



# Research into the Trends of the KZN Filmed-Content Consumer

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**LUMEC**

# Introduction and Background

- LUMEC specialises in socio-economic analysis, strategic planning, policy and strategy formulation, value chain analysis, urban planning, and socio-economic impact assessments.
- In 2016, the KwaZulu-Natal Film Commission appointed LUMEC to undertake research into the trends of the KZN filmed-content consumer to drive audience development.
- As an output, LUMEC developed an animated video with some of the key results of the research.



• OUR KINGDOM IS YOUR STAGE •

# Factors Inhibiting Audience Development

- **Content development**
  - SAFI is largely subsidy-based and films are often not considered a commercial product – as such, content is often not developed with a target market in mind.
- **Marketing and distribution**
  - Globally, marketing strategies are implemented from the early stages while locally, marketing is often under-emphasised and only done once a production is complete (or close to complete).

# Factors Inhibiting Audience Development

- **Cost and access to cinemas**
  - All cinemas in urban areas, making it difficult and expensive for much of the population to visit cinemas.
  - SA has a relatively high ticket and confectionery costs.
- **Domestic film representation at cinemas**
  - The KZN exhibition market is dominated by Ster-Kinekor and NuMetro (75% of screens).
  - Local films have to compete for scheduling against international films which generate much bigger profits.

# Consumption Trends and Platforms





# Consumption Trends and Platforms

- **Audience consumption trends in KZN are driven by cost and access**
  - TV is the dominant platform as 98% of the population having access to TV.
  - 70% have never been to the cinema.
  - Much slower growth in VOD than indicated by global trends.
- **DVDs are still an important distribution platform**
  - Although DVD sales have declined globally, 50% watch DVDs more than once a month.
  - Over half bought their last DVD from street vendors or markets, implying a large 'pirated' DVD market.



# South African Content Preferences







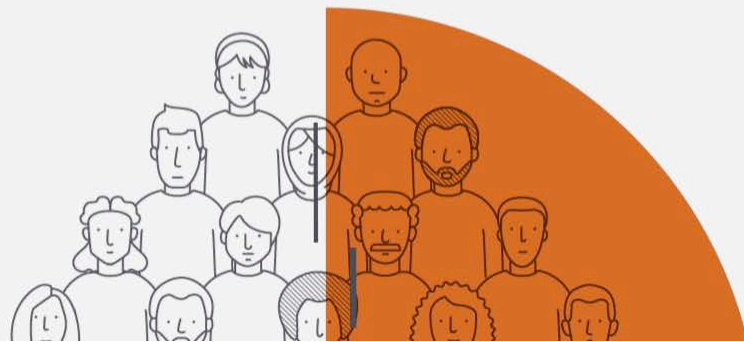
# South African Content Preferences

- **Domestic film preferences**
  - Leon Shuster films continue to be a firm favourite - other favourites are largely gangster films with lots of violence and explicit language.
  - DVD was the most popular platform for the consumption of SA films.
  - Only 4% of respondent's viewed their last SA films at the cinema – only 12% of films on the cinema in 2016 were domestic films.
- **Drama series continue to dominate the television**
  - South Africa's most viewed TV shows, Uzalo and Isibaya, are also the most viewed amongst KZN audiences.

These start to speak to language, genre and ratings preferences.....

# Language, Genre and Ratings Preferences





# Language, Genre and Rating Preferences

- **Language is an important factor, but current content isn't representative**
  - Over 40% of the population prefer content in isiZulu, however - no films on SA cinemas in 2016 were in isiZulu.
  - In relation to TV, in which the most viewed shows (Isibaya & Uzalo) are in isiZulu.
- **Sex and nudity vs violence and strong language**
  - Could this be an indication that KZN (and South African) audiences are fairly conservative?
  - Perhaps this was witnessed by the recent outrage against Inxeba - The Wound?

# Key Recommendations







# Some Conclusions

- Approach audience development needs to be viewed from both a supply and demand perspective.
- Need to support local filmed-content producers to develop better scripts, marketing strategies and business plans, and to better distribute through existing (e.g. DVD) and emerging (e.g. VOD) platforms.
- Need to encourage support for local content via development initiatives such as school film programmes and community screenings.

# Thank you!

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To view the full animated video, please visit:

**[www.lumec.co.za](http://www.lumec.co.za) or  lumecSA**

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