

Distribution Challenges and Opportunities in Zimbabwean Film Industry: A Case Study of Harare

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Abstract

Distribution is one of the least focused subject in film studies, yet it is the most substantial part of the film industry. Over the years it has been experiencing significant technological transformations disrupting many traditional models of distribution (broadcasting television, DVDs, etc.) which were profiting most of well-established broadcasting service providers and studios. The introduction of digitalization in the distribution sector has created a competitive global environment with small returns, scrambling for audience over cable televisions and online facilities. This paper investigates the challenges and opportunities in the distribution sector of Zimbabwean film industry. Selective stakeholders from Zimbabwean film industry were interviewed and their responses were analyzed using thematic encoding. The results indicated that there is a need for a clear distribution policy, educational workshops on business management skills in marketing, maximization of all available distribution opportunities, and formation of more international film distributors' partnership in order for the industry to establish itself in both local and international market.

1. Introduction

Distribution is the most significant and the only monetization component in film value chain which can lead to the sustainability and development of the Zimbabwean film industry. Once the production of a film is complete, it has to reach audience through a process called distribution. In order for a film to be a successful and film industry to sustain, there is a need to strengthen and use effective distribution channels. Ever since the circulation and consumption of film has been driven by technological innovations, there has been a constant change in the market and audience behavior on genre preferences, especially after the introduction of internet. According to Grunenwald (2013), academic researchers need to focus more on film distribution sector to create a better understanding of the challenges that need to be overawed in order to create a more sustainable film industry.

The biggest challenge of the Zimbabwean film industry lies not only in the global marketing sphere but also within Zimbabwe itself. For decades, the industry has been operating without any proper national film policy to guide the film practitioners on how to distribute their films, which legal international agencies to deal with and how to negotiate the best deals out of their copyrights. In addition, Zimbabwe has been operating with only one national broadcasting television, known as Zimbabwe Broadcasting Corporation (ZBC T.V), this has resulted in limited distribution channels, low budgets with poor productions (Aboo, 2008). Presently, there has been fewer (< 20) theatrical releases of Zimbabwean films which clearly shows the lack of local film distribution within and outside Zimbabwe. According to Lobato (2006), distribution is the least theorized and most difficult element of the film industry to research because the required information is closely guarded for commercial reasons.

The new technological advancement in film industry has opened up new avenues to distribute films such as Video On Demand (VOD) like Netflix, SVOD, and other multiple distribution channels which has challenged the traditional forms of media distribution (cinema, DVD rentals and sales, and broadcasting television). This paper investigates the challenges in film distribution sector and discusses the ways to overcome and maximize the opportunities of distribution channels. This paper also intends to identify how the global changes have affected the Zimbabwean filmmakers. Additionally, the Zimbabwean film industry distribution trend will be looked into in order to understand the distribution channels that the Zimbabwean filmmakers are implementing so as to clearly outline their challenges and potential distribution opportunities that could assist the industry to develop and sustain.

2. Literature Review

Distribution is the process of supplying a completed film to a consumer (Ulin, 2010). It is the last process of a film value chain and it can only be successful after a pre-production and production processes. Film distribution is one of the least-researched segment (Lobato, 2006). The inadequate literature on distribution channels of the Zimbabwean film industry is evident that there is a great need to fill in the gap. It is difficult to analyze the marketing trends of the film industry since many filmmakers are not so open to share information on how they distribute their films. Zimbabwe has been facing an economic crisis and the government has not been supporting the film industry. As a result, the film industry has been losing some talented actors and film technicians to other countries.

2.1 Distribution within the Film Value Chain

Film distribution channels is one of the stages in a film value chain, hence it depends on other stages within the film value chain. For instance, a film may implement the best distribution channels to supply to the audience but it may be fruitless if no pre-production research is done on audience's preferences. It is important that value should be added in every stage of film value chain (Heatlie, 2011). Film value chain can be divided into seven components (Table 1).

Table 1. Components of film value chain (Bloore, 2009)

Components	Description
1. Development	Involves scriptwriting
2. Financing and pre-sales	Focuses on securing funds and marketing the film to television broadcasters
3. Production: shoot and post	Filming of the production
4. International sales and licensing	Includes securing licenses and international urgencies
5. International distribution	Premièring and exhibiting films to other countries
6. Exhibition and exploitation	Different platforms of releasing a film to audience will be used
7. Consumption	Viewers finally receives and enjoy the film product

The film reach its exhibition and exploitation phase when the national distributor determines different platforms (or modes) whereby the film will be released. This phase also determines the order in which films will reach the audience. As distribution links the film to its audience, it is therefore covered in three elements of Bloore's film value chain - International sales and licensing, International distribution, and Exhibition and exploitation.

