, metadata, and technical compliance as core elements.
<b>Domestic theatrical market</b>	The local cinema exhibition market within South Africa. In the report it is described as a weak recoupment channel for most local productions.
<b>Economic value capture</b>	The extent to which a local industry retains income, rights, royalties, and downstream benefits from the exploitation of its content.
<b>Encoding</b>	The technical processing of audiovisual files into required digital formats for platform or distributor delivery.
<b>Export competitiveness</b>	The ability of a country's audiovisual industry to achieve sustained international circulation, licensing, sales, and market visibility in foreign territories.
<b>Export pathway</b>	A route through which content reaches international markets, including sales agents, festivals, broadcasters, streaming platforms, film markets, and diaspora channels.
<b>Export-promotion architecture</b>	The institutional set of programmes, funding tools, market support mechanisms, and intelligence systems designed to improve international circulation and sales.
<b>Festival circulation</b>	The movement of a film through film festivals as a route to validation, publicity, distributor attention, and international exposure.
<b>Film market</b>	A formal industry marketplace where buyers, sellers, financiers, sales agents, producers, and platforms negotiate rights, deals, and partnerships.
<b>Global circulation</b>	The ability of content to travel and remain visible across multiple territories and platforms internationally.
<b>Global competitiveness</b>	The ability of a national industry to compete successfully in international markets across access, visibility, monetisation, and long-term value retention.
<b>Heatmap of competitiveness</b>	A comparative visual or score-based representation showing relative strengths and weaknesses across benchmark dimensions.
<b>Hybrid distribution model</b>	A release and monetisation approach that combines multiple channels or revenue logics, such as theatrical, broadcast, SVOD, AVOD, FAST, or mobile-first strategies.
<b>Hybrid release model</b>	A release strategy that does not rely on a single sequence or single channel, but combines or overlaps windows, platforms, or territories.
<b>Infrastructure feasibility</b>	One of the report's benchmark dimensions, referring to whether network access, affordability, device ecosystems, and digital payments make a given distribution strategy viable.
<b>Institutional alignment</b>	The extent to which policy, incentives, export support, distribution support, and industry strategy work coherently together.
<b>International circulation</b>	The movement of content beyond its domestic market into foreign territories and audiences through formal or informal channels.
<b>International licensing</b>	The sale or granting of rights for content exploitation in one or more foreign territories or windows.
<b>International market access</b>	The ability to reach foreign buyers, platforms, broadcasters, festivals, or audiences through effective routes to market.
<b>Localisation</b>	The adaptation of content and associated materials for use across languages and territories, including subtitling, dubbing, captions, and localised metadata.
<b>Market access power</b>	One of the report's benchmark dimensions, referring to the strength and diversity of pathways through which local content can reach international buyers and audiences.
<b>Market intelligence</b>	Information and insight on buyers, territories, audience trends, platform requirements, and deal conditions used to support stronger market decisions.
<b>Metadata</b>	Structured descriptive information about a title, such as title, synopsis, genre, identifiers, ratings, versions, and language details, used for platform ingestion, organisation, and discoverability.

