Research into the Trends of the KZN Filmed-Content Consumer

SACO Conference 2018

7th March 2018

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.

KWAZULU-NATAL
FILM COMMISSION
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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.

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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 decided 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?

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Key Recommendations

Some Conclusions

- Approach audience development needs to 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 or **lumecSA**