2.2 Shift from Traditional Paradigm to Modern Distribution Model

The Zimbabwean film distribution background emerges from developed countries. Tuomi (2007) also observed how most film sectors have followed Hollywood film process. Hence, it is important to have an overview of Hollywood mode of film distribution. Lorenzen (2008) noted that cinema has been the major dominant mode of film distribution before the 21st century, and this gave control to few studios to be responsible for the whole film process and owning the cinemas and the film product itself. According to Finney (2010), these studios benefited more as sole owners as they would first release the film at the film festivals, then in cinemas, thereafter make DVD copies, then lastly sale it to television broadcasting centers. Between 1988 and 1997, the time interval between a theatrical and video release averaged six months, then on cable networks or television broadcasting services supported by advertisements for up to a minimum of eighteen months (Waterman and Lee, 2003). This traditional order and timing of windows proved to maximize a film's revenue. The emergence of VCR disrupted their monopoly. According to Chang et al. (2004), there was a time when these movie studios tried to block the distribution of VCR through lawsuits in an attempt to shun

away the television industry. However, as the time went by, the movie studios learnt that they could benefit from this development by releasing their films on different distribution channels through “windows”. Reiss (2010) defines 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*”.

Most countries, especially developing countries like Zimbabwe, have been following a film distribution process paradigm developed by Hollywood. This can be attributed to partnerships that the Hollywood has made over the world. Other countries, like Nigeria, have also adopted the use of international agents in order to monetize and maximize profits from their films instead of being exploited by pirates. Most of these agents are under legal distribution companies and their function is to purchase the rights to fully exploit the film in different modes of distribution (Finney, 2010). This can only be done after the distribution company and the filmmakers have signed an agreement which stipulates terms like how long will the film be exploited, where legal license has been given to distribute the film (Finney, 2010).

2.3 Zimbabwean Film Distribution

The distribution is a very significant part of film process where the revenue is generated. If distribution system is weak, then the film industry is likely to face some huge challenges in creating a sustainable film industry (Heatlie, 2011). This paper will largely focus on the domestic distribution of Zimbabwean films as a springboard for export of film production. Therefore, it is important to emphasize on local distribution challenges in order to develop measures that will enable the film industry to reach far beyond national borders.

2.3.1 The Local Market

Zimbabwe’s domestic market for film is currently very low due to several factors - lack of research on audience’s preferences, poor quality film products, lack of professional filmmakers, poor scripts and directing skills, and lack of support from the government. According to Lorenzen (2008), three key factors (population size, preferences, and purchasing power) affect the market size. Larger countries like Nigeria, with a population of 170 million, have succeeded in popularizing their films locally compared to countries like Zimbabwe with relatively small population size of 15 million. China has 60% of domestic market, India has 94.5% and the US has 93.4% (Lorenzen, 2008). Purchasing power also plays an essential role in determining the size of the market. If the economy of the country is effectively running, then the probability of many people going to cinema or buying DVDs is high than that of a country in an economic crisis. The financial ability is a central factor when evaluating the Zimbabwean film market because majority of the Zimbabwean population have been surviving with only one dollar or less since 2000. Zimbabwe’s low purchasing power restricts the size of the domestic market for films and the development of the film industry in Zimbabwe. As a result, the attendance in Zimbabwean cinema has been decreasing since 2000.

According to Dikito (2016), many Zimbabweans prefer to watch western movies (Hollywood), other African movies (Nollywood) and Indian (Bollywood) movies and soaps. Only a handful of people watch Zimbabwean films, which includes artists and few other people who support local homegrown films produced by their peers. Zimbabwean cinemas are largely dominated by western films. The preference of the Zimbabwean can be attributed to failure of Zimbabwean filmmakers to make films that suite the taste of their domestic market, and inadequate marketing of Zimbabwean films. Mboti (2016) indicated that Zimbabwean filmmakers have been operating on low budgets which has resulted in poor quality productions. Furthermore, audience no longer have faith on Zimbabwean filmmakers to produce decent films because filmmakers are heavily guarded by media legislative laws and censorship board (or BAZ) which stifles the creativity of these artist and technicians (Rwafa, 2012). It is generally difficult for the Zimbabwean film industry to compete with its competitors because they cannot even afford to advertise their films intensively. Most Zimbabwean filmmakers focus on financing the pre-production and production process without considering post-production costs such as promotions and advertising. Dikito (2016) recommended filmmakers to hosts marketing seminars and conferences to develop film producers’ understanding about the distribution trends and its development, and understand their market before producing a film.

