

Kwazulu-Natal

Film-Induced Tourism Strategy

Final Report



• OUR KINGDOM IS YOUR STAGE •

24/03/2022



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Abbreviations

CFAD	Centre for Fine Art Animation and Design
DFO	Durban Film Office
DTIC	Department of Trade, Industry and Competition
DUT	Durban University of Technology
GFC	Gauteng Film Commission
FITI	Film Industry Transformation Initiative
IDC	Industrial Development Corporation
KZN	KwaZulu-Natal
KZNFC	KwaZulu-Natal Film Commission
MICT	Media Information Communication Technologies
NFVF	National and Film and Video Foundation
SABC	South African Broadcasting Corporation
SAGA	South African Guild of Actors
SETA	Sector Education and Training Authority
TKZN	Tourism KwaZulu-Natal
UKZN	University of KwaZulu-Natal



Definitions

Actor	refers either to a male performer or any male or female who plays a character role in an on-screen film; alternate gender-neutral terms: player, artist, or performer.
Actress	refers to any female who portrays a role in a film.
Animation	(and animator, animated films) is a form or process of filmmaking in which inanimate, static objects or individual drawings (hand-drawn or computer-generated imagery [CGI]) are filmed 'frame by frame' (i.e. one frame at a time), each one differing slightly from the previous frame to create the illusion of motion in a sequence, as opposed to filming naturally-occurring action or live objects at a regular frame rate. Often used as a synonym for cartoons (or 'toons' for short), although animation includes other media such as claymation and computer animation; see also CGI, claymation, stop-motion, time-lapse.
Cast	is a collective term for all of the actors/performers (or talent) appearing in a particular film; usually broken down into two parts: the leads with speaking roles, and the seconds or supporting characters, background players or extras, and bit players.
Casting	is the process of selecting and hiring actors to play the roles and characters in film production and brought under contract. The lead roles are typically cast or selected by the director or a producer, and the minor or supporting roles and bit parts by a casting director. Type-casting refers to an actor playing only roles similar to those he/she has played before.
Cinematic	means relating to or suggestive of motion pictures; having the qualities of a film.
Cinematographer	(cameraman or director of photography) is the person who supervises all aspects of photography, from the operation of cameras to lighting.
Director	(and directing) is the creative artist in complete artistic control of all phases of a film's production (such as making day-to-day determinations about sound, lighting, action, casting and editing), for translating/interpreting a script into a film, for guiding the performances of the actors in a particular role and/or scene, and for supervising the cinematography and film crew. The director is usually the single person most responsible for the finished product, although he/she could not make a film without the support of many other artists and technicians. Often the director is called a helmer (at-the-helm); the assistant director is known as the AD; the director of photography (or cinematographer), responsible for the mechanics of camera placement, movements and lighting, is known as the DP.
Film festival	is an event at which films can be premiered, exhibited, awarded and engaged in distribution deals; also known as a 'fest'. Examples include Cannes, Toronto, Sundance, etc.
Film	(1) as a verb, means to record a scene or to make (or lens) a motion picture; (2) as a noun, refers to a motion picture, or (3) the thin strip of material on the film



	negative (with a base and light-sensitive coating of emulsion) that is used to create images through light exposure (Duncan, 2015).
Film industry	describes a much more specific group of companies or businesses.
Filmmaker(s)	is a collective term used to refer to a person(s) who has (have) a significant degree of control over the creation of a film: directors, producers, screenwriters and editors.
Foreign/ international film	refers to films that are produced outside of South Africa.
Location	(or 'on location') entails the properties or places (interior or exterior) used for filming away from the studio, set or (back)lot, often to increase the authenticity and realism of the film's appearance. Exteriors are abbreviated as ext., and interior as int.
Motion picture	(movies, pic(s), pix or 'moving pictures') is a length of the film (with or without sound) with a sequence of images that create an illusion of movement when projected; originally referred to the motion or movement (due to the principle of persistence of vision) perceived when a string of celluloid-recorded images were projected at a rate of 16 or more frames per second; an art form, and one of the most popular forms of entertainment, known archaically as a 'photoplay' during the silent era.
Post-production	is the final stage in a film's production after principal photography or shooting, involving picture editing, the addition of sound/visual effects, musical scoring, mixing, dubbing, distribution, etc. Digital post-production can also include changing facial expressions, removing flaws or obtrusive objects (microphone, boom, etc.), enhancing the visual image, etc. It is also known as 'post'; contrast to preproduction.
Pre-production	is the planning stage in a film's production after the project is finally greenlit and before principal photography or actual shooting commences, involving script treatment and editing/rewriting, scheduling, set design and construction, casting, budgeting and financial planning, and scouting/selection of locations; contrast to post-production.
Producer	(film) is one or more of the principals of a movie production, involved in various logistical matters (i.e. scheduling, financing, budgeting); raises funding and financing, acquires or develops a story, finalises the script, hires key personnel for cast, crew and director, and arranges for the distribution of the film to theatres; serves as the liaison between financiers and filmmakers while managing the production from start to finish (post-production).
Production	is the general process of putting a film together, including casting, set construction, costuming, rehearsals and shooting; also refers to the middle stage of production which is preceded by preproduction and followed by post-production.
SA/Local Films	refers to films that are produced by South Africans and shot in South Africa and further include films classified as 'national films' by virtue of having received official co-production status from the NFVF.
Set	is the environment (an exterior or interior locale) where the action takes place in a film. When used in contrast to location, it refers to an artificially constructed time/place (e.g. a backdrop painting of a dusty Western street with a facade of



	storefronts); supervised by the film's art director. 'Strike' refers to the act of taking apart a set once filming has ended.
Theatre	is the place for screening, presenting or viewing a film or motion picture; also known as 'cinema'.
Video	means "to see", in other words, the visual or pictured image (either projected, taped, etc.) as opposed to the audio aspect of the film; also refers to the visual component of television. Digital video refers to a video signal represented by a series of binary numbers that are readable by computer—compare with analogue video. AKA 'vid' (for short).



Section 1: Introduction

1.1 Introduction

Films have the recognised potential to influence tourist perceptions and motivations to travel to a specific destination, and thereby increase visitation numbers in the given destination. This phenomenon is best known as film-induced tourism (Loedolff, 2014). It has been prioritised and adopted by the KwaZulu-Natal Film Commission (KZNFC) as a means to cultivate an integrated institutional approach towards facilitating and promoting film production and tourism to stimulate film-induced tourism within KwaZulu-Natal (KZN).

In 2016, The KZNFC launched its first Film-Induced Tourism Strategy as part of its efforts towards attracting both film producers and film-tourists into the province (KwaZulu-Natal Film Commission Press, 2017). The purpose of this report is therefore to present an update on the previous strategy by fulfilling the following objectives:

- Ensuring that the new strategy is aligned to the emerging trends characterised by adaption to technological changes and audience behaviours.
- Ensuring that strategy provides a balance of film/audio and tourism-related strategies.

The key objectives of the KZNFC are:

- To promote and market the province as a global destination for film production;
- To develop, promote and market, locally and internationally, the film industry in the province;
- To facilitate investment in the film industry in the province;
- To provide and encourage the provision of opportunities for persons, especially those from disadvantaged communities, to enter and participate in the film industry in the province;
- To address historical imbalances in the infrastructure and the distribution of skills and resources in the film industry in the province; and
- To contribute to an enabling environment for job creation in the film industry in the province.

Based on these institutional objectives, this Film-Induced Tourism Strategy aims to fulfil the following strategic outcomes:

- Increase in the number of tourism days within KZN;
- Increase in the number of films produced in KZN by companies that originate outside of KZN;
- Increase in awareness of both the TKZN and KZNFC brands;
- Increase in the number of niche tourism products.



1.2 Report Outline

The development of this Film-Induced Tourism Strategy comprises multiple sections, as illustrated below.

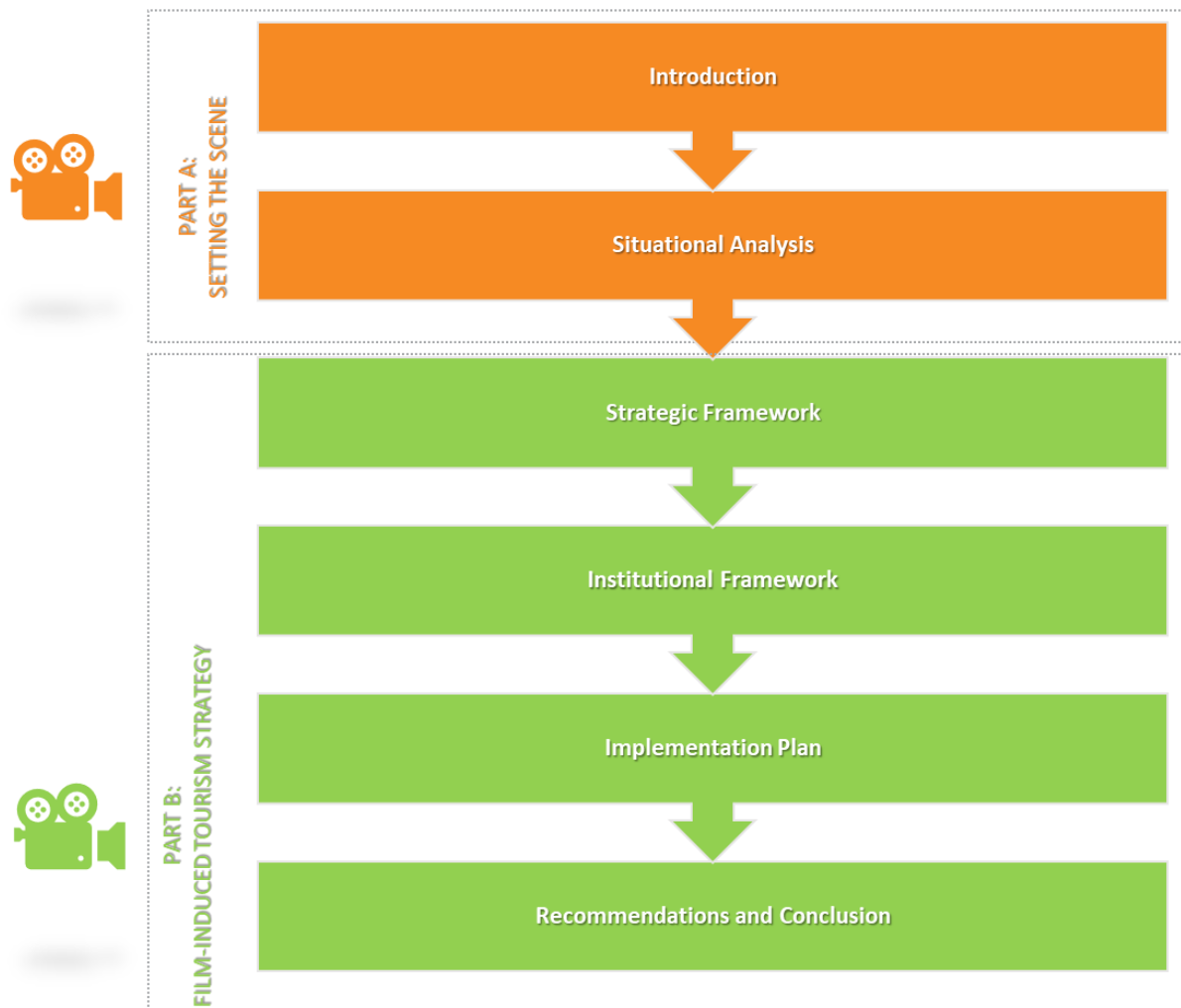


Figure 1: Report outline

This report is divided into two parts (A and B) as shown above. The main sections, along with the methodology, are unpacked below.

Section 1: Introduction

The opening section sets the scene for the Film-Induced Tourism Strategy with some background information on the report and what it seeks to achieve.

Section 2: Status Quo Assessment

A status quo assessment is presented in this section for a closer look into the film-tourism industry and to make comparisons with global and national industries. This assessment is essential for an understanding of how the industry is shaped and defining all the factors that stimulate or hinder



development. The section thus provides a basis upon which to identify gaps and opportunities to drive implementation processes going forward.

Section 3 Strategic Framework

This section presents a strategic framework for KZN's film-tourism industry. This is achieved by presenting the vision along with the goals and objectives of the Film-Induced Strategy. In the end, the key outcomes of the situational assessment are interpreted and used to determine the best development areas as well as key success factors.

Section 4: Institutional Arrangements

The section aims to guide where the key areas of interventions can be incorporated into the KZNFC's existing programmes. This is to ensure that the suggested interventions are easy to implement and adapt.

Section 5: Implementation Plan

Implementation guidelines are presented in this section to guide KZNFC in initiating the key action plans.

Section 6: Recommendations and Conclusion

A summary of key recommendations is summarised and reiterated in this section. This is followed by a sub-section on conclusions for the Strategy.



Section 2: Status Quo Assessment

2.1 Introduction

Film-induced tourism is one of the fastest-growing sectors in recent years (Domínguez-Azcue et al., 2021). The success of different film destinations across the world varies depending on several factors, such as the number and quality of films as well as each film's ability to sell a destination as a 'must see' for both domestic and international tourists. This section aims to assess the status quo across different contexts (i.e. global, national and KZN's film-tourism industries).

2.2 Overview of the Global Film-Tourism Industry

The global film industry showed healthy projections for the future before 2020, with Box Office and home/mobile entertainment revenue for 2019 amounting to \$42.2 billion and \$58.8 billion worldwide, respectively (Escandon, 2020). This positive growth trend was disturbed by the rise of the coronavirus (COVID-19) pandemic in early 2020 after countless movie theatres closed to contain the outbreak (Watson, 2020). As a result, the global cinema industry lost approximately \$32 billion in 2020, representing a 71.5% reduction in Box Office revenue compared to 2019 (Ramachandran, 2020).