<b>Term</b>	<b>Definition for this report</b>
<b>Mobile-first environment</b>	A market condition in which audiences primarily access digital content through smartphones and mobile networks rather than fixed broadband or desktop systems.
<b>Monetisation</b>	The process of generating income from content through subscriptions, advertising, transactions, licensing, syndication, or related commercial models.
<b>Multi-channel access</b>	A strategy or condition in which content reaches markets through several complementary routes rather than a single dominant pathway.
<b>Platform alignment</b>	The degree to which content and its packaging fit the requirements, economics, audience logic, and technical specifications of digital platforms.
<b>Platform economics</b>	The commercial logic that shapes platform decisions, including subscriber growth, retention, ad yield, cost discipline, and catalogue strategy.
<b>Platform readiness</b>	The degree to which content and industry systems are able to meet platform requirements for rights, technical delivery, metadata, localisation, and quality control.
<b>Platformisation</b>	The structural shift in distribution in which digital platforms increasingly determine visibility, circulation, recommendation, and monetisation of content.
<b>Policy credibility</b>	The extent to which policy tools are seen as stable, reliable, and investable by industry participants and international partners.
<b>Policy and ecosystem support</b>	One of the report's benchmark dimensions, covering incentives, treaties, export promotion, institutional support, intelligence systems, and related industry enablers.
<b>Portfolio system of distribution</b>	The idea that successful international circulation depends on multiple complementary pathways rather than reliance on a single route to market.
<b>Post-production</b>	The stage after principal filming in which editing, sound, colour, mastering, subtitling, and other finishing processes are completed.
<b>Production capability</b>	The creative, technical, and infrastructure strength that enables a country to produce audiovisual content competitively.
<b>Production incentive</b>	A public policy tool such as a rebate, tax credit, or grant designed to attract production activity and strengthen industry capacity.
<b>Production-led model</b>	An industry model focused primarily on getting content made, sometimes without equal attention to downstream circulation, market access, or value retention.
<b>Purposive sampling</b>	A qualitative sampling method used to select expert respondents based on relevance, experience, and functional knowledge rather than statistical representativeness.
<b>Quality control (QC)</b>	Technical and editorial verification to ensure that content and associated materials meet distributor or platform standards.
<b>Recoupment channel</b>	A route through which producers recover production costs and generate returns, such as theatrical release, licensing, or streaming deals.
<b>Regional integration</b>	The strengthening of market access and collaboration within regional blocs or neighbouring countries, such as SADC and broader African markets.
<b>Release window / windowing</b>	The sequencing or structuring of how content is made available across channels and over time, such as theatrical first, then streaming, then broadcast.
<b>Revenue share / rev-share</b>	A deal structure in which revenues generated by content are split between parties according to agreed proportions.
<b>Rights clarity</b>	The condition in which ownership and exploitation rights are clearly documented, allowing content to be licensed or acquired without legal uncertainty.
<b>Rights fragmentation</b>	A condition in which rights are divided, unclear, or dispersed across multiple parties, reducing tradability and weakening bargaining power.
<b>Rights retention</b>	The extent to which local creators or producers maintain ownership or exploitable control over intellectual property and downstream rights.
<b>Route-to-market</b>	The practical commercial path through which a project moves from completion to audience access, including channels, partners, and release strategy.
<b>Sales agent</b>	An intermediary that represents a title or slate to international buyers, negotiates licensing deals, and helps structure rights sales across territories and windows.
<b>Scalability</b>	The ability of a distribution strategy, platform relationship, or market model to expand reach and revenue efficiently over time.
<b>Service capability</b>	The ability of a production ecosystem to support both domestic work and foreign productions through skilled crews, facilities, and execution capacity.

<b>Term</b>	<b>Definition for this report</b>
<b>South–South trade</b>	Trade flows between developing or emerging economies, referenced in the report as an increasingly important route to growth outside traditional Western centres.
<b>Stakeholder insight</b>	Evidence derived from expert interviews across the value chain, used in the report to complement desk research and comparative benchmarking.
<b>Streaming platform</b>	A digital service that delivers audiovisual content over the internet for on-demand or scheduled viewing.
<b>Structural constraint</b>	A system-level barrier that limits performance, such as weak rights retention, limited localisation capacity, affordability pressures, or poor incentive administration.
<b>Sustained export performance</b>	Consistent international sales, visibility, and monetisation over time rather than isolated one-off successes.
<b>Technical compliance</b>	Conformity with the delivery standards, formats, metadata requirements, and QC procedures expected by platforms or distributors.
<b>Technical delivery</b>	The process of preparing and transmitting audiovisual files and related materials in the required standard for ingestion by a broadcaster, platform, or distributor.
<b>Technical distribution supply chain</b>	The operational layer of vendors, aggregators, and systems that support mastering, metadata, localisation, encoding, and platform delivery.
<b>Theatrical exhibition</b>	Cinema-based release and screening of films. The report treats it as an important but limited and pressured channel for local-content monetisation.
<b>Theatrical share</b>	The proportion of cinema admissions or box office revenue accounted for by local films within the domestic theatrical market.
<b>Tradability</b>	The degree to which a project is capable of being sold, licensed, or commercially exploited across territories and platforms.
<b>Value retention</b>	The degree to which economic returns and rights remain within the local industry rather than shifting to external partners.
<b>Windowing strategy</b>	The planned sequence or structure of content release across different channels and territories to optimise audience reach and revenue.

