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A critical analysis of the distribution challenges and opportunities faced by South African independent documentary filmmakers

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2014-01-16
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A critical analysis of the distribution challenges and opportunities faced by South African independent documentary filmmakers

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Research Report submitted to the Faculty of Humanities of the University of the Witwatersrand in partial fulfilment of the degree of Masters of Arts.

Word Count: 24 900

Submitted: June 2013

ABSTRACT

Distribution is one of the least theorised elements of film studies, yet its ability to monetise a film directly contributes to developing a sustainable film industry. This study analyses the distribution challenges and opportunities faced by South African independent documentary filmmakers. Ten South African documentary industry stakeholders participated in semi-structured "expert" interviews. Their responses were analysed using thematic encoding. Overall, the results indicate that the South African market is too small to support the South African documentary industry and that there is increasing pressure for documentary filmmakers to participate in the highly competitive international market. Furthermore, the results reveal that South African documentary filmmakers need to develop their business skills and have greater documentary-specific government support in order to maximise distribution opportunities and overcome distribution challenges both domestically and internationally. The analysis of findings, in which the results are interpreted in relation to existing literature, finds that South African documentary filmmakers are becoming less resistant to utilising the opportunities of international distribution and Video on Demand (VOD). However, they continue to face the challenge of negative international perceptions of Africa. Additionally, some filmmakers are using aspects of an alternative distribution model called hybrid distribution that Broderick (2009) theorised in response to shifting film market conditions. However, the study suggests that filmmakers need to amend new distribution models for South Africa's unique distribution environment. Furthermore, the South African government's development of a long-term vision for the South African documentary industry would help to maximise distribution opportunities, overcome distribution challenges and work towards a more sustainable industry.

DECLARATION

I, Ryley Grunenwald, declare that this research report is my own work except as indicated in the references and the acknowledgements. I have used the Harvard author-date system as the convention for citation and referencing. This research report is submitted in partial fulfilment of the requirements for the degree of Master of Arts at the University of Witwatersrand, Johannesburg in the field of film and television. It has never been submitted before for any degree to this or any other university.

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RYLEY GRUNENWALD

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DATE

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LOCATION

ACKNOWLEDGEMENTS

I would like to thank my supervisors, Nobunye Levin and Damon Heatlie, for their consistent guidance and advice throughout the writing of this research report. Secondly, I would like to thank my husband for enabling me to study and for being supportive throughout the process. Additionally, I am grateful to Professor Gillian Marcelle who provided me with useful suggestions early in the process.

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1. INTRODUCTION

1.1 Scope and relevance of study

Once an independent documentary film is completed, it reaches its audience by the process of distribution via multiple modes including cinema, DVD rental and sales, television, and Video on Demand (VOD). By monetising the documentary film, distribution is the most commercial link in the film value chain. The film value chain will be defined and discussed in the literature review. Distribution is an important contributing factor to the sustainability and development of the South African documentary industry.

This research study utilises a qualitative research methodology consisting of ten elite semi-structured interviews with South African independent documentary filmmakers and documentary industry stakeholders; distributors, sales agents and funders. The research explores distribution challenges and opportunities faced by South African documentary filmmakers. Furthermore, it investigates whether changes in global independent documentary film distribution have affected South African documentary filmmakers. Additionally, “hybrid distribution”, created in response to market changes, will be explored with the intention of assessing whether the South African documentary film industry is following hybrid distribution, a variant of it or a completely different model. The purpose of this will be to see what elements of hybrid distribution South African documentary filmmakers are implementing or could utilise in the future to overcome their challenges and maximise their opportunities.

Film distribution is a vital component of the film value chain which monetises the product and helps create a sustainable film industry. Films need to be profitable in order for film production companies to not only cover costs but also build financial reserves for investment into the development of their next films. Therefore, pinpointing the South African documentary industry’s distribution strengths and

weaknesses is vital for building a better understanding of the challenges that need to be overcome in order for the industry to be more sustainable. Academic researchers can play an important role in providing much-needed research on film distribution, and have the power to influence film industry stakeholders and policy makers. This is reinforced by Lobato (2006, p. 119), who states that:

> By shifting the terms of our relationship with the filmic text from a form of art-historical appreciation to a more engaged form of social analysis, we will be in a much better position to [...] have our voices heard in policy and industry circles, and to make cinema studies matter just that little bit more.

The South African film and television industry faces unique challenges that not only limit documentary distribution within South Africa but also have a knock-on effect on international distribution. Problems within the South African Broadcasting Corporation (SABC), limited intellectual property rights to filmmakers, low production budgets (Aboo 2008 p. 101), limited access to international markets (CIGS 1998, p. 32) and almost no theatrical releases of South African documentaries (NFVF 2010, p. 10) contribute to the lack of local documentary distribution within and outside of South Africa. Conversely, a Swedish-UK co-production, *Searching for Sugar Man* (2012 Bendjelloul) became “the most successful documentary of all time in South Africa”. It received standing ovations in theatres and made more than R1 million at the box office after just three weeks of its release on limited screens (Times Live 2012). The feel-good documentary follows South African subjects searching for the mysterious US musician, Rodriguez, who became a legend in South Africa, yet reportedly only sold six albums in the US (ibid). The documentary won the Oscar for Best Documentary at the 2013 Academy Awards (Times Live 2013).

According to Lobato (2006, p. 114), distribution is the least theorised and most difficult element of the film industry to research because the required information is closely guarded for commercial reasons. Indeed, most research about South African

film does not specifically apply to documentary but more generally to film and television or even on a broader scale, to the creative sector. Therefore, I hope that this study's contribution to documentary film and television distribution research will assist the documentary film industry with overcoming the challenges and maximising the opportunities of distribution.

1.2 Research question

The research focuses on the following research question: *what are the distribution challenges and opportunities faced by South African independent documentary filmmakers according to responses offered by the selected sample of documentary stakeholders?*

1.3 Delimitations of the study

This study is limited to the South African documentary industry, which excludes fiction film and television, corporate and promotional videos, and commercials. Additionally, the focus is on creative documentaries, whether single or series and regardless of distribution platform. According to the International Documentary Film Festival Amsterdam (IDFA):

> The creative documentary is an art form. The documentary-maker is therefore an artist - not a journalist. Where the journalist attempts with his or her reports to present reality as objectively as possible, the artist follows his or her own idea. [...] Like reportage, documentaries provide insights into the world around us; but they are also characterised primarily by artistic qualities: innovation, originality, professional skill, expressiveness and cultural/historical value (IDFA 2013).

Therefore, this study focuses on auteur-led South African documentaries with a creative style and does not include other forms of South African non-fiction entertainment such as reality television, magazine shows, television formats or wildlife programmes.

Furthermore, this study is limited to respondents based in Gauteng, South Africa. It also only focuses on one stage of the film value chain; distribution.

1.4 Definition of terms

Creative documentary: a documentary characterised primarily by artistic qualities: innovation, originality, professional skill, expressiveness and cultural / historical value (IDFA 2013).

Data set: all data that refers to a particular topic that will be used for a specific analysis (Braun & Clarke 2006, p. 83).

Data extract: a particular part of coded data extracted from the research (Braun & Clarke 2006, p. 83), such as a specific point made by a respondent.

Distribution: the process of delivering a completed film to its audience.

Documentary: A film that informs us about actual situations and usually depicts individuals who are actually involved in these situations or events (Nicols 1981). (As discussed in delimitations of study, this research focuses on creative documentary).

Feature film: Fiction films of usually 90 to 120 minutes that are often theatrically released in cinema before being exploited on other modes of distribution (Heatlie 2011, p. 7).

Film value chain: “the chain of processes including the key creative and financial steps that are taken through conception to completion of a film product” (Finney 2010).

Independent film: a film that is not produced and distributed in the studio system but rather by a number of different companies and freelancers. Similarly, it has multiple sources of funding (Bloore 2009).

Windows: “the different chronological stages at which a film is [financially] exploited” (Finney 2010).

1.5 Assumptions

This study assumes that the respondents have been honest and open in their answers. Fortunately, speaking about distribution challenges and opportunities did not require interviewees to divulge sensitive financial information. The greatest risk for respondents was to openly evaluate institutions upon which their businesses or organisations rely. Honest answers depended on the respondents trusting that their anonymity would be maintained, and their motivation to develop the South African documentary film industry.

2. LITERATURE REVIEW

2.1 Introduction

This introduction outlines the issues that are discussed in more detail within the literature review. The review begins with a description of the role of distribution in the independent film value chain, which provides an overview of the various stages of a film's life. This positions distribution within the bigger picture of a film's life. Thereafter, an overview of the evolution of global independent documentary film distribution is provided. Within this context, the review focuses on the domestic and international distribution challenges and opportunities faced by independent documentary filmmakers in South Africa. Following a review of the causes and effects of the global film distribution shifts that occurred from 2000, the review considers whether documentary distribution in South Africa has been affected.

Additionally, the review explores "hybrid distribution" (Broderick 2009), which has been theorised in response to the global shifts. The purpose of looking at hybrid distribution is to discover whether or not South African documentary filmmakers are using it and to assess its usefulness in distributing South African documentary. It is important to consider distribution models because, as "plans of action", they have the potential to overcome the distribution challenges and maximise the distribution opportunities that this review identifies.

Lobato (2006, p, 114) states that film distribution is one of the least-researched segments of the film industry from a film studies point of view. What is particularly concerning is the lack of research available that is specific to the South African film industry; particularly for the genre of documentary and its distribution. Joffe and Newton (2008, p. 33) explain that as South African independent filmmakers have limited access to research and information on the South African film industry, it is difficult for them to analyse the market trends and audiences that affect their investment choices. Furthermore, CIGS (2008, p. 109) reports that the institute best-placed to lead these efforts, the National Film and Video Foundation (NFVF) holds that domestic information is difficult to collect, as there is a lack of trust from

filmmakers who are reluctant to share their information. Therefore, it must be noted that while this review focuses on documentary, in some cases it is necessary to have a broader look at South African independent film in general, given the lack of literature specifically about South African independent documentary.

Independent films are not connected to the major studios of Hollywood, which are a handful of companies that dominate the global film industry with high-budget blockbuster films that reach mass audiences (Heatlie 2011, p. 26). Studio films will be discussed further later in this review. Hence, as the large majority of South African feature films are independent films[i], and there is a lack of literature about South African documentary independent films, it will sometimes be necessary to refer to the South African feature film industry.

Additionally, South African documentaries have heretofore been independent of the major studios that create global blockbusters. South African documentaries perhaps do have varying degrees of "independence". In-house documentaries created within South African broadcasters or even commissioned by them may be viewed as "less" independent for having fewer sources of finance and less creative freedom than a documentary that the South African broadcaster licences after its completion. However, if South African documentary filmmakers want to operate in the global film market, it may be useful to consider the international market's interpretation of "independent". Even if a South African broadcaster purely uses its own full-time staff and funds to produce a documentary, it would not reach the same budget, production value, distribution or marketing levels associated with a blockbuster Hollywood studio film. Although there are perhaps varying degrees of "independence" in the South African context, they have been created outside the Hollywood studio system and could therefore, in an international context, be perceived as independent productions. Thus, in referring to South African documentary in the remainder of this research, I refer to independent South African documentaries.

2.2 Distribution within the independent film value chain

Before considering the ways in which the reviewed literature depicts changes in documentary film distribution, it is useful to consider the positioning of distribution within the life of the contemporary documentary film. While distribution is the focus of this research, one cannot ignore that it is but one stage in the life of a film and depends on the others in the film value chain. For example, one may follow "best practice" in distributing a film, but if no target market research was done during the development stage, and the film is created in opposition to audience's preferences in the production phase – then the distribution of the film will be much more fraught.

In 1985 Porter coined the term "value chain" referring to the process of industries adding value to the products they create (Porter as cited in Heatlie 2011, p. 27). Bloore (2009, p. 8) developed the value chain theory to apply it to independent film, creating the independent film value chain. He divides the life of a film into seven elements: development, financing and pre-sales, production: shoot and post, international sales and licensing, international distribution, exhibition and exploitation and finally consumption (ibid). Bloore's (2009) chart (Appendix A), shows that these stages are applicable to both independent feature and documentary films as they undergo a similar process from development to audience consumption. However, within certain stages, some of the elements differ slightly. For example, documentaries usually "cast" real people instead of actors and they develop stories derived from reality rather than writing fictional scripts (Nichols 1981).

However, whether an independent film is a feature film or documentary, it begins in development and proceeds to a complex stage of film financing and securing pre-sales with broadcasters (ibid). Once finance is secured, the film is then prepared, filmed and completed through pre-production, production and postproduction. The finished film is then ready to be distributed so that it can reach its audience. If the film had pre-sales, it will be delivered to those that pre-bought it (ibid). Usually a sales agent, who has decided that the film is worthwhile, will market the film at international film markets and sell the available distribution rights. The sales agent will recoup the marketing costs and then take commission off each sale. The film can be bought

directly by those only interested in specific rights, such as a television broadcaster; or it can be bought by a distributor for a specific territory, which then licenses the film to third parties (ibid). The film reaches its exhibition and exploitation phase when the national distributor determines the different platforms (or modes) whereby the film will be released and the order in which they will reach the audience. As distribution links the independent documentary film to its audience, distribution is therefore covered in three elements of Bloore's film value chain: International sales and licensing, International distribution and Exhibition and exploitation.

2.3 Brief evolution of the traditional documentary distribution model

To fully understand the South African film distribution landscape, it is crucial to give an overview of how the theorisation around film distribution has developed. Tuomi (2007, p. 4) makes the important observation that most film sectors follow the industrial evolution of Hollywood.

Lorenzen (2008, p. 5) explains that cinema exhibition was the dominant mode of distribution in the first half of the last century and was controlled by the major movie studios of Hollywood. Major studios vertically integrated[ii] the production, distribution, marketing and exhibition of their films. The studios were thus able to secure sales by not only controlling the production of films but by also often owning the cinemas that exhibited them (ibid). Furthermore, they reached mass markets with high marketing and distribution budgets. Although independent companies emerged, the studios continue to dominate the film industry with their ability to produce high-budget blockbuster films that reach mass audiences (Heatlie 2011, p. 26). These major studios were responsible for establishing the traditional film distribution model.

Throughout film distribution's evolution, the studios have resisted the arrival of new modes of distribution. For example, movie studios initially attempted to boycott the television industry by refusing to license their films to television broadcasters and when VCR emerged, they tried to block its diffusion through lawsuits (Chang et al 2004, p. 1). However, the movie studios discovered that they could reach a much

larger market by releasing a film on the various modes of distribution in a particular order of "windows" (Lorenzen 2008, p. 5). Reiss (2010, Loc 823[iii]) describes a window as "the amount of time that rights are allowed to be exploited in one market before the film is made available [...] in another market". The traditional distribution model's order of windows is based on "sequential distribution", which is the process of a product becoming available through various channels to an increasingly wider range of customers (Henning-Thurau, Housten & Walsh 2006, p. 559). Sequential distribution also enabled the film industry to take advantage of repeat customers who might consume the film on several modes of distribution.

Finney (2010, p. 4) explains that this order of windows was not only adapted as new platforms arrived, but for the Hollywood studio system to ensure that profits were maximised on each platform before being moved to the next. According to Finney, an independent film has traditionally been released at key film festivals, then in cinemas before going to DVD and then finally to television. Between 1988 and 1997, the time interval between a theatrical and video release averaged six months (Waterman & Lee 2003, p. 4). Typically, one year after the theatrical release, a film appeared on premium monthly subscription cable channels that often had exclusive exhibition rights to the film for up to eighteen months. Following this, the film moved to basic cable networks or television broadcasters supported by advertising for several years (ibid). This traditional order and timing of windows proved to maximise a film's revenue. It not only served Hollywood well but also became the foundation of the traditional distribution model for independent filmmakers.

A core ingredient to the traditional distribution model has been the role of sales agents and distributors. A distributor is a company that buys the rights to exploit the film in cinemas and/or other modes of distribution (Finney 2010, p.217). Independent filmmakers often sign a long-term all-rights deal with a single distributor, which gives the distributor right to exploit the film on every mode of distribution in every territory; usually for several years. Alternatively, many independent filmmakers sign a contract with a sales agent who acts as their representative to license or sell the rights to international distributors (Finney 2010, p. 223). The sales agent charges commission for each sale; usually in the range of 25% as well as costs. By working with a

distributor or sales agent the independent documentary filmmaker can focus on documentary filmmaking and rely on a professional with established networks to distribute the film.

The traditional distribution model is based on the traditional order and timing of windows, developed by Hollywood, and an all-rights distribution deal with a distributor or sales agent. Many independent filmmakers the world over adopted this traditional distribution model to reach audiences and monetise their films.

2.4 South African documentary distribution

Having outlined where distribution fits into the independent film value chain and depicted the evolution of the traditional distribution model, we now turn to focus on literature and light the scene of the distribution challenges and opportunities South African documentary filmmakers face. Joffe and Newton posit that the South African film industry's focus has been on the production of film, while "the distribution of creative content is the Achilles' heel of the creative industries" (2008, p. 18-20). Distribution is crucial to generate revenue for a film and increase its chances of profitability. Therefore, if distribution is a weakness in the South African film industry, there is arguably a lack of sustainability within the industry (Heatlie 2011. p. 39). This section first considers the domestic distribution of South African documentary film as it has a direct effect on international distribution. As CIGS (1998, p. 32) explains, "The size of the domestic market is important in providing a springboard for export of film and television production". Therefore, the domestic distribution challenges and opportunities of South African documentary have consequences that reach far beyond South Africa's borders.

2.4.1 The South African market for South African documentaries

As part of this critical analysis of the distribution challenges and opportunities faced by South African documentary filmmakers, I will assess the size of the South African market for documentary before analysing the traditional modes of documentary

distribution in South Africa: cinema, television and DVD. New modes of distribution will be discussed later in the review.