However, a different trend emerged during the same period (2020) with the global film industry experiencing unprecedented growth in online video usage (both transactional and subscription). Online transactional and subscription video revenue increased by 30% from 2019's \$26 billion to \$34 billion in 2020 (Ramachandran, 2020).

The pandemic is accelerating the ongoing transformation in movie production, distribution and consumption, and it will continue to impact the global industry severely and detrimentally. Movie ticket sales and consumer confidence levels will also continue to drop, and box office revenue will suffer as the number of films releases falls due to slow or postponed movie production schedules (Watson, 2020).

The COVID-19 pandemic has brought with it some new realities that do not favour the global film industry. In response, more festivals and conferences that are facilitated by filmmakers and related role-players are moving from physical travel to online spaces. According to Tutt et al. (2021), the first quarter of 2021 was already expected to see all North American and European film festivals and markets take place online. Similarly, the 2021 Toronto International Film Festival also took place online.

A similar trend exists amongst consumers as they opt to watch film content on their smartphones and other portable devices as opposed to visiting cinemas. This change reflects consumer preferences for content consumption, which increasingly favour streaming video-on-demand (Hall and Pasquini, 2020).

2.3 South African Film-Tourism Industry

South Africa has successfully positioned itself as a credible and competitive film-tourism destination. This position was favoured by the country's excellent film infrastructure, world-class studios and hard-working, skilled crews. Most of these world-class film production facilities can be found in Cape Town and Johannesburg. Cape Town Film Studios, which is Africa's first custom-built high-tech studio



complex, is classified as one of the top ten studios globally by international production executives (DTIC, 2020).

Local industry role-players have realised that opting for co-productions with international companies results in the direct investment of millions of rands into the economy. Accordingly, South Africa has signed co-production treaties with eight countries: Canada, Italy, Germany, the UK, France, Australia, New Zealand and Ireland (DTIC, 2020). Further, the Nigeria-South Africa Audio-Visual Cooperation Agreement was recently signed in Abuja during December 2021 (BMA, 2022).

Concerning the promotion of film-induced tourism, Netflix recently conducted a survey, the Cultural Affinity Study, to gauge the likelihood of international film-tourists visiting South Africa after watching locally produced filming content. The survey results revealed that the subscribers were 3.1 times more likely to make South Africa their primary travel destination while also being 5.6 times more likely to learn a local language (IOL, 2021). This confirms that the work that is produced by the South African film-tourism industry captivates and encourages international visitors to choose the country as a preferred film-tourism destination.

In terms of incentives, the South African government—through the National and Film and Video Foundation (NFVF), the Industrial Development Corporation (IDC) and the Department of Trade, Industry and Competition (DTIC)—is playing an active role in investing and supporting the local film production industry. The country recorded a total of approximately 150 active production companies in 2020, some of which are known to produce a range of award-winning movies and TV series on both local and international platforms (DTIC, 2020).

The DTIC alone administers three types of film and television incentives:

- Foreign Film and Television Production and Post-Production Incentive
- SA Film and Television Production and Co-production
- The South African Emerging Black Filmmakers Incentive (SA Emerging Black Film)

2021 has so far seen an increase in the number of incentives rising as Netflix and the NFVF recently created a partnership aimed at funding the production of South African ‘micro-budget’ feature films. As part of this partnership, the two parties have agreed to contribute R14 million each in support of the production of local films, which will include exclusive debuts on Netflix (Business Tech, 2021). Such partnerships are expected to further enhance the performance of the South African film industry and thereby help promote the country as the ultimate film-tourism destination.

2.3.1 Supply of Skills in the Industry

The diversity of film-friendly locations in South Africa continues to attract local and international filmmakers. While this has resulted in the utilisation of local skills in specific destinations, filmmakers often tend to bring their own casts and crew (MICT SETA, 2020). This is due to the notable scarcity of technical and other skills in the country’s film industry.

The MICT (Media Information Communication Technologies) SETA (Sector Education and Training Authority)’s *Sector Skills Plan 2021/22* identifies several hard-to-fill vacancies, particularly in the film and electronic media sub-sector, as tabulated below.



Table 1: Hard-to-fill vacancies in the local film industry

Sub-sector	Occupation	Reason	Quantity Needed
Advertising	Multimedia Specialist	Lack of skilled people	126
	Digital Artist	Lack of skilled people	110
	Marketing Practitioner	Not enough opportunities for workplace placement	80
	Multimedia Designer	Lack of skilled people	48
	Copywriter	Lack of skilled people	45
Film and Electronic Media	Media Producer	Lack of skilled people	100
	Multimedia Specialist	Lack of skilled people	96
	Sound Technician	Equity consideration	96
	Director (Film, Television, Radio or Stage)	Lack of skilled people	40
	Film and Video Editor	Lack of skilled people	20

Based on the table above, the film and electronic media sub-sector lacks skills supplies in technical roles specific to the sector and is less lacking in generic skills such as HR and finance (MICT SETA, 2020). The status quo calls for a need for industry role-players to partner with the MICT SETA to strategise how to address the skills shortages. The government could also remedy the situation by investing in advanced skills development programmes for writers, directors and producers, and financially support talent to attend such programmes elsewhere if they are not available locally (UNESCO, 2021).

2.3.2 Impact of COVID-19 on SA's Film-Tourism Industry

The South African film industry was one of those hit hardest by the COVID-19 pandemic as the government was forced to impose restrictions on movements and gatherings, which entailed the closure of cinemas. These restrictions brought the industry to a halt, primarily because of its nature of production, and the consumption of its output wherein physical interaction is required on production sets and in exhibition spaces such as cinemas.

Similarly, the occasional easing down of lockdown regulations does not necessarily mean business as usual across the industry. The restrictions still impose strict operating directives and, in most cases, only 50 individuals are allowed on set or location at a time, limiting the size and complexity of productions that can be completed (The Conversation, 2020). This has proven to hinder the industry's positive contributions to South Africa's economy.



Table 2: Economic impact of the film industry on SA economy between 2017/18 - 2020/21

Economic impact	2017/18	2018/19	2019/20	2020/21
Production (R million)	R6 941	R7 981	R7 181	R2 918
GDP at market prices (R million)	R1 165	R1 237	R1 088	R442
Employment (number)	R33 146	R38 096	R31 444	R12 775
Total annualised payroll (R million)	R219	R248	R218	R88
Household income (R million)	R864	R894	R803	R326
Contribution to taxes (R million)	R96	R105	R91	R37

Source: (NFVF, 2021)

The film industry's contribution to the South African economy is projected at R2.91 billion in 2020/21, down from R7.18 billion in 2019/20. The industry suffered losses of 18 669 full-time jobs due to the pandemic and related government lockdown restrictions, resulting in remuneration losses that amounted to R129.29 million. Subsequently, the industry's contribution to government taxes declined by R54.18 million (NFVF, 2021). The status quo calls for local film destinations, including KZN, to revert to their drawing boards to strategise how to revive film tourism in the country.

2.3.3 Local Film-Tourism Industry Trends

An overview of some of the most common trends in the film industry follows below.

Film festivals as the ideal platform to promote film-induced tourism

Hosting film festivals has become a prevailing practice, both locally and internationally. While most of these festivals are traditionally held at different venues in different countries, COVID-19 travel restrictions have forced their migration into online spaces. Online attendance, however, presents an advantage for film-tourism managers to not only attend as many film festivals as possible but also to showcase their destinations to international audiences.

Remote filming amid COVID-19 outbreak

The COVID-19 pandemic has stimulated a new trend where the production of film content is carried out remotely. This makes it possible for filmmakers to keep producing films by optimising on a collective of creatives' skills, equipment and software. An example of a product of remote filming is the Tim Greene-led production *Cabin Fever*. For this co-authored fiction film, actors performed scenes at home, filming themselves on whatever camera or device they had access to. The footage was then uploaded for editors, also working from home, and director viewings were held remotely using platforms like the now ubiquitous Zoom (The Conversation, 2020). Although this new trend demonstrates how the industry is evolving with adaptations to innovation and technology, it could potentially pose a threat to film-induced tourism as it denies film destinations the opportunity to receive 'remote filming crews' to shoot movie scenes at physical locations. If more films productions were to adopt this new trend, most local film locations would remain underutilised and, as such, film destinations would experience a drop in the number of film-tourism visitors.



Online distribution

More audiences than ever before are opting for online streaming services, particularly from Showmax. Showmax itself is prioritising acquiring local content by licensing as many as possible, such as acclaimed features *Five Fingers for Marseilles* (2017), *Inxeba (The Wound)* (2017), *Kanarie* (2018) and *Sew the Winter to My Skin* (2018).

Increases in data consumption have a direct impact on audiences' ability to stream videos from their smartphones, tablets and other devices. This trend is expected to increase as COVID-19 regulations encourage people to practice social distancing and most movie theatres are forced to remain closed under stricter lockdown regulations. This compels people to opt for online streaming in the comfort of their homes. The trend provides an opportunity for local films to be distributed through digital platforms to reach a wider audience of film-tourists online. Figure 2 below demonstrates South African citizens' data consumption habits and the type of content that is prioritised.