2.3.1.1 Cinema

According to Ulin (2010) and Zhu (2001), “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 Zimbabwean films are

rarely screened in Zimbabwean cinemas negatively affect the films' financial success. Whilst Zimbabwe is showing a potential growth of young filmmakers who have been constantly and independently producing films, the industry might fail to reach its full potential due to the lack of sufficient cinemas in the nation, especially in rural areas where there is none.

2.3.1.2 DVD

In the customary chronological order of windows, DVD rentals and sales follow just after the end of the theatrical release. Finney (2010) pointed out that the internet has been disrupting and affecting the DVD revenue negatively. It is difficult to analyze the Zimbabwean DVD market for local film mainly because of piracy and unwillingness of distribution companies to share the statistics on the sales information under the pretext of financial confidentiality and competitive reasons.

2.3.1.3 Television

Television sales remain one of the most important markets for the film industry (Holtzeberg and Rofekamp, 2002). However, there is limited opportunities for Zimbabwean filmmakers to broadcast their films on television because they have to compete against each other for one and only national broadcasting television, ZBC TV. According to Heatlie (2011), public broadcasters are the main source for the sustainability of film industry as they invest in local content and promote the film industry through licensing completed projects. However, Zimbabwean broadcasting service has been facing some financial constrains for years now and also having difficulty in purchasing local content making it difficult for Zimbabwean film filmmakers to find a platform to showcase their work through television.

2.4 International market for Zimbabwean Films

Since the domestic market is too small to support the Zimbabwean film industry, it is important for filmmakers to look at the scope of distributing their work internationally. Most Zimbabwean producers have tried to get their individual productions distributed in the international market with limited success. The factors that might be affecting include culture (Waterman and Taylor, 2000), viability of the economy to produce films with big budget (Lorenzen, 2008), perception of African films (Mostrup, 2011), and political relations of Zimbabwe with other countries. When trying to penetrate the global market, it is important to understand how the world view "Africa". Mosttrup (2011) observed that the prejudices continuously propagated about Africa in film were negative and this kind of stereotype of viewing Africa as "poor and corrupt" are still existing and this might be a contributing factor of why some Zimbabwean filmmakers cannot secure funds from international financial pools. In addition to funds, most African countries do not have formal international film distributors to represent their countries (Tuomi, 2007), which also applies to the Zimbabwean film industry. According to Mboti (2016), the government has not been supporting the Zimbabwean film industry to access international distribution systems. Some failures might be attributed to lack of understanding of international finance and distribution as well (Heatlie, 2011).

2.5 Global shifts from traditional film distribution

Today, film distribution is largely based on social networks and global interconnectivity (Pardo, 2014). The development of digital technologies have caused interferences to the traditional distribution. This has brought several challenges and conveyed uncertainty of the future of the film distribution process (Parks, 2007). Ryan and Hearn (2010) viewed the emergence of new technologies as an instrument that paved a way to saturated market, piracy, and VOD. This has also affected the Zimbabwean film industry. The introduction of cheaper digital technology, especially digital cameras and editing equipment, has enabled anyone to become a filmmaker and easily supply films to the audience. The new distribution model provides inexpensive and easy access of films from different media platforms to a global audience. As a result, the market is flooded with an oversupply of films (Finney, 2010; Zhu, 2001) and this has forced films to be sold at lower prices which has forced most films to fail to recoup the costs of their productions.

Reiss (2010) condemned internet for exacerbating piracy and prying the distribution channels. Films are getting leaked on the internet even before they are officially released. Luckman and Roeper (2008) ratified how internet has increased piracy by revealing the case of an Australian film, *The Jammed* produced in 2007, where over 20 000 illegal internet downloads were exposed on an illegal website. Zimbabwe have numerous vendors who sell pirated copies (Rwafa,

2012) and most of the audience download films from illegal websites at lower prices or even for free. This has forced most of filmmakers, especially in developed countries, to release their productions simultaneously through multiple modes of distribution (e.g. VOD) in order to maximize their profits (Reiss, 2010). VOD is new advanced television broadcasting service which can be transmitted by the internet and pays rights directly to the owner and shares revenue, for instance Transactional pay-per-view VOD (TVOD platform like iTunes), Subscription VOD (SVOD with pay tv like Netflix), a free-to-user or ad-supported VOD (AVOD), or digital cable network with set top-boxes, known as “decoders” (Zhu, 2001). This kind of a service gives viewers a freedom to choose content from a catalogue and enable them to control when to watch the program, record or fast-forward. Internet has benefitted filmmakers too as it allows them to communicate with the audience before production and even after the production for suggestions and feedback creating an ongoing and more sustainable relationship with the audience (Ryan and Hearn, 2010). This allows filmmakers to campaign, market their films using trailers on different platforms and even seek funding for high-budget films.

