



The Garden Route & Klein Karoo (GR&KK)

Creative Industries Strategy

(An excerpt from the comprehensive strategy document available on request)

As supported by

Eden District Municipality and the municipalities of George, Knysna,
Bitou, Mossel Bay, Hessequa, Oudtshoorn & Kannaland

Facilitated by the South Cape Economic Development Partnership
(SCEP)



EXECUTIVE SUMMARY

The Garden Route and Klein Karoo has the ability to sell locations (TV, Film, Commercials) competitively to the industry, and together with the growing “over-exposure” Cape Town is currently experiencing, the region is ideally placed to not only manage any overflows, but to become a major player in its own right in the industry. It is anticipated that as soon as money flows to the area for on-location shoots this will stimulate the industry and the focus could then move to spin-off and supporting actions (e.g. skills development, studios, post-production, etc.). The South African Film Industry has seen 450 films shot since 2008, generating R2.2bn since 2003.

The GR&KK has a competitive advantage with its multiple localities it is able to package and can offer a wide range of locations (forests, vineyards, farms, tree houses, tented camps, dams, rivers, beaches, airport, railway, game lodges, caves, heritage sites & buildings, industrial areas (i.e. broader than natural advantages).

The vision is to make the GR&KK a film industry destination of choice and be the hub for the film and television industry in the region with the corresponding mission to facilitate and enhance an enabling environment that allows the film and television industry to play a meaningful role in the socio-economic development of the region. Partners and key role players have been identified to assist in taking this vision forward in a self-sustainable way, and eight specific strategic interventions had been identified to guide the implementation and establishment of **the GR&KK Film Office as a one-stop service entry point for the local and international industry members.**

The roles of a film office has been identified and should be centrally located as an independent Non for Profit Company, consisting in the first year of a manager and administration person, and overseen by an advisory board equally represented by industry and governmental members as support to the office. The office will in the beginning be subsidised by the local municipalities and industry, and over time create opportunities to access other sources of income to be less “grant/subsidy” dependant and more self-sustainable. A total of R80 000 is budgeted as pre-start-up funding with an annual operational budget conservatively estimated at around R 720 000.

THE GARDEN ROUTE & KLEIN KAROO IS FILM FRIENDLY!!





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1. INTRODUCTION

This document was not crafted from a comprehensive industry study in the Eden District. It is rather based on lessons learnt by Local Economic Development practitioners from the various municipalities in their active engagement with the film industry over the preceding 18 months. The strategy was crafted with the explicit purpose of finding a position that will satisfy both industry demands for support and Local Economic Development goals of the various local authorities. Although such a consensus position is not a simple point to arrive at, the author believes that this strategy will serve the needs of both industry and government, to the ultimate benefit of local residents in terms of job creation and economic growth.

2. A VISION FOR THE GR&KK AUDIO-VISUAL INDUSTRY

The GR&KK film industry can grow by leveraging its unique and diverse combination of locations, ease of access and “Film Friendly” attitude. The challenge for the industry is how to effectively address the constraints it faces, so it can unlock the region’s growth potential. As the Western Cape’s next key economic hub, the region has a fast growing population, ready for both local and international productions. The region is becoming a popular filming destination, but at the same time is still naïve with no specific strategy to drive the industry requirements and need to become more pro-active.

The vision will be achieved through the implementation of a development framework based on creating clear and practical interventions that will:

- Co-ordinate the efforts of Provincial Government (through Wesgro), District and local B Municipalities to ensure all efforts and initiatives are centralised
- Maximise the resources and infrastructure currently in the region and build on the ones lacking
- Invest in the development of the local film workforce and the production companies that constitute them
- Develop and promote the products and services of local production companies



- Invest in the support and development of creative communities through programming, infrastructure development and maintenance and create opportunities and access to the sector
- Create a range of sector specific initiatives in identified growth areas.

Vision: Making GR&KK a film industry destination of choice and be the hub for the film and television industry in the region.