South Africa's domestic market for film is at present very small in comparison to developed markets (CIGS 1998, p. 32). According to Lorenzen (2008, p. 4), three major factors contribute towards market size: population size, preferences and purchasing power. In looking at population, larger countries have an advantage in capturing their domestic market such as China (60% of domestic market), India (94,5%) and the US (93.4%) (ScreenDigest as cited by Lorenzen 2008, p. 1). The population of South Africa is substantially smaller than populations of countries such as the US (Hollywood), India (Bollywood) and Nigeria (Nollywood) that have succeeded in tapping into their domestic markets, albeit predominantly with feature films. According to the Population Reference Bureau (PRB) (2012), by mid-2012 South Africa's population was 51,147,000 compared to 170,124,000 in Nigeria, 313,858,000 in the US and 1,259,721,000 in India. South Africa's relatively small population is thus a disadvantage to the South African documentary industry. The South African film market is furthermore fragmented by language and cultural groups, which render large audiences for a specific film even more elusive (CIGS 1998, p. 71). Furthermore, zooming into the different modes of distribution later in the review reveals that the domestic market size is even further limited for South African documentaries.

According to Lorenzen (2008, p. 4), purchasing power also plays an important role in determining the size of a market. Therefore, the financial ability of South Africans to buy cinema tickets and DVDs, rent DVDs or own a television is a crucial factor when assessing the South African documentary market. In 1997 only 23% of the South African adult urban population were attending cinema regularly (CIGS 1998, p. 67); there is unfortunately a dearth of information on more recent cinema attendance. Between 2000 and 2009, 43% of the South African population were living on below $2 a day, compared to 0% in the US, Australia and the UK (PRB 2012). South Africa's low purchasing power limits the size of the domestic market for South African documentary.

Lorenzen's (2008, p. 4) third factor in assessing the market size for film is the preferences of the population in question. Only a minority of South Africa's small cinema going market is actually willing to watch South African films. In 2010, local films made up 11% of market share in gross revenues behind the USA's domination (NFVF 2010, p. 7-8). The preference of the South African market for major studio films can be attributed to their higher production values (CIGS 1998, p. 30); the limited ability of South African filmmakers to make films suited to their domestic market's tastes (Heatlie 2011, p. 51), and the inadequate marketing of South African films (Heatlie 2011, p. 54).

South African films have relatively low budgets. It is difficult to compete with the better-quality equipment, crew and postproduction as well as longer shooting periods that high-budget imported material enjoys (CIGS 1998, p. 30). A snapshot of international documentary "forums", where filmmakers try to convince international television broadcasters and financiers to invest in the production of their films, provide interesting comparative data. At the 2012 "Forum" of the International Documentary Film Festival of Amsterdam (IDFA), the only South African documentary project selected to present at the central pitch was *The Devil's Lair,* directed by Riaan Hendriks and produced by Neil Brandt*,* with a proposed budget of €146, 129 (R1, 637, 339) (Brown 2012a). This is a substantially higher budget than a 52-minute documentary commissioned in South Africa, the common length of a television hour, which would be in the range of R260 000 ($30 112) (Smith 2011). Nonetheless, at the IDFA Forum, the highest proposed documentary budget was €1,258,000 (R14, 095, 576) from *Shadow World,* a co-production between the US and Belgium (ibid) while the average budget was around €400 000 (R4, 481,900) (Brown 2012b). Proposed budgets generally indicate the filmmakers' access to finance as well as distribution in order to recoup the costs for the film. South African documentary filmmakers are clearly disadvantaged by the challenges inherent in working with relatively low budgets.

The second factor contributing towards the South African domestic market's preference for major studio films is that, according to Heatlie (2011, p. 51), audiences have lost faith in local filmmakers to produce films that audiences want to see. Tuomi

(2007, p. 13) explains that South African filmmakers tend to be production-led instead of distribution-led. South African filmmakers often make films that they want to make rather than catering for the domestic market.

A third factor influencing the South African market's preference for major studio films is that South African films are generally inadequately marketed (Heatlie 2011, p. 54). This is problematic when 90% of audiences decide what film they would like to see before visiting the cinema and 50% before entering a DVD rental store (Henning-Thurau et al 2006, p. 563). Marketing seems to be a key issue in South Africa where most South African independent filmmakers, according to Ronge (2011, p. 23), "...tend to plough all their money into the production and leave nothing for promotion and advertising...and much of their failure is because of ignorance and poor money management." However, organisations such as the NFVF have tried to build capacity in this regard by regularly hosting UK-based expert Angus Finney to train select South African film producers in the business aspects of filmmaking (Mokhele 2011). Additionally, South Africa's film market, the Durban FilmMart (DFM) hosts annual seminars and conferences to develop film producers' understanding of market trends and expectations (Krige 2011b). One can hope that these training initiatives will help producers to become more distribution-led and to prioritise marketing.
South Africa's population, purchasing power and preferences result in a tiny domestic market. In order to compete with imported content, South African documentary filmmakers need to push for high production quality despite lower budgets, to understand their market before making a film and to prioritise the marketing.

2.4.1.1 South African cinema

In 2010, not a single South African documentary had a theatrical release in a major cinema (NFVF 2010, p. 10). Between 2000 and 2007, 7 of the 55 South African films released were documentaries (2008 NFVF, p. 10) and made up only 0,9% of the total box office gross for the 47 South African films that had box office figures available (NFVF 2008, P. 24). Furthermore, the South African cinema market has a low demand for documentary, regardless of its origin. In 2010 only 3% of the year's total box office gross for all films exhibited in major South African cinemas were of the documentary genre - all being foreign films (NFVF 2010, p. 9). Thus, a reason it has

become rare to see a South African documentary on major cinema screens in South Africa may be that it is simply not profitable for exhibitors. A theatrical release needs an audience in order to be financially feasible.

Ulin (2010, loc. 7729), (Parks 2007, p. 8) and Heatlie (2011, p. 31) emphasise that a theatrical release is important to create status and media awareness around an independent film in order for it to sell successfully in other territories and modes of distribution. Zhu (2001, p. 275) states, "A film's success largely depends on its theatrical performance, which in turn affects the performance in video and other distribution channels". Therefore, the fact that South African documentaries are rarely screened in South African cinemas may negatively affect the documentaries' financial success on other modes of distribution.

There is great potential for growth in the black youth market, which currently occupies 42% of local cinemas (Heatlie 2011, p. 65). However this market may not be reaching its full potential, as there is the lack of cinemas available to South Africans living in townships (ibid) where arguably many black youth reside[iv]. The NFVF recognises the need for more cinema screens:

> A long run rise in production volumes and distribution companies will have to be offset by an equivalent rise in the number of screens per capita. This will add to ensuring that penetration levels of local films are maximised and will lead to improved revenue streams and thus a self-sustaining industry (NFVF 2010, p. 4).

While mainstream cinemas may not yet be expanding meaningfully to townships, the private company Kasi Distribution has begun to reach some South African rural and township communities through mobile cinemas (Screen Africa 2012). While it is too early to tell how successful this initiative will be, it is very encouraging that smaller companies are trying to grow the domestic market for film.

Although theatrical release can have an impact on other modes of distribution, the literature reviewed shows that South African cinemas rarely screen foreign and South African documentaries (NFVF 2010, p. 10). Furthermore, large portions of South Africa's township and rural populations have no access to cinemas. Therefore, South

African documentary filmmakers would need to maximise opportunities in terms of other modes of domestic distribution.

2.4.1.2 South African DVD

In the traditional order of windows, DVD rentals and sales follow the theatrical release. Finney (2010, p. 7) points out that DVD revenue in developed industries is declining as internet-based distribution becomes more popular. However, meaningful analysis of the South African DVD market for local documentary is difficult as portions of the South African film & television industry are reluctant to share information (NFVF cited in CIGS 1998, p. 109) as many hold financial information and sales figures confidential. Next Entertainment, one of the primary DVD distributors in South Africa, confirmed (2012, pers. comm. 13 March) that the South African DVD distribution industry keeps statistics private for competitive reasons. Fortunately, the empirical research conducted as part of this study (and detailed in the research findings) provides greater insight into the challenges and opportunities when distributing South African documentary on DVD.

2.4.1.3 South African television

Many foreign public broadcasters help to sustain their film industries by investing in their local films or licensing completed projects (Heatlie 2011, p. 64). A key challenge faced by South African documentary filmmakers is the uncertainty in securing a domestic broadcaster. While there are limited opportunities with South African television broadcasters such as DSTV's Mzanzi Magic and free-to-air ETV, the SABC has the greatest mandate to screen local documentary content. The reason is that the SABC is a public broadcaster, expected to uphold local content quotas assigned by the Independent Communications Authority for South Africa (ICASA). Although SABC reaches audiences of between 9 and 22 million viewers a week, depending on the channel (SABC 2011), major issues within the SABC make it difficult for South African documentary filmmakers to find a platform for their work.

In 2008, managerial problems surfaced from within the SABC that were allegedly connected to rifts within South Africa's ruling party, the African National Congress (ANC) (Fourie 2009, p.8). In 2009, parliament passed the Broadcasting Amendment Bill. The bill gave the ruling party greater power to remove the entire SABC board, review the procedures by which the board should be appointed as well as review the relationship between the SABC board and SABC management (ibid). Shortly after the bill was passed, the SABC board was replaced (ibid). Some NGOs, academics and opposition politicians regarded the bill as an attempt by the ANC to have more control over the management and content of the SABC (ibid). In addition to management issues and political interference, the SABC found itself in a financial crisis, declaring losses of R784 million before tax in March 2009 (SOS as cited in Skinner 2011, p. 3). A key reason the SABC found itself in financial instability is that it increased expenditure far beyond the growth of its revenue (Ensor 2012) by overstaffing, employing consultants and purchasing expensive foreign content (Ross 2009). It is interesting that a contributing factor to the SABC's financial crisis was the public broadcaster's decision to purchase expensive foreign products rather than invest in exportable quality South African content.

Additionally, Stephen (2011) notes that the SABC are possibly not meeting their quotas to screen South African content. ICASA are mandated to monitor the SABC's compliance of quotas. When the South African Screen Federation (SASFED) raised concerns that quotas could be short by 10-20%, ICASA admitted that they did not have the necessary equipment to monitor quotas. Stephen (2011) unpacks the consequences; "This could translate into a loss of commissioned programming worth millions of rands worth for the industry, which has suffered hard times due to the ongoing management and funding crisis at the state broadcaster". With television often the only domestic platform for South African documentary, it is concerning that the SABC may not be fulfilling its mandate. According to Sosibo, Dawes and Ensor (cited in Aboo 2008 p. 101), a further issue is that the SABC is unwilling to share intellectual property (IP) rights for commissioned productions. This makes it difficult for South African documentary filmmakers to finance a film through local and foreign broadcaster partnerships as well as sharing in international distribution revenue streams. The SABC's internal financial and management crisis, intellectual property

policies and possible non-compliance to quotas create major challenges for the South African documentary filmmaker who needs a local broadcaster to help finance a film and to prove to foreign buyers that the film garnered support in its domestic territory.

The challenges that South African documentary filmmakers face with regards to the population, preferences and purchasing power of the South African market, as well as obstacles specific to South African cinemas, DVD and television indicate that the domestic market may be unable to sustain its local documentary industry. CIGS (1998, p. 68) critically observes that, "The South African market is too small to support a film and television industry. For this reason, the development of new markets is essential to the development of the industry". It could thus be vital that South African documentary filmmakers find success in the international market.

2.4.2 International market for South African documentaries

Since the domestic market is too small to support the South African documentary industry, it is important to look at South African documentary filmmakers' challenges and opportunities in relation to distributing their work internationally.

Holtzeberg and Rofekamp (2002, p. 4) maintain that television sales remain one of the most important markets for documentary. Two of the most sought-after television slots that accept international documentary content are the UK's *Storyville* on BBC Four and *POV* on the US channel Public Broadcasting Service (PBS). However, the archives of these documentary slots indicate the percentage of South African films screened over the last decade to be only 0,4% (BBC Four 2012) and 0,5% (PBS POV 2012) respectively. This indicates that, "South African producers have tended to try to get their individual productions distributed in the international market with limited success" (CIGS 1998, p. 32). The factors affecting international distribution include demand uncertainty (Lorenzen 2008, p. 5), cultural discount (Waterman and Taylor 2000, p. 13), economies of scale (Lorenzen 2008, p. 3), perceptions of African film (Mostrup 2011, p. 44), and South African filmmakers' readiness for competing in the international film market (Heatlie 2011, p. 13).

International distribution has a much higher degree of demand uncertainty because the stylistic and lingual preferences of foreign markets are very unpredictable (Lorenzen 2008, p. 5). The US, with its Hollywood system, has been one of the few countries to overcome demand uncertainty because they have been distributing and marketing their films on the international market and adapting their advertising campaign to each country since early last century (ibid). In contrast, most non-US films have high demand uncertainty and may not have the resources to achieve high production values. In effect, they do not reach mass audiences in order to bring in substantial revenues. Additionally, Waterman and Taylor (2000, p. 13) point to "cultural discount" as a challenge with regard to exporting films. Similar to demand uncertainty, they explain that (if all other factors such as budget are equal) a country generally prefers the actors and locations of their own country. Therefore, various international territories may find that the unfamiliar culture of South Africa is more difficult to relate to than the familiar culture of their local documentaries. Hence, when entering the international market, South African documentary filmmakers may face the challenges of demand uncertainty and cultural discount.

Owing to economies of scale, every dollar or hour spent on a film will have a greater return on investment with a larger domestic market and therefore larger countries have the resources for more variety of films and bigger film budgets. This enables them to have more exportable films than smaller countries (Waterman & Taylor 2000, p. 14). Lorenzen (2008, p. 3) points out that "...smaller countries exporting to larger countries are at a disadvantage compared to larger countries exporting to smaller markets". This may partly explain why foreign films from larger countries such as the US have less resistance entering the smaller South African market than South African films do in entering the US market.

When trying to break into the international market it is important to consider what international perceptions are of "Africa". Mostrup (2011, p. 44) comments that the prejudices continuously perpetuated about Africa in documentary, predominantly those made by documentary filmmakers living outside of Africa, are that Africa is "poor and sad" or "crazy and corrupt". He states that there have been too many visual clichés in the media depicting Africa "such as colourful clothes, the starving

babies with big tummies, the dust, the huts and the Masai". South African feature film director Junaid Ahmed states that his visits to international film festivals and markets have revealed that "there continues to be racist and stereotyped perceptions of Africa...these perceptions impact on how international film producers, financiers and other film role-players respond to working with or participating in film projects in Africa" (The New Age 2012). These prejudices are problematic when South African documentary filmmakers are looking for international financiers or broadcasters.

However, *Searching for Sugar Man* (2012 Bendjelloul), although a foreign documentary, tells an uplifting South African story with South African subjects and won the Oscar in 2013 for Best Documentary (The Oscars 2013). Furthermore, some South African documentary filmmakers are making exportable films that challenge negative stereotypes about Africa. For example, the refreshing *Glitterboys & Ganglands* (Beukes 2011) follows rival contestants in the Miss Gay Western Cape beauty pageant. The documentary does not rely on visual clichés of poverty as described by Mostrup (2011) to depict the male subjects' low economic status, but rather focuses on their quest to become the beauty pageant queen. Instead we see the men strutting down the runway with feather boas and scheming how to win the crown. The documentary secured a London-based distributor and has been televised in several countries (Mostert 2012). One of the most successful South African documentaries is *The Lion's Trail* (Verster 2002), which tells the story behind Solomon Linda's Zulu song "Mbube" which directly inspired the pop song, "The Lion Sleeps Tonight". Broadcasters all over the world licensed the documentary and it won an Emmy Award (Fireworx 2011). Despite stereotypical perceptions about Africa within the international film market, some South African filmmakers are succeeding to secure international distribution. However, obstacles to the international trade of South African film do not only lie with the international market.

The international distribution of South African documentaries needs the active participation of South African documentary filmmakers, sales agents and the South African Government. Some South African filmmakers are reluctant to explore international distribution as they believe that the South African film industry is insufficiently developed to compete on the international market, particularly with

regard to budget levels and therefore production quality (Heatlie 2011, p. 58). Furthermore, Tuomi (2007, p. 81) points to the insignificant presence of distributors representing South African films on the international market.

Also, Heatlie (2011, p. 13) notes that many South African filmmakers have a poor understanding of international finance and distribution. Therefore South African documentary filmmakers may need government assistance to improve their understanding of the international market. The role of government is crucial to help improve documentary filmmakers' access to international distribution. Countries around the world have different government schemes to help develop documentary distribution. Members of the European Union (EU) have access to generous funds through the EU's MEDIA programme, which supports the European audiovisual industry. In 2012 €2 million was dedicated to create a fund called "Circulation of films in the digital era" with the goals of improving circulation of European films, growing audiences and informing the market of recommended alternative distribution strategies (MEDIA 2012).

The British Film Institute (BFI) launched a distribution fund in early 2013 with an annual budget of $6,35 million, which supports both feature films and documentaries (Variety 2013). A documentary can receive up to $238 000 to expand audience reach as well as funds to reach niche audiences that would be interested in the film. For example, the UK documentary, *Ping Pong*, which follows a ping-pong championship for the elderly, was distributed to old age homes all over the UK with the assistance of the BFI (ibid). South African government funding has been available for South African documentary filmmakers to attend markets and festivals in order to promote their films through the NFVF and South Africa's Department of Trade and Industry (the dti). In 2012, the Documentary Filmmakers' Association (DFA) began to utilise the dti's Export Marketing and Investment Assistance (EMIA) group scheme, which funded large groups of South African documentary filmmakers attending markets as an official delegation (African Cinemas 2012). The NFVF also became a partner and funder in these delegations (ibid). Through this collaboration, a greater number of South African documentary filmmakers began to access the international documentary market and develop their knowledge of international distribution. In April

2012, a delegation of 16 South African documentary filmmakers attended the Hot Docs Canadian International Documentary Festival (Hot Docs), the largest international documentary film festival in North America (NFVF 2012a). In November 2012, a group of 34 South African documentary filmmakers attended IDFA, the largest international documentary film festival in the world (African Cinemas 2012). The South African government is indeed providing some invaluable opportunities for the development of the international distribution of South African documentary.

Tuomi (2007, p. 2) states that "although South Africa has the competency to become a significant player in the international film market, the local industry faces a number of external and internal obstacles." Some of the external challenges regarding the export of South African documentary film include demand uncertainty, cultural discount and stereotyped views of Africa. However, internal challenges include South African filmmakers' hesitance to enter the international market, the lack of distributors representing South African film and the need for producer training in international distribution. Although the literature reviewed highlights these challenges, it also points to the opportunity created by South African Government funding that is enabling South African documentary filmmakers to access the international documentary film market.