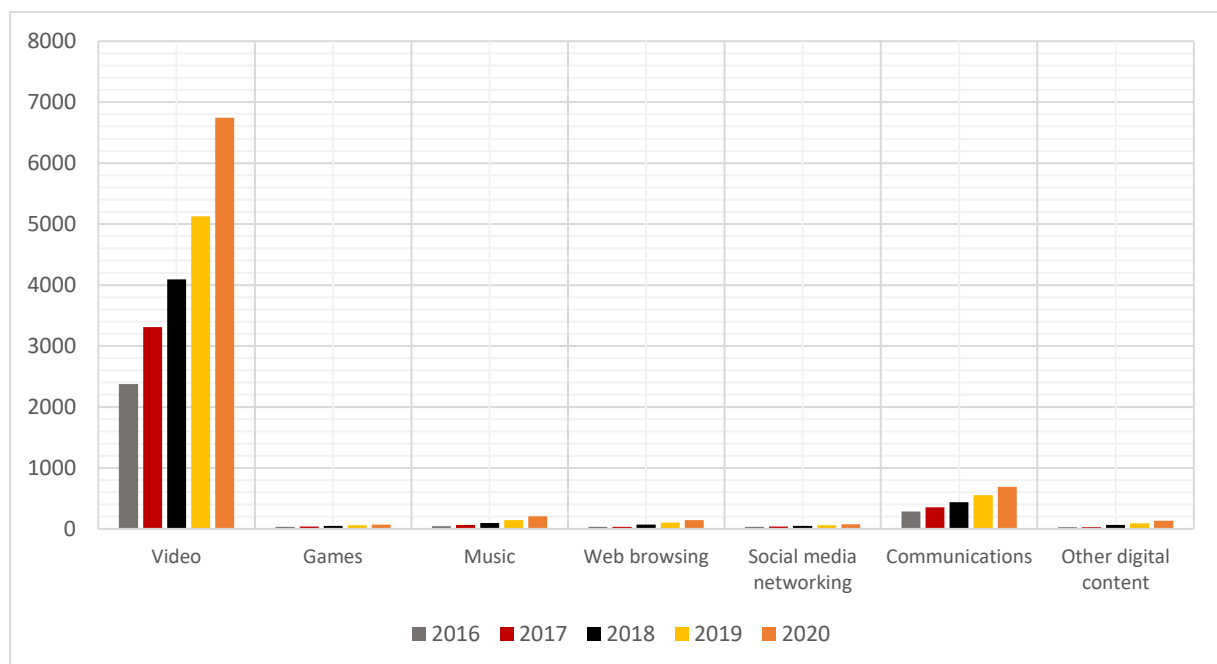


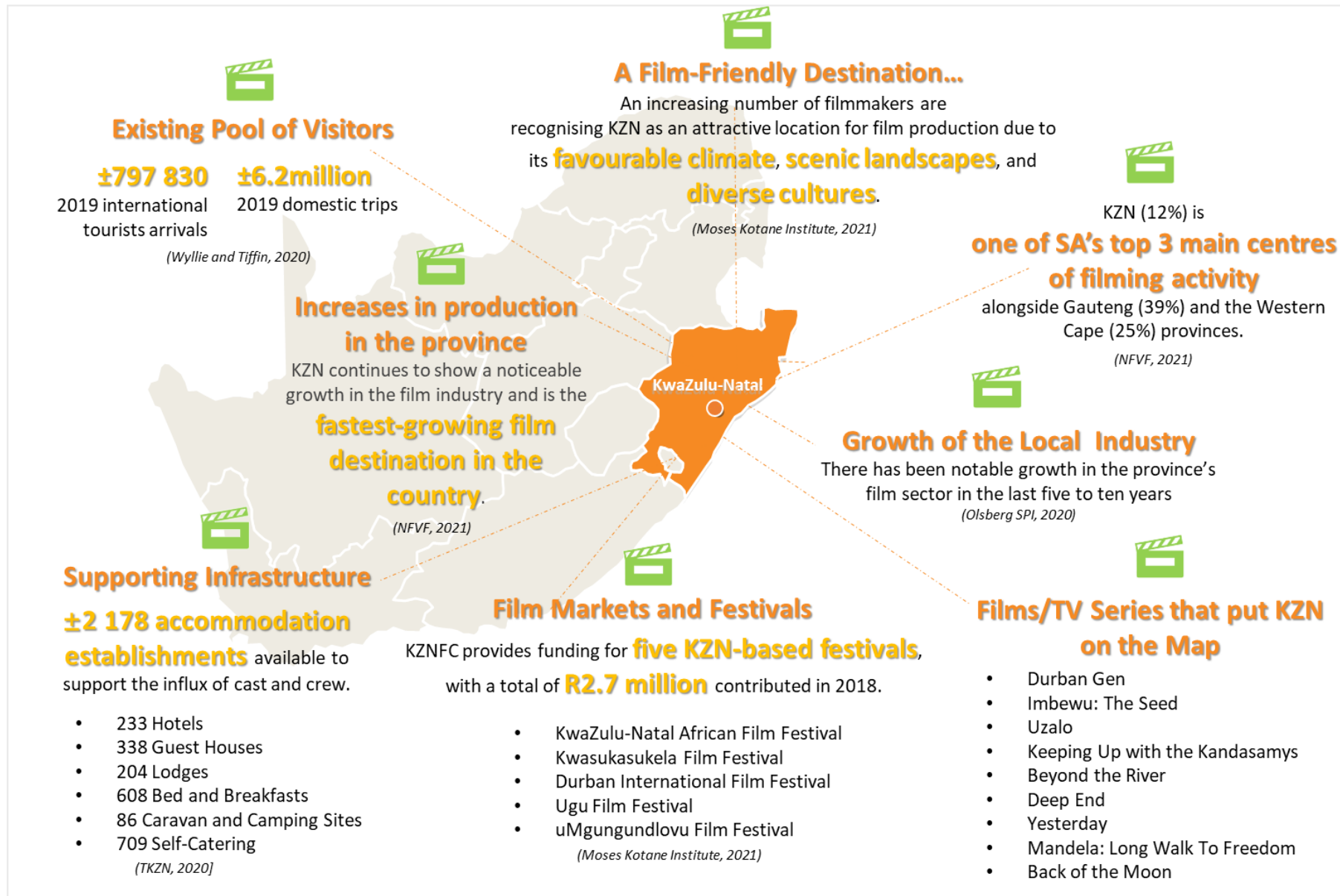
Figure 2: South Africa: Data consumption by content type, 2016–2021 (GB millions)

Adapted from PwC (2019)

According to Figure 2 above, South Africans generally consume their data on streaming services, mostly on videos (such as films and TV series content). The likelihood of a similar trend occurring across the world is very high as technology and digitisations are the 'go-to' tools in the current day and age. Fortunately, this trend favours the local film-tourism industry as a larger audience can view as many films and TV series as they please. In the process, these potential tourists are awarded the opportunity to discover different film-tourism destinations to add to their 'must visit' destinations.



2.4 KZN Film-Tourism Industry at a Glance



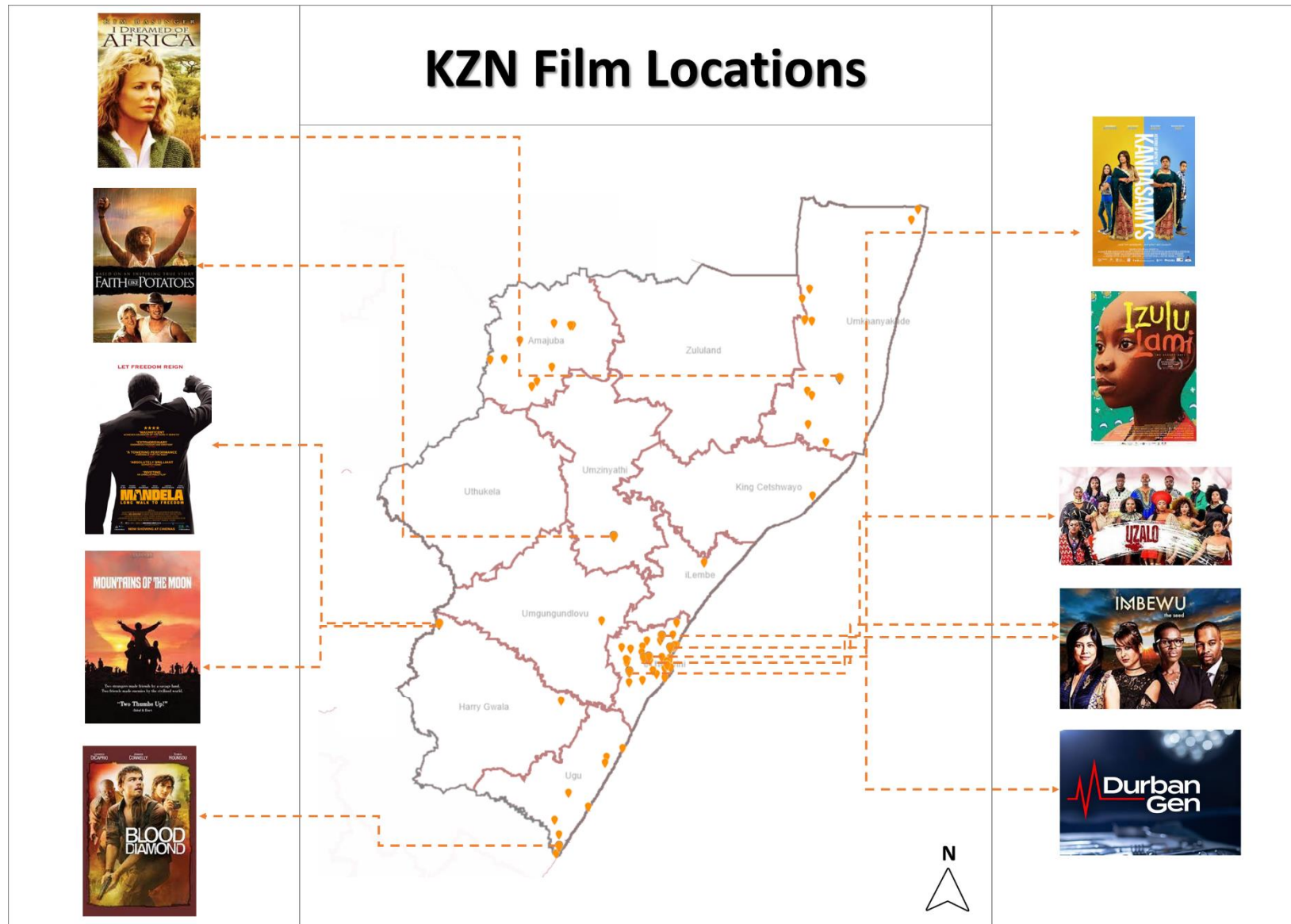


Figure 3: Film locations in KZN



2.4.1 KZN film industry

KZN has a rich history of cinematic activities linked to film appreciation, with Durban being the first city in South Africa to erect a permanent building for the screening of motion pictures—the Electric Theatre in 1909 (DFO website, n.d.). The construction of this theatre only marked the inception of the KZN’s film industry, and many milestones have been achieved to date. For example, the films *Zulu* and *Zulu Dawn* rank amongst the most successful international films made in Africa (DFO website, n.d.).

Since its inception in 2014, the KZNFC has proven to realise and appreciate the local film industry and the benefits of film-induced tourism and the exposure produced by visual media. KZNFC has and continues to fund film productions that take place in the province. Tabulated below are some of the completed projects that were funded by KZNFC:

Table 3: Completed productions

Project name	Genre	Platforms	KZN Location utilized
Kandasamys – The Wedding	Feature film	Cinemas and MNET	Chatsworth
Keeping up with the Kandasamys	Feature film	Cinemas	Chatsworth
3 days to go	Feature film	Cinemas	Durban
Ukhakhayi	TV series	eTV co-production	The Wheel, China mall Magistrate Court, Durban C/C Mathikwe clinic, Inanda Dam PineTown *Kwa Ncolosi; church; houses *Emaphephethen i; stadium; houses
Beyond the river	Feature film	Cinemas and SABC	The Dusi, Tugela and Umgeni
Love lives here	Feature film	Cinemas	Inanda, Durban
Kings of Mulberry Street	Feature film	Cinemas and DSTV Channel 108	Verulam
Durban Beach Rescue Season 1	TV series	Travel Channel (pre-sale), SABC3	Durban, North Beach, Bluff, uMhlanga
Durban Beach Rescue Season 2	TV series	Travel Channel (pre-sale), ETV	Durban- North Beach
Gqom Nation 1	TV series	MTV Base (co-prod)	Durban
Gqom Nation 2	TV series	MTV Base (co-prod)	Durban
Deep end	Feature film	Cinemas	Durban – Beachfront
Made in Africa	Reality show	BET Africa (pre-sale)	Durban – Durban Central
Uncovered	Feature film	Cinemas	Newcastle
Family matters	Made for TV movie	Mzansi Magic (license fee)	Ndwendwe
Harvesters	Feature film	Cinemas	KwaZulu-Natal
Asinamali	Feature film	Cinemas	Lamontville
Code Green	TV series	SABC1	Umfolzi Park, Hluhluwe, Durban UKZN
Seeking giants	Short film	SABC2	Saint Lucia , Durban Harbour, Ushaka Marine World



Project name	Genre	Platforms	KZN Location utilized
Illegal trade of SA reptiles	Short film	SABC2	Wits, Gauteng Locations
Edendale: valley of flowers	Short film	SABC2	Mbali Township in PMB
Uzalo	TV series	SABC1	KwaMashu

This Film-Induced Strategy is therefore geared towards finding the best means to promote KZN as a film-friendly destination. In pursuit of this goal, the KZNFC has and continues to develop relationships with major role-players in the local and international film industries to encourage more film organisations to produce films in KZN. According to the chief executive of Videovision Entertainment (a local film and television company that is also a major role-player in the industry), an increasing number of filmmakers have discovered KZN as an ideal location for film shoots (Majola, 2019). This speaks volumes about the recognition of the destination as a desirable film-tourism destination.

While this highly needed cooperation is essential in selling KZN as a desirable film-tourism destination of choice, it is important to bear in mind that a destination needs to possess certain attributes to be able to attract film projects to its locality (Hoffmann, 2015). These attributes (tabulated below) are scrutinised in this section to determine the province's strengths and weaknesses.

Table 4: Key attributes of a film-friendly destination

Attributes of a destination	Explanation
Availability of local film industry and film infrastructure	Presence of: <ul style="list-style-type: none">• film studios and production facilities;• skilled film crews/labour, resources/equipment and expertise;• film sets.
Hassle-free productions	<ul style="list-style-type: none">• Cooperation and support from government level and film commissions.• Active promotion, lobbying and websites.• Location scouting services.• Tax breaks.
Destination marketing organisations and media exposure	<ul style="list-style-type: none">• To grasp opportunities posed by film productions at various windows of exposure to promote the destination through film.• Media coverage to generate awareness of film projects.

Table as adapted from Hoffmann (2015).

Availability of local film industry and film infrastructure

KZN's film industry has shown noticeable growth, and the province is now recognised as the fastest-growing film destination in South Africa (NFVF, 2021). This position is favoured by the KZNFC's active role in supporting the province as a film-tourism destination. The KZNFC had funded a total of 236 projects to the value of more than R250 million by 2020, of which 177 were in development and 59 in production phases (Ellaya, 2020).

While these notable milestones are worth celebrating, it is important to acknowledge that KZN's film-tourism industry still faces challenges that hinder its complete success. Competition is one of the limiting factors as the province comes third after Gauteng and the Western Cape as the more prolific film-tourism destinations.



KZN's film industry is also facing challenges relating to:

- a lack of film infrastructure;
- a lack of skilled production crew;
- a lack of consumer support for locally produced films;
- inadequate finances; and
- a lack of a large pool of talented scriptwriters.

Hassle-free productions

- This report has so far established that KZN boasts a vibrant and competitive film industry. The industry owes much of its success to the support of government through initiatives such as the DTIC's rebate programme as well as the Black Filmmakers Fund, which has resulted in more local films being made (Majola, 2019). It also helps that the government offers tax rebates of between 25% and 35% on films produced in the country and that the slump of the rand against the dollar means that productions can cut costs substantially by shooting in South Africa (SAV, n.d.).
- Further, the KZNFC is committed to contributing to the transformation process of the province's film industry. This is made possible by the KZNFC Film Industry Transformation Initiative (FITI), which is geared towards medium-term focused human capital development of previously disadvantaged individuals to increase their participation in senior positions and equip them to deliver high-quality, high-value productions (KZNFC, 2020).

Destination marketing organisations and media exposure

The KZNFC plays a vital role in promoting and marketing KZN as a global destination for film productions. The KZNFC is motivated by the fact that the industry, from pre-production to distribution, is indispensable in driving socio-economic development in the province (DEDTEA, 2020).

It is essential, however, to acknowledge that collaborative marketing initiatives between the KZNFC and local municipalities are needed to foster awareness about the region's potential. This suggested collaboration will help the province to realise the full potential of film-induced tourism.



2.4.2 Film-Induced Tourism Activities

Film festivals and film markets are some of the components of film-induced tourism that play a significant role in a destination's film-tourism industry value chain. Presented below is an overview of the status quo of KZN's film festivals and markets.

The KZNFC encourages and supports KZN-based film festivals and film markets with the understanding that the subject aids the destination's marketing efforts and thereby stimulates economic activity. The benefits of film festivals and film markets are reported to be wide-ranging, and include, for example (KZNFC, 2021):

- The general marketing of the KZN film sector.
- Showcasing the abilities of KZN film producers to local, national and international markets.
- Encouraging networking between interest groups.
- Facilitating information sharing.
- Identifying creative, innovative ideas and concepts being developed in the industry markets for the transaction of film content.