Mission: To facilitate and enhance an enabling environment that allows the film and television industry to play a meaningful role in the socio-economic development of the region

Strategic Objectives:

- To increase the number of local and international film productions using the regionally based GR&KK Services, i.e. permits facilitation, locations promotion and logistical support.
- To increase access to locally produced films, especially to under resourced area communities through screenings, workshops, cinema exhibitions and broadcast partnerships. Local to include cross-boundary, provincial-wide access
- To increase number of jobs created in the film industry, through GR&KK support and facilitation.
- To transform the film industry by increasing enterprise ownership and participation by previously disadvantaged groups, i.e. Blacks, Women and people with Disabilities.
- To contribute to an increased number of locally filmed productions being showcased, exhibited and bought locally through affordable sets and locations.

Core Function: The GR&KK aims to become a serious player in the film and television industry through harnessing the region's creative expertise and unique and wide-ranging locations, by:

- Marketing the Garden Route and Klein Karoo as a film location of choice
- Acting as a centralised industry intelligence hub and resource



- Working with, and providing advice to industry, government agencies and other key stakeholders about the support, development and growth of a sustainable creative industry
- Promoting and celebrating an active screen culture across the province, and
- Supporting the transformation of the sector into a world-class industry reflective of South Africa in its entirety.

Brand: The GR&KK has been mandated to build a strong destination brand for the Garden Route & Klein Karoo film industry and has committed itself to marketing the Garden Route as an internationally celebrated region through film. Representing the unique and diverse newcomer hub of the South African film industry, the GR&KK brand will seek to reflect the diversity and richness of the greater region.

In support of the brand the GR&KK will have to develop a new slogan to market the wide-ranging production services and locations on offer in the region.

Industry engagement: The GR&KK has created a platform for engaging the industry in a coordinated manner through an advisory industry forum that meets regularly and is chaired by SCEP.

There are four potential alternative growth paths that GR&KK Film can follow, namely:

- Business as usual
- A good value film friendly location
- Development of local content industry
- Integrated growth



Table 1 – Alternative growth paths

'Business as usual'	'A good value location'	'Development of local content industry'	'Integrated growth'
<ul style="list-style-type: none"> Some newly formed businesses may struggle to succeed due to competitive pressures Continued fragmentation of industry and under-resourced local government support Local content development is likely to be limited Dissatisfaction and migration of young and established local filmmakers to areas with more dynamic film sectors Threat of industry decline 	<ul style="list-style-type: none"> Film friendly location management, permitting and community views Competitive pricing and service levels from the facilitation industries / municipalities Growth in service, but limited growth in local content Extension of services to post-production Continued vulnerability to external shifts e.g. development of new location 'hot spots', currency fluctuations etc. 	<ul style="list-style-type: none"> Strong local filmmaking emerges Successful support efforts, potentially including local script and creative projects, production, audience development and distribution Increased number of co-productions supported by a wide range of co-production agreements Broadcasting, potentially with higher new local content, creates a stronger local market Locations permitting and pricing are not resolved, 'Made in GR&KK' films successfully enter niche markets, 	<ul style="list-style-type: none"> Industry becomes more responsive to competitive pressures in terms of price, quality standards, and skills Greater responsiveness to new technologies and linkages with related industries opening up new opportunities (creative industries, IT, new media, etc.) Increased cooperation and supportive relationships between facilitation and local content create more positive career paths and sense of belonging, resulting in greater retention of skills and talent in the region Strong, sustained and coordinated local government support Higher growth rates, greater sustainability of businesses and a greater contribution to the regional economy



3. CURRENT STATE OF THE INDUSTRY

According to Wesgro, the film sector can be defined as film production, documentary production, TV, commercials, stills photography, as well as contemporary new media platforms, such as animation and gaming. South Africa in general and the Western Cape in particular are well-known as desirable film and production locations. South Africa has a vibrant, growing film industry that is increasingly competitive internationally. The industry is also growing in the Western Cape, reinforcing the region's status as a desirable production location.