Henning-Thurau et al. (2006) recommended that the international film distribution organizations must try to find price that allow every distribution channel to gain revenue for the sustainability of film industries. In Zimbabwe, the use of VOD is still at its infancy mainly because it is expensive for audience to use broadband. Although new distribution channels have shaken the traditional order of windows, the global film industries have been continuously trying to explore new opportunities of film distribution.

3. Methodology

A qualitative method was used to obtain the required information using both primary and secondary sources. Primary source included semi-structured questionnaires with both open and closed ended questions, which were developed to collect information on challenges and potential opportunities associated with the film distribution in Zimbabwe. The questionnaires were administered to 25 prominent filmmakers in Harare using email, out of which 18 valid responses were received. Secondary sources included conference papers, journal articles, national reports, online sources, etc. The data collected were captured and analysed using Microsoft Excel.

4. Results and Findings

4.1 Film Distribution in Local Market

Majority (about 68%) of respondents strongly disagree on the presence of a viable domestic market in the country (Figure 1), mainly due to the lack of distribution infrastructure (e.g. cinemas) and a viable distribution policy to distribute films to audiences. Some of them indicated that Zimbabwe needs more national television broadcasting service as many audiences do not prefer to watch ZBC TV which repeatedly broadcasts old films.

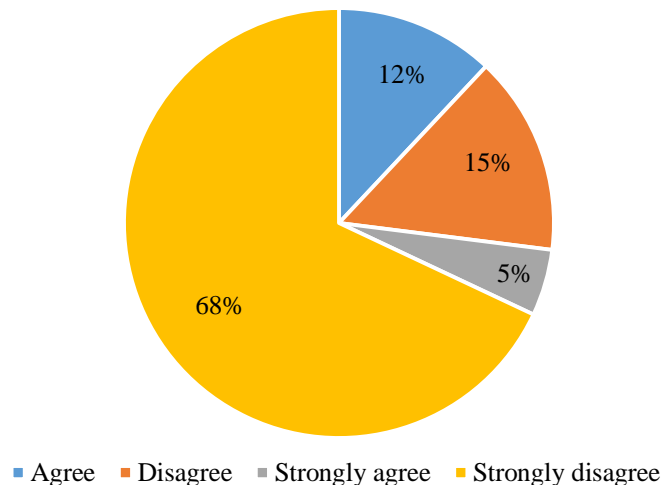


Figure 1. Viability of domestic film market in Zimbabwe

4.2 Film Distribution in International Market

Zimbabwean film productions are not known to most of its local territory, and least popular to international market. Talking about international distribution is tricky because Zimbabwean film industry has failed to even satisfy the local market by delivering good films. Majority (about 78%) of the respondents believed that Zimbabwean film industry is not active in distribution of its films in international market (Figure 2). None of the respondents agreed on the notion that Zimbabwe film industry is very active on global market. There is a stiff competition as there are many good quality sophisticated films premiered worldwide almost every month hitting billions per week in the box office. It will take a while for Zimbabwean films to be competitive and filmmakers need to engage with other international companies to enter and be recognized in the global market.

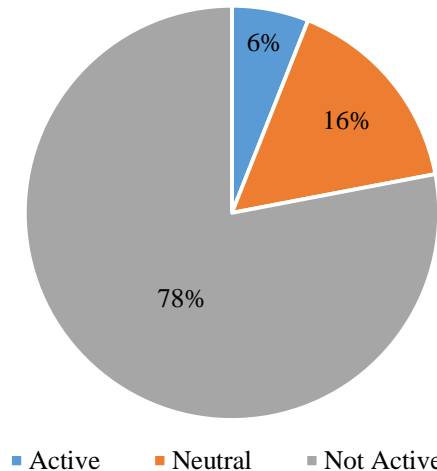


Figure 2. Activity level of Zimbabwean film industry on global market

4.3 Shifting Distribution Models

The issue of Zimbabwean filmmakers utilizing the new distribution paradigm is debatable. About half (52%) of the participants indicated that the Zimbabwean film industry has failed to adopt the new distribution channels (Figure 3) citing different factors such as lack of funds, lack of exposure to international platforms, etc. However, with the availability of internet, piracy or illegal film distribution has significantly increased in the country.

