

## *The Viability of Online Distribution for South African Feature Films*

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### **Abstract**

Distribution is an important aspect of the film value chain. Despite the growth of the South African film industry, distribution remains one of its central challenges. This can in part be contributed to the country's political history that still affects the economic and social sphere. Issues related to poverty, unemployment, infrastructure, transport, and mobility all affect cinema attendance. Access to the internet remains a challenge because of lack of electricity, poor telecommunication infrastructure and high data costs. Considering the above, this paper investigates the feasibility of online distribution for South African feature films. The paper considers the current dominant streaming services in South Africa (Showmax and Netflix) and off by discussing some of the advantages and disadvantages that online distribution holds for South African film producers and consumers. These factors will be important to consider when assessing the feasibility for online film distribution.

Keywords: South Africa–VOD, Streaming, Online, Streaming Service, Distribution, Film, Cinema, Netflix, Showmax, Audience

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## **Introduction**

In this paper we investigate online feature film distribution and its challenges within the South African context. We discuss the conditions that would affect the viability of using online film distribution and the benefits it holds to producers, specifically in profit generation. Current challenges for online film distribution, including online legislation and policies, local and international Over-The-Top services, data costs, bandwidth restrictions, target audience and marketing will form part of the discussion. It is important to point out that this research is concerned with profitability for producers using online film distribution and is thus framed in this way.

This is a qualitative study that follows an exploratory research design in order to determine the nature of the ‘problem’, namely how to implement online film distribution. The methodology granted the researchers flexibility to slightly adapt and change our scope, especially when the Covid19 pandemic resulted in a great change in the film distribution landscape.

We analysed research reports and policy documents, while conducting unstructured interviews with role players from the South African film industry. These role players included the Film and Publication Board (FPB); the National Film and Video Foundation (NFVF); the Independent Communications Authority of South Africa (ICASA) and the Department of Communications and Digital Technologies (DCDT). We also interviewed two South African online Video-On-Demand platforms, namely DSTV Box Office and Showmax, a local film distributor (Indigenous Film Distribution) and the two dominant film distributors / exhibitors Ster-Kinekor and Nu-Metro.

The aim of these interviews was to understand these role players’ views on current distribution structures in South Africa as well as their opinions about online film distribution and the future of online media in a technologically advanced and driven industry. The use of open-ended questions from the interviews provided both the interviewer and interviewee an opportunity to discuss and elaborate on the topic. In particular, it afforded the interviewee the opportunity to share vital information which contributed to the findings of the research.

As this paper forms part of a larger study, we have summarised our main findings up to this point here, while more of our recommendations will be published subsequently as it becomes available. The current scope of the paper focuses solely on feature film distribution, and does not discuss other short or serialised format. research was undertaken within the confines of online film distribution for feature films in South Africa. It did not focus on other formats or mediums such as television series or documentaries.

## **Film Distribution – a theoretical framework**

Film distribution is “a process in which a film, after completion, is made accessible to its target audience” (Mfolo, 2022, p. 1). During this process the producer, sales agent or distributor distributes the film to be sold or screened at cinema, on television, or internet streaming services or video-on-demand platforms. This distribution is done in order for an audience to view the film and for the producers, filmmakers and other role players to earn income from it (Kehoe & Mateer, 2015, p. 97).

Distribution is an integral part of the film value chain. It is aimed at recouping the funds spent during the production phase of the film and to earn additional revenue. This can only happen if a film is consumed by an audience who pays for a cinema ticket, rents a DVD or pays for a television or streaming subscription. Therefore, one must focus not only on distributing your film, but in distributing it to the correct channels where a relevant audience will be able to enjoy the film (Ulin, 2013, p. 5).

In negotiating the distribution of your film, one usually focuses on three central elements, namely marketing, film exhibition and copyright attribution. Marketing entails creating awareness about your content and promoting your film for consumption. Film exhibition enables a audience member to watch a film (Hark, 2002, p. 1). Copyright is defined as the exclusive right granted by law to an author or creator to exploit their original work for a period of time. These rights empower the author or creator to distribute or control the economic use of the work (DTI, 2018, pp. 5, 40-41).

The film value chain was strictly followed: in order to maximize profit, feature films were made exclusively available on one platform (like cinema) before it was released on DVD and then licensed to television (usually to satellite, cable or pay television first, then followed by “free to air” television. Producers would follow these “release windows” in order to make profit, as “content value is optimized by exploiting the factors of time, repeat consumption (platforms), exclusivity and differential pricing in a pattern, taking into account external market conditions and the interplay of the factors among each other,” (Ulin, 2013, p. 5).