2.5 Global shifts in traditional independent film distribution

Having discussed the domestic and international distribution of South African documentary film against the backdrop of the traditional order of windows, this section looks at changes to the traditional distribution model since the turn of the century from a global and South African perspective. The traditional distribution model has been continuously changing as new modes of distribution have arrived. However, Parks (2007, p. 2) notes that the international distribution market started facing greater uncertainty by early 2000 with the development of digital technologies. Ryan & Hearn (2010 p. 2) also attribute major changes in the film industry to new technologies that paved the way for a saturated market, Video on Demand (VOD) and an increase in piracy. These factors have caused disruptions to the traditional distribution model and increased both opportunities and challenges to the distribution of South African documentary.

2.5.1 Saturated market

Parks (2007, p. 2) and Zhu (2001, p. 276) highlight the arrival of cheaper digital technology, particularly in digital cameras and editing suites, which is breaking down barriers to entry and allowing the market to be oversupplied with independent films. Evidence of the market being flooded is indicated in the dramatic increase of documentary submissions to film festivals. The Sundance Film Festival submissions for documentary rose from 347 in 2000 (McInnes 2000) to 1637 in 2012 (Sundance Institute 2011). The oversupply of films, according to Finney (2010, p. 4) and Zhu (2001, p. 276), dramatically pushed down the prices of independent films. Parks (2007, p. ix) states that a consequence of this market saturation and lower prices for independent films is that it has become extremely difficult for independent filmmakers all over the world to simply recoup the costs of their film. In addition to the supply of films outweighing the demand, Finney (2010, p. 5) argues that the 2007-2008 world economic crisis reduced spending and increased working hours thereby increasing competition for the public's leisure time[v].

2.5.2 VOD

Zhu (2001, p. 274) explains that VOD is a mode of distribution, usually transmitted by the internet or digital cable network, that allows viewers to select content from a catalogue on a video server, and to be able to control their viewing experience with pause, fast forward and rewind. Digital cable networks load films onto their servers that viewers can select using set top-boxes, known as "decoders" in South Africa[vi]. These decoders tune an external signal into content that is displayed on televisions (ibid). On the other hand, VOD through the Internet allows viewers to select films through a VOD website and to either stream it or download it and watch it on a media player (such as Windows Media player). Although the video files are highly compressed, high speed Internet with high capacity, known as broadband, is crucial. The video files are usually protected with encryption that requires a password from the viewer to prevent file sharing, and in some cases, the file can only be watched on the computer that accessed the file. The viewer sometimes has a choice to watch the film for free with advertising, to rent a file whose password will be valid for a limited period, or to purchase the file, also known as download to own (DTO) (ibid). The

main advantage for independent filmmakers wanting to distribute their films is that working with digital files has lower costs than reproducing physical film prints or DVDs.

Bernfield (2012) states that VOD developed its own windowing system. Transactional pay-per-view VOD (TVOD) usually takes the first window, aims for current and popular films and collects revenue through once-off transactions. The revenue is then shared with the rights owner (Bernfield 2012). An example of a TVOD platform is iTunes, which now distributes films as well as music. The second VOD window is subscription VOD (SVOD), for example Netflix, where viewers pay a monthly subscription to an Internet VOD site or to their Pay TV account (ibid). In this case, individuals who own the rights to the film usually get paid a flat fee for an often non-exclusive "license" to their film. The final window is free-to-user or ad-supported VOD (AVOD), which pays the rights owner a revenue share, and in rare cases an advance fee (ibid). This VOD windowing system provides viewers with a range of viewing experiences and is priced accordingly. For example, AVOD may be free but viewers might not want their viewing experience to be interrupted by commercials (ibid). The VOD windows allow users to choose their content and when, where and how they will view it.

Chellappa and Shivenu (cited in Davis & Vladika 2008, p. 6) and Zhu (2001, p. 276) state that the digital revolution has shaken the traditional distribution model's system of windows. In looking at VOD's ideal position in the traditional order of windows, Henning-Thurau, Sattler, Eggers and Housten (2007, p. 1) reveal that the arrival of VOD sparked a debate on the order and timing of the various modes of distribution being released to the market. Some US studios have proposed that in order to maximise their revenue, there should be a "simultaneous release" of theatrical, DVD rental and VOD modes of distribution followed by DVD sales three months later (ibid). However, theatre chains see this modification of release windows as a "death threat" to their business as the DVD market would effectively cannibalise their market with an estimation of 40% loss in revenue for US theatres and a 50% increase for DVD retailers (ibid). Zhu (2001, p.277) refers to VOD as a possible "disruptive technology" and warns that once high-speed broadband is well diffused VOD could

lead to “chaotic transformations” by not only eliminating the theatrical market but potentially also replacing DVD.

Henning-Thurau, Henning, Sattler, Eggers and Housten’s (2007, p. 17) recommendation is that the film industry should find price and window configurations that allow every mode of distribution to either find revenue gain or remain constant. Their “win-win” configuration for the US studios starts with a three-month theatrical-to-DVD retail window (with increased DVD retail price) followed by a three-month DVD rental and VOD window. This would allow studio revenues to rise by 7.3%, theatres to remain unharmed, DVD retailers to benefit from a the shorter window by 11.1% growth, and the higher DVD price to lift DVD rental revenues by 4.5% and VOD’s by 7.5% (ibid). Such a window configuration may not be necessary for South African documentary. As established, theatrical releases and DVD have not played a major role in the domestic or international distribution of South African documentaries. Despite problems within the SABC, television remains the most prominent mode of distribution for South African documentary. Therefore, the rise of VOD may predominantly be an opportunity for South African documentary filmmakers.

While VOD may have had a slow start in the late 1990’s (Cunningham, Silver and McDonald 2010 p. 125) it has picked up to create a business worth $992 million with SVOD increasing by 10 000% and TVOD by 75% in 2011 (Fernandez 2012, p. 1). Unfortunately, Fernandez did not specify what portion of this business is generated from documentary. Some independent feature filmmakers started to receive “modest incomes” from VOD from around early 2011 (Bernfield 2012) while international documentary sales agents and filmmakers have generated revenues on cable television VOD (Mandelberger 2011). Although high revenues in general remain “elusive”, there are speculations that by 2014 the mode of VOD, whether Internet or cable based, will provide “solid” revenue streams for documentary filmmakers (ibid). However, it must be noted that this mode of distribution is not yet widespread globally. This is illustrated by the fact that in 2010 50% of total VOD revenue for film was generated from the US and 6% from the UK (Marich 2010).

From a South African perspective, VOD is still in its infancy. Some South African documentary filmmakers have started to utilise VOD platforms including African-based platforms such as africafilms.tv (Balancing Act 2012). However, Heatlie (2011, p. 74) found that most South African filmmakers were sceptical about VOD as an effective mode of distribution. Their main concerns were VOD's ability to generate revenue, the threat of piracy and South Africa's slow broadband. As a result, they were not regarding VOD as a mode of distribution with "revolutionary potential" (ibid). However, digital rights management (DRM) technologies have been developed to restrict illegal copying of VOD products (Chang et al 2004, p.2) that may begin to ease South African filmmakers concerns about VOD related piracy. Piracy will be discussed in more detail in the following section. Meanwhile, South Africa's limited broadband reach prevents most South Africans from being able to download documentary films from VOD. Only 1.6% of South Africa's population has access to broadband compared to 21.4% in the US, 27.4% in South Korea and 32.8% in the Netherlands (Techloy 2011). Furthermore, Muller (2011) indicates that broadband costs remain prohibitive for most South Africans. However, South African broadband penetration should improve with time. Furthermore, 60% of South Africans over the age of 16 have mobile phones (Kreutzer 2009, p.1) so it will be exciting to see how developments in mobile phone technology, particularly battery life, storage space and Internet speed may open up new doors to distributing South African documentary film in South Africa.

As VOD threatens to change the traditional order of windows it seems as if film industries all around the world need to re-negotiate the timing, order and price structures of their windows. Until South Africa's broadband diffusion, speed and affordability improves, VOD is not yet a viable platform for South African documentary filmmakers to reach their domestic market. However, South African documentary filmmakers should not dismiss the international market they can reach, given the global consumption enabled by VOD.

2.5.3 Piracy

According to Reiss (2010, loc. 880), another factor disrupting the traditional order of windows is that faster Internet connections and the public's urgency to see new films

have encouraged piracy**.** Lobato (2006, p.118) argues that piracy is merely catering to an audience "where legitimate industries are unable or unwilling to". However, Luckman and Roeper (2008, p. 3) confirm the threat of piracy by illustrating the case of the Australian independent film *The Jammed* (McLachlin) which suffered revenue loss when 20 000 illegal downloads were discovered on a pirate website. In the South African film industry, bootleg copies of South African films seem to be distributed via DVD rather than VOD (CIGS 2008, p. 32). This may be due to South Africa's low broadband penetration. A high profile case was the distribution of pirated DVDs for South Africa's Oscar winning film *Tsotsi* (CIGS 2008, p. 32). However, CIGS (2008, p. 32) goes on to declare, "There is no doubt that the digitisation of content in all markets facilitates the growth of piracy and it is a huge threat to the industry". Reiss (2010, loc. 880) believes piracy has put added pressure on filmmakers to simultaneously release their films through multiple modes of distribution in order to maximise their profits. Therefore, piracy, particularly piracy facilitated by the Internet, is another factor disrupting the traditional order of windows.

Advances in technology and technology's increasing affordability have contributed to an oversupply of content, the arrival of VOD and the increase of piracy. Kaufman and Mohan (as cited in Ryan and Hearn 2010, p. 4) refer to stakeholders' ill-preparedness to predict the future of distribution as an "emergency distribution landscape". The following section will review literature in relation to documentary filmmakers' responses to the "emergency distribution landscape".

2.5.4 Documentary filmmakers' response to shifts in global film distribution

New distribution models are emerging in response to the instability of the distribution landscape, primarily characterised by an over supply of films and a disrupted order of windows. Many new ideas and attitudes towards distribution, which are discussed in this section, have yet to prove successful in the long term. Finney (2010, p. 7) cautions that "there is increasing pressure to create new business models, but many remain hybrid experiments rather than clear sustainable new business platforms". Nonetheless, it is possible that South African documentary filmmakers could be open to non-traditional approaches to documentary distribution if they have found the traditional distribution model to be ineffective.

Several alternative approaches to independent film distribution have been brought together into a distribution model called “hybrid distribution” by Broderick (2009) which is characterised by the independent producer being more involved in the distribution phase, particularly through splitting rights and selling directly to audiences. Broderick (2009) points out that although, “higher budget, more mainstream features are better suited for an ‘Old World’ approach,” hybrid distribution is particularly well suited for documentaries and low budget feature films. However, Broderick warns that no model should be followed blindly as each country faces its unique opportunities and challenges. Furthermore, African producers’ strategies need to be even more innovative as they face relatively limited access to the Internet (Broderick as cited in Krige 2011a).

A characteristic of hybrid distribution is the more direct role of the film producer in documentary distribution. While Parks (2007, p. 139) observes that independent filmmakers tend to believe that the film process is over on the final day of postproduction, Reiss (2010, loc. 589) believes they should be spending roughly the same amount of time and money in the film’s marketing and distribution as development, pre-production, production and postproduction combined. Indeed, hybrid distribution seems to be calling for South African filmmakers to do more than making documentaries to hand over to a single distributor. For this reason it is vital that South African filmmakers receive training to develop their business skills, particularly in the areas of entrepreneurship, management, accounting and marketing (Tuomi 2007, p. 13).

A core characteristic of hybrid distribution is the principle of split-rights. Parks (2007, p. 93) articulates that an all rights deal with a single distributor may be the core problem of the traditional distribution model. Parks (2007, p. 71) points out that splitting up rights such as television, theatrical, DVD, airline, educational and digital will potentially generate more money for the independent filmmaker. However, as South African broadcasters usually do not share IP rights for commissioned content with filmmakers, only documentaries made outside the commission model have the opportunity to split rights. Furthermore, it is rare to find domestic sales agents who

are active in all avenues of South African documentary distribution. For this reason South African documentary filmmakers producing “non-commissioned” content have had little choice but to use a combination of sales agents and direct sales to South African audiences – perhaps unconsciously using the hybrid distribution model. For example, *Glitterboys & Ganglands* (Beukes 2011) signed with an international distributor but withheld South African rights so they could split domestic rights for television, DVD and VOD. Tuomi (2007, p. 11) reveals that when it comes to international distribution, most South African filmmakers rely on an all-rights deal with a foreign sales agent. While it is difficult to deal with multiple foreign sales agents or distributors, South African filmmakers may also benefit from splitting rights according to sales agents and distributors’ mode and territories of expertise.

Broderick (2009) points out that independent filmmakers may benefit from reserving direct sales for themselves. Therefore, while multiple sales agents or distributors are working on their territory or mode of expertise, the South African documentary filmmaker should consider reserving the right to sell DVDs at screenings and DVD and VOD through their film website. Broderick (2009) states that split rights and direct sales assist the independent filmmaker to have “unprecedented access to audiences, to maintain overall control of their distribution, and to receive a significantly larger share of revenues”. Meanwhile, Loepman and de Roeper (2008, p. 6) raise the concern that the financial success of direct sales to niche audiences may depend on economies of scale which is easier to achieve in large countries such as the US. Therefore, South African filmmakers may have low profit margins despite devoting large amounts of time to reach tiny niche audiences.

Following shifts in the traditional order of windows, hybrid distribution has emerged for documentary filmmakers. Hybrid distribution centres on split-rights, direct sales and the increased role of the producer in the distribution phase. While hybrid distribution is not tried and tested, it might be useful in film industries that are finding the traditional distribution model of a single all-rights deal ineffective for smaller documentary films. South African documentary filmmakers are using aspects of hybrid distribution but perhaps they would benefit from a more “conscious”

implementation of hybrid distribution and amend it to suit South Africa's unique challenges and opportunities.

2.6 Conclusion of literature review

Owing to the challenges in accessing literature about the South African documentary industry, the available South African literature predominantly gave insight into the distribution challenges and opportunities faced by South African filmmakers as a whole.

In order to view South Africa's film distribution landscape in a global context, it was necessary to use Bloore's (2009, p. 8) independent film value chain to see where film distribution fits within the life of a film and to understand a brief evolution of the traditional film distribution model. The traditional order of windows was developed from Hollywood's need to accommodate new modes of distribution as well as to maximise their profits. Another key element of the traditional distribution model was the filmmaker's strategy to sign an all-rights deal with a single distributor.

The focus then shifted to the key issue of the distribution challenges and opportunities faced by South African documentary filmmakers. In looking at South Africa's domestic market, Lorenzen's (2008, p. 4) key factors of population, purchasing power and preference were used as a tool and it became evident from the available literature that South African documentary filmmakers face challenges in all three areas. An overview of these three factors is that, firstly, the South African population is relatively small and particularly fragmented. Secondly, South Africa's purchasing power is also relatively lower than dominant markets. The third and perhaps most problematic factor is that the South African market has a preference for major studio films. However, South African documentary filmmakers have the opportunity to improve their market share by improving their production quality, their understanding of the market and the marketing of their films.

The traditional modes of distribution in South Africa were then assessed. It was found that the media hype around a theatrical release could be crucial to the success of the

other modes of distribution. Unfortunately, South African documentaries are very rarely screened in South African mainstream cinemas. It was also found that if more township cinemas are built South African films might reach an untapped market. It was also established that DVD retail and rental industries need to provide the South African film industry with data that can help inform distribution strategies. Despite these challenges, the SABC has the greatest mandate to screen local content, as it is the public broadcaster. However, the SABC is presenting documentary filmmakers with the key challenges of possibly not complying with local content quotas and withholding intellectual property rights to commissioned content. Furthermore, the management and financial crisis of the SABC is making it difficult for local filmmakers to secure a local broadcaster, which affects both domestic and international distribution.

In assessing the international market for South African documentary it was evident that South Africa, like most non-US countries, has the disadvantages of demand uncertainty and cultural discount which was intensified by the fact that South Africa has a relatively small film industry and does not have the advantage of economies of scale. Furthermore, international negative perceptions of Africa affected the international market's attitude towards films from and about Africa. However, the review also demonstrated that South African filmmakers in general are hesitant to enter the international market and so there is an opportunity for growth if training and development on international distribution were to be provided. An encouraging development is that the South African delegations to key international documentary festivals, facilitated by the DFA and funded by the dti and the NFVF, have allowed more South African documentary filmmakers to access the international market.

The focus of the review expanded once more to a global level to outline the primary causes for the shifts in the traditional distribution model. The literature revealed that developments in technology had led to a saturated market, the arrival of VOD, which threatens the traditional order of windows, and increased piracy, which is encouraging a simultaneous release of films on multiple distribution platforms. Despite VOD starting to monetise films, South African filmmakers are sceptical about its efficacy owing to potential piracy and the poor broadband diffusion within South

Africa. However, South Africa's high mobile penetration may create opportunities for VOD in the future.

Uncertainty within the international independent film market has led to "hybrid distribution", which is founded on the independent producer being more involved in the distribution phase, particularly through split-rights and direct sales. Therefore, there is great need for the business development of South African documentary filmmakers. Although South Africa is already implementing many elements of hybrid distribution, the model needs to be adapted for South Africa. These adaptations would particularly need to consider South Africa's low economies of scale and poor broadband. With the increased reliance on the highly competitive international market, and continuous developments in film distribution, South African documentary filmmakers need to be on top of their game to work towards a more sustainable South African documentary film industry.

3. RESEARCH METHODOLOGY

3.1 Introduction

This chapter describes the methodology used to further investigate the distribution challenges and opportunities faced by South African filmmakers, and outlines the characteristics that render it most appropriate for the study.

Qualitative research methods were used to collect and analyse data around the research question:

What are the distribution challenges and opportunities faced by South African documentary filmmakers according to responses offered by the selected sample of documentary stakeholders?

Thematic analysis was used to identify, analyze and report themes and patterns by organising and describing data sets which are useful to interpret areas of the research topic (Boyatis as cited in Braun & Clarke 2006, p. 80). Themes represent a patterned response to an aspect of the research question within the data set (Braun & Clarke 2006, p. 84).