KZNFC has supported the attendance of 18 filmmakers at national and international markets and festivals for them to exhibit their products on various platforms prior to the emergence of COVID-19 (between 2014 to 2019).

The KZNFC is therefore committed to ensuring that local filmmakers gain exposure and can participate in national and international markets and festivals that are increasingly migrating to online platforms due to the ongoing pandemic. As part of its support, the KZNFC provides funding for film festivals and markets to create an environment for filmmakers to interact with other local and international industry players. This is achieved through exhibitions, networking sessions and targeted appointments (KZNFC Annual Report, 2020/21).

2.4.3 KZN Destination Marketing Efforts

Destination marketing refers to efforts to engage with key players to drive awareness of a particular destination and, by doing so, cultivating an interest in visiting the destination. It entails finding creative ways of promoting and communicating the destination's value proposition, i.e. creating the reason for people to visit the given destination (TPBO, 2017). In the case of KZN as a tourism (or film-tourism) destination, the province is marketed by the KZNFC and Tourism KZN (TKZN) through:

- social media platforms,
- mass media platforms (television, radio and print media promotions),
- word of mouth, and
- festivals and markets.

Brand South Africa and South African Tourism (SA Tourism) also plays a significant role in promoting KZN as a desirable tourism destination. The marketing efforts that are made by each of these entities (as well as others) and the impact of films and TV series that feature KZN jointly contribute towards attracting tourists into the province.



2.4.4 Stakeholder Analysis

Tabulated below is a list of key stakeholders and ecosystem role-players in the KZN film-tourism industry. The list includes relevant government entities and private sector parties as well as academic institutions, along with their functions.

Table 5: Ecosystem role-players

Names of stakeholders and partners	Content creator	Funder	Policymaker	Supporter
KZNFC		x	x	x
Tourism KZN				x
SA Tourism				x
The Department of Trade, Industry and Competition		x	x	
National Film and Video Foundation		x	x	x
Industrial Development Corporation		x		x
Durban Film Office		x		x
Durban Film Mart	x			x
Zulu Coast Film Office	x			x
MICT SETA		x		x
Department of Labour: KZN			x	x
African Film and Drama Academy (AFDA)	x			x
University of KwaZulu-Natal (UKZN)	x			x
Durban University of Technology (DUT)	x			x
Creative Arts College	x			x
Durban Actors Studio	x			x
Movietech Film and Television College				x
Centre for Fine Art Animation and Design	x			x
Department Of Sport, Arts and Culture		x	x	
EDTEA		x	x	
Southern Africa's Freelance Association	x			x
Documentary Filmmakers' Association	x			x
Independent Producers' Organisation	x			x
Personal Managers' Association				x
Animation South Africa	x			x
South African Guild of Actors	x			x
Writers' Guild of South Africa	x			x

2.4.5 Impact of the Proposed Merger of KZNFC and TKZN on Film-Induced Tourism

The proposed merger of the KZNFC and TKZN will potentially work in favour of the local film-tourism industry. This will create synergies as both entities have a proven record of good governance and excellent marketing skills. Each entity also has a better understanding of the province coupled with some rich industry knowledge.



Based on these strengths, the proposed merger is expected to improve institutional efficiency and aid marketing strategies for KZN. The local film and tourism industries stand to benefit the most from this merger as they were amongst the industries hardest hit by the COVID-19 pandemic. The merger thus presents an opportunity for the experts from both entities to draw on their innovative ideas and expertise to collectively derive a recovery plan for the province.

Overall, the new KwaZulu-Natal Tourism and Audio-Visual Authority (KZNTAVA) will create opportunities that include the following:

- Fusion of the entities' skills development programmes, and collaboration with the MICT SETA, to develop new intensified skills development and training programmes and bursaries as a means of addressing skills shortages in the province.
- Combination of resources and expertise to explore animation as a niche with the understanding that the proliferation of modern technology and skills can unlock significant growth.
- Creation of more partnerships with industry role-players with the intent to identify and support different opportunities across the value chain, including local film concept development, local film product packaging, distribution (mainly on digital platforms) and marketing (e.g. through movie trailers) (DTIC, 2020).
- Promotion of KZN as a film destination to attract more large productions, especially in winter (the province has a mild winter season which may be conducive for outdoor filming).
- Exploration of the possibilities of tapping into existing co-production treaties with Canada, Italy, Germany, the UK, France, Australia, New Zealand and Ireland to draw upcoming film productions to KZN.
- Promotion of more co-productions between local and international film producers. In these partnerships, South African counterparts will need to be encouraged to play an active role in determining how local film destinations need to be portrayed in co-produced films. This will bear fruitful results for film tourism as foreign counterparts have access to an audience that South Africans do not have, as well as a marketing budget.
- Facilitation of conversations with the South African National Defence Force (SANDF) to make military vehicles available for the film industry; this is an expensive exercise that also requires a change in legislation. This kind of support can potentially attract international filmmakers by making available to the industry a more diverse range of opportunities and services that make SA an attractive region in Africa.

2.4.6 Local Case Studies and Lessons for KZN

As mentioned, KZN is competing with Gauteng and the Western Cape as the best film-tourism destinations in South Africa. According to the NFVF (2021), approximately 39% of all South African film operations are concentrated in Gauteng, followed by the Western Cape with almost 25% and KZN with only 12% of film operations. In the case studies that follow, an overview of these two competitors is presented for insight into how each destination's film-tourism industry is structured and how it maintains its success. Some lessons will be derived for KZN to give value to this strategy.



Case study 1: Gauteng film-tourism industry

According to the NFVF's third Economic Impact Assessment Study, Gauteng remains the film and television capital of South Africa (NFVF, 2021). This position is favoured by the active role that is played by the Gauteng Film Commission (GFC) alongside local industry stakeholders. In its first Quarterly Performance Report for the 2021/22 Financial Year, the GFC celebrated some short-term milestones that favour the local film-tourism industry. The GFC facilitated 170 permits for a variety of projects, including 57 commercials, three documentaries, 11 TV content, ten videos, three stills, seven feature films and five short films across the Gauteng City Region. This stimulated the province's economy as 5 272 new job opportunities were created with an estimated production value of R196 568 million for the sector within a short period (GFC, 2021). Furthermore, the GFC secured several partnerships with industry role-players such as the NFVF, Canon and MICT SETA (GFC, 2021). The partnership between the GFC and Canon mainly focuses on skills training and equipment supply. The other partnerships (i.e. between the GFC and NFVF and MICT SETA) are briefly unpacked below (GFC, 2021).

- A memorandum of understanding (MoU) was finalised during the first quarter of the 2021/22 financial year. This MoU was signed in an effort to develop the local film industry by creating an environment that promotes the shared capacity to achieve shared goals.
- The GFC and MICT SETA partnership made it possible for the GFC to place (from May 2021 to May 2022) 30 graduates in an internship programme, including at several hosting production companies. This was done to enhance skills in the province's film industry by ensuring that academic theoretical knowledge in fields such as production, project management and research, marketing and communication, camera and lighting, administration and entertainment law is translated into practice during the internship programme.

On the production side, Gauteng is generally known for movies such as *Hotel Rwanda* (2004), *Tsotsi* (2005), *District 9* (2009), *Bang Bang Club* (2010) and *Avengers: Age of Ultron* (2015). The province's landscapes are also showcased every week night in popular TV series, as outlined below.

Table 6: Gauteng-based TV series

Category	Name of TV series	Number of viewers
SABC 1	<i>Generations: The Legacy</i>	±6.6 million viewers (Maldonado, 2021)
	<i>Skeem Saam</i>	±5.5 million viewers (Maldonado, 2021)
	<i>uBettina Wethu</i>	± 2.5 million viewers (de Wee, 2021)
SABC 2	<i>Muvhango</i>	±4.13 million viewers (Maldonado, 2021)
	<i>7 de Laan</i>	±1.3 million viewers (Maldonado, 2021)
SABC 3	<i>The Estate</i>	±503 193 viewers (Ferreira, 2021)
eTV	<i>Scandal!</i>	±4.98 million viewers (Maldonado, 2021)
	<i>House of Zwide</i>	±4.24 million viewers (Mngadi, 2021)
DStv	<i>The Queen</i>	±1.13 million viewers (Maldonado, 2021)
	<i>Diep City</i>	± 1.08 million viewers (Maldonado, 2021)
	<i>Gomora</i>	± 1.65 million viewers (Maldonado, 2021)



Gauteng's facilities compete with the best in the world. The province is home to well-established and equipped post-production digital facilities as well as audio, graphics and animation houses. A list of these facilities is included below.

Table 7: List of film and television studios in Gauteng

Name of studio	Location	
Atlas Studios	Milpark	Johannesburg
Clive Morris Productions	Ferndale	Randburg
Foghound Studios	Midrand	Johannesburg
Global Access	Central Business District	Johannesburg
Gold Island Studios	Midrand	Johannesburg
Media Film Service	Sandton	Johannesburg
Phoenix Studios	Blairgowrie	Johannesburg
Q Studios	Kew	Johannesburg
Realtime Pictures	Linden	Johannesburg
Red Pepper Pictures	Linden	Johannesburg
Sasani Studios	Highlands North	Johannesburg
Shine Studios	Braamfontein	Johannesburg
SABC Henley Television Studios	Auckland Park	Johannesburg
Stark Films	Randburg	Johannesburg
Stark Studios	Randburg	Johannesburg
Telemedia	Rivonia	Johannesburg
The Production Works	Melville	Johannesburg
Urban Brew Studios	Ferndale	Randburg
Zechariah Film Studios	Wonderboom	Pretoria

Source: (GFC website, n.d.)

Further, the province is a host to a Kodak-approved, full-service film laboratory, which is the only high-resolution facility working with Spirit Data cine, 24p and 3D graphics as well as Flame, Inferno and a Kodak lightning film recorder (GFC website, n.d.). The availability of these studios and other facilities reflects the province's interest in infrastructure investment, which is key to attracting local and foreign film productions to the destination.

Case study 2: Western Cape film-tourism industry

The Western Cape province (particularly Cape Town) is well-marketed as a global filming destination both domestically and internationally. The City of Cape Town Metropolitan Municipality authorised 671 film shoot applications between July and September 2021, which is a 44% increase compared to the same period in the year 2020 (Hyman, 2021). This increase in bookings is a positive sign that the industry is making a return following the disruptions wrought by COVID-19. Before 2020, the City's Film Permit Office had recorded a total of 11 726 film bookings (made on the online Film Permit System) in the first nine months of the 2018/19 financial year (July 2018 to March 2019), compared with 11 350 of the previous financial year. In response to these 11 726 bookings, the office issued 6 906 permits for a variety of locations preferred by local and international producers (Tourism Update, 2019).



The Western Cape tourism agency's (Wesgro) robust marketing strategy played a significant role in promoting and thereby attracting a higher number of film bookings. The agency, through its Film and Media Promotion Unit, continues to promote the destination in various forms. For instance, the unit recently hosted a presentation panel at the *South By Southwest* (SXSW) Festival in Texas. During the delivery of this presentation, the unit played a short promotional video displaying the Western Cape's various landscapes and behind-the-scenes footage of productions that were filmed there (Spiller, 2021). This platform allowed the unit to not only employ word-of-mouth as a marketing tactic but also to utilise evidence to keep the audience intrigued.

The success of the location as "the ultimate film-tourism destination" is the result of a collaborative effort between key industry role-players such as the City of Cape Town and other key stakeholders from the local film and media sector. This collaborative atmosphere has enabled industry role-players to share ideas and work together to realise the vision of making Cape Town the filming hub of Africa (Granat, 2018).

Western Cape boasts an excellent film infrastructure profile that is inclusive of the famous Cape Town Film Studios and two other smaller film studios, namely Salt River Studios and a film studio recently built inside the Good Hope Centre (SAV, n.d.). Cape Town Film Studios alone has created approximately 98 000 job opportunities in its first ten years of operation while contributing about R21 billion to the local economy by 2018 (Cape Town Film Studios website, n.d.). This signifies the value of investing in infrastructure in a global film-tourism destination.

According to the City's Mayoral Committee Member for Safety and Security and Social Services, JP Smith, the destination's challenges cannot be fixed overnight. This is said with the understanding that a clear vision and strategy would need to be devised to guide strategic interventions to be implemented through collaboration with key partners. The City's tactical interventions to revive the industry include (Granat, 2018):

- A review and development of a new film policy for the City of Cape Town.
- Developing a film strategy.
- A review of the current filming by-law.
- Resolving the film commission question.
- Re-engineering the City's film office.
- Working with all stakeholders and sectors to promote, grow and develop the industry.

Lessons for KZN's film-tourism industry

The two case studies demonstrate that active marketing is an essential ingredient in building any successful global film-tourism destination. The Gauteng case study emphasises that an adequate supply of high-quality infrastructure is an indispensable element in attracting local and foreign film-makers to a destination.

The Western Cape case study reveals that it is important for destination managers to continuously:

- review and develop new film policy for their destination, and
- promote and create a collaborative atmosphere to grow and develop the local film-tourism industry.



Skills development is also noted as a significant investment area as KZN currently faces challenges in this space. The areas to be prioritised in this space include production, project management and research, marketing and communication, camera and lighting, administration and entertainment law, and other areas.



2.5 Gaps and Opportunities

This section summarises all the gaps and opportunities identified by this report using a strengths, weaknesses, opportunities and threats (SWOT) analysis.