In the twentieth century films were made on celluloid and it was a longer and more costly process. Fewer films were produced and according to Parks (2012, p. 1) this made it easier to get a distribution deal. Yet in the twenty first century technology has given filmmakers the opportunity to produce films faster and cheaper. Thus, one could say that the digital evolution disrupted the traditional film industry and led to more film distribution challenges (SACO, 2018, p. 85). Technological advancements will affect conventional rules of competition and eventually even make some of the distribution rules like the “windows” and the film value chain (discussed above) obsolete. This will allow a new value chain to form with new players, products and services in a market, (Ball, 2022, p. 39).

In the next section of the paper we will briefly give a historical background to the South African film industry, with specific reference to how this history has contributed to the fragmented industry and other obstacles that producers face in terms of feature film distribution.

## **Historical Background**

The South African film industry emerged in the 1890s, making it one of the oldest industries internationally. Despite this long history, the current industry is fragmented, especially in terms of audiences and distribution (Mboti & Tomaselli, 2015, p. 622). At the beginning of the twentieth century the country’s film industry were dominated by English South Africans and even during the first two decades of the white National Party’s rule “cinema had remained under the control of English-dominated capital” (Tomaselli, 1989, p. 35).

In 1965, the National Party government made amendments to the subsidy scheme to stimulate Afrikaans language films. In the same year Afrikaans dominated capital, represented by the insurance conglomerate SANLAM, bought out 20<sup>th</sup> Century Fox “which

gave [Afrikaner interests] a monopoly on the production, distribution and exhibition of feature films.” (Tomaselli, 1989, p. 35). Yet in 1976 it was reported by the Board of Trade and Industries that only four of the 88 films made in the last four years would have made a profit without the assistance of the subsidy. In 1977 “the fixed language differential percentages were dropped and a sliding scale based on net box office receipts substituted” (Tomaselli, 1989, p. 36). At the time of writing this paper, in 2022, it is to be noted that the South African film industry is still largely reliant on government subsidies.

In 1994 democratic elections took place and the ANC became the ruling party. A year later the new democratic government called for a restructuring of the audiovisual industry, resulting in the establishment of the National Film and Video Foundation (NFVF) in 1999 (Botha, 2007, p. 23). For the next twenty years the industry’s distribution system would largely focus on traditional platforms such as cinema theatres, television broadcasters, and video and later DVD sales and rentals (Mfolo, 2022, p. 2).

South Africa’s film industry has a notable problem that many of our interviewees identified to us: it is that no one can really tell you what a South African film is and looks like. This is in stark contrast to industries like Bollywood. A Bollywood film for example can be identified by its musical traits, a “feel-good-ending” and bright colours in its costumes and art design (Goodyear, 2021; Hafeez, 2016, p. 69). To date, many film investors like the NFVF (who manages film funds on behalf of the South African Government) promotes feature films that have a political backdrop such as the apartheid struggle. Government institutions fund these films because they have a desire to balance and correct the misrepresentation produced during the apartheid regime particularly for black audiences (Goldbaum, 2021). Still, in contemporary times, these films are often regarded as soft advertising for the ruling ANC, as they have faced criticism and a decline in membership and voters in recent years (Desai, 2022).

As opposed to the Hollywood, where the studio will typically control and own the film, the South African film industry is considered to be “independent”, as most films are made by independent one-man-owned production companies. Copyright and ownership of the film is usually held by the producer, however that if a film is commissioned by Multichoice or Showmax that the company will own copyright of the film (Mfolo, 2022, p. 63).

### **South African Film Distribution**

In South Africa cinema attendance steadily declined during the last decade. The declining audience can be attributed to access to cinemas, as cinemas are traditionally located in upper class urban areas, while the majority of South Africa’s black population still resides in townships and other densely populated areas. Townships are areas that were designated to exclusive racial groups under the apartheid government legislation. In contemporary South Africa, these areas continue to exist. Prominent examples of these areas Soweto (Gauteng) and Khayelitsha (Western Cape). Therefore, to travel to cinemas South Africans need to pay for transport costs. Combined with the expensive ticket costs and the high price of cinema snacks, it is more cost effective for the average South African to watch television. All of these factors were highlighted in the *Establishment of the Film Sector as Catalyst for Economic Growth in South Africa: Toward a Sallywood Report* (SACO, 2018).

The international film industry has historically been an industry defined by anti-competitive practices. Therefore, according to Cones (2013, p. 2), filmmakers and distributors were

forced to make adjustments to sustain their respective industries. In South Africa, the declining cinema attendance meant that cinemas relied more on foreign content, mostly Hollywood blockbusters, to attract audiences. It is a rule of thumb at South African cinema chains like Ster Kinekor and Nu Metro that the film title within the theatre that sells the least tickets will be dropped from the circuit. In 2015, the Ster Kinekor cinema chain pulled the South African romantic comedy *Tell me Sweet Something* from their theatres three weeks after its initial release. This caused an uproar among local film producers, as they complained that Hollywood blockbusters are given preference as exhibitors feel that they could generate more profit from these films (Mdaka, 2015). This move came despite a historical plea to South African filmmakers that “a nation’s cinema needs experimentation and funds to stimulate creative energy” (Tomaselli, 1989, p. 39).