A qualitative research methodology allows one to capture the complexity of various human perspectives (Flick 2005, p.4). It is thus the most appropriate approach for this study as it was important to not only capture a wide range of views on South African documentary distribution but to also allow for very detailed information. Detail and depth are particularly useful for research areas that are largely absent from academic research. As the literature review explained, this is the case with South African documentary distribution. Qualitative research's exploratory nature suits under-researched topics (Creswell as cited in Heatlie 2011, p. 38).

Thematic analysis has the potential to provide a detailed and complex interpretation of data (Braun & Clarke 2006, p. 90). An advantage of the approach is that it is not limited by strict rules and is therefore a flexible research methodology. However,

Braun and Clarke (2006) have established guidelines to encourage a methodologically sound use of thematic analysis (ibid).

As thematic analysis can be used in a variety of ways and within other theoretical frameworks (Braun & Clarke 2006, p. 83), it is important to outline how it was used in this particular study. The thematic analysis utilised in this study adopted a realist method as semi-structured elite interviews were used to collect data on the realities and experiences of players within the South African documentary industry (ibid). Therefore, the nature of the data was viewed at face value without delving into subtext. Similarly, the themes were identified from the data using a semantic approach which means respondents' answers were only regarded in their explicit meaning (Braun & Clarke 2006, p. 87). Thirdly, rather than a more detailed report of one theme within the data, this study provides a rich account of the key themes from the entire data set. According to Braun and Clarke (2006, p. 85), this is preferable when dealing with an under-researched area. Fourthly, a "theoretical" thematic analysis was used. Therefore, the data was coded for specific research questions and influenced by key areas of interest identified in previous literature (Braun & Clarke 2006, p.86).

3.2 Interview design

Data was collected through semi-structured "expert" interviews with ten individuals actively involved in the South African documentary industry. Respondents in expert interviews are integrated into the study as representatives for a group (or industry) rather than as a single case study as with biographical interviews (Flick 2005, p. 89). 10 open-ended questions were presented to respondents in face-to-face interviews of around 60 minutes. Please refer to Appendix B for the interview questions.

An advantage of semi-structured interviews is that interviewees may respond freely to open-ended questions and their viewpoints are not restricted by a rigid wording or the order of the questions (Flick 2005, p. 92). As established in the literature review, the South African film industry is notorious for being secretive with information. It is possible that individuals may self-censor their responses if they fear certain public

statements may affect their reputation or careers. For this study, it was made clear that all respondents would remain anonymous and that they would not officially represent themselves, their businesses or organisations.

A disadvantage of semi-structured expert interviews is that without the strict adherence to a set of questions there is a risk that the interviewee may start to focus on private matters, irrelevant issues within the field or launches into an irrelevant lecture known as the “rhetoric interview” (Flick 2005, p. 90). Therefore, it is crucial that the interviewer ensures the process remains aligned with the topic (ibid).

3.3 Population and sample

The population relevant to this study would be South African documentary filmmakers who have produced at least one South African documentary as well as sales agents, distributors and industry sales agents involved in the distribution of South African documentary. There are no records of the total number of individuals within this statistical population. However, the population is estimated to be very small when one considers the DFA’s membership of 141 documentary filmmakers (DFA 2013).

With regard to the issue of case sampling, emphasis was placed on the respondents’ experience and knowledge regarding the South African documentary industry. As Heatlie (2011, p. 40) points out, a qualitative research methodology is more concerned about the relevance of the sample to the area of research than its representation of the population. Therefore, as the study utilised expert interviews, the sample needed to have knowledge and insight into the distribution challenges and opportunities faced by South African documentary filmmakers. The case sampling method for this study was theoretical sampling whereby, “the analyst jointly collects, codes and analyzes his data and decides what data to collect next and where to find them, in order to develop his theory as it emerges” (Glaser and Strauss as cited in Flick 2005, p. 64).

Ten respondents were selected to provide diverse perspectives on the distribution challenges and opportunities faced by South African filmmakers. Five South African documentary filmmakers were selected who have experience in varying levels of domestic and international distribution of their documentaries and who were of sufficient age and experience to comment on the changes in South African distribution models, which is a key area of interest. Five South African professionals involved with different aspects of South African film distribution were selected to provide a different point of view with regards to the challenges of distributing South African documentary content. This consisted of two sales agents, one distributor, one exhibitor and one government funded-organisation that provides assistance with distribution). Respondents were initially contacted telephonically, after which a formal email was sent to them. A small sample was selected as the constant reading and re-reading of data necessary for thematic encoding is very time consuming (Barnes & Clarke 2006, p. 90).

3.4 The research instrument

The research instrument was the semi-structured interview. In order for comparative analysis that is required during thematic encoding, the same 10 pre-formulated questions (Appendix B) were created as a guideline for all respondents to ensure that key areas within the research questions were covered. However, the semi-structured interview is essentially flexible and so the order, wording and sometimes sub-questions were improvised during the interview. In many cases this assisted in getting a richer understanding of the respondent's insights.

3.5 Data collection procedures

The majority of interviews were conducted at the respondents' places of work. The interviews took place during work hours at a time that was convenient to the respondent. One respondent was working outside of Gauteng for an extended period and could not meet in person. As the particular respondent's participation would add great value to the study, the interview was conducted via Skype video, which offered

a face-to-face experience. The audio of all the interviews was recorded on an iPad using Audio Note software that allows one to type notes that are synced to the audio recording. During the interview key words were typed in order to keep track that all areas of the research question had been covered.

3.6 Data analysis and interpretation

The process of thematic analysis began during that of data collection (Barnes & Clarke 2006, p. 89). During interviews and note taking, I began to notice a pattern of responses that highlighted certain areas of interest. As a theoretical approach to thematic analysis was adopted, it was appropriate that immersion into the relevant literature prior to data collection and analysis had highlighted particular features of the data (Tuckett as cited in Barnes & Clarke 2006, p. 89).

The thematic analysis involved a constant move between three components: the entire data set, the coded extracts of data and the actual analysis of the data as it was being written (ibid). Therefore, it was a recursive, non-linear process (ibid).

After the interview, the audio recordings were used to create and check transcriptions of the interviews on Microsoft Word. These transcriptions were then summarised to one-page tables that were written in key words. The one-page summaries were transferred to Microsoft Excel so that the respondents' answers could be compared next to each other. During this process, a basic list was created to highlight areas of interest.

3.7 Thematic encoding

Initial codes were produced by indentifying interesting data of semantic content across the entire data set and to manually organise them into "meaningful groups" (Tuckett as cited in Barnes & Clarke 2006, p. 91). Extracts of data were encoded inclusively by keeping some of the surrounding information so that it would remain in context (Bryman as cited in Barnes & Clarke 2006, p. 93). For this purpose, the

transcripts often had to be referred to. An Excel document was then created in order to group codes into different overarching themes and sub themes and to colour code the data extracts according to the respondent.

Given the fact that “data within themes should cohere together meaningfully, while there should be clear and identifiable distinctions between themes” (Barnes & Clarke 2006, p. 94), it became necessary to review the themes. Each theme was reviewed by reading its coded extracts and analyzing whether they fitted well together and whether there was enough data to support it. If themes lacked coherence then either the misfit coded extracts were moved to other themes, or the theme itself was amended or discarded for a new theme to be created. When reviewing the themes in relation to each other, it was found that some themes were too closely related to one another and were therefore merged. It was then necessary to re-read the data to ensure that the themes adequately represented the data set and to check if any codes had accidentally been left out at the early stages of encoding. Before starting to write the actual analysis, the themes were named and the data extracts within each theme were organised to create a narrative with notes about what was of particular interest to each data extract and their relationship to one another (Barnes & Clarke 2006, p. 96).

From the entire data set, four key themes were derived:

Theme One: Domestic documentary distribution
Theme Two: International documentary distribution
Theme Three: Shifting documentary distribution models
Theme Four: Role of government

The one-page summaries of each of the ten respondents are available in Appendix C. Chapter 4 will discuss the findings according to each theme.

3.8 Limitations of the methodology

There is the limitation that a qualitative research study focusing on a small group may result in other key opinions not being represented. However, the methodology was appropriate for the under-researched area of South African documentary distribution and ideally, this study would be built on by further studies on the topic. One disadvantage of focusing on key themes across the entire data set, rather than on only one theme, is that some complexity is lost (Braun & Clarke 2006, p. 85). However, the research area of South African documentary distribution is under-researched so a rich overview and accurate reflection of the data set is important. Additionally, the methodology utilised expert interviews, which assumes that the respondents are in fact "experts" of the topic. The limitation of this method is that the respondents may turn out not to be experts after all (Meuser and Nagel as cited in Flick 2005, p. 89). An assessment on the "expertise" of the respondents will be discussed in Chapter 5 under "Final Analysis: assessment of respondents". One of the purposes of this study is to assist the South African documentary industry in identifying current distribution challenges and opportunities. This study may likely lose relevance with time as market conditions, policies and distribution models change even further.

3.9 Validity and reliability

Flick (2005, p. 218) reveals that academic arguments regularly raise the validity and reliability of qualitative research. However, external validity, which is supposed to enable generalisations to emerge from the study to a "larger population", is a criteria better suited to quantitative research (Kalaf, Dan & Dietz as cited in Heatlie 2011, p. 46). The reason is that the purpose of qualitative research is in fact to rather have a deep understanding of the individuals' opinions and insights involved in the study (ibid). Meanwhile, the criteria of "reliability" focuses on the consistency of a study's findings that can be difficult to measure without the use of statistics associated with quantitative research (ibid). However, according to Flick (2005, p. 221), reliability depends less on the findings and more on the method: on the development of the interview procedure, the data "genesis" and the documentation thereof.

The criteria of dependability, credibility and “confirmability”, have been specifically developed to assess the validity and reliability of qualitative research (Flick 2005, p. 228), and therefore are appropriate for semi-structured expert interviews. Dependability refers to the honesty of the researcher and the respondents. Given my own involvement in the South African documentary industry there was the risk that I could have “researcher bias” and interpret or summarise data extracts through the lens of my own experience and opinions (Flick 2005, p. 223). To avoid this I made use of the recursive style of methodology, which required a constant referring between the audio recordings, transcripts, one-page summaries, comparative table and the analysis. As for the honesty of the respondents, the literature review referred to the unwillingness of the South African film industry to divulge information (NFVF 2008, p. 109). However, I found that respondents were ready to share their insights. They seemed to want to assist in the research of their industry and felt secure to freely share their opinions owing to their anonymity.

Credibility uses methods such as triangulation to cross verify the data from more than two sources as well as feedback to the informants (Flick 2005, p. 230). In this study, data triangulation was adopted by having respondents from different data sources (Denzin as cited in Flick 2005, p. 226). Interviewees were selected from three different areas of the documentary distribution process (the documentary filmmakers, the sales agents and distributors and a distribution funder). Triangulation, an alternative to validation, “increases scope, depth and consistency in methodological proceedings” (Flick 2005, p. 227). Furthermore, respondents were given the option to check summarised data. Also, each stage of thematic encoding was documented (audio files, transcripts, summaries and tables) and provided some “confirmability”.

4. RESEARCH FINDINGS

4.1 Introduction

This chapter describes in detail the findings of the research within the four themes.

4.1.1 Theme one: Domestic documentary distribution

4.1.1.1 Overview

"There is no distribution model or culture" (Respondent 6).

Many of the respondents had largely negative statements about domestic documentary distribution. One felt that South African documentary filmmakers were "working in a vacuum" (Respondent 6) while another suggested that there was "no cost effective infrastructure to distribute to the masses and so wide distribution is impossible" (Respondent 4). A common issue mentioned was the "fundamental problem" that South African audiences are too small (Respondents 4 and 9). A possible causal factor suggested was that documentary generally appeals to a well-educated audience and the large portion of uneducated South Africans has led to an undeveloped documentary market (Respondent 3). Furthermore, others believed that South Africa has too few sales agents (Respondent 5) and that South African distributors are not interested in documentaries (Respondent 7). These factors seem to be putting major strain on the South African documentary industry. For example, Respondent 7 pointed out only knowing of two production companies that solely rely on producing documentaries (Respondent 7). Respondent 5 was more positive about the status of the South African documentary film industry by stating that more young black documentary filmmakers had emerged and were starting to make films that resonated with black South Africans who make up the majority of the South African population.

4.1.1.2 Cinema

"Documentaries do well in certain independent cinemas" (Respondent 10).

There was a fair amount of consensus that South African cinema was not really part of the domestic documentary distribution model because major exhibitors usually do not screen South African documentary (Respondents 3, 4, 5, 8, 9). Respondents referred to the cinema market for local documentary as "almost non-existent", "not really an option" and "not viable". One respondent pointed out that even a bigger documentary would not recoup its budget in cinema (Respondent 3) while another believed pursing a documentary theatrical release in South Africa was "more for vanity" (Respondent 4). A common view was that Ster-Kinekor and Nu Metro were failing to reach the majority of the population. For example, one argued that cinemas were only built in wealthy areas (Respondent 3) while another revealed that most initiatives to build cinemas in townships had crumbled (Respondent 4). Nevertheless, some respondents were optimistic about alternative big screen initiatives. Several welcomed the emergence of independent cinemas that provide a niche market that appreciates local documentaries (Respondents 1, 3, 9 and 10), three respondents pointed out that South Africa has documentary film festivals such as Encounters and Tri Continental (Respondents 4, 8 and 10), while the "noble efforts" of mobile cinemas were also praised (Respondent 1). 6 of the 10 respondents mentioned the Swedish-UK documentary *Searching for Sugar Man* (2012 Bendjelloul) (1, 2, 4, 5, 7, 9) as they were inspired by its box office success in South Africa. For example, Respondent 5 referred to it as a "good model" and asked "why can't we do more of that?".

4.1.1.3 Local broadcasters

"There is no vision at any of the local broadcasters to create excellent product that will sell throughout the world, make money, and raise the status of South African documentary filmmakers, and I think that's appalling" (Respondent 3).

All respondents agreed that South African television, predominantly the SABC, is the main and sometimes only platform for South African documentary. Respondent 7 also mentioned that free-to-air broadcaster ETV also sometimes screens local documentary while Pay TV broadcaster MNET no longer licenses documentaries

owing to their claim of poor audience ratings. The respondent also pointed out that the financial troubles of Top TV had led to the Fox FX Channel no longer being able to license South African documentaries for digital satellite broadcast to Africa.

Local broadcasters were seen to license very few completed documentaries and mostly relied on a business model of commissioning content (Respondent 1), for which broadcasters retained all IP rights (Respondents 1 and 3) and provided very low budgets (Respondents 3, 6 and 7). Their stance on IP blocked most attempts for international co-productions (Respondent 1 and 7) and did not incentivise documentary producers to release on DVD (Respondent 3). Respondent 6 was frustrated that local broadcasters did not view documentary filmmakers as partners with whom they could consult and seek content. He provided the examples of local broadcasters not actively engaging with documentary filmmakers at the annual Durban Film Mart and ETV requesting documentary content from the public via a television commercial rather than contacting documentary filmmakers through the DFA. The SABC were regarded by some as being out of touch with technology as they still required master tapes to be delivered in standard definition on Betacam SP tapes, “even though South African documentary filmmakers have been filming on high definition for years and Betacam SP decks have not been manufactured for ten years” (Respondents 1 and 6).

Perhaps the most common concern was SABC’s failure to exploit commissioned documentaries, for which they have full IP rights (Respondents 1, 3, 4, 6). One respondent stated that, “Most films went onto SABC and died at the SABC” (Respondent 4) while another joked that South Africa’s primary distribution platform has been the SABC and then the SABC’s shelf (Respondent 6). Respondent 3 pointed out that the SABC should provide online and physical stores to sell their content to the public. Despite all these challenges, some respondents were more positive, stating that the SABC has a large audience hungry for documentary content with decent production levels (Respondent 8), the SABC can pay up to R100 000 for a one hour licensed documentary (Respondent 5) and that South Africa has a good market for television where repeat sales of documentaries have been possible (Respondent 4).

4.1.1.4 DVD

"DVD is a losing game" (Respondent 4).

Seeing that so little is known about South Africa's DVD market it was particularly interesting to find out what the respondents' views were on using DVD to distribute South African documentary. The commonly held view was that while there are a few documentary filmmakers releasing their films on DVD it is not a very successful market (Respondents 1, 2, 3, 4, 6, 7 and 9). For example, DVD documentary releases "don't really work" (Respondent 1), "are losing volumes but still possible" (Respondent 7) and are "a losing game" (Respondent 4).

As the previous sub-theme established, most documentaries produced in South Africa do not have the IP rights to release on DVD. Those that do seem to have limited results as "documentary is not considered a market in South Africa for DVD rental or sales" (Respondent 6) and "the paying market is limited" (Respondent 2). One reason put forward is that the majority of South Africans are accustomed to documentary being freely available on their public broadcaster so are unlikely to pay for documentary DVD content (Respondent 9).

Another important factor is the role of piracy. A distributor pointed out that physical and digital piracy is having a negative impact on DVD sales (Respondent 2) while a filmmaker joked that piracy is one of the most effective distribution methods and the filmmaker's challenge is to try making a living matching pirated DVD prices of around R15 (Respondent 4).

An often-recurring challenge highlighted was the difficulty in actually getting DVDs in retail stores. Several respondents pointed out that some of the major obstacles were the required large capital outlay (Respondent 4); having to deal with mandatory middlemen (Respondents 3 and 7); the delays and fees associated with the Film Publications Board (FPB) to rate content (Respondents 2 and 3); the difficulty of competing with the lower prices of foreign content that has the advantage of economies of scale (Respondent 3) and the lack of interest from stores (Respondents 3 and 6). Furthermore, a distributor made the interesting observation that documentaries connected to well-known international brands such Michael

Moore, Discovery Channel and History Channel products have done well in South African DVD stores (Respondent 2). He pointed to South African feature films that did well in the South African DVD market following international success and commented that perhaps "the South African market take cues from international media about its own products".

In looking at informal DVD markets, one filmmaker had found that sales in townships were not cost effective and the effort required to sell DVDs to the South African educational market usually "wasn't worth the effort required" (Respondent 4). However, another respondent felt that one opportunity that was being overlooked was direct sales to audiences after screenings at independent cinemas (Respondent 10).