Strengths

- Good climate, with a mild winter season that is beneficial for outdoor filming.
- Presence of different scenic landscapes, and easy access to film locations.
- The proposed merger of KZNFC and TKZN is likely to improve film-tourism and draw more filmmakers to the province.
- Presence of institutions of education such as UKZN, which offers a Digital Arts programme (with a film animation strand). The programme continues to produce highly qualified graduates who specialise in film and animation.
- Presence of competent film offices as well as advanced permitting processes.
- Availability of excellent tourism products and services (e.g. hotels, restaurants, car hire, film equipment hire services, etc.) to support the film industry.
- The film industry has support from the KZNFC and other national institutions (NFVF, DTIC, IDC).
- Hassle-free productions with filming costs that are more affordable compared to other provinces.
- Availability of skills development programmes from the KZNFC and other industry role-players.
- Rich cultural heritage suitable for showcasing Indian and African cultural storylines.
- Cheaper labour costs in KZN when compared to the Western Cape and Gauteng.
- Availability of a film cluster to support sector stakeholders.

Weaknesses

- There is a deficiency in the allocation of resources for marketing of locally produced films.
- The province has film infrastructure shortages (e.g. studios and equipment).
- The local film industry generally lacks skills supplies in more technical roles such as media producers, directors, digital artists, multimedia specialists, etc. Further, most Head of Department roles (HODs) also remains vacant due to insufficient skills supply.
- Migration poses a challenge to the local film-tourism industry as qualified graduates from the province tend to seek employment in Gauteng and the Western Cape due to the limited opportunities in KZN.
- The local film-tourism industry is experiencing a very slow transformation process, which delays inclusive socio-economic growth and development.
- The lack of a cinema-going culture has contributed to dwindling numbers in attendances since before COVID-19 emerged. This is due to consumer preferences to obtain content cheaply or for free.
- There have been reported cases of film production crews carrying out filming activities in the province without contacting or obtaining consent from the filming offices. This trend has been occurring simply because some film producers prefer to skip all the red tape due to time and cost considerations.



- Film offices—the Durban Film Office, in particular—tend to direct and limit film producers to locations that fall in their jurisdiction. This leads to discrepancies as the northern regions of KZN receive fewer opportunities when it comes to hosting film productions.
- Local municipalities are not always committed to providing maintenance services to film locations.
- Municipal officials generally lack knowledge that is needed to service the film industry and better market their regions independently across the province.

Opportunities

- Develop good film trailers by embedding the features (culture, landscape, climate, etc.) of KZN in movies and their trailers. Once developed, the film trailers may be promoted on various social media platforms.
- Create a system that provides film producers with incentives (e.g. through a marketing budget) to develop and promote local film trailers from a marketing perspective.
- There is also a need for industry role-players to work in collaboration to identify and convince potential sponsors with a marketing budget to invest in brand KZN.
- KZNFC needs to capitalise on the virtual film festivals by demonstrating active participation in as many of the platforms as possible. This may be a way to market KZN as a film-friendly destination.
- Address skills shortages in the industry by strengthening partnerships between the KZNFC (and other role-players) and the MICT SETA to better position skills development programmes to bridge the current gap. This can be achieved by increasing access to and uptake of relevant skills development interventions.
- The government could help address skills shortages by investing in advanced skills development programmes for writers, directors and producers, and financially support talent to attend such programmes elsewhere if they are not available locally (UNESCO, 2021).
- Promote transformation in the local film industry by offering more permit discounts for filmmakers who contribute to the local economy by employing local citizens and spending money in the region.
- There is a need for district and local municipalities in KZN to strengthen their visibility to encourage film producers to follow all filming protocols and procedures as stipulated by the film offices.
- Film animation graduates need to be provided with funds to use their skills to create work for themselves, especially in the absence of opportunities.
- Create a system that allows film animation graduates to sell their ideas (as locally crafted ideas) at various international film festivals.

Threats

- The presence of COVID-19 and the lack of knowledge on how long it will last poses a threat to the film-tourism industry. Lockdown regulations are likely to:
 - keep cinema doors closed;
 - prohibit travel into KZN;
 - cause a strain on filming activity through social distancing measures;



- increase unemployment;
 - cause further reductions in salary cuts, which kills consumer spending on film content.
- Local consumers' preference of international films over local films as well as high volumes of imported products (Hollywood, Bollywood and Nollywood) also threaten the success of the local film industry.

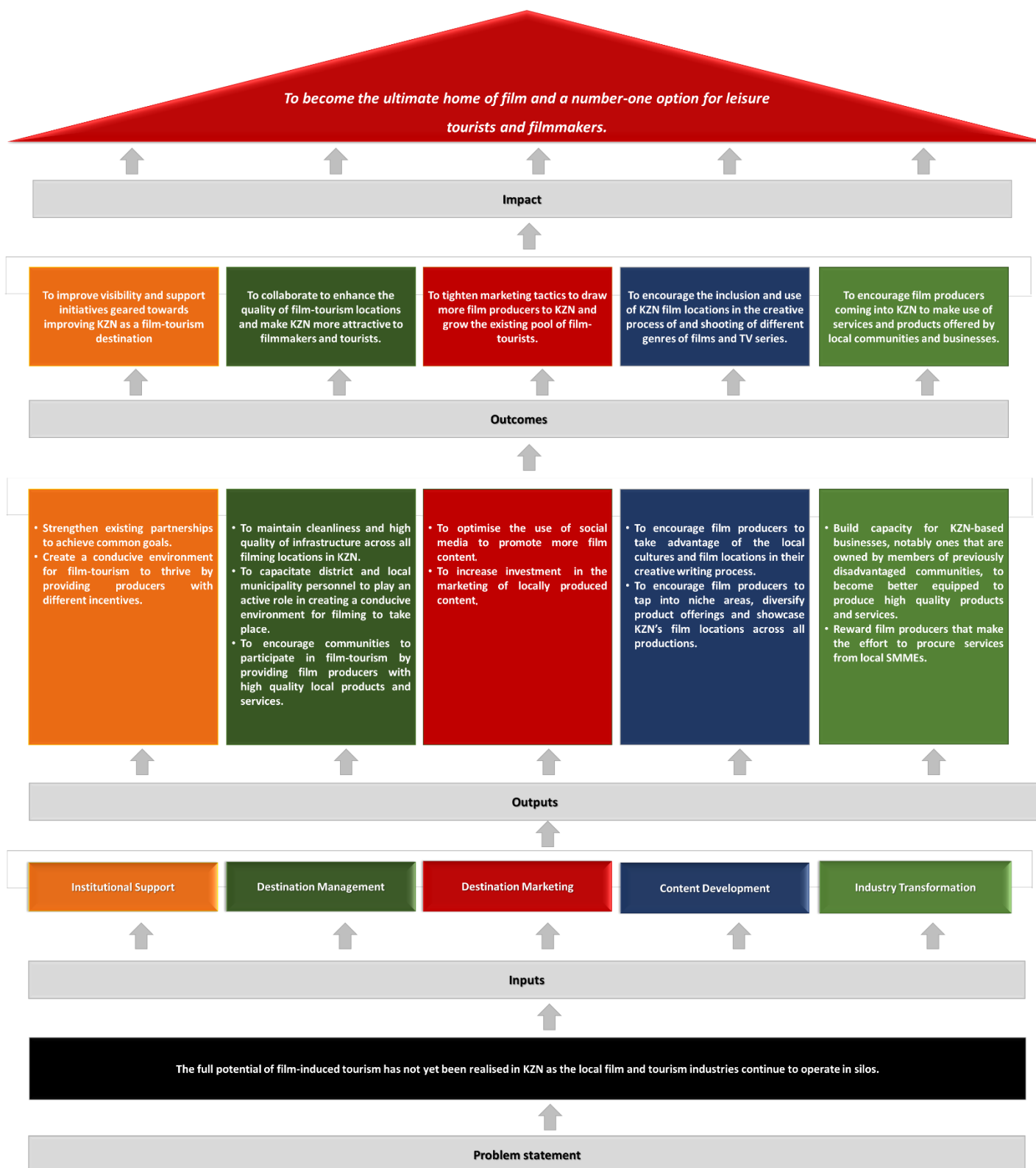
It is evident from the key findings of this report, notably the gaps (i.e. weaknesses in the SWOT analysis) presented above, that the film-tourism landscape in KZN has changed little in the past five years. Almost all the challenges that were identified by the previous Film-Induced Strategy remain pressing issues in the industry. The situation worsened with the rise of COVID-19 in 2020, which brought the industry to a halt. In light of the above, the strategic framework that follows in the next section presents a series of key strategic interventions and also revises the previous strategy's recommendations.



Section 3: Strategic Framework

3.1 Strategic Direction

The diagram below summarises the strategic framework for the Film-Induced Tourism Strategy.





3.1.1 Institutional Support

Efforts to promote film tourism in any destination cannot be fulfilled if the film industry lacks institutional support, particularly from the government. In the case of KZN, various departments and the KZNFC have put some programmes in place to provide support to the industry. However, the industry must travel a long road to reach its full potential. In light of the above, this strategy proposes some key areas of interventions that are geared towards supporting and improving the industry.

Table 8: Institutional support

Focus area	Key consideration	Proposed intervention
Skills development	Address skills shortages in the industry by strengthening partnerships between the KZNFC, TKZN, MICT SETA and other role-players to better position skills development programmes to bridge the current gap. This can be achieved by increasing access to and uptake of relevant skills development interventions.	<ul style="list-style-type: none">• Revisit, increase uptake and intensify existing skills development programmes, including internships.
Hassle-free productions	Government must encourage film-tourism by easing some administrative and other burdens to allow private initiatives to thrive. This includes facilitating equipment purchases and access to filming locations and simplifying the process of obtaining film permits (UNESCO, 2021).	<ul style="list-style-type: none">• Invite local and foreign film producers to a workshop wherein they may raise some of their challenges relating to film productions.• Review and possibly remove all the administrative tax barriers to film production.
Co-productions	Leverage off co-productions (between South African and international countries) to encourage the use of KZN tourism destinations for films, television programmes and documentaries.	<ul style="list-style-type: none">• KZNFC and TKZN to liaise with the NFVF to explore the possibilities of tapping into existing co-production treaties with Canada, Italy, Germany, the UK, France, Australia, New Zealand and Ireland to draw upcoming film, television programmes and documentary productions to KZN.

3.1.2 Destination Marketing

Destination marketing lies central to the KZN film-tourism agenda and must be prioritised by both KZNFC and TKZN as well as other members of the ecosystem. Thus, without excellent marketing tactics, KZN may never climb the ladder and gain recognition as a unique filming destination. The best approach to destination marketing, as will be detailed in the summary of key areas of interventions tabulated below, is optimising the use of technology.



Table 9: Destination marketing

Focus area		Key consideration	Proposed intervention
Marketing approach	Develop and market good film trailers	Encourage film producers to develop good film trailers by embedding the features (culture, landscape, climate, etc.) of KZN in movies and film trailers. Once developed, the film trailers may be promoted on various social media platforms.	<ul style="list-style-type: none"> Set up a marketing incentive for film trailers (and films) that promote KZN as a film-tourism destination.
	Develop destination marketing videos	KZNFC must team up with TKZN to create more destination marketing videos. TKZN has already begun this process, with the latest being one that promotes the TV series <i>The River</i> . This can be done for all existing and upcoming films and TV series that are shot in KZN.	<ul style="list-style-type: none"> Promote destination marketing videos at upcoming film festivals and conferences. Market all the destination marketing videos on social media platforms by utilising hashtags and requesting audiences to reshare the content.
	Improve visibility in film festivals and conferences	The KZNFC, along with TKZN, needs to capitalise on existing and upcoming film festivals by demonstrating active participation in as many of the platforms as possible.	<ul style="list-style-type: none"> KZNFC (and TKZN) to improve visibility in upcoming film festivals and conferences by using the platforms to sell KZN to the world (i.e. talk about the destination and showcase trailers of movies that were shot in the province).
	Increase length of stay	Film-induced tourism should not only be focused on attracting tourists to visit KZN. The focus should also be expanded on how the tourism and film industries' role-players can collaborate to motivate tourists to have longer stays.	<ul style="list-style-type: none"> Tourism product owners and service providers need to develop attractive and affordable product packages that entice people to stay longer and explore more of the region. Develop weekend/mid-week specials to entice visitors to stay longer. Target existing business travellers by packaging pre- and post-meeting/ conference itineraries that focus on film tours.



Focus area		Key consideration	Proposed intervention
			<ul style="list-style-type: none"> Target leisure tourists by developing film tours to locations where filming often takes place.

3.1.3 Destination Management

All members of the ecosystem must play a role in building the local film tourism sector in KZN. Members of this ecosystem include relevant entities across the different spheres of government (including the DTIC, NFVF, KZNFC, TKZN, etc.), business in the film and tourism industries, educational institutions (including UKZN, DUT, AFDA, Creative Arts College, Movietech Film and Television College, the CFAD, etc.), and local communities.

Some key areas of interventions for the next five years are noted below. Note that the process of making a destination ‘film-ready’ is gradual. As such, the suggestions provided below should only be seen as a starting point to fertilise the ground for all other ecosystem members to follow and contribute towards enhancing the destination.

Table 10: Destination management

Focus area		Key consideration	Proposed intervention
Film-readiness initiatives	Host annual film readiness workshops	<p>The workshops are to target district and local municipalities to enable them to report on the following:</p> <ul style="list-style-type: none"> The state of tourism infrastructure The availability and state of film locations Mechanisms used to support and encourage film tourism in their region Challenges faced with regards to promoting film-induced tourism in their area <p>The workshop will also be a platform for local and district municipality personnel to be capacitated on how they can improve their promotion of film tourism in their regions.</p>	<p>The KZNFC and TKZN to organise and facilitate film-readiness workshops with district and local municipalities. The idea is to ensure that the workshop becomes a permanent feature of the annual film industry’s calendar.</p>



3.1.4 Content Development

The development of authentic local films and TV series, as well as developing KZN locations as unique African spaces, is crucial. Thus, by offering producers filming spaces that are unique to KZN, and enabling local and international tourists and other audiences to consume locally crafted movie and TV content, KZN stands a chance to attract more film producers and visitors. It is therefore important to continuously identify niche areas and innovative ways to showcase and sell KZN in upcoming filming initiatives.