With the outbreak of the Covid-19 pandemic in 2020, South African cinemas closed for six months between the period of March 2020 and August 2020. Where the South African film industry used to be a contributor to the country’s GDP, the film industry’s contribution to the economy declined to 2,9 billion South African Rands for the period between 2020 and 2021 (Dumeko, 2021). This can be attributed to producers being used to the traditional value chain where they always released their films in cinema theatres before distributing it to other platforms (NFVF, 2021). It is clear that alternative distribution models, mainly online distribution, is the key for producers to maintain a sustainable film industry.

### **Dominant Film Streaming Services in South Africa**

South Africa’s most prominent streaming platform, Showmax, originated in South Africa and offers a SVOD service similar to Netflix. However, Showmax primarily focuses on distributing content that was produced in South Africa. Showmax is owned by Multichoice. Multichoice also owns the prime satellite pay television service DSTV that operates across the African continent. Multichoice also operates as a type of studio system that produces content that is aimed for target audiences in South Africa and across the continent. The multiplatform pay television service provider is also responsible for the video-on-demand platform DSTV Box Office (Multichoice, 2022).

Unlike Showmax, DSTV Box Office is a transactional movie rental service where one can pay per movie and rent a film for 24 hours while it is still available at traditional cinemas (Multichoice, 2021; Udoakpan & Khan Tengeh, 2020). South African feature films and other local content produced for Showmax will ultimately be recycled to television on DSTV’s respective satellite channels to meet the needs of its target audiences. This is done to further exploit revenue generation from the content the service provider has invested in.

Since its launch in 2016, Netflix has been the main competitor for Showmax in the South African market. Therefore, we have summarized some key attributes of the two streaming services in the table below:

**Table 1: Comparing Netflix with Showmax**

	<b>Netflix</b>	<b>Showmax</b>
Launch	1997 in USA 2016 in South Africa	2015 in South Africa 2016 launched in 36 other African countries In 2017 Showmax launched in Poland, however it closed down its service there in 2019.
Content	International TV series and films. Limited South African content available, mostly series and films that have been commissioned since 2018.	International and local television series and films. Its content largely consists of programmes, series and films that are produced for a South African market that enjoy watching content in their own languages, such as Afrikaans, isiZulu, isiXhosa, Sesotho, Tshivenda and so forth.
Technology	TV, PC, Games Console, Mobile or Tablet	TV (Requires DSTV Explora if it is not a Smart TV), PC, Mobile or Tablet
Subscription (listed in ZAR)	R 99.00- R 199.00 per month depending on quality and number of devices accessing the service	R 99.00 per month
Accessibility	Over 190 countries, including South Africa	Available in South Africa with limited distribution across 65 countries: Africa, Europe, Asia/Pacific region.

In the last two years, more streaming services were launched in South Africa, such as eVOD, Disney+ and Amazon Prime (known as Prime Video).

Launched in November 2012, three years prior to Showmax, Wabona was actually South Africa (and one of Africa)'s first a pay-per-view video on demand streaming services. However, because of low internet penetration, a lack of content and poor marketing, the company closed its doors in 2015. Wabona folded due to lack of funding and difficulties in developing a sustainable business in the African VOD space (Mulligan, 2016). In contrast, Netflix and Showmax (backed by Multichoice) have the financial muscle to maintain their platforms' operations and expand it, even in difficult financial climates (Chatikobo, 2018).

Building on the examples set by the above streaming services, the advantages and challenges for online feature film distribution will be discussed in the section below.

### **Advantages and Challenges for Online Film Distribution in South Africa**

#### **Advantages**

South Africa is a developing country faced with several issues, such as a high unemployment rate. If online film distribution could be implemented successfully, the film industry could expand and contribute more employment opportunities, even in other sectors like travel and business tourism which has been identified as industries that could benefit from the growth of the film industry (Urban-Econ, 2017).

The growth of the film industry will not also contribute to economic development, but also to cultural diversity. South Africa has eleven official languages and a range of ethnic and cultural groups. If more feature film content is made available through online platforms, it can contribute to a broader knowledge and understanding of each other as well as to the nation building within South Africa (Sikobi, 2019; Urban-Econ, 2017, p. 11).