4.1.1.5 VOD

"3 years ago I didn't want anything to do with VOD and now it's actually starting to become a real revenue generator" (Respondent 8).

It is necessary to point out that the respondents that were using utilising VOD did not differentiate between South African and international VOD users.

The distribution mode of VOD received mixed views from respondents. Several were hopeful of its potential (Respondents 1, 3, 4, 8 and 10) with one filmmaker calling it "a game changer" (Respondent 4). Others were less enthusiastic saying that "VOD is not really worthwhile" (Respondent 6 and 7). However, most respondents agreed that South Africa's slow and expensive broadband prevented it from widely distributing South African documentary to the domestic market (Respondents 1, 3, 4, 6, 8 and 10). For example, South Africa's slow broadband resulted in one filmmaker's documentary upload taking up to three days (Respondent 1).

Some of the other challenges respondents mentioned were having to wait two years to put a title on VOD to appease broadcasters (Respondent 8), the cost barrier of accessing key VOD platforms (Respondent 7), rarely receiving upfront payments (Respondent 3) and the need to distribute several titles to make the time and effort

worthwhile (Respondent 4). Nevertheless, what was encouraging was that several respondents associated VOD with growing potential as a monthly income generator (Respondents 1, 3, 6 and 8). For example, one filmmaker said he was happy to be earning around R2000 a month on an old documentary that was on only one VOD platform (Respondent 1), while another filmmaker had 4 documentaries on 5 different platforms geo-blocked for North America and was making a few hundred dollars a month (Respondent 8). While this is certainly promising, VOD is still in its infancy. According to one filmmaker, "we need another 3 years before we see proper revenue flowing" (Respondent 4).

4.1.2 Theme two: International documentary distribution

4.1.2.1 Interest

"The international market is still intrigued by South Africa" (Respondent 6).

A number of respondents felt that there was some interest from international broadcasters in South African documentary (Respondents 1, 4, 5, 6, 8, 9 and 10). According to Respondent 8, "there are about fifteen foreign broadcasters committed to giving voices to the marginalised", which he felt included South African documentaries. Another view was that South African documentary was largely "unknown" in international territories (Respondent 3). The basis of the respondents' opinions seemed to be largely based on the distribution mode of television, as respondents were aware of some South African documentaries that had been televised internationally (Respondents 1, 4, 5, 6, 9 and 10). Three respondents specifically mentioned the documentary series *Steps for the Future* (2001 various) that included several South African documentaries (Respondents 1, 5 and 8). It seems that interest from broadcasters does not cross over into many other international modes of distribution. For example, when looking at international theatrical releases of South African documentary, one respondent stated, "I can't think of a single film that's done more than a limited run" (Respondent 4). He went on to say that only a few good South African documentaries have been produced and made a big impact.

4.1.2.2 Challenges of international documentary distribution

"The international market is sophisticated so competition is high" (Respondent 9).

The three main challenges respondents mentioned regarding the international distribution of South African documentary were international perceptions and preferences, access to the international market and international budget levels.

Some respondents believed a major challenge to be the international market's negative perceptions about South African, or African, documentary. Some respondents believed that the international market primarily perceive South African documentary to be wildlife, (Respondents 2 and 4) and of low production values (Respondent 4 and 10). Another challenge is dealing with the preferences of the international market, which included broadcasters and sales agents' preference for documentary series to single documentaries (Respondents 5, 7 and 9). A disturbing recurring comment from respondents was that European and American broadcasters have a prejudice against black documentary subjects (Respondents 3, 4 and 8). Respondent 8 explained that this prejudice did not necessarily reflect the value system of the broadcasters but rather their audiences who they needed to please. "European and American audiences aren't interested in black faces," stated Respondent 4. Respondent 8 revealed that a European commissioning editor admitted that audience ratings plummeted when content had black lead subjects. He explained that many of these broadcasters' income from advertising or government were determined by their audience ratings. Respondent 6 pointed out, "It is no secret that [broadcasters] want to perpetuate what their constituency believe about Africa." He explained that documentaries about African success would not be as popular as documentaries with subject matter that is regarded as "barbaric" by European and American audiences, such as coup d'états, traditional healers and polygamy.

Secondly, some respondents referred to the challenge of meeting international budget levels. Respondent 8 pointed out that European broadcasters expect imported licensed documentaries to be in the budget range of at least € 200 000. Respondent 1 stated, "It is difficult to raise a budget of international standards". This is problematic when the foreign market is "over supplied and therefore highly competitive" and requires "exceptional quality" (Respondent 7).

The third challenge mentioned by several respondents was access to the international market. Respondents 7 and 9 made the observation that South Africa is geographically isolated from Europe, which makes it expensive for documentary filmmakers to attend key markets and festivals to meet international buyers. Respondent 7 believed that the chances of a filmmaker getting a straight TV deal for a single documentary with a broadcaster was “less than zero” unless the filmmaker had an established relationship with the commissioning editor and the buyer of the broadcaster. Respondent 3 felt that filmmakers need training in how to market their films and how to negotiate with broadcasters.

4.1.2.3 Opportunities of international documentary distribution

“Before the demise of the SABC very few producers understood the international market, how to finance films, how to retain rights and build relationships with international broadcasters. SA documentary has only really come into its own in the last 5 years” (Respondent 4).

The most highlighted opportunity for the distribution of South African documentary amongst respondents was increased access to and understanding of the international market (Respondents 1, 3, 4, 5, 6, 9). In particular, the respondents highlighted the government-funded delegations sent to documentary film festivals, facilitated by the DFA since 2012. The dti and the NFVF’s role will be further discussed under the fourth theme: “Role of government”. Some respondents believe that South African documentary filmmakers began to rely more on the international market (Respondents 3, 4, 6 and 9) following problems within the SABC (Respondents 3 and 4) and this has occurred in the last few years (Respondents 3 and 4). Respondent 4 felt that the “crash” of the SABC has resulted in documentary filmmakers becoming more innovative, aggressive and entrepreneurial. Respondent 3 elaborates, “The best thing that ever happened was that the SABC imploded because it suddenly forced everyone to wake up and look outwards [...] suddenly South African documentary filmmakers are emerging onto the international market”. He felt that the increased access to the international market and understanding of its requirements would dramatically raise the standard of South African documentary by 2018.

According to many of the respondents, there are, in addition to increased access to international markets, several other opportunities for the distribution of South African documentary. Firstly, two respondents felt that South African documentary filmmakers have access to particularly compelling and dramatic stories compared to some developed countries (Respondent 8 and 9), which is an opportunity to pique the interest of the international market in South African documentaries. Secondly, a number of respondents felt that opportunities for international distribution lay within possibly untapped markets such as the international educational market (Respondents 3 and 4) and niche European and American markets that have a culture of attending cinema and access to Digital Cinema Prints (DCP) via satellite or internet (Respondent 7, 9 and 10). Thirdly, three respondents pointed out that international co-productions would not only give filmmakers access to the other country's tax rebate and financing but also access to their distribution networks, and that several co-production treaties were in place (Respondents 1, 3 and 9).

4.1.3 Theme Three: Shifting distribution models

4.1.3.1 Symptoms and causes

"The traditional model has collapsed" (Respondent 8).

According to Respondent 5, "our distribution models are shifting dramatically". Respondents have observed that windows are getting closer and their orders are "mixed up" (Respondents 3 and 6), that distribution models are becoming more diverse (Respondent 9) with old models "in a state of flux" (Respondent 3). Respondents mentioned a number of potential causal factors. Firstly, audiences are more fragmented because of an oversupply of content, an increase of content platforms and changes in media consumption (Respondents 1, 2, 3 and 5). Secondly, some saw piracy as a major issue regarding shifts in the traditional distribution model (Respondents 2, 3, 4 and 8). Respondent 2 was particularly concerned, stating, "The next generation won't pay for Pay TV" while Respondent 8 had discovered several of his documentaries being sold on a pirate site. Although Respondent 2 felt a simultaneous release of cinema, DVD and VOD would discourage piracy another

Respondent 3 felt it was not yet a “proven” method. Thirdly, two filmmakers felt that the economic downturn has affected the demand for documentaries and that since 2008 distribution opportunities have decreased (Respondent 3 and 8). Fourthly, Respondent 8 believed political meddling contributed to the SABC crisis, which resulted in budgets being cut.

4.1.3.2 The traditional distribution model

“The days of all-rights deals with sales agents are pretty much over” (Respondent 4).

Most respondents agreed that very few South African documentary filmmakers have done deals with international sales agents (Respondents 1, 4, 6, 8, 9 and 10) owing to a lack of access to the international market (Respondents 4, 9) as well as South African documentary profit margins being too low to withstand sales agents’ commission (Respondent 8). Most respondents were cautious about international sales agents (Respondent 1, 3, 5, 8, 9 and 10) while two felt they were useful in certain circumstances (Respondents 7 and 9). Three respondents advised that if using a sales agent one should ensure that reports are detailed and transparent (Respondents 3, 8 and 9). Several respondents shared the view that an all-rights deal was not ideal (Respondents 4, 5, 6, 7 and 9). Respondent 4 had found an all rights deal useful before he had access to the international market, however, “in the last five years, things have changed radically: now it is madness to sign over all rights. No one sales agent will have the expertise with all platforms”. The all-rights deal did not seem to be something common within the South African territory (Respondents 2, 5 and 7). Respondent 7 pointed out that “there is not much point” in local sales agents representing all rights as there is virtually no cinema or DVD market for documentary. Therefore, it is not uncommon for South African documentary filmmakers to utilise a South African sales agents for South African television sales (Respondent 10).

4.1.3.3 Hybrid distribution

"Only in the last few years have South African filmmakers begun to understand that the main work begins when the film is finished" (Respondent 4).

While Respondents 5 and 9 felt that hybrid distribution started in South Africa between 2009 and 2010, most respondents pointed to a low prevalence of hybrid distribution. Several respondents felt that splitting international rights was not very prevalent (Respondents 1, 2, 3, 4, and 9) for several reasons. Respondent 1 commented that not many had fostered the required direct relationships with senior commissioning editors from international broadcasters and were able to deliver good content. Respondent 2 felt that most filmmakers still want to focus on filmmaking rather than distribution. Four respondents said such a model required the filmmaker to have a certain skills set which many South African documentary filmmakers do not yet have (Respondents 3, 4, 7 and 9).

Eight out of ten respondents mentioned they agreed with the principle of retaining some rights for direct sales (Respondents 1, 3, 4, 5, 6, 8, 9 and 10) and many provided anecdotal evidence of how they were putting this into practice, particularly for African territory and the VOD platform. However, several respondents agreed that rights should only be retained for territories where the filmmaker had a deep understanding of the market and established relationships (Respondents 1, 3, 6, 7 and 8). Furthermore, a few filmmakers were concerned that retaining key territories would probably "put off the big distributors" (Respondents 1 and 8). Another warning came from Respondent 7 who said that "non-exclusive deals don't work for distributors" because in the film market it is unprofessional when one film is presented to a buyer by several different representatives. However, Respondent 3 felt non-exclusive deals were becoming "more possible" as long as there was open communication between parties to avoid two parties pursuing the same buyer and another commented that negotiating such a deal required the filmmaker to have a reputation, relationships with key broadcasters and an understanding of the market (Respondent 8).

4.1.4 Theme Four: Role of government

4.1.4.1 The NFVF

"It is unclear whether the NFVF has a thought-out distribution strategy for documentary" (Respondent 4).

In terms of the NFVF's distribution funding, a number of respondents pointed out that the NFVF provides important funding for filmmakers to attend festivals and markets (Respondents 1, 4, 5 and 9). While Respondent 5 believed that the NFVF was "trying really hard to get us to markets", another felt that it was "difficult to see the impact of NFVF's distribution funds" and thought less of the funds should be spent on the festival attendance of NFVF representatives (Respondent 1). According to two respondents, the NFVF has no clear documentary strategy (Respondents 4 and 6).

Four respondents mentioned the NFVF's training initiatives with regard to distribution. Respondent 4 stated that the NFVF has "a good course for producers" but also felt that it was predominantly focused on feature films. Respondent 9 believed it would be beneficial for the NFVF to have a distribution department where filmmakers applying for market and festival funding could get assistance with developing their distribution strategies. Furthermore, Respondents 3 and 5 commented that the NFVF should have a media legal department that could help documentary filmmakers negotiate contracts with broadcasters and sales agents.

While this research is not focused on the financing of documentaries, Respondents 6 and 7 pointed out that the NFVF production funds indirectly affect distribution. The respondents felt that NFVF production funds for documentary were "too small" which discouraged the supply of feature length documentaries and limited their ability to achieve outstanding production values. Furthermore, the respondents felt that the NFVF's policy of only funding single documentaries discourages documentary series which are more likely to secure distribution seeing that they are in high demand with international television broadcasters.

With regard to the NFVF's consultation with documentary filmmakers, there were varied perspectives. Respondent 6 felt that there is "no consultation with the

documentary industry before decision making". Respondent 3 mentioned that there was the NFVF Indaba but felt that it was "ineffective". A more positive view was from Respondent 1, who felt that despite the challenges, South African documentary filmmakers had a "champion and custodian" in a NFVF staff member who was focusing on documentary and was trying to make a difference.

4.1.4.2 the dti

"The dti seriously supports market and festival attendance" (Respondent 1).

Five respondents pointed to the increased access to the international market made possible by the dti's EMIA scheme (Respondents 1, 3, 4, 5 and 6) which provides funding for filmmakers to attend film markets. Comments were predominantly positive, describing the EMIA scheme as "really good" (Respondent 3), "great" (Respondent 4) and "a huge help" (Respondent 5). One view was that the delegations had educated filmmakers about the international market (Respondents 3 and 5). Respondent 3 showed the importance of the scheme by stating, "it has made my business possible". More neutral comments included the observation that while the EMIA scheme was crucial, "filmmakers need to develop their understanding of distribution in order for it to work" (Respondent 4). Although interview questions were focused on distribution and not financing, three respondents felt that it was necessary to mention the dti's 35% tax rebate. They believed lowering the threshold and adjusting the rebate guidelines for documentary would enable more documentary filmmakers to utilise the rebate and therefore increase the supply of South African documentaries with higher budgets and higher production values, improving their chances of distribution (Respondents 1, 6 and 7).

4.1.4.3 The South African government in general

"We need long term vision for our industry" (Respondent 8).

Several respondents directed statements to the South African government that there is a need for national documentary distribution strategy or vision (Respondents 3, 5, 6, 8 and 9). Respondent 3 stated, "South Africa needs a national film strategy so that everyone works together in a more coordinated environment with effective channels

of communication to reach the same goals". Respondent 6 suggested that DAC could create a holistic partnership with other government departments, the private sector and the film industry that would increase the demand for documentary content and develop documentary audiences. For example, the Department of Education could acquire useful teaching mechanisms by annually commissioning documentaries in line with the school curriculum. Respondent 10 mentioned that there needs to be more political will from government and exhibitors to maximise the use of existing independent cinemas and grassroots screening spaces.

Other concerns were the lack of film distribution funds, the lack of support and subsidies for local sales agents, the shortage of relevant research, the long delays in rolling out low cost cinemas and the lack of anti-piracy campaigns (Respondent 2, 3, 5, 7 and 8). Respondent 7 pointed to the Competition Commission and felt they should not allow the Pay TV landscape to be monopolised by MNET, which no longer supports the South African documentary industry. He also stated that ICASA failed to provide conditions for entry-level entrance into Pay TV that would enable competitors to win subscribers.

Some respondents suggested that the South African documentary film industry could not solely depend on its government. Respondent 4 felt, "government's ability is limited as the South African market is not big enough". Meanwhile Respondent 6 stated, "we cannot wait for government. We have to create opportunities for ourselves".

4.2 Conclusion of research findings

In looking at the domestic distribution of South African documentary, most respondents were quite negative as they felt South Africa's market was too small and the country lacked distribution infrastructure, making it difficult to have a sustainable documentary industry. While there was a consensus that cinema and DVD were not viable platforms, existing independent cinemas and grassroots screening spaces may be underutilised. VOD was seen to have potential but undermined by South Africa's slow broadband. Despite this, VOD was highlighted as an opportunity and an

increasingly worthy path to pursue. Most respondents agreed that the SABC was the primary platform for documentary but voiced many concerns around the SABC's failure to further exploit commissioned documentaries, unwillingness to share IP, resistance to co-productions, being behind with technology and not adequately partnering with the documentary industry.

Many respondents felt there is some international interest in South African documentary for television. However, several felt that it is challenging to access the international market and to deal with international broadcasters' perceptions and preferences. Despite this, most respondents were greatly encouraged by the recent increase in access to the international market which some feel was catalyzed by the SABC crisis encouraging documentary filmmakers to look beyond South Africa.
Shifts in distribution models were recognised by a number of respondents who felt that possible causes have been a fragmentation of audiences, piracy, problems within the economy and political meddling. Most respondents were not in favour of all-rights deals and believed that few filmmakers were using international sales agents. There were mixed views on the prevalence of splitting and retaining rights for South African documentaries although most respondents believed the practices to be ideal, but some were wary of resistance from international sales agents.

With regard to government's role in developing the distribution of South African documentary, most felt that a key problem was the absence of a long-term national vision and felt that DAC and the NFVF should create new policies and strategies around documentary distribution. Several respondents also felt the NFVF should increase production and distribution funding, distribution training and provide legal assistance for distribution contracts. Meanwhile, there were positive comments about the dti's EMIA scheme, which has provided substantial access to international markets, though some mentioned they want to see the threshold of the dti's tax rebate lowered and specific guidelines drawn up for documentary.

5. ANALYSIS OF FINDINGS

5.1 Introduction

The aim of this chapter is to provide an interpretation of the findings discussed in the previous chapter in relation to the distribution challenges and opportunities faced by South African documentary filmmakers, which were examined in the literature review. Key findings are summarised within the four established themes, followed by an analysis positioning them in relation to the literature reviewed.

5.2 Analysis of domestic documentary distribution

Respondents agreed that the limited market size of South Africa was a major obstacle to the domestic distribution of South African documentary and made it difficult for the documentary industry to be sustainable. This is in line with CIGS's (1998, p. 68) statement that, "The South African market is too small to support a film and television industry".