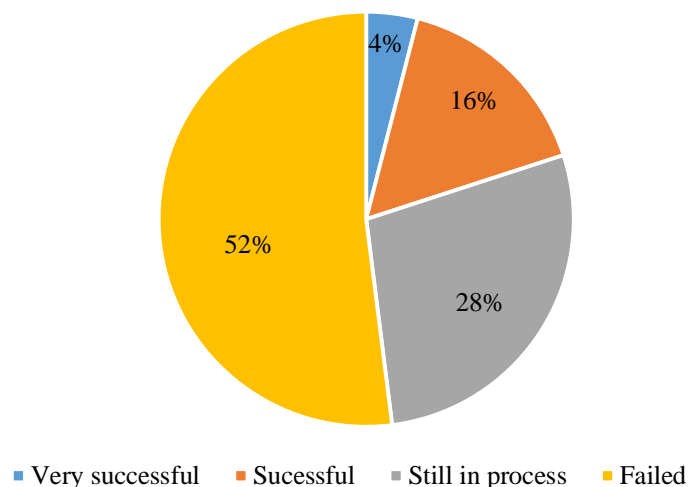


Figure 3. Success of shifting to new distribution model

5. Discussion

Most respondents seem to agree that the film industry in Zimbabwe has not been viable for a very long time now. Despite the limited size of the local market, films are not attracting audience because of the poor quality films. Hence, there is a need for funds to produce quality films, open independent television channels, promote indigenous online television and build cinemas in order to develop audience base. Some filmmakers suggested that it has become difficult to generate income using old traditional modes (e.g. DVDs) because of piracy. Therefore, there is a constant need of change and innovation in film distribution sector. Many respondents felt that Zimbabwean film industry needs to grow its local market niche first before focusing on the international market, but some has been encouraging to have pacts with other international countries, meanwhile some of the 'best' productions needs to be uploaded on internet not for profit making but to get audience attention. The literature together with some respondents confirmed that there has been a saturated market leading to lower prices for films (Finney, 2010) and piracy (Rodriguez et al., 2006). Many respondents acknowledged that Zimbabwean film industry needs proper distribution training on advertising its productions, negotiating with broadcasters and distributors and the government should assist in funding such initiative.

The paradigm shift from traditional distribution to modern system has been largely problematic for Zimbabwean filmmakers as they are facing increased piracy, more fragmented audiences, lower prices for films and less distribution opportunities. Unlike many European and African peers, most Zimbabwean film filmmakers have struggled to transition from traditional distribution models to hybrid distribution models. The emergence of hybrid distribution calls for distribution skills in order to establish global relations with international broadcasters and sales agents. The government should assist with trainings and networking filmmakers with international film distributors in order to create a sustainable competitive film industry in Zimbabwe. Zimbabwean filmmakers and sales agents require further training, support and development to be able to present competitive Zimbabwean documentaries abroad. Furthermore, industry stakeholders are feeling the absence of an official long-term distribution strategy or vision for the film industry that can guide Zimbabwean filmmakers and funders towards common national goals regarding film, particularly in relation to film distribution.

Retail film shops are becoming history and the availability of the new technological distribution modes together with perpetuating piracy is making it difficult to monetize film. It is also difficult to rely on cinemas as a distribution channel because Zimbabwe only have four cinemas under Ster-Kinekor, which cannot reach to the majority of people and most people consider it as a medium for the elite group as they are only found in wealthy areas like Avondale. Watching a film in a cinemas has always been considered as luxury as tickets are a bit expensive compared to buying a DVD, which own can be owned and watched multiple times with family and friends. However, a few respondents', especially young filmmakers, are optimistic on premiering their productions in cinemas if there is an initiative of building more cinemas all over the country which will enable them to exploit their production on the day of release and help maximize their profits. Filmmakers can also benefit from this initiative.