Distributing films on online platforms like streaming services means that you are offering your viewers the ultimate convenience of accessing content without having to travel outside their home. VOD offers the buyer a variety of films at a cheaper rate, namely a monthly subscription that would often cost the same price as the entire traditional cinema experience. Viewers are also not limited by timeslots as they would be when watching a film in a theatre or on television. However, one has to note the negative effect it will have on traditional cinema attendance (and one can already witness this at the current point of time). In the last five years ticket prices have already increased in order for exhibitors to invest in digital infrastructure and to pay the rent in shopping malls. One would expect that online film distribution may bring more disruption. As it stands, many of the art house cinemas in South Africa recently closed down, such as the *Cinema Nouveau* in Brooklyn, Pretoria (South Africa's capital city). As the so-called "die-heart" cinema supporters were forced to stay home during the Covid 19 lockdown, they became used to consuming their subtitled art house content on streaming services such as Netflix, Showmax, Disney+ and Amazon Prime.

Gaining access to a streaming service often means that a producer can instantly get a global audience for its feature film – and a wider range of audience connection.

## Challenges

In South Africa one of the greatest obstacles to online film distribution used to be the lack of access to the internet. The South African population that lives in the rural areas do not have fiber connections and other uninterrupted forms of internet access. However, with mobile phones granting users access to the internet, the internet user population has steadily grown. In 2017 the 'internet user penetration' was at almost 54%, by 2021 it had grown to more than 60%, and by 2026 it is expected to be at 66,6% (Johnson, 2021). Yet it is still quite low when one compares this to the internet market penetration of the United States of America. The USA with its 92% internet penetration is the country with the third highest number of internet users in the world (CNBCTV18.com, 2022; DataReportal, 2022). South Africa is ranked third in terms of internet penetration on the African continent, however, it is still far below the global average of 66% (Saleh, 2022).

While we have pointed out in our 'advantages' section that online content consumption is convenient to the audience, it may not be as easy to the filmmaker to gain maximum profit from its online distribution deal. While the previous window system granted the producer access and potential profit from every step of the process, many online deals contain copyright clauses which does not allow the producer to sell their film to more than one streamer at the same time. This means that producers will only get a once off fee from a streaming service (like Netflix) for their feature film and (depending on the contract) they will not be able to exploit the film in other territories or platforms.

The classification and content regulation of feature films in South Africa is regulated by the Film and Publication Board (FPB) under the Minister of Communications and Digital Technologies. The institution was established in 1996 under the Films and Publication Act. In

our interviews with the FPB, it was confirmed that an online content regulation system (OCRS) is still being put in place for online film classification and regulation (Mashele, 2018; Pithumber, 2021). Therefore, the legislation and regulation to govern these practices still needs to be implemented. Furthermore, South Africa's government has faced challenges in regulating international streaming services, notably Netflix. Initially Netflix resisted FPB's classification regulation rules. Netflix only registered with the FPB in to adhere to the country's classification content regulations and rules. They argued that they wanted the freedom to regulate content itself and be free from government censorship. The situation of Netflix paying tax to the South African government is also not entirely clear (Ferreira, 2021).

In our interviews we found that filmmakers often focus so much on the technology that they neglect to consider the audience's preferences and the way audiences connect and interact with these new technologies and platforms.

Lastly, in terms of film production and content generation, the following stood out from our interviews with role players in the industry: If South African producers want to distribute more feature films through online distribution, they would have to make films that are contemporary and depict South Africans' daily lives (as opposed to feature films that are most often set against the turbulent times of apartheid). The head of content at Multichoice, Jan du Plessis (2018) emphasized in an interview with the researchers that for online streaming services to grow, there needs to be a continuing stream of newly released films that resonates with local and international audiences. He also explained that South African filmmakers need to understand film business in order to generate revenue and make profits from their films.

## **Conclusion**

The profit generation within the film business largely depends on the marketing and distribution phase. It is apparent from our research that both traditional and online film distribution pose advantages and disadvantages in revenue generation.

Traditional platforms suggest the exclusivity of revenue windows as a better option for profit generation as it allows for maximum exploitation, however buying tickets at cinema theatres are more expensive for consumers than subscribing to a streaming service. the costs are greater for the audience. The impact of the Covid-19 pandemic, such as cinemas being closed during hard lockdown periods, and consumers moving to streaming services will further influence the affordability of the cinema experience for audiences. While online options are cheaper for viewers, it costs producers money as they will no longer be able to earn profit from the traditional 'window' system in the film value chain. Since the South African film industry does not a formal studio system like Bollywood and Hollywood, independent filmmakers might not be able to gain as much from these distribution models as their international counterparts, especially when signing over their copyright and distribution rights to streaming services that have a global reach.

The growth of SVOD platforms such as Showmax and Netflix in South Africa, as well as the recent establishment of other streaming services, points to the potential for the successful implementation of online distribution for feature films. other types of online platforms exclusive to South African feature films for the sustainability of the industry. However, producers need to understand the film business and produce feature films that can appeal to South African and international audiences alike.

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