In looking at the role of cinema, the findings align with the literature indicating that South African documentaries rarely have a theatrical release (NFVF 2010, p. 10), with respondents saying that it was not a viable market. With no published data on the South African DVD market available, it was interesting to discover that respondents also had little faith in the domestic DVD market, which they felt was a challenge to enter, and usually did not provide satisfactory results. Some filmmakers struggled to compete with lower prices of foreign films while a distributor stated that successful documentary DVD titles were generally well-known foreign products as high levels of international marketing heavily influences the South African market. The data concurs with literature that highlights the importance of marketing (Henning-Thurau et al 2006, p. 563) and suggests that South African producers are still inadequately marketing their films (Heatlie 2011, p. 54 and Ronge 2011, p. 23). However, the findings indicated that filmmakers may be overlooking the opportunity of direct sales to audiences at independent cinemas.

Meanwhile, the respondents' mixed views on VOD differed slightly from Heatlie's (2011, p. 74) study two years earlier that highlighted South African filmmakers' resistance to VOD, which was based on limited infrastructure, limited faith in its viability and fears of piracy. In this research, most respondents were still frustrated with South Africa's slow and expensive (Muller 2011) broadband. However there was less scepticism about VOD's potential to generate an income as modest monthly incomes were starting to be generated. Contrary to Heatlie's (ibid) study and VOD related concerns about piracy from Chang et al (2004, p. 8), not a single respondent associated VOD as a source of their films' being pirated, although one respondent had found a pirate site selling his film, which he believed was sourced from a DVD. Respondent 8's comment that broadcasters resist a simultaneous release with VOD is in line with literature that states the arrival of VOD has started a debate about the order of windows (Henning-Thurau et al 2007, p. 1).

The respondents' views of VOD distribution going "slowly" resonate with literature that indicates that VOD also initially had a slow start in other territories (Cunningham et al 2010, p. 125). However, Respondent 4's comment that VOD needs another three years [2016] to generate solid income for South African filmmakers intersects with Mandelberger's (2011) speculation that that will be the case for US independent filmmakers by 2014, suggesting that South Africa's VOD progress may be about two years behind. Overall, data suggests that VOD is facing less resistance from South African filmmakers and is rather being regarded as an opportunity, albeit more viable in the next few years.

The consensus was that television is the primary documentary platform in South Africa. However, respondents felt major challenges they were facing were the SABC's failure to further exploit commissioned documentaries; not sharing IP with filmmakers; resistance to co-productions; requesting out-of-date technology from filmmakers and not adequately partnering with the documentary industry to seek and develop content. Aside from Aboo's (2008 p. 101) observations about IP, the other concerns were not found in previous literature explored, which possibly suggests that these areas are in need of further research.

5.3 Analysis of international documentary distribution

Many respondents felt that although the international cinema market was not viable, there was some international interest from international television broadcasters in South African documentary. This resonates with Holtzeberg and Rofekamp's view (2002, p. 4), that television sales remain one of the most important markets for independent documentary. However, several respondents found a challenge to be international broadcasters' resistance to black lead characters and their preference for subject matter that reinforced negative stereotypes about Africa. This data concurred with Mostrup's (2011, p. 44) views that documentaries about Africa, regardless of the country of origin, often perpetuate prejudices that the continent is "poor and sad or crazy and corrupt". This implies that South African documentary filmmakers relying on international broadcasters' finance may find themselves either reinforcing racist prejudices about Africa; having to convince international broadcasters to take risks with their audience ratings or finding alternative funds and distribution platforms. Respondents highlighted access to the international market as a major challenge, which intersects with Tuomi's (2007, p. 81) observation that there is an insignificant presence of distributors representing South African films on the international market. Meanwhile, the reported challenge of meeting international budgets is supported by Smith (2011) and Brown's (2012a) claims that South African documentary budgets, whether produced for a domestic or global market, are very low. However, most respondents were greatly encouraged by the recent increase in access to the international market (African Cinemas 2012), which some feel was catalysed by the SABC crisis encouraging documentary filmmakers to look beyond South Africa.

5.4 Analysis of shifting distribution models

The reviewed literature and respondents mentioned common factors contributing to shifts in distribution models. These included an oversupply of content leading to fragmented audiences (Parks 2007, p. 2) and lower prices for films (Finney 2010, p. 4 and Zhu 2001, p. 276); piracy (Rodriguez et al 2006 p. 75); problems within the economy (Finney 2010, p. 5) and political meddling in the SABC (Fourie 2008, p.8).

For example, Respondent 2 was in line with Reiss (2010, loc. 880), in believing that a simultaneous release would discourage piracy. Furthermore, in reviewing the prevalence of the traditional distribution model in South Africa, most respondents were not in favour of it as they wished to avoid all-rights deals and believed that few filmmakers were using international sales agents. Most respondents stated that few filmmakers have ever used international sales agents, as most filmmakers have not had access to the international market. This contradicted Tuomi's (2007, p. 11) statement that most South African filmmakers rely on an all-rights deal with a foreign sales agent. This may because Tuomi was predominantly looking at South African feature filmmakers.

Parks (2007, p. 139) supports Respondent 4's belief that, up until recently, most filmmakers have believed that their work is over once the film is completed, not realising that the main work is in distributing the film. Perspectives on the prevalence of splitting rights (Parks 2007, p. 93) and direct sales (Broderick 2009) for South African documentaries varied. The majority of respondents believed the practices to be ideal which is in line with Broderick's (2009) hybrid distribution model, although several respondents felt that "only a handful" of filmmakers have the skills set, knowledge and product to put this into practice, particularly tackling negotiations with international sales agents who prefer to have as many rights as possible. This is supported by Heatlie's (2011, p. 21) claims that South African film producers need to become creative entrepreneurs by honing their creative, financial and networking skills.

Respondent 4 made the observation that aside from a lack of skills, hybrid distribution "requires a lot of energy and the profit margins aren't always great". This resonates with Luckman & Roeper's (2008, p. 2) concerns that the financial success of direct sales to niche audiences may depend on economies of scale which is easier to achieve in large countries such as the US. Therefore, it is not surprising that Broderick has mentioned African filmmakers' unique strategies need to be particularly innovative (Krige's 2011a) and that respondents for this research have called on the South African Government to create a long-term documentary distribution "strategy" to deal with South Africa's unique challenges and opportunities.

5.5 Analysis of the role of government

The literature reviewed on the South African film industry indicates that the focus has been on the production of film, and that "the distribution of creative content is the Achilles' heel of the creative industries" (Joffe and Newton 2008, p. 18-20). Five years later, most respondents report there is an absence of a long-term national vision for film distribution. Research appears to be crucial to this process. Respondent 5 highlighted the need for research to be able to create a distribution strategy. This intersects with Lobato (2006, p. 119) who pointed to research being important for policy makers, with Tuomi (2007, p. 12) who felt non-traditional distribution channels needed further research and also with Joffe and Newton (2008, p. 33) who stated that South African filmmakers have limited access to research which they need to analyze market trends and audiences.

Respondents are largely looking to the NFVF to help improve the distribution of South African documentary. Respondent 8 mentioned the urgent need for low cost cinemas to reach a wider audience in South Africa, which has previously been acknowledged by Heatlie (2011, p. 65) and the NFVF (2010, p. 4) itself. However, Respondent 4 pointed out that the large capital outlay needed, and the limited paying market has contributed to most township cinema initiatives "falling flat". Meanwhile Respondent 10 felt that government and exhibitors may be trying to "reinvent the wheel" as existing independent cinemas and grassroots screening spaces were perhaps being underutilised and there was an opportunity to create a national network of these existing venues.

Several respondents recognise the need for South African documentary producers to receive distribution training, particularly with regard to negotiation skills with broadcasters and sales agents, operating on the international market, navigating contracts and learning how to deal with shifting distribution models. This data reinforces Tuomi's (2007, p. 13) research that highlights the need for South African filmmakers to develop their business skills, particularly in the areas of entrepreneurship, management, accounting and marketing. While Mokhele (2011) pointed out that the NFVF provides a highly regarded course for producers,

Respondent 4 suggests that this is predominantly focused on the feature film industry. Previous literature (Krige 2011b) has noted that annual producer conferences happen at the DFM. Perhaps in addition to the NFVF's emerging producers course, the DFM could be a potential opportunity to address issues specific to documentary.

Both the literature reviewed (African Cinemas 2012) and respondents acknowledge the role the NFVF's distribution funds have played in helping filmmakers to access documentary festivals and markets. However, several respondents felt the NFVF should increase production and distribution funding for documentary to help even the playing field when competing with international documentary filmmakers who have access to substantially larger government grants (MEDIA 2012). Some respondents echoed Tuomi's (2007, p. 81) concern that the presence of South African film represented by international sales agents was "insignificant" and felt that local sales agents should receive greater support and training. There was a consensus from respondents and previous literature (African Cinemas 2012) that the dti's EMIA scheme has provided substantial access to international markets and contributed to developing the South African documentary industry. However, some felt that if documentaries had documentary-specific conditions and a lower threshold for the dti tax rebate, South African documentary would be more likely to compete on the international market, upon which there is a greater reliance. Interestingly, no respondents mentioned the Industrial Development Corporation (IDC), which loans money to filmmakers. This could indicate that the IDC is not considered as a viable financing option, possibly because interest is charged on the loan.

5.6 Final analysis – an assessment of the respondents

In assessing the "expertise" of the sample, all respondents were found to be experts. Whether they were producers, funders, sales agents or distributors, they were confident, well spoken, highly professional and had strong views about South African documentary distribution, based on many years of experience. Having said that, while many had vast experience in both domestic and international distribution, two were predominantly experts of the South African market. However, the sample's

varied focus on domestic and international markets provided me with in-depth and detailed data for both markets. Despite concerns that respondents might be reluctant to share their expertise and possibly risk their "competitive edge", I found that in reality the respondents were incredibly generous in sharing their knowledge. I got the sense that they really wanted to help develop the greater South African documentary industry by participating in the research, and they were not just focused on their own careers and personal success.

5.7 Conclusion of analysis

The limited South African market for documentary has contributed to South African documentary distribution models differing quite substantially from the "traditional" model explored in the literature review. This is indicated by the fact that mainstream cinema exhibition is currently not viable unless a documentary audience is developed and there is a roll out of low-cost cinemas or a co-ordination of existing grassroots venues to reach a wider market. DVD, while possible, requires considerable effort from filmmakers to enter the market and compete with foreign products. As its financial reward appears to be limited, the purpose of documentary DVD release is possibly more to reach an audience beyond television. However, an underutilised opportunity is direct DVD sales to audiences at independent cinema screenings. There is less resistance from South African filmmakers to VOD as a few are beginning to generate modest revenue from this mode. Despite the challenge of slow and expensive broadband in South Africa, filmmakers are largely optimistic about VOD's future. The key platform for distribution is television, particularly the public broadcaster, the SABC. Despite large audiences, major problems within the public broadcaster have led South African documentary filmmakers to broaden their horizons and pay the international market more attention.

The increased access to international markets in recent years, funded primarily by the dti and also made possible by the NFVF, has provided an opportunity for South African documentary filmmakers to develop their understanding of broadcasters and sales agents' expectations. While filmmakers require further training to successfully

operate in foreign markets, there is rising optimism that this “look outwards” will raise the standard and international presence of South African documentary.

The traditional distribution model of an all-rights deal with a single distributor or sales agent has perhaps never been a common occurrence in the distribution of South African documentary. For example, the lack of viable distribution platforms has not justified a domestic all-rights deal while limited access to international markets has put very few South African documentary filmmakers in contact with international sales agents. Although international access is becoming more possible, filmmakers appear to have little interest in all-rights deals but do see the value in giving sales agents specific rights. However, few filmmakers have the skills and knowledge to negotiate split rights with sales agents and further training and development is needed. Hybrid distribution as explored in the literature review is not an exact fit for the South African territory. The SABC has historically denied filmmakers IP to exploit rights beyond television, and in any case, cinema and DVD platforms have not been particularly viable markets for documentary. However, a few filmmakers producing outside the “commissioned” model have been splitting television, DVD and VOD rights domestically. Many are becoming more interested in splitting international rights and retaining rights that they are confident of handling themselves, depending on established relationships and knowledge of the market. For example, some are licensing directly to specific international broadcasters; signing multiple non-exclusive agreements with VOD aggregators; assigning African rights to a South African sales agent (or handling them independently); signing remaining television rights to one international sales agent and educational rights to another.

Some respondents maintained that they do not have a clear South African documentary distribution model to follow, and called to government to assist with creating a long-term distribution strategy for South African documentary so that filmmakers have a framework to work within. While many regard the role of government as crucial, filmmakers recognise their responsibility to develop the South African documentary industry and seem to desire greater collaboration between filmmakers and relevant government departments. Filmmakers are encouraged by certain government initiatives that have increased access to the international market

and feel that further government efforts in documentary distribution research, training and funding will go a long way to raise the profile of South African documentary.

6. CONCLUSION

6.1 Introduction – review of the study

The central research question driving this study is, “What are the distribution challenges and opportunities faced by South African documentary filmmakers according to responses offered by the selected sample of documentary stakeholders?” First, the study identifies the distribution challenges and opportunities domestically and internationally. It then unpacks the ways in which some of the challenges affect one another and explores the potential causes for these challenges. The limited literature on documentary distribution suggests that South Africa’s domestic distribution faces a number of challenges, which have a knock-on effect on South African documentary’s international distribution in the highly competitive foreign market.

The traditional film distribution model, explored through the film value chain and the evolution of film distribution, became a central conceptual framework. By looking at the traditional order of windows, the challenges and opportunities within these windows for the domestic and international distribution of South African documentary were evaluated. The research also explores shifting distribution models, with changing orders of these windows and the management of documentary rights. It explores hybrid distribution that was created with the purpose of overcoming these shifts and challenges.

Empirical research was used in the form of ten semi-structured “expert” interviews with documentary filmmakers, sales agents, distributors and a funder. While the box office success of *Searching for Sugar Man* (2012 Bendjelloul) became a source of inspiration for many of the respondents, they shared the challenges and opportunities that they face along their own journeys to achieving international and domestic distribution. Thematic encoding was used to analyse the data by grouping the data extracts into four themes: “domestic documentary distribution”, “international documentary distribution”, “shifting distribution models” and “the role of government”. These themes were presented in the findings.

6.2 Reviewing the research question

In considering the research question, “what are the distribution opportunities and challenges faced by South African documentary filmmakers according to responses offered by the selected sample of documentary stakeholders?”, the research led to five key discoveries. First, for domestic distribution South African documentary filmmakers find that the domestic market size is very limited. Nonetheless they are becoming more interested in utilising South African independent cinemas and VOD. Second, the SABC crisis has forced South African documentary filmmakers to rely more on in the international market while government funding is enabling South African documentary filmmakers to attend international film markets. Third, South African documentary filmmakers need further training and a clear national documentary strategy to compete on the international market. Fourth, South African documentary filmmakers have not experienced dramatic effects of shifts in the traditional distribution model because domestic distribution platforms have been limited to start with. Finally, South African documentary filmmakers are interested in the hybrid distribution model but the model needs to be adapted for the South African documentary landscape and filmmakers need further training to implement it. These key findings will be discussed in more detail below. While the findings may not result in a secret formula to emulate the success of *Searching for Sugar Man* (2012 Bendjelloul), they do identify distribution challenges that need solutions and present opportunities that South African documentary filmmakers should not overlook.

It was particularly interesting to see that despite a small paying domestic market, problems with local television broadcasters and limited alternatives for viable distribution platforms, South African documentary filmmakers are looking to maximise the domestic distribution opportunities available to them. For example, some documentary filmmakers are utilising independent cinemas where niche markets have shown an interest in South African documentaries. There is a further opportunity for these existing spaces to be co-ordinated to create a national network of independent cinemas where DVDs can be sold directly to audiences after screenings. Additionally, VOD has begun to show promise of generating solid

revenue in years to come, and documentary filmmakers are looking forward to witnessing VOD's full potential once South African broadband becomes faster, cheaper and more widely diffused.

One of the most surprising discoveries was that the SABC crisis has forced many South African documentary filmmakers to broaden their horizons. While the majority of South African documentaries are produced within the SABC's commissioning model, many documentary filmmakers regard the domestic market as unsustainable, and as a result are beginning to rely more on the international market. In doing so, South African documentary filmmakers are starting to become more aggressive, entrepreneurial and innovative as they start to compete for international partners and distribution possibilities. This has been coupled with arguably the greatest distribution opportunity, which has been government funding, particularly from the dti and the NFVF, to enable South African documentary filmmakers to attend international markets. This has resulted in raised levels of optimism amongst industry stakeholders who feel that this international exposure will eventually raise budgets, production quality and market suitability in South African documentary.

Meanwhile, increased access to international markets has in turn presented a key distribution challenge. South African filmmakers and sales agents require further training, support and development to be able to present more internationally competitive South African documentaries abroad. Furthermore, industry stakeholders are feeling the absence of an official long-term distribution strategy or vision for South African documentary that can guide filmmakers and funders towards common national goals regarding documentary, particularly in relation to documentary distribution.

The South African documentary film industry has responded less dramatically than many North American and European independent filmmakers to global shifts in the traditional distribution model. Although South African documentary filmmakers have noticed shifts in the traditional order and timing of windows, these shifts have not been regarded as a major "disruption" because there have been so few viable domestic distribution platforms to start with. However, the causes of these shifts

have been problematic for South African documentary filmmakers who now face increased piracy, even more fragmented audiences, lower prices for films and less distribution opportunities.

Another finding worth highlighting is that most South African documentary filmmakers have not directly transitioned from traditional distribution models to hybrid distribution like their many European and North American peers. For many years, the lack of access to international markets and the shortage of films produced outside the SABC's commission model prevented many South African filmmakers from signing a traditional all-rights deal with a single distributor or sales agent. Now that more filmmakers have access to international markets, few are interested in all-rights deals. With the emergence of hybrid distribution, many see opportunity in splitting international rights and retaining rights that they are confident of handling themselves. However, the challenge remains that few filmmakers have the skills, knowledge and established relationships with broadcasters and sales agents required to put this into practice. Therefore, while hybrid distribution can give South African documentary filmmakers the opportunity to learn from the aspects that are possible to emulate in South Africa, the challenge is for the hybrid distribution model to be adapted according to South Africa's unique circumstances.