Table 11: Content development

Focus area	Key consideration	Proposed intervention
Explore niche areas	Industry role-players need to be encouraged to explore animation as a niche area to showcase KZN as a film-tourism destination.	KZNFC and TKZN to organise niche area identification workshops with film industry role-players to test the possibility of diversifying current product offerings and how film tourism can be optimised through the identified focus areas.

3.1.5 Industry Transformation

The growth of film tourism in the KZN industry should occur at a grassroots level and not exclude poor communities. The best (and only) way to unlock this is by encouraging all members of the ecosystem to work together to promote inclusive growth. Some interventions that may be implemented to transform the film and tourism industries are presented below.

Focus area	Key consideration	Proposed intervention
Community participation	Local communities should be considered and encouraged to participate in film-tourism activities in their regions. This is especially important as community members form part of the ecosystem and therefore have an impact on the development and delivery of film-tourism products. Community-based SMMEs in either tourism or film sectors must thus be encouraged to offer services to film production companies that	<ul style="list-style-type: none">• KZNFC and TKZN to collaborate with the provincial Department of Economic Development, Tourism and Environmental Affairs (EDTEA) and KZN-based business incubators to set up programme(s) or enhance existing ones to capacitate and support SMMEs in the film or tourism sectors to provide support services to film productions.• KZNFC and TKZN to collaborate with EDTEA, and KZN-based business incubators to setup



Focus area	Key consideration	Proposed intervention
	come into their region occasionally.	programme(s), or enhance existing ones, to capacitate and support SMMEs in the film or tourism sectors to become better equipped to provide support services to film productions.
Provision of more permit discounts	Promote transformation in the local film industry by offering more permit discounts for filmmakers who contribute to the local economy by employing local citizens and spending money in the region.	KZNFC to liaise with film offices to reward film producers who demonstrate commitment to procuring supporting services from local SMMEs that are owned by previously disadvantaged community members in terms of the provisions of the Generic or new B-BBEE Score Card for the live events and technical production services sector.

3.2 Key Success Factors for Film-Tourism Development

The following key success factors need to be prioritised to create an enabling environment in which film-tourism can thrive in KZN.

Decentralise filming activities	Filming activities in KZN are mainly concentrated in eThekweni Metropolitan Municipality. This centralisation must be shifted by developing and encouraging film producers to explore other parts of the province. The more films and TV series are shot in different locations across KZN, the better the chances of exposing film-tourists to other parts of the province.
Invest in and promote good film trailers	Embed the unique features (culture, landscape, climate, etc.) of KZN in movies and film trailers. Once developed, the film trailers need to be shared on social media with the use of hashtags to ensure that the content reaches a larger audience.



Provide film producers with marketing incentives	Marketing of KZN as a destination should not be the responsibility of only KZNFC and TKZN, but also of film producers who are enticed by available locations. The producers may be supported through the provision of marketing incentives, which should encourage them to embrace the beauty of KZN in their films and also advertise the final product as far as possible.
Address skills shortages in the film industry	Strengthen partnerships between the KZNFC (and other role-players) and the MICT SETA to better position skills development programmes to bridge the current gap. This can be achieved by increasing access to and uptake of relevant skills development interventions.
Promote transformation and inclusion of marginalised communities in the economy	Promote transformation in the local film industry by offering more permit discounts for filmmakers who contribute to the local economy by employing local citizens and spending money in the region.



Section 4: Institutional Arrangements

4.1 Internal Arrangements

The successful roll-out of this Film-Induced Tourism Strategy relies on the merger of the KZNFC and TKZN. The two entities will be at the forefront of the Strategy's implementation, and once merged, the newly formed entity will need to deliberate on the most feasible implementing structure.

However, considering that the merger is still ongoing, it is recommended that the key areas of interventions be implemented under the relevant programmes of the KZNFC until the merger is finalised. This will ensure that the KZNFC's current internal systems and processes accommodate the proposed interventions without having to deviate from normal routines. Below is a summary of the institutional arrangements to be put in place to ensure that the proposed interventions are implementable.

Category of proposed intervention	Existing programmes	
	Programme One: The Office of the Chief Executive Officer	Programme Three: Marketing and Industry Development
Institutional Support	x	
Destination Marketing		x
Destination Management		x
Content Development		x
Industry Transformation	x	

Programme One: The Office of the Chief Executive Officer

This programme is ideally suited to accommodate all the key areas of interventions that are proposed under *Institutional Support* and *Industry Transformation* as the programme has the following relevant (highlighted) functions.

Development of strategies, policies and standards of performance.	x
Development of statutory and ad hoc reporting on the performance of the organisation.	
Monitoring performance and evaluating the outcomes of the organisation.	x
Driving the programme of Governance, Risk and Compliance through the Organisational Values, Culture and Leadership.	x
Policy and legislation advocacy, drafting and implementing.	x
Stakeholder development, networking and engagement to enhance relationships, encourage local production and ensure a clear understanding of the mandate and services of the KZNFC.	x
Negotiating and entering into partnerships with various stakeholders to enhance the competitiveness of KZN through film-friendly programmes and to secure additional funding to further enhance and increase our outcomes.	x
Overseeing the effectiveness of the functions and operations of the Board and its committees to enhance its governance and oversight.	
Oversee the internal audit function and risk management of the organisation.	
Conducting research designed to inform future programmes of the organisation.	x
Managing the Corporate Social Responsibility programme for the organisation.	



Under this programme, the proposed interventions will be overseen by the team depicted below.

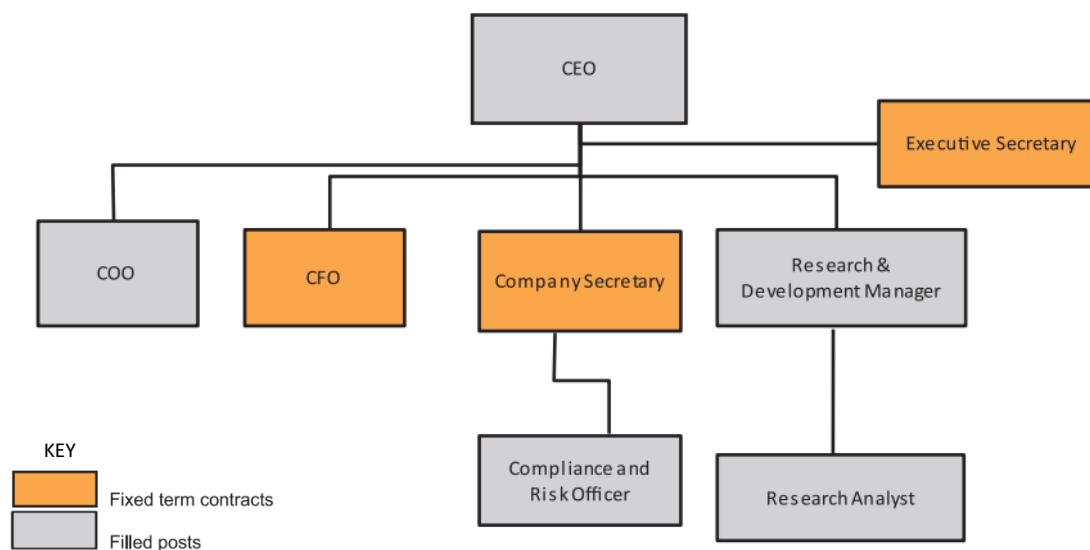


Figure 4: Proposed structure for Programme One *

*This structure, as adapted from Annual Performance Plan 2021-2022, may be subject to changes when the proposed merger of the KZNFC and TKZN comes into effect.

Programme Three: Marketing and Industry Development

Proposed interventions under the categories of *Destination Marketing*, *Destination Management* and *Content Development* are deemed necessary to be implemented with programme three. Such interventions will be supported by the following highlighted functions of the existing programme.

Human Capital Development (HCD): A programme that implements skills development programmes for the film industry across the province.	×
Production and Development: Production and Development provides support to various genres for films and TV programmes developed and produced in the province through the film fund.	×
Marketing and Communications: A function that implements the overall marketing and communications strategy in support of the various programmes and initiatives in the Commission, including community outreach programmes.	×
Locations and Facilities: A one-stop shop facility for all locations and facilities enquiries across the province. A database of locations, crew and providers of film-related services is compiled in partnership with the municipalities across the province.	×



In the diagram below, the human resources structure is suggested as per the recommendations of the recent (2021-2022) Annual Performance Plan:

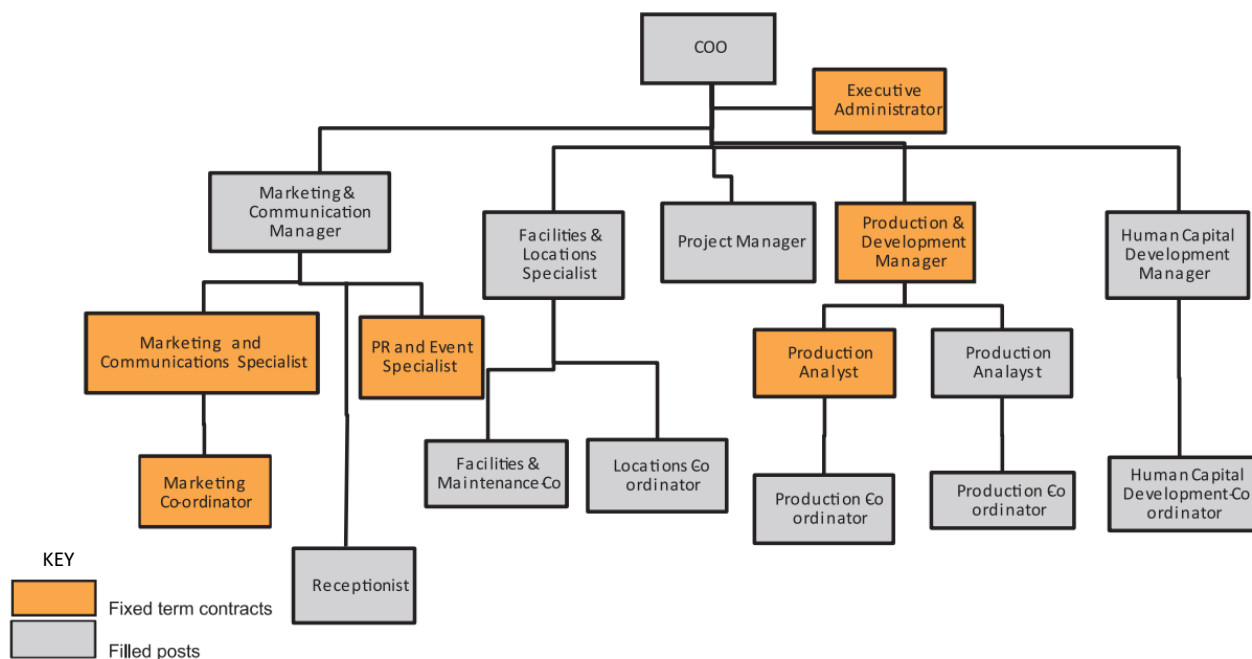


Figure 5: Proposed structure for Programme Two**

**This structure, as adapted from Annual Performance Plan 2021-2022, may also be subject to changes when the proposed merger of the KZNFC and TKZN comes into effect.

Once this merger is completed, KZNFC and TKZN will need to organise a workshop with all industry role players to begin to split roles and responsibilities to ensure successful implementation of the Film-Induced Tourism Strategy.

4.2 External Role Players

The summary below provides key points on what the main roles and responsibilities of industry role players will be:

Table 12: Roles and responsibilities of the different role players

Role in Destination Tourism Development and Management	
National government	<ul style="list-style-type: none">Revise relevant existing policies, where necessary, to accommodate some of the key areas of interventions as presented in this report.Ensure that proposed marketing incentives and budgets are created and made available from national down to local government spheres.Create an enabling environment and provide support for the KZNFC and TKZN, along with other industry role players, to thrive.



Role in Destination Tourism Development and Management	
Provincial government	<ul style="list-style-type: none"> • Play an active leading role in promoting and marketing KZN as a film-tourism destination. • Work closely with the KZNFC and TKZN to ensure that marketing strategies and efforts are tightened going forward and provide support where it is needed. • Play a more prominent role in film content development as well as tourism development activities than the national government. Such a role includes the involvement of local communities, safety and security of visitors, support niche content development, infrastructure provision, etc. Budgets and resources allocated to provinces will need to reflect this reality.
Local government	<ul style="list-style-type: none"> • Ensure that each district has an operational (and effective) film office. • Responsible for land-use planning, urban and rural development with a specific focus on maintaining all film locations. • Provide and maintain tourist services, sites, and attractions, e.g., camping and caravan sites, recreational facilities (parks, historical buildings, sports facilities, theatres, museums, etc.) and public services. • Provide road signs under nationally established guidelines. • Market and promote specific film locations and disseminate information in this regard. • Control public health and safety. • Facilitate the participation of local communities in the tourism industry and film productions that take place in their regions. • Facilitate the establishment of appropriate public transportation services, e.g., taxi services. • Ensure that the film permitting processes are less complicated to benefit film producers.
Private sector	<p>Tourism industry:</p> <ul style="list-style-type: none"> • Invest in the development of tourism products and services. • Provide support services to the local film industry (e.g. accommodation, car rentals, catering services, etc.). • Package tourism products and services in the most attractive manner to encourage visitors coming into KZN to stay longer. • Advertise and promote individual tourism products and services regionally and internationally. • Continuously upgrade the skills of the workforce by continuously providing training and retraining. • Satisfy customer needs by providing quality products and services. • Ensure the safety, security, and health of visitors in collaboration with the government and other private sector members. • Collaborate with the government in planning, promoting, and marketing tourism. • Encourage local communities to participate in the local tourism development efforts. <p>Film industry</p> <ul style="list-style-type: none"> • Produce TV and film content and embed the features of KZN in the creative writing process.