Few respondents also pointed out how their productions have been shelved since the beginning of 2016 when Broadcasting Authority of Zimbabwe held a conference requesting content for twelve digital television channels that were going to be opened, but till date the channels have not been opened. There is only one indigenous Pay per view Television, known as Kwese TV, which has been recently introduced in 2017 but it hasn't really opened up to support local filmmakers. In addition, some of the productions do not even make it to international VOD platforms because of poor quality productions. Most of them are hopeful that this could be the only viable income revenue generator in this technological era. However, some seemed worried about slow and expensive broadband in Zimbabwe which could inhibit most filmmakers from using VOD. Most of respondents felt that there is a need to educate and inform our society that they are stealing from and inhibiting the film industry to monetize and produce more films. Some even mentioned about trying to compete with pirated DVDs prices with a little success. For Zimbabwe to succeed in film distribution, the film industry need to be at par with the international standards first. It is also important to be innovative and stay abreast of technological developments in order to maximize revenue from film productions.

The traditional film distribution model has been shrinking because of piracy and online broadcasting systems. Even if one would want to stick to the old mode of distribution through ZBC TV, it is not guaranteed that producer will be able to recoup all the expense. The diversity of distribution have disrupted the tradition distribution modes and there are variety of films available on internet to watch or download at almost free cost. Most respondents seemed certain that many Zimbabwean audiences frequently download films from free websites, be it legal or illegal. The shift in

distribution mode has made it difficult for most of the filmmakers to predict and satisfy the wants of local target audience as they have a wide choice of films. Other respondents have stressed on the importance of embracing the new modes like VOD and finding new ways of taking advantage of both the old and new distribution modes to maximize profits. Some of them were concerned about the current state of Zimbabwean economy and how it may affect the feasibility of strengthening the distribution modes.

6. Conclusion and Recommendations

The paper identified the distribution challenges that need solutions and presented some opportunities that Zimbabwean film filmmakers should not overlook. The Zimbabwean film distribution models has been greatly affected by the lack of funds to produce quality films that can be easily distributed both at domestic and international markets. The world at large have been utilizing a hybrid distribution model, but Zimbabwe is yet to explore it to the fullest. There has been lack of distribution infrastructure in Zimbabwe making it challenging to have a sustainable film industry. Most Zimbabwean filmmakers have been relying on DVD sales but piracy has worsened since past two decades leading to most filmmakers experiencing losses. However, the rural areas have been always underutilized and most of the filmmakers seem be reluctant on exploring these areas. Most Zimbabwean filmmakers believe that VOD has the potential to generate income for them but so far only a few have experienced how this new distribution model work. Many voiced out that the government should give filmmakers licenses to open television channels and operate independently in addition of providing financial support. The Zimbabwean film industry has to continuously work on developing innovative solutions and strategies to solve film distribution challenges and build on opportunities towards a sustainable film industry.

6.1 Recommendations to the Film Industry

Table 2 highlights distribution challenges and opportunities of Zimbabwean films, which will assist film filmmakers and government in identifying what problems need solutions and what opportunities need to be maximized in order to create a sustainable Zimbabwean film industry.

Table 2. Overcoming film distribution challenges

A. For filmmakers	
Training	<ul style="list-style-type: none"> • Will help create formal innovative business strategies on how to distribute films. • Develop skills on how to deal with international broadcasters and negotiate rights.
VOD	<ul style="list-style-type: none"> • Will assist filmmakers to have a solid income.
International distribution partnerships	<ul style="list-style-type: none"> • International market access opportunities. • Festivals and other exhibition programs.
Content	<ul style="list-style-type: none"> • Create more films.
B. Government	
Addressing domestic market	<ul style="list-style-type: none"> • Educating the public about piracy through campaigns. • Issuing more broadcasting television channels to film stakeholders. • Build more cinemas around the nation.
Consulting with filmmakers	<ul style="list-style-type: none"> • Need to establish a clear long-term industry vision and strategy. • Develop audience and strategize other mechanisms to develop the audience base globally.
International Relations	<ul style="list-style-type: none"> • Make use of the existing international relations for co-productions. • Select and sponsor Zimbabwean filmmakers to attend international film conferences, exhibitions, festivals so that they can establish international markets.
Telecommunication	<ul style="list-style-type: none"> • Address Zimbabwe's slow and expensive broadband so that VOD can reach its full potential.
Legal Guide	<ul style="list-style-type: none"> • Provide strong legal measures to pirates

	<ul style="list-style-type: none"> • Provide legal advice to filmmakers especially on issues to do with international distribution deals
Funds	<ul style="list-style-type: none"> • The government needs to invest more in training filmmakers, research facilities and promote the industry as a whole.

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Biographies

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