6.3 Recommendations to the industry

The following distribution challenges and opportunities are highlighted to assist documentary filmmakers and government in identifying what problems need solutions and what opportunities need to be maximised in order to create a more sustainable South African documentary industry.

6.3.1 Documentary filmmakers

Documentary filmmakers would have far greater chance of finding solutions and creating opportunities if they were to unite and to become actively involved in volunteer-based industry associations such as the DFA and SASFED which would then have greater capacity to foster close partnerships with the NFVF, the dti, GFC,

DFO, CFC, the DFM and local broadcasters. Through these relationships, documentary filmmakers can persistently pursue critical support and lobby for their needs.

For example, filmmakers may find it beneficial to lobby through the DFA for more support from the SABC, which is the primary platform for documentary. Solutions need to be found for South African documentary filmmakers and the DFA to become the primary port of call when the SABC is looking for content to license or commission. In order to lobby for international co-production opportunities, it may be beneficial for documentary filmmakers, with the possible support of the NFVF, to provide the SABC with a presentation of economic and branding benefits to international co-productions and examples of successful documentaries that have used such treaties. Additionally, the DFA and its membership could research the possibility of creating a television channel dedicated to documentary and host annual distribution forums during which the membership can track the status of distribution challenges and their solutions. Meanwhile, Research indicated that documentary filmmakers should keep their eye on VOD, which is slowly showing potential as a solid income generator.

For international distribution, documentary filmmakers through the DFA should continue to develop their partnerships with the dti and the NFVF who fund international market access opportunities. The research indicates that filmmakers need to ensure that they are researching the international market and meeting its expectations of production quality and universal appeal. However, South African documentary filmmakers also need to find ways of creating compelling films of exceptional quality that debunk the negative stereotypes about Africa that, according to the research, international broadcasters often perpetuate. In order for South Africa to become better known for documentary, more South African projects need to pitch at international documentary forums and compete in top international documentary festivals such as IDFA and Hot Docs. While filmmakers require assistance via training, it is also their responsibility to develop their skills and knowledge in order to become more competent and confident with international broadcasters, negotiating split rights with sales agents and handling certain rights on their own. Meanwhile, if

filmmakers decide to use sales agents, research suggests that an all-rights deal should be avoided and that detailed and transparent records should be provided.

6.3.2 Government

Government needs to consult with the documentary industry that, as research shows, is looking for a long-term documentary vision to work towards that will ultimately influence documentary specific research, training, funding, audience development, distribution mechanisms and strategies for South African delegations attending international markets.

In addressing the major problem of a tiny domestic market failing to sustain the South African documentary industry, government may find it beneficial to implement a long-term and maintained documentary audience development plan. In doing so, documentary film industry stakeholders in South Africa need to find solutions to roll out a low-cost distribution infrastructure that will reach the majority of the South African population, bearing in mind that their purchasing power is limited. Seeing that the SABC is the public broadcaster and is able to reach the masses, ICASA and the NFVF should place more pressure on the SABC to license more South African documentary, fulfil its local content quotas, share IP, be open to international co-productions, provide access to well-managed archives and generally hold a vision for the creation of high quality, exportable South African documentaries. The research indicates that the Competition Commission needs to lower entry barriers and sustainability obstacles for competitors in the Pay TV landscape. At this point, MNET monopolises the Pay TV landscape and no longer supports the South African documentary industry.

Solutions need to be found to urgently address South Africa's slow and expensive broadband so that VOD can reach its full potential. Additionally, government should explore ways to take piracy more seriously such as educating the public through anti-piracy campaigns and collaborating with Internet service providers to identify digital pirates so they can be prosecuted.

Government's existing schemes have been instrumental in creating greater access to the international market. However, filmmakers require training and development to manage rights and become highly competent negotiators with international broadcasters and sales agents. Also, solutions need to be found to provide filmmakers with legal advice in negotiating international contracts. Furthermore, filmmakers require access to larger production funds so that they are more likely to compete with the production quality of the international market. Meanwhile, the research shows that government may need to find ways to provide support and training to South African based sales agents so that more South African films can be represented on the international market. After all, it is unrealistic that all documentary filmmakers will have the time, opportunity and resources to represent their own projects on a regular basis. Furthermore, it may be beneficial for government to look into the feasibility of creating a national network of independent cinemas and grassroots screening spaces to maximise existing spaces.

The study indicates that government should invest in regular, high-quality research specifically about South African documentary so that the documentary film industry has a better understanding of its domestic market's needs; how local documentaries are performing domestically and internationally; and how this corresponds to competitors in the international market.

6.4 Future research

Filmmakers, policy makers, funders, sales agents and distributors need access to up to date qualitative and quantitative research about domestic and international markets so they can make informed business and policy decisions.

It would be helpful if annual reports specific to South African documentary were available. Useful quantitative data include the annual number of documentaries produced, budget ranges, sources of funding, commissions and licensing by local and international broadcasters, involvement of local and international sales agents, distribution methods and financially viability. This would help the industry keep track of its progress. As identified in the literature review, the NFVF have found filmmakers

reluctant to share such data. It may be useful to issue such surveys through industry associations and as Heatlie (2011, p. 86) suggests, make it mandatory for government fund grantees to provide information.

Case studies of highly successful South African and international documentaries would be useful in informing and guiding South African filmmakers. Useful information includes their selection of topic and style in relation to their target market; budget levels and financing structure; the role of soft fund and broadcaster partners; the role of documentary pitching forums; the role of government; their festival strategies; their distribution strategies; their marketing strategies; their audience engagement / outreach strategies and their sales results.

While SASFED have independently researched the SABC's compliance to local content quotas, it is important that formal studies are done through research and academic institutions. Further research is needed for demonstrating the ways in which possible non-compliance is affecting the South African economy and national identity.

Another important area of study is the mapping of distrubution progress for South African documentaries on VOD, particularly since it is beginning to take off. To date there is no published data illustrating the number of South African documentaries on VOD platforms and the portion of local versus international platforms. There is also a dearth of information pertaining to sales figures, the key countries supporting South African documentaries on VOD and the portion of rental versus download to own. Since slow broadband is a problem in South Africa, research exploring the viability of alternative means of distribution in South Africa such as mobile phones would be useful.

6.5 Final words

As distribution challenges and opportunities are continuously identified and reviewed, industry stakeholders will be better equipped to develop innovative solutions and strategies to build and sustain the South African documentary film industry. Just as the SABC crisis prompted more South African documentary filmmakers to break into the international market, filmmakers need to develop solutions that not only overcome current distribution challenges, but also leverage the opportunities that present.

NOTES

[i] One “South African” film that is connected to a major studio was *District 9* (Blomkamp 2009), which was distributed, but not produced, by the studio TriStar, a subsidiary of Sony Pictures Entertainment. However, it was a co-production between the United States, New Zealand, Canada and South Africa.

[ii] Vertical integration is the merging of businesses that are involved in various stages of production.

[iii] Loc’ refers to location numbers of the Kindle editions of books. This method is in accordance with the Harvard Referencing System for Kindle (and other Electronic Sources). While some recent Kindle books have started to provide the printed version’s page equivalent, none of the e-book texts sourced for this research did. Estimated page numbers cannot be used as a Kindle text’s number of pages depends on the size of the font selected.

[iv] Statistics South Africa and the South African Institute of Race Relations rely on statistics generated from the national census. The Census does not specifically measure the population percentage of South Africans residing in townships, as township populations are included in population figures for greater municipality areas. Therefore, this statistic is not publically and freely available.

[v] The economic downturn made it more difficult for the public to maintain their standard of living as the cost of living increased. Therefore, to counteract this, many people worked more hours to and in doing so cut down on their leisure time. The public had less time to spend watching films and therefore filmmakers found it was more difficult to find audiences for their films.

[vi] An example of a set top box or decoder is South Africa’s DSTV decoder.

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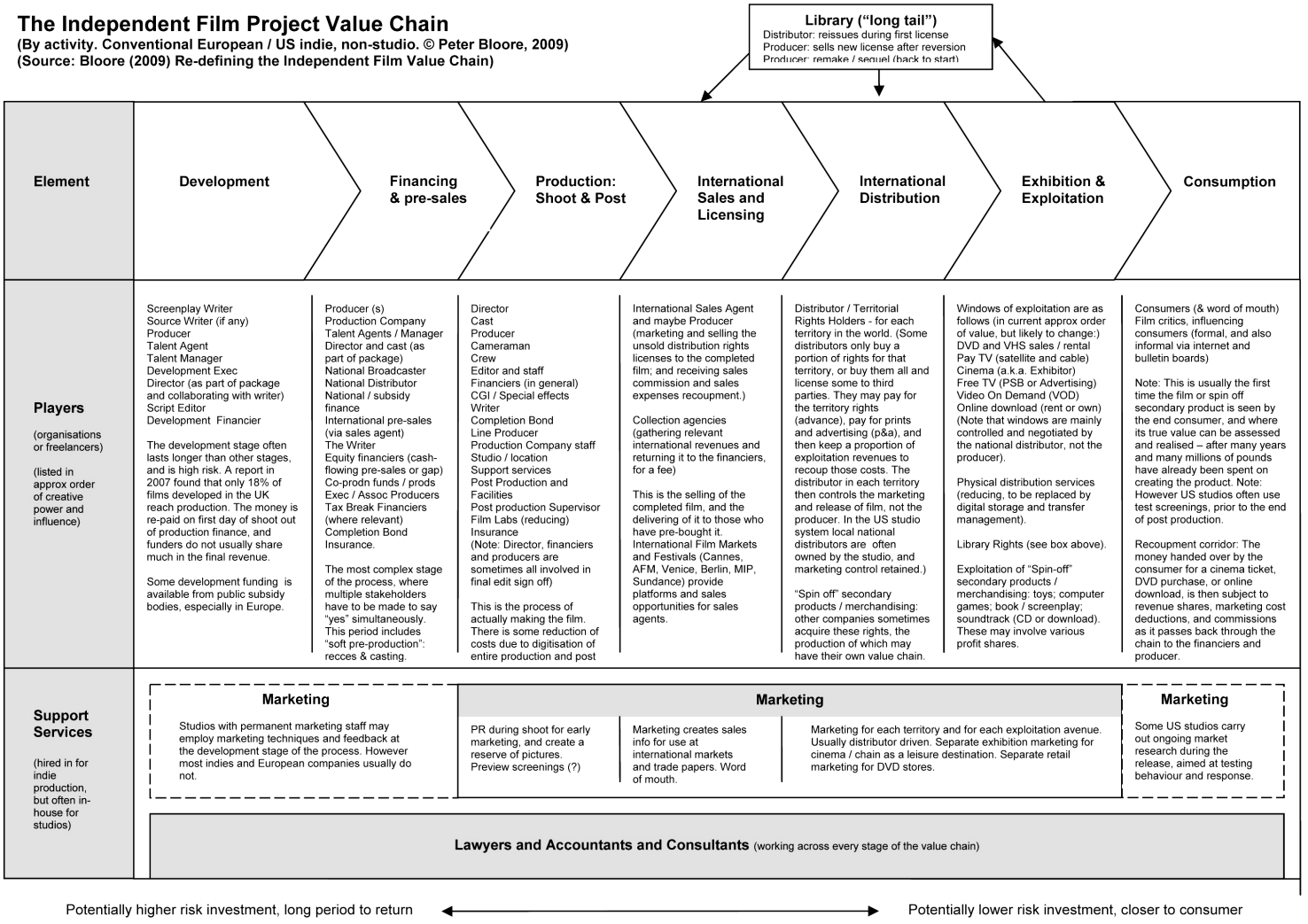
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APPENDIX A: Bloore's Independent film value chain

The Independent Film Project Value Chain

(By activity. Conventional European / US indie, non-studio. © Peter Bloore, 2009)
(Source: Bloore (2009) Re-defining the Independent Film Value Chain)



APPENDIX B: Research Instrument - Interview Questions

1) What are the key challenges and opportunities in distributing South African documentary in South Africa?

2) What are the key challenges and opportunities in distributing South African documentary in foreign markets?

3) How effective is the distribution of South African documentary within South Africa across the different modes of distribution?

4) How effective is the distribution of South African documentary in foreign markets across the different modes of distribution?

5) Over the years, how has South African documentary been released to the public in terms of the order and timing of windows?

6) Over the years, how effective has the traditional distribution model been for South African documentary filmmakers?

7) For South African documentary filmmakers how prevalent and effective is the “new world” model where rights are split to multiple sales agents, the film producer is intensely involved in the distribution process and the filmmaker retains rights to sell their product directly to their audience?

8) Has the “digital age” affected the distribution of South African independent documentary within South African and in foreign markets, and if so, how?

9) Do you think that South African independent filmmakers’ models for distributing their documentaries in South Africa and the rest of the world have changed, and if so, what do you think the causes of these changes may be?

10) In your view, how effective are the various government initiatives in developing the distribution of South African independent documentary?

APPENDIX C: Interview one-page summaries

	Respondent 1	
1	Challenges and opportunities of domestic distribution of SA documentary?	Very few documentaries get made outside local broadcasters' commissions. Broadcasters retain all rights so DVD not incentivised. SABC doesn't exploit content. SABC still require delivery on 4:3, SD, Betacam SP. Several VOD platforms for African (non-commissioned) content.
2	Challenges and opportunities of international distribution of SA documentary?	SA isolated from Europe geographically so difficult to attend markets and festivals. The dti export schemes create access to international markets. Difficult to raise budget of international standards. Co-productions with other African countries not very common as SA isolated from rest of Africa. Some interest in SA stories as seen as exotic yet often not easy to export as language barriers obstacle.
3	Status of modes of distribution in SA?	Limited cinema going audience in SA because of affordability. Noble efforts for mobile cinema. Have well run documentary festivals but low attendance. Less communal viewing therefore great potential for VOD in SA once decent broadband. DVD releases don't really work even with some retail outlets.
4	Status of modes of distribution in foreign markets?	Very bad. Few members of international delegations had completed content of high standard to sell. *Searching for Sugarman* did well at cinemas but not an SA production. Some foreign broadcasters invest in a few one-off documentaries and entire slates like *Project 10*. *Why Democracy?* and *Why Poverty?* series predominantly European money and facilitated in SA. Handful utilises VOD for older titles and sees revenue.
5	Traditional distribution model in SA?	Typically only SABC. Very few have DVD release. Some launch at independent cinema or film festival.
6	Prevalence of traditional distribution model in SA?	Few who use international sales agents haven't had great results. No results yet with SA sales agent. Opportunity is Off The Fence, an international distributor that has offices in SA.
7	Prevalence of hybrid distribution in SA?	Not so prevalent yet those who do best fostered direct relationships with senior commissioning editors from international broadcasters and deliver good content. Many foreign sales agents view Africa as "throw away" territory so best to retain those rights. Licensed African in-flight rights directly. DISCOP gives access to African territories. May be ideal to split rights but distributors don't like it so rather give sales agents short period to prove themselves.
8	Effects of digital age?	Increased options have fragmented audiences and cut budgets. Windows getting closer and mixed up. Trailers, clips and entire films go out on Vimeo with password protection so VOD deals done online save time and expenses. Takes long time to upload: 2-3 days for feature length. Kenya has faster broadband than SA.
9	Other factors changing distribution models in SA?	Commission model unsustainable broadcasters may become open to international co-productions.
10	Government initiatives?	dti seriously supports market and festival attendance. Difficult to see impact of NFVF distribution funds. Less should be spent on market attendance of NFVF representatives. However, champion and custodian in NFVF staff member who focuses on documentary and tries to make a difference. NFVF should assist in the brokering of contracts with sales agents.

	Respondent 2	
1	Challenges and opportunities of domestic distribution?	Paying market is limited. Physical and digital piracy is an issue. IP integrity no longer exists. Film Publications Board slows down distribution. Filmmakers should meet regularly to discuss distribution issues. Documentary is genre watched repeatedly. DVD should have low cost high value extra features.
2	Challenges and opportunities of international distribution?	Easier for bigger companies to sell at International markets than for independent filmmakers. Buyers prefer to buy packages as less paper work and established relationships.
3	Status of modes of distribution in SA?	Perceived as predominantly wildlife. Mostly TV. DVD stores sell international documentary product to older market especially History channel, Discovery channel and Michael Moore products. SA market takes cues from international media.
4	Status of modes of distribution in foreign markets?	Rodriguez film closest thing. Sundance launched it.
5	Traditional distribution model?	TV, DVD. Now also VOD.
6	Prevalence of traditional distribution model in SA?	All-rights deal older model but now the filmmaker has ability to manage rights more carefully.
7	Prevalence of hybrid distribution in SA?	Filmmakers still want to focus on filmmaking rather than managing distribution. Some split local rights and build audiences through sponsored grass roots screenings. Should have a simultaneous release with cinema, TV, DVD and VOD. Encourages immediate secondary revenue source. Holding back encourages piracy.
8	Effects of digital age?	Piracy is killing creative content. Preventative measures seen as restriction of freedom of information. Will result in reliance on endorsements and product placement. Next generation won't pay for Pay TV.
9	Other factors changing distribution models in SA?	Filmmakers fighting for audience's attention as oversupply of content.
10	Government initiatives?	Telkom, government parastatal, encouraged piracy by advertising uncapped line can be used to download movies long before there was legitimate download site in SA. Government needs to educate public with anti-piracy campaigns.