## APPENDIX C: Global Distribution Benchmarking Framework and Scorecard

### C.1 Purpose of the Benchmarking Framework

The Global Distribution Benchmarking Framework provides a structured, comparative tool for assessing South Africa’s audiovisual distribution performance relative to selected international territories across **Africa, Europe, North America, Asia, and MENA**.

The framework is designed to:

- Standardise cross-country comparison despite market heterogeneity
- Translate qualitative expert insight into decision-grade comparative intelligence
- Identify relative strengths, structural gaps, and priority intervention areas
- Support repeat measurement and longitudinal tracking over time

The framework draws on global best practice in comparative policy and market analysis.

### C.2 Benchmarking Dimensions

Five core dimensions reflect the end-to-end global distribution system, from policy and infrastructure through to monetisation and visibility:

- 1) Market Access & Reach
- 2) Distribution Models & Commercial Structures
- 3) Digital & Technical Readiness
- 4) Policy, Incentives & Institutional Support
- 5) Performance Outcomes & Visibility

Each dimension is scored using a qualitative comparative scale, supported by evidence from desk research and expert interviews.

### C.3 Comparative Scorecard Structure

**Table C1: Global Distribution Benchmarking Scorecard**

Dimension	Indicator	Evidence Sources	Comparative Score*	Commentary
Market Access & Reach	Access to major global platforms	Platform catalogues; expert interviews	Low / Medium / High	Selective access; uneven scale
	Strength of sales agent networks	Distributor interviews		

Dimension	Indicator	Evidence Sources	Comparative Score*	Commentary
	Festival-to-market conversion	Festival data; sales outcomes		
Distribution Models	Licensing sophistication	Deal structures; MG prevalence		
	Co-production penetration	Treaty usage; partner interviews		
	Revenue participation	Rights retention analysis		
Digital Readiness	Metadata & localisation standards	Platform requirements; producer readiness		
	Encoding & delivery compliance	Technical audits; expert views		
	Platform discoverability alignment	Algorithmic practices		
Policy Incentives &	Export-oriented incentives	Policy review		
	Distribution-linked support	Funding mechanisms		
	Administrative efficiency	Stakeholder feedback		
Outcomes & Visibility	International performance	Box office; streaming rankings		
	Brand & cultural visibility	Awards; media coverage		
	Long-term value capture	IP ownership outcomes		

\*Scores are comparative and contextual, not absolute rankings.

Source: Birguid

#### C.4 Territory Comparison Logic

Benchmarking will compare South Africa against reference territories (one per region) selected for strategic relevance rather than size alone:

- **Africa:** Nigeria, Kenya, Morocco

- **Europe:** United Kingdom, France, Germany
- **North America:** United States, Canada
- **Asia:** South Korea, India
- **MENA:** United Arab Emirates, Egypt

Each territory profile will summarise:

- Dominant distribution pathways
- Policy and incentive architecture
- Platform penetration and content flows
- Export performance patterns

### **C.5 Scoring and Interpretation Approach**

- Scoring is evidence-led, not perception-led
- No composite “league table” will be published
- Emphasis is on diagnostic insight, not ranking prestige

Outputs include:

- Comparative heatmaps
- Priority gap analysis
- Strategic leverage points for South Africa

This ensures the framework supports policy action and industry strategy, not abstract comparison.

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