Role in Destination Tourism Development and Management	
	<ul style="list-style-type: none">• Utilise KZN’s film locations in most productions.• Prioritise use of local skills and other resources when filming in KZN.• Make government aware of industry gaps, challenges and needs.• Develop film trailers that promote films as well as KZN.• Attend film festivals with the KZNFC where possible and work together to market and sell KZN to the world in such platforms.• Identify new film locations within KZN, especially ones that have not been used before.• Create working opportunities for KZN graduates in the same industry.• Explore animation as a niche area to be explored.• Invite international film producers to KZN through co-productions.

In the implementation plan below, key role-players are noted with each proposed intervention. In most of these interventions, it is expected that the KZNFC, through the merger, will work with TKZN to roll out the implementation of this strategy.



Section 5: Implementation Plan

The implementation guidelines presented in this section highlight the necessary actions to roll out the implementation of the proposed key areas of intervention. The expected timeframes are indicated for such activities to happen, and if these timeframes are the same for each action, they can be assumed to occur concurrently.

Category	Proposed intervention	Timeframe					Stakeholder(s)	Priority Matrix
		2022	2023	2024	2025	2026		
Institutional support	<ul style="list-style-type: none"> Revisit, increase uptake and intensify existing skills development programmes, including internships. 						<ul style="list-style-type: none"> KZNFC MICT SETA Film schools/ universities 	High
	<ul style="list-style-type: none"> Invite local and foreign film producers to a workshop wherein they may raise their challenges relating to film productions. 						<ul style="list-style-type: none"> KZNFC FILM producers 	High
	<ul style="list-style-type: none"> Undertake awareness campaigns with Tourism Business regarding the film industry and its opportunities in terms of marketing and product development/enhancement. 						<ul style="list-style-type: none"> KZNFC TKZN 	Med
	<ul style="list-style-type: none"> KZNFC and TKZN to liaise with the NFVF to explore the possibilities of tapping into existing co-production treaties with Canada, Italy, Germany, the UK, France, Australia, New Zealand and Ireland to draw upcoming film, television programmes and documentary productions to KZN. 						<ul style="list-style-type: none"> KZNFC TKZN NFVF 	High
Destination marketing	<ul style="list-style-type: none"> Set up a marketing incentive for film trailers (and films) that promote KZN as a film-tourism destination. 						<ul style="list-style-type: none"> KZNFC TKZN DTIC 	High
	<ul style="list-style-type: none"> Promote destination marketing videos at upcoming film festivals and conferences. 						<ul style="list-style-type: none"> KZNFC TKZN 	High



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Category	Proposed intervention	Timeframe					Stakeholder(s)	Priority Matrix
		2022	2023	2024	2025	2026		
	<ul style="list-style-type: none"> Market all the destination marketing videos on social media platforms by utilising hashtags and requesting audiences to reshare the content. 							
	<ul style="list-style-type: none"> KZNFC (and TKZN) to improve visibility in upcoming film festivals and conferences by using the platforms to sell KZN to the world (i.e. talk about the destination and showcase trailers of movies that were shot in the province). 						<ul style="list-style-type: none"> KZNFC TKZN 	Low
	<ul style="list-style-type: none"> Tourism product owners and service providers need to develop attractive and affordable product packages that can entice people to stay longer and explore more of the region. Develop weekend/mid-week specials to entice visitors to stay longer. Target existing business travellers by packaging pre- and post-meeting/conference itineraries that focus on film tours. Target leisure tourists by developing film tours to locations where filming often takes place. 						<ul style="list-style-type: none"> KZNFC TKZN Tourism product owners 	Med
Destination management	<ul style="list-style-type: none"> The KZNFC and TKZN to organise and facilitate film readiness workshops with district and local municipalities. The idea is to ensure that the workshop becomes a permanent feature of the annual film industry's calendar. 						<ul style="list-style-type: none"> KZNFC TKZN District and local municipal personnel 	Med
Content development	<ul style="list-style-type: none"> KZNFC and TKZN to organise niche area identification workshops with the film industry role-players to test the possibility of diversifying current product offerings and how film-tourism can be optimised through the identified focus areas. 						<ul style="list-style-type: none"> KZNFC TKZN Film producers 	High



KZN Film-Induced Tourism Strategy

Category	Proposed intervention	Timeframe					Stakeholder(s)	Priority Matrix
		2022	2023	2024	2025	2026		
							<ul style="list-style-type: none"> Tourism product owners 	
Industry transformation	<ul style="list-style-type: none"> KZNFC and TKZN to collaborate with EDTEA and KZN-based business incubators to set up programme(s), or enhance existing ones, to capacitate and support SMMEs in the film or tourism sectors to provide support services to film productions. 						<ul style="list-style-type: none"> KZNFC TKZN EDTEA Business incubator owners 	Med
	<ul style="list-style-type: none"> KZNFC to liaise with film offices to reward film producers who demonstrate commitment to procuring supporting services from local SMMEs that are owned by previously disadvantaged community members in terms of the provisions of the Generic or new B-BBEE Score Card. 						<ul style="list-style-type: none"> KZNFC Film offices 	Med



Section 6: Recommendations and Conclusion

6.1 Recommendations

This section seeks to reiterate the key recommendations as presented in this report:

- It is important that a destination marketing booklet is developed and published on an annual basis. The booklet will provide film producers with all the information that they need to know about filming in KZN.
- Marketing strategies need to be tailored in such a way that encourages a geographical spread of filming activities in KZN, as opposed to being concentrated on in eThekweni Metropolitan Municipality. The more films and TV series are shot in different locations across KZN, the better the chances of exposing film-tourists to other parts of the province.
- Further to marketing, it is important that:
 - KZN's unique features (culture, landscape, climate, etc.) be embedded in movies and film trailers;
 - Film producers be encouraged to develop very good film trailers;
 - Ensure a wide distribution of film trailers on various social media platforms; and
 - Create a marketing incentive to be reserved for marketing of film content that have been shot in KZN.
- It is also important to develop and market destination marketing videos that showcase and sell KZN to film producers and tourists.
- Provide film animation graduates with funds to use their skills to create work for themselves where possibilities arise.
- Promote transformation in the local film industry by offering more permit discounts for filmmakers who contribute to the local economy by employing local citizens and spending money in the region.
- Address skills shortages in the industry by strengthening partnerships between the KZNFC, TKZN, MICT SETA and other role-players to better position skills development programmes to bridge the current gap. This can be achieved by increasing access to and uptake of relevant skills development interventions.
- Leverage off co-productions (between South African and international countries) to encourage the use of KZN tourism destinations for films, television programmes and documentaries.
- Encourage film-induced tourism by calling for industry role players in tourism and film sectors to collaborate and share ideas on how tourists may be motivated to have longer stays in KZN.
- Improve visibility of film offices in different municipal areas to ensure that film producers coming into KZN know what protocols and procedures to follow. This is also to ensure that the filmmakers' presence in the province is acknowledged and supported, where possible.
- Industry role-players need to be encouraged to explore animation as a niche area to showcase KZN as a film-tourism destination.
- Local communities should be considered and encouraged to participate in film-tourism activities in their regions. This is especially important as community members form part of the ecosystem and Thus, community-based SMMEs in either tourism or film sectors must thus be



encouraged to offer services to film production companies that come into their region occasionally.

- Promote transformation in the local film industry by offering more permit discounts for filmmakers who contribute to the local economy by employing local citizens and spending money in the region.

6.2 Conclusion

In conclusion, this report has demonstrated that KZN is home to one of the fastest growing film industries in South Africa. The province has a diverse range of film locations that favour different movies and TV productions. Despite the existing skills shortages and infrastructure challenges, KZN stands a chance to attract more future productions. Such possibilities may be brought to life if marketing strategies in the province are improved significantly.

The proposed merger between the KZNFC and TKZN is also expected to help boost film-induced tourism in the province. This is mainly because the merger will result in the creation of synergies among the professionals and experts who currently work for the two entities. It is hoped that through the creation of such synergies, both the tourism and film industries will gain better support from government, and that in the end, KZN will become better positioned to grow film-tourism.

The critical success factors noted in section 4.2 will come in handy as a guide to help key role players in film and tourism in KZN to better manage and expand the industries. This *KZN Film-Induced Tourism Strategy* is also expected to make a significant impact in the province if it is well implemented.

Ultimately, the goal is to transform KZN into one of the best and leading film-tourism destination that competes locally and globally with some of the best in the world. Its marketing strategies should aim to entice regional and international film producers and leisure tourists to want to make their next stop in KZN, and while at that aim to stay longer. In essence, efforts to implement this Strategy should be targeted towards making KZN the ultimate home away from home.



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Section 8: Annexures

Annexure 1: Policy Review

This provincial Film-Induced Strategy is aligned with broader national and provincial level legislative frameworks, which include the National Development Plan (NDP), the Medium-Term Strategic Framework (MTSF), local spatial development plans and the provincial priorities (KZNFC, 2021). Summarised below are some of the relevant legislative frameworks that have been taken into account to further ensure alignment.

Table 13: Legislative framework

Legislative framework	National	National Tourism Sector Strategy, 2010
		The Films and Publications Act, 1996
		National Industrial Policy Action Plan – 2010
		The National Film and Video Foundation Act (Act No. 73 of 1997)
		Promotion of Access to Information Act (Act No. 2 of 2000)
		Intergovernmental Relations Framework Act (Act No. 13 of 2005)
		White Paper on Arts, Culture and Heritage
	Provincial	KwaZulu-Natal Film Commission Act No. 3 of 2010
		KwaZulu-Natal Tourism Act, 1996
		Tourism KwaZulu-Natal 2013-2018 Strategic Plan
		Provincial Growth and Development Strategy - 2021
	Local	Local Spatial Development Frameworks
		Local Integrated Development Frameworks

This Film-Induced Strategy aims to ensure alignment with all the key policies and other important legislative frameworks as tabulated above. This alignment will be part of an effort to keep the strategy relevant to the local and broader film-tourism industry (and its role-players) at the national, provincial and local levels as the KZN film-tourism industry is not necessarily disjointed from similar industries in different contexts.



Annexure 2: Appraisal of the Previous Strategy

Introduction

KZNFC launched its first Film-Induced Tourism Strategy in 2016 to capitalise on the synergies that can potentially be created by the film and tourism industries. The development process of this previous strategy included lengthy primary and secondary research to identify the major challenges that hinder the growth of film-induced tourism in KZN. A summary of these gaps is provided in the Table below.

Table 14: Gaps identified by the previous strategy

Gap		Description
Gap 1: Information / communication	Unclear port of call	KZNFC is a relatively new institution, and while they have made extensive effort to establish and communicate themselves as the first port of call for all film-related queries, these efforts have not necessarily reached all industry stakeholders. As a default, tourism offices become the next point to query, failing which film productions opt for other, more easily accessible locations such as Cape Town or Johannesburg (which have easier access through film-service companies and more established film industries).
	Locations database/ information is not easily accessible	In other film-dominant locations such as Cape Town and Johannesburg, information regarding locations (private and public) is accessible via local commission websites (public), service companies and agencies (public and private), and websites of other complementary tourism and investment promotion agencies. In the case of KZN, locations available for filming are only advertised on the KZNFC and DFO websites, and these are limited to public locations.
Gap 2: Institutional support and facilitation gap	Insufficient production support	It emerged from the stakeholder consultation that there is insufficient production support for production companies interested in filming in the province, particularly at a local municipal level. Ideally, local municipal tourism officers/film officers should support and facilitate the production preparation process in collaboration with film service companies—in the case of KZN, there are no film service companies (only a few independent scouts), and local municipalities do not have specific offices set up to facilitate and support the production process.
	Professionalism	A destination's attractiveness and profile can be enhanced by the local service providers' role-players' adherence to international standards for customer service and excellence; this is achievable by ensuring that service providers/operators are registered with relevant grading councils and other international organisations. It is important that local municipalities, communities and traditional authorities understand the economic and tourism impact of film on the local economy, and therefore provide quality service at every turn. In the case of KZN, the quality of service at a local level can be improved to support tourism, film and film-tourism.
	Institutional collaborations and support	Collaborations have a massive potential to serve as a launch pad into otherwise uncharted territory. In this case, domestic and international collaboration on events with, for example, other sectors/ institutions, including higher education institutions and other countries which have



Gap		Description
		been successful in film and film-tourism, have the potential to communicate KZN's commitment to growing the film-tourism market and the film industry. To date, other than the annual Durban International Film Festival and Durban Film Mart, there have been no programmes leveraging the province's potential for film-tourism. This is a gap that would be particularly easy to close as key relationships are already in place. KZNFC and TKZN have established relations with the film and tourism sector in partner countries.
Gap 3: Targeted Marketing of Film-Tourism	Underutilisation of film-tourism potential and target market	There have been over 183 film productions in KZN, some of which are still relevant and have been aired internationally and locally. For example, the 1985 movie series <i>Shaka Zulu</i> , which is set in the site of what is now Shakaland, was recently re-aired on SABC 3. More recent examples include the internationally acclaimed <i>Mandela: Long Walk to Freedom</i> . On the local front, quality local films like <i>Spud</i> and <i>Between Friends</i> , as well as television dramas such as SABC's <i>uZalo</i> and Mzansi Magic's <i>Sibaya</i> , have been filmed in KZN. The province has not yet maximised the potential of its existing film locations for film-tourism or as tourists' destinations (the above-cited films included), and in a similar respect, there is currently no marketing activity around film-tourism.
Gap 4: Promotion of Destinations for Film-Tourism	Limited information on KZN Film-Tourism	At present, the KZNFC has been the only institution responsible for promoting KZN film locations; however, most of the efforts have been directed to film producers. Overall, there is currently limited tourism information highlighting/promoting KZN's film-tourism potential as well as tourist destinations, including heritage sites for film productions.
	Limited to post-service client aftercare for film business clientele (business tourists)	Like any other investment promotion, it is important to continuously nurture relationships with investors in order to encourage re-investment. This is achievable through continuous, quality post-investment client care which includes (but is not limited to) keeping clients informed about investment opportunities and other soft incentives like travel vouchers to key locations with film potential. In KZN, there are minimal soft incentives targeting the creative sector even though the promotion of the creative sector is a key mandate of investment promotion institutions such as TIKZN. Beyond that, there are no existing programmes or travel packages aimed at encouraging film producers and crews (business tourists) to return to KZN after filming.
Gap 5: Product Development	Product development	Provincial-level efforts with regard to film-tourism have so far been limited to research. Findings from TKZN research and the status quo research carried out by Urban-Econ both indicate a lack of products encouraging film-tourism. Countries with flourishing film-tourism have—over and above their marketing efforts—developed specific film-tourism products to stimulate tourists' interest in visiting the destination. Film maps, film-related specials at hotels and memorabilia are examples of products that could be developed.