	Respondent 3	
1	Challenges and opportunities of domestic distribution of SA documentary?	No culture of watching documentary. SA broadcasters don't take documentary seriously: poor slots, low budgets, no IP, content strands created by inexperienced staff, favours foreign content, censorship, no vision to create excellent, exportable documentaries. SA documentary filmmakers emerging onto international market. Standard will rise. Opportunity to retain IP, access foreign infrastructure and funds. Filmmakers need training in marketing and how to negotiate with broadcasters. Opportunity for co-production with other African countries. SA needs to stop thinking they are leading the continent.
2	Challenges and opportunities of international distribution of SA documentary?	Important to attend international markets to understand trends. SA documentary unknown. Europeans and Americans have prejudice against black subjects, Africa and African film. Opportunity to change perceptions. The global economy resulted in slashed prices, less acquisitions, more reruns and debts. Broadcasters want higher quality, multiple versions and interactive components for less money, unsustainable. VOD platforms rarely pay upfront and difficult to control what is being sold to whom. Not enough African-based distributors. Need to develop new distributors.
3	Status of modes of distribution in SA?	Ster-Kinekor and Nu Metro's business models based on selling popcorn and built in wealthy areas that don't reach most of the population. Positive emergence of few independent cinemas. Local broadcasters don't sell content. Filmmakers need middleman to sell DVDs to retailers. Many stores won't sell documentary and difficult to compete with US prices. FPB requires fees. Piracy. VOD doesn't work with limited broadband.
4	Status of modes of distribution in foreign markets?	Cinema releases of some bigger documentaries though won't recoup budget. Several SA documentaries on VOD platforms. Educational market huge but many SA filmmakers unaware.
5	Traditional distribution model in SA for documentary?	Mostly only TV, sometimes DVD but no incentive. Now looking to international market and niche audiences.
6	Prevalence of traditional distribution model in SA?	Previously ripped off by UK sales agent but couldn't do anything. SA filmmakers unrealistic about sales agents and expect immediate results.
7	Prevalence of hybrid distribution in SA?	Windows have changed, old models in state of flux. Simultaneous release touted, not yet proven. Non-exclusive more possible. Better to handle rights yourself or until you find the right distributor. SA filmmakers need business skills and development.
8	Effects of digital age?	Can release on Vimeo. Oversupply of online content. Less resistance to VOD as some filmmakers making money every month. The next big thing is mobile: re-edits for mobisodes.
9	Other factors changing distribution models in SA?	Economics. Media consumption changes have fragmented audiences so more time spent on distribution – and less on filmmaking. Faster pace of life can lead to hasty decisions and less creativity.
10	Government initiatives?	EMIA scheme is really good and has made my business possible. SA needs national film strategy so everyone works together in more coordinated environment with effective channels of communication to reach same goals.

	Respondent 4	
1	Challenges and opportunities of domestic distribution?	No cost effective infrastructure to get films to the masses so wide distribution impossible. Young black filmmakers emerging and starting to make films that resonate with black audiences. Can learn from Nigerian model: purely market driven and profitable, but fact that SA audiences are too small is a fundamental problem. Too many South African producers lurch from one film to the next with dry spell in between so very few sustainable production companies.
2	Challenges and opportunities of international distribution?	Chances of distributing and making money from SA documentary is very small so focus is on universal stories that reach international audiences and have high production values. Only a few good SA documentaries produced. SA documentary seen as wild life or low production values. Since demise of SABC, more producers learning the international market. European and American audiences aren't very interested in black faces. Increased interest from China. Since SABC crashed, SA filmmakers have become more innovative and aggressive and entrepreneurial.
3	Status of modes of distribution in SA?	Audiences for SA documentary in cinemas almost non-existent therefore theatrical releases almost impossible. Not viable market but more for vanity. Good market for television. DVD still has life in SA but losing game for documentary. Sales in townships not cost effective. Formalised outlets require big capital outlay. Effort required for educational market not worth it. Having 1 film on VOD not worth time and effort required. VOD will become more important.
4	Status of modes of distribution in foreign markets?	Few SA documentaries have made huge impact. Can't think of single SA documentary that's had more than limited run in an international cinema. Quite a few have sold to international broadcasters. An SA film has done well if it has sold to 4. 10 is a hit. Educational DVD market in the states is huge if you find the sweet spot.
5	Traditional distribution model?	Sometimes only film festivals. Mostly films went out onto SABC and died at SABC. Now some do 1 broadcast sale, try to get it out on DVD and that's where it ends.
6	Prevalence of traditional distribution model in SA?	Until recently, very few were doing deals with sales agents. Was useful when I'd no access to the market. In the last 5 years things have changed radically. Now it is madness to sign over all-rights. No one sales agent will have the expertise with all platforms. The days of all-rights deals with sales agents are pretty much over.
7	Prevalence of hybrid distribution in SA?	Hold onto the rights I can manage myself. Non-exclusive. Only in last few years have SA filmmakers begun to understand main work begins when film finished. Only handful has skills and knowledge utilise that model and to have products that have an audience. Requires a lot of energy and profit margins aren't always great.
8	Effects of digital age?	VOD is a game changer and will become more so. Now bandwidth too slow. We need another 3 years before we see proper revenue flowing.
9	Other factors changing distribution models in SA?	Piracy is an effective distribution – the challenge is to be able to make a living on matching those prices of about R15 a DVD, which is difficult.
10	Government initiatives?	Government's ability is limited as SA market is not big enough. NFVF has good course for producers although focused on feature films. NFVF provides funds for distribution. Unclear whether NFVF has thought out distribution initiative for documentary. Most initiatives to build cinemas in townships have fallen flat. EMIA scheme great yet filmmakers need to develop their understanding of distribution in order for it to work.

	Respondent 5	
1	Challenges and opportunities of domestic distribution of SA documentary?	Difficult to get local broadcasters to engage with documentary content. Good relationships with local broadcasters essential. Fit into briefs, know annual slots and agendas. Negotiation skills and networking key. SABC pays up to R100 000 per one hour of licensed content. Few sales agents in SA. Need more buzz and hype around documentary launches. Local broadcasters should advertise documentaries shown on TV.
2	Challenges and opportunities of international distribution of SA documentary?	Need to broaden our horizons, understand the market, find local stories that have universal appeal and make them sing for the domestic and international market. The dti delegations to international markets help us understand what international broadcasters want. Levels of interest vary. Fatigue with Apartheid struggle stories. We sort of have to grow up and do stuff that is exciting and original. SA has the talent.
3	Status of modes of distribution in SA?	SA documentaries rarely get shown in cinema. Oscar nominated *Searching for Sugarman* not South African but good model: made money in SA. Why can't we do more of that? Documentary slots on local broadcasters. Africa.tv has a VOD platform for African content.
4	Status of modes of distribution in foreign markets?	Films shown on international broadcasters. *Steps* in 2001 was a huge example.
5	Traditional distribution model?	Launch. TV.
6	Prevalence of traditional distribution model in SA?	Signed with international sales agent, although not all-rights, got hamstrung by the deal. Locally, would never give all rights to one entity, takes away your power.
7	Prevalence of hybrid distribution in SA?	A few filmmakers are starting to, or talk about, splitting rights to multiple sales agents for the last 3 years. Retain rights in order to make a living. Can do quite well by giving educational rights to educational distribution specialists.
8	Effects of digital age?	Our distribution models are shifting dramatically. So many people can now access documentary content online. Technology is possibly giving filmmakers more power and access though it requires more time and energy.
9	Other factors changing distribution models?	Kid can film something on cell phone and upload it to YouTube. So much more content, more channels.
10	Government initiatives?	dti and NFVF trying really hard to get us to markets. Huge help last few years. Delegations have educated filmmakers about international market. Need more research. Need concerted effort from government to look at models that have worked, to look at SA's own unique circumstances and to come up with a strategy.

	Respondent 6	
1	Challenges and opportunities of domestic distribution?	No distribution mechanisms in place. Documentary filmmakers working in a vacuum. SABC doesn't exploit commissioned content. Local broadcasters don't seek content for licence or consult with filmmakers. Low SABC budgets encourage cutting corners. No access to SABC archives. SA documentary filmmakers should create own channel.
2	Challenges and opportunities of international distribution?	International market still intrigued by SA. SA market too small so must pander to foreign broadcasters. Europe broadcasts content that reinforces perceptions about Africa. Lucrative opportunities with other African countries dashed by lack of SA support. DFA delegations have created opportunities.
3	Status of modes of distribution in SA?	Documentary not considered a market in SA for DVD rental or sales. Broadband too expensive and slow for VOD. DSTV "Box Office" only for US blockbusters.
4	Status of modes of distribution in foreign markets?	Increased reliance on international markets. Some SA documentaries on foreign broadcasters. Some utilise VOD but only worthwhile for US blockbuster.
5	Traditional distribution model in SA?	No distribution model or culture. Film festivals. SABC.
6	Prevalence of traditional distribution model in SA?	Some sign all rights out of desperation. MNET exploitatively tried to buy African content exclusively for 25 years. DFA or NFVF should have media legal department help filmmakers negotiate contracts.
7	Prevalence of hybrid distribution in SA?	Retain rights for territories where there are established relationships and market understanding.
8	Effects of digital age?	SA filmmakers have to downgrade HD masters to SABC's redundant format.
9	Other factors changing distribution models in SA?	No.
10	Government initiatives?	NFVF has no clear documentary strategy. No consultation with documentary industry before decision-making. Small funds don't encourage feature length documentary. Ineligibility of series discourages historical content. Opportunity for DAC to create holistic partnership with government departments, private sector, industry and cinema exhibitors to create demand and supply of documentary content. Regulation should ensure every feature length documentary gets screened in cinema and on SABC. NFVF should have a distribution arm that represents SA content at stands at MIPTV, Hot Docs and IDFA. DAC has not provided structure to create a vision for documentary.

	Respondent 7	
1	Challenges and opportunities of domestic distribution of SA documentary?	SA documentary market is undeveloped. Documentary market generally well educated, yet large portion of population uneducated. Few production companies only do documentary. SA does not subsidise SA sales agents' business models as they do in Europe. SABC buyers sometimes contact SA agents for content. SA distributors don't buy SA documentaries.
2	Challenges and opportunities of international distribution of SA documentary?	Highly competitive as oversupplied, need exceptional quality. Competing with European producers who automatically get 50% budget financed by CNC if they've had 3 films broadcast. Need relationships with sales agents but expensive to travel to markets. Chances of filmmaker getting straight TV deal for single documentary with broadcaster less than zero unless established relationship with commissioning editor and buyer. Prefer series. Launch at major festivals important. Opportunity to distribute to niche audiences via digital cinema networks in major cities, using Digital Cinema Prints (DCP).
3	Status of modes of distribution in SA?	Cinema not really option. TV: SABC and ETV show documentary. DVD losing volumes but still possible. For retail need to go through DVD distributor. VOD not really worthwhile: tiny income on small platforms and expensive to access key platforms.
4	Status of modes of distribution in foreign markets?	Usually need international sales agents for foreign broadcasters.
5	Traditional distribution model in SA for documentary?	Mostly straight to TV. Some do DVD but not great for documentary.
6	Prevalence of traditional distribution model in SA?	Sales agents often bully young filmmakers and get all-rights for 3-4 years.
7	Prevalence of hybrid distribution in SA?	Locally, often only makes sense to give over TV rights as almost no cinema and VOD market. Internationally, negotiating split deals more possible but need reputation and negotiation skills as sales agents usually offer take-it-or-leave it deals. No point in retaining rights unless you're sure you can handle them. Non-exclusive deals don't work for distributors.
8	Effects of digital age?	Google analytics on massive YouTube hits might help prove market to sales agent. Digital domain is yet to prove itself as income generator for filmmakers.
9	Other factors changing distribution models in SA?	Competition Commission should be on MNET's back as they monopolise the Pay TV landscape. ICASA has failed to provide conditions for entry-level entrance into Pay TV that would enable competitors to win subscribers. Fox TV FX can no longer licence SA documentaries as Top TV has financial difficulties. MNET stopped documentary slot as ARs were "too low" although ARs are not made public.
10	Government initiatives?	The dti needs to lower the threshold for documentary. SABC need to pay higher licence fees and be open to co-production. NFVF funding is too small. DAC should fund Encounters to set up a proper social issues documentary fund possibly with Lotto money.

	Respondent 8	
1	Challenges and opportunities of domestic distribution?	SABC has issues but large television audience hungry for documentary with decent production levels. Documentaries have a long shelf life.
2	Challenges and opportunities of international distribution?	SA has dramatic stories but needs to appeal to international, older, educated demographic. Broadcasters expect budgets of at least €200 000. AR-driven European broadcaster admits audience ratings plummet with black lead characters. Series provide meaningful distribution.
3	Status of modes of distribution in SA?	Very few SA documentaries had proper theatrical release in the last decade. Cinema important for DVD and VOD sales. Most go straight to TV. Seeing more small DVD releases. VOD slow.
4	Status of modes of distribution in foreign markets?	About 15 foreign broadcasters committed to giving voices to marginalised. Opportunities decreased since 2008. Traditional model collapsed.
5	Traditional distribution model in SA?	Festival screening fees. TV. DVD. VOD.
6	Prevalence of traditional distribution model in SA?	Few filmmakers use sales agents as already low profit margins. Sales agent must be transparent and give detailed reports.
7	Prevalence of hybrid distribution in SA?	Took off 4 years ago in SA. Avoid exclusive rights, especially for VOD. Retain rights. Handle key territories yourself but puts off big distributors. Know the market. Build a reputation. Build relationships with key broadcasters.
8	Effects of digital age?	More films made than slots available. Cheaper to send film on Vimeo with a password-protected link. Making money on VOD but have to delay 2 years to keep broadcasters happy. Subtitle software makes it cheap reach other markets. Seen my films being sold online by pirate companies. Social media has helped to find, engage and build niche audiences.
9	Other factors changing distribution models in SA?	Political meddling contributed to SABC crisis. Budgets were cut.
10	Government initiatives?	Where are distribution funds, support for distributors, roll out of the low cost cinemas? Need long-term vision.

	Respondent 9	
1	Challenges and opportunities of domestic distribution of SA documentary?	SA has large documentary audience on public broadcaster so unlikely to pay for it on DVD. Unlike Asia and India, we don't have strong enough domestic market to support local films. Potential for audience growth. SA doc budgets are small so easier to recoup.
2	Challenges and opportunities of international distribution of SA documentary?	SA docs are becoming more cinematic and getting more international attention. International market is sophisticated so competition is high. Few big distributors for documentary. Most prefer fiction and prefer series. Filmmakers relying on foreign partners so starting to build relationships. Many SA filmmakers have compelling stories. Co-production treaties with a lot of countries, easier to access other countries tax rebates and finance.
3	Status of modes of distribution in SA?	Mostly TV. Very few big theatrical releases on mainstream cinema. Some release in independent cinemas. Some try sell DVDs directly or use distributors. Competition high in the DVD market.
4	Status of modes of distribution in foreign markets?	Theatrical is a possibility as they have an audience that has a culture of cinemas going. Some filmmakers have licensed their films to several foreign broadcasters. VOD is also possible as foreign markets are more accustomed to this platform than in SA.
5	Traditional distribution model in SA?	If very high profile would go traditional route of cinema, television, DVD. Most go to television.
6	Prevalence of traditional distribution model in SA?	Very few hand over all rights to one distributor, try to retain some rights. Most try self-distribution as limited access to foreign markets. Few constantly engage with international sales agents and broadcasters. Few understand international documentary distribution. Slowly changing.
7	Prevalence of hybrid distribution in SA?	Not very prevalent but producers starting to become more business savvy and realise that it's better to hold onto rights they can sell themselves. Sometimes makes sense to hand over certain rights. However, filmmakers need to be cautious, as some never see revenue. No longer only one distribution model, become a lot more diverse.
8	Effects of digital age?	Easier to distribute content online, more control, empowering.
9	Other factors changing distribution models in SA?	Before SA filmmakers only had access to domestic market. Now with more co-productions it's easier to tap into those countries' distribution networks.
10	Government initiatives?	Government has helped to provide access for filmmakers to international markets but not a lot to properly interrogate distribution or provide useful intervention that is working yet. Government need to develop policy around it. NFVF provides funds to get filmmakers to markets but NFVF needs department where filmmakers get assistance with their plans for distribution. Delegations will establish SA producers quite well and brand SA as a documentary territory.

	Respondent 10	
1	Challenges and opportunities of domestic distribution of SA documentary?	Lack of screening spaces for documentary. NYC has many non-mainstream cinemas, which is important for the life of a film. In SA, primary cinema opportunities are Encounters Documentary Film festival, Tri-Continental Film Festival, The Labia and The Bioscope. An opportunity to learn from Dogwoof model that allows users to book screenings online and the screening fee is determined according to certain factors. Definite market for documentary in SA. Documentaries do well in certain independent cinemas.
2	Challenges and opportunities of international distribution of SA documentary?	Documentaries often are too specific and lack universal appeal. International standard is very high – certain look and production value is expected.
3	Status of modes of distribution in SA?	Predominantly only broadcast. A few years off from realizing VOD's potential because of bandwidth and high cost of uncapped ADSL. Opportunity for VOD site for South African documentary.
4	Status of modes of distribution in foreign markets?	Don't really see SA documentaries on international cinemas but there is presence on broadcasters.
5	Traditional distribution model in SA?	Independent cinemas are flexible about the order. Documentaries can screen on television beforehand because not everyone is able to catch it on television or they enjoy the collective experience and benefit of watching an issue-based documentary and being able to discuss it with the filmmaker and audience afterwards.
6	Prevalence of traditional distribution model in SA?	Not really. People should avoid sales agents as it puts someone between the film and the audience. However, sales agents are useful for television sales in South Africa as there is not space for many players. "Packaged deal" suits sales agents.
7	Prevalence of hybrid distribution in SA?	Much greater flexibility if you can approach directly. Non-exclusive deals are much more appropriate, such as Africafilms.tv. Retain domestic rights. Try use as many non-exclusive platforms as possible.
8	Effects of digital age on distribution?	Films are easier to access. As more mainstream cinemas in Europe are taking over "big title" art house market, smaller independent cinemas must differentiate. Opportunities for documentaries to access smaller independent cinemas.
9	Other factors changing distribution models in SA?	Lack of will from exhibitors and government to maximize use of existing independent cinemas and grassroots screening spaces, many which are not DCP compliant. Lack of forum to discuss these issues. Likely that many of these independent cinemas will close. Opportunity for a national network of independent cinemas: untapped market for niche screenings and direct DVD sales.
10	Government initiatives for distribution?	NFVF is trying to roll out low cost cinemas, but lack of engagement and consultation with players on the ground. There are existing models and screening spaces like the King's Cinema in Alexander township. They should not reinvent the wheel. There seems to be a lack of understanding of how films meet their audience. There needs to be political will. There needs to be research into whether a network of the existing independent cinemas could be a viable model. Many initiatives have failed in townships. Better to use clearly defined legitimate spaces. Can learn from Europa Cinemas, which subsidizes European content. Maybe SA government can subsidize local content to independent cinemas as local quotas won't work at mainstream cinemas - need feasibility study.