Based on previous research and the gaps noted above, the strategy sought to achieve the following strategic goals and objectives.



Table 15: Strategic direction of the previous strategy

Strategic goals	Strategic objectives	
Goal 1: To develop an integrated and collaborative institutional approach towards supporting, facilitating and promoting film production and tourism to stimulate and encourage film-induced tourism within the province.	Establishment of a clear port of call	Establish a clear port of call in the Province that will be the first point of contact for any parties interested in filming in the province, to stimulate film-tourism promotion and attraction.
	Co-ordinated film – tourism destination support	Provide tourism-related film destination support services that will promote tourism destinations and facilities as assets in the production value-chain.
	Production support	Provide extensive production support that will attract prospective filmmakers to the province, particularly to KZN’s key tourism destinations.
	Professionalism	Ensure international standards of professionalism are adhered to by film and tourism role-players, and enhance local customer service training, tour guiding and storytelling capacity to increase the attractiveness of KZN as a film-tourism destination.
	Institutional collaboration and support	Partner with relevant organisations and producers to encourage the promotion of KZN as a film and tourism location.
Goal 2: To develop and market film-tourism products, tourism destinations and film locations to attract both film producers and film-tourists (both business and leisure tourism markets) to the province.	Targeted marketing	Identify appropriate target markets that would find film-tourism appealing, and use appropriate marketing channels to promote KZN’s destinations, particularly film destinations.
	Business tourism promotion	Develop conferences, promotion packages and campaigns designed to boost film ‘business’ tourism.
	Product development	Develop film-tourism and ancillary products for leisure tourists.

Once the foundation had been laid in the previous strategy, the strategic goals were revisited to define strategic objectives targeted towards addressing the identified gaps. The purpose of the next section is to determine what has been achieved in the last five years (i.e. between 2016 and 2021).



Successes and Failures of the Previous Strategy

Tabulated below is an assessment of the strategic objectives set under Strategic Goal 1.

Table 16: Intervention assessment for Goal 1

Area of intervention	Required intervention	Achieved	In progress	Still outstanding
<i>Film Service Companies</i>	Promote and encourage the establishment of KZN-based (and owned) film service companies (linked to KZNFC's current incubation programme) to promote KZN and provide tourism destination information and support to encourage film-tourism on the back of film production.		X	
<i>Film Protocol and Procedures</i>	Clearly define the roles and responsibilities of all stakeholders, and the procedures required for regulatory activities, such as film permits, through the development of a Provincial Guideline for Film Offices and Provincial Film Protocol.	X		
<i>Online Presence</i>	Increase the online presence of both KZNFC and TKZN as promoters of tourism destinations for film production. Both institutions should also establish web links to TIKZN, municipal websites, development agency websites and other destination promotion agencies (travel agencies/tour companies) to promote film-tourism in the province.	X		
<i>Print and Digital Media</i>	Develop a Media Plan that identifies the specific digital (social media, web-based media platforms, etc.) and print media (brochures, newspaper and relevant magazine articles/features) interventions, the content for each based on end-user preferences and potential partners, to promote KZN as a film-tourism destination.	X		
<i>Film-Tourism Destination Database and Map</i>	Create a database of tourism destinations throughout the province and develop a map of film-tourism destinations (i.e. suit of tourism locations suitable for films, such as mountains, sea, hills, country-side, savannah, wildlife, city/downtown, warehouses and vacant buildings) and promote these on key stakeholder websites.	X		
<i>Local Film Office Capacity</i>	Develop local municipal film scouting and facilitation capacity within local tourism offices to support both film production in local areas and coordinate and promote film-tourism activities.			
<i>Traditional Leadership</i>	Undertake training and information sessions with traditional leadership to strengthen the understanding of the benefits of film-tourism and film production on the local community, and community involvement in destination and location support and film production (extras, service providers, etc.).			X



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Area of intervention	Required intervention	Achieved	In progress	Still outstanding
<i>Financing and Incentives</i>	Provide a package of financial and non-financial incentives and financing options aimed at 'sweetening the deal' for productions that promote KZN tourism destinations, including a tailor-made combination of incentives from the DTI and IDC, rebates from municipalities (permits, rates rebates, etc.), co-funding from NFVF, and other sources of funding in line with film production and tourism (such as rebates on the use of hotels for the film).	x		
<i>Hospitality</i>	In partnership with the hospitality industry, develop tailored discount packages for production teams/companies to encourage them to choose KZN as their preferred film location, and promote film-tourism routes through their marketing platforms. TKZN must also encourage smaller tourism establishments (B&Bs, etc.) to form part of these packages.	x		
<i>Market Intelligence</i>	Undertake market intelligence activities, gathering feedback on services provided and experience from both producers and hospitality industry service providers. Information gathered must be used to improve and modify financial and hospitality packages to improve service and the 'film friendliness' of the province.			x
<i>Accreditations and Grading</i>	Support tourism and film-tourism facilities and destinations in obtaining international tourism grading and accreditation to support the promotion of these locations as film-tourism destinations (e.g. plaques at various tourism facilities and destinations to promote the 'quality' of the facility, etc.).			x
<i>Industry Standards</i>	Assist tourism service providers with the implementation of industry standards (relating to rates, standards, professionalism, etc.) to avoid exploitation and to enhance confidence in the service intermediaries and the province as a film-tourism destination.			
<i>Customer Service Training</i>	Provide information and training to local municipalities, communities and traditional authorities on how to provide quality customer service to film production teams and tourists to enhance the benefits of both film and tourism on the local economy. It is critical that expectations are managed.		x	
<i>Tour Guide and Storytelling Capacity</i>	Provide training to local communities and traditional authorities and assist in registration of tour guides and storytellers relating to film-tourism destinations, tours and stories (linked to battlefields, etc.).			x



KZN Film-Induced Tourism Strategy

Area of intervention	Required intervention	Achieved	In progress	Still outstanding
<i>Institutional Collaborations</i>	Partner with organisations that have a foothold in the film and tourism industries, as well as tertiary institutions, to further promote KZN as a film and tourism destination.		X	
<i>International Collaborations</i>	Leverage off co-productions (between South African and other African film producers from Nigeria, Ghana, Kenya, etc.) and other relationships (music video and television producers) to encourage the use of KZN tourism destinations for African films, music videos, television programmes and documentaries.		X	

Tabulated below is an assessment of the strategic objectives set under Strategic Goal 2.

Table 17: Intervention assessment for Goal 2

Area of intervention	Required intervention	Achieved	In progress	Still outstanding
<i>Targeted Marketing</i>	Develop appropriate marketing communication mechanisms (internet, word of mouth, brochures, television, social media, radio, events and programming) aimed at specific market segments (particular countries, tourist markets, etc.) to promote KZN as a film-tourism destination (and film location).		X	
<i>Capturing Valuable Public Relations and Information</i>	Capture any positive PR information and interviews through TV, radio and positive comments with key cast members, crews and directors to promote KZN as a film location and film-tourism destination.		X	
<i>Product and Destination Promotion</i>	Develop aggressive promotional material such as travel competitions; film reviews and release specials; and discounted rates at film-related hotels/tourist attractions in order to market tourism destinations linked to the film.		X	
<i>Road Shows</i>	Undertake road shows in TIKZN, TKZN and KZNFC priority countries (and countries with current co-production agreements with SA) to promote the province's film-tourism destinations to tourists, as well as producers and directors (e.g. Bollywood directors).			



KZN Film-Induced Tourism Strategy

Area of intervention	Required intervention	Achieved	In progress	Still outstanding
<i>Internal Marketing</i>	Engage with the film and tourism associations, educational institutions and other forums/platforms (such as radios and TV shows) to promote the province's film-tourism products and destinations.			X
<i>Existing Platforms</i>	Leverage off existing conferences and platforms such as DIFF, Durban Film Mart, Tourism Indaba, DISCOP, as well as 'pre' and 'post' tours linked to events such as Tourism Indaba, in order to attract film business to KZN.			
<i>Conferencing</i>	Develop a conference or symposium for film-tourism in KZN to promote and position the province as a film-tourism location.			X
<i>Recreational Incentives</i>	Offer film producers occasional complementary holiday packages for their return visit to KZN in order to promote tourism destinations as future film locations.		X	
<i>Products</i>	Product development for leisure tourists, such as tours, re-enactments (e.g. Zulu and Zulu Dawn) and physical props from film sets, which can be strategically placed at key locations for tourists to visit in line with the various tourism segments. Signage is crucial.			X
<i>Film-Tourism Tour</i>	Develop a film-tourism tour to promote and showcase KZN locations that have been used for film, TV, etc. Wildlife tours are linked to documentaries, maritime tours and cultural tours.			X
<i>Souvenirs and Accessories</i>	Assist with the establishment of crafters and small enterprises to develop souvenirs and accessories tied to films produced at tourism destinations. Link to museums where movies can be showcased.			X
<i>Film Studio Development</i>	Facilitate the development of a film studio in KZN in order to boost and promote film-tourism in the province (including tours, live audiences, movie props, etc.).			X



Annexure 3: Availability of supporting infrastructure

KZN offers a wide range of facilitation and support services to its local film industry. These services are readily accessible to filmmakers to promote the use of local services to ensure that they receive the best value for each production spend (DFO website, n.d.).

Table 18: Supporting services

		Some existing major local suppliers																
		Guartec Services (Pty) Ltd	Go Big Productions	Starlight Casting Agency & Productions	Falconscope	Casino Vegas Events	Purenblack	Sunshine Co.	Lashei Productions	Avis	Castme Talent Agency	Open Plan Studio	Mobile Model Management	Trevelation Media	Mashu'Weto Films	A.S.K Decor & Caterers	Visual Eminence	Mangamanga Business Production
Supporting services	Accommodation		x			x												
	Action/Props Vehicles			x	x													
	Adventure/Sport/Tourism				x	x												
	Aerial Filming Services						x											
	Animation						x											
	Audio Visual Equipment							x	x									
	Boat/Yacht Charters			x		x		x	x									
	Camera Equipment			x				x										
	Car/Truck Hire			x		x		x		x								
	Casting Agents		x	x		x			x		x	x	x	x	x			
	Catering Equipment		x	x		x										x	x	
	Cinematographers			x	x				x						x			x
	Conference Centres					x						x				x		
	Consulates					x	x											
	Courier/Freight																	
	Crew Agents		x	x		x												
	Drones			x		x												x
Extras		x	x											x	x			



KZN Film-Induced Tourism Strategy

		Some existing major local suppliers																
		Guartec Services (Pty) Ltd	Go Big Productions	Starlight Casting Agency & Productions	Falconscope	Casino Vegas Events	Purenblack	Sunshine Co.	Lashei Productions	Avis	Castme Talent Agency	Open Plan Studio	Mobile Model Management	Trevelation Media	Mashu'Weto Films	A.S.K Decor & Caterers	Visual Eminence	Mangamanga Business Production
	Festivals				x	x			x						x			
	Golf Cart Hire					x												
	Grips/Equipment/Rigging				x	x												
	Health and Safety Services			x														
	Insurance Brokers					x												
	Lighting Equipment			x		x		x								x		
	Location Managers	x		x		x									x			x
	Location Scout	x	x	x	x	x			x			x						x
	Makeup Artist Suppliers		x	x				x										x
	Model Agents		x	x		x							x					
	Photographers	x		x		x		x	x			x	x	x	x		x	
	Post Production		x			x	x		x						x			
	Producers		x	x	x	x	x		x					x			x	x
	Production Company		x	x	x		x		x			x		x	x			
	Pyrotechnics					x												
	Scriptwriters			x	x				x					x	x			
	Security	x		x		x											x	
	Set Building/Construction					x										x		
	Sound Recording Studio						x								x			
	Studios		x				x	x				x						
	Training		x	x	x													x



Annexure 4: List of stakeholders

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