- In the first half of 2015, 121 feature films were released at South Africa's box office, valued at over R548 million.
- The country's revenue from motion picture, video and TV production is expected to grow by 3.3% from USD977m in 2012 to USD1.2bn in 2018.
- In 2014, theatrical revenues for all films released in South Africa totalled R 880.3m, an increase of 0.13%. Foreign films grew by 6%, while South African films dropped by 44% in 2014.
- 228 films were released at South Africa's box office in 2014. Of those, 23 were South African films. In the same year, 56 film productions were shot in the country. Afrikaans language claimed 48% of the release on local productions, and 66% of local box office revenues.
- Animation studios in the Western Cape are the largest animation producers on the African continent.
- Over 20% of all film projects in South Africa in 2012 were filmed in the Western Cape with The Cape Town Film Studio rated as one of the top 10 studios globally.
- According to the Commercial Producers Association Industry Survey 2013, the average total turnover generated for all types of commercials in South Africa per company in 2012/2013 was R24m.
- The total turnover generated for all commercial productions for the same period was R1089.4m.
- Cape Town-based production companies generated R731m turnover, while Johannesburg-based companies generated R351m in turnover in 2012/2013.
- The global video game market generated revenues of R2.2bn in 2012.



There are many reasons why the Western Cape is a preferred destination for local and international production teams. Local and foreign filmmakers are taking advantage of the country's diverse and unique locations – as well as its low production costs. Among other attractive benefits, low production costs and favourable exchange rates present considerable savings for film-makers: it is up to 40% cheaper to make films here than it is in Europe and the USA, and up to 20% cheaper than in Australia.

The 2016 Film Industry Forecast, as seen by CallSheet was as follows.

4 015
INTERNATIONAL CLIENTS

The stills industry hosted 4 015 international clients for a total of 36 135 accumulative days. (SAASP, 2013/14)


PRODUCTION GROWTH

South Africa's revenue from motion picture, film, video and TV production is expected to grow by 3.3% from US\$977 million to US\$1.2 billion in 2018. (NFVF, 2015)

R306M
CUSTOM-BUILT STUDIO

Cape Town Film Studios is the first custom-built Hollywood-style studio of its kind in Africa, built at a cost of R306 million. (Wesgro, EPIC Q1 2015 Report)


GLOBAL CITIES

Cape Town ranks fourth out of 16 global cities for both quality and cost. It is the single cheapest destination in terms of production, set, site, utilities and labour costs. (FDI Intelligence, 2015)


JOBS CREATED

The dti's film incentives resulted in R1.952 billion in qualifying expenditure, which the NFVF estimates created 35 786 jobs during 2013/14 alone. (Wesgro, EPIC Q1 2015 Report)

R30M
EXPANSION PROJECT

In the 1st quarter of 2015, Wesgro facilitated a R30 million expansion project in the film industry, creating 30 jobs. (Wesgro, EPIC Q1 2015 Report)


NATIONAL GDP

The NFVF estimates that the film industry contributed R3.5 billion to national GDP in 2012, and is growing at an annual average rate of 14%. (Wesgro, EPIC Q1 2015 Report)

7
CO-PRODUCTIONS

Three of SA's eight co-production treaties were active in 2014. SA-Germany completed four projects; SA-Canada completed two; SA-UK one. (NFVF, Co-Production Report 2014)



4. STRENGTHS, WEAKNESSES, OPPORTUNITIES AND THREATS

Internal environment	
Strengths	Weaknesses
<ul style="list-style-type: none"> Seasonality affecting commercial sustainability of enterprises in other regions Strong business environment with good support infrastructure (hospitality, tourism) Strong provincial economy with strong and growing domestic demand for entertainment Recent successful productions Diverse locations, accessible within short driving distance Proximity to a well-established international facilitation industry in the Western Cape Wealth of local stories Increased political support from the Western Cape Provincial Government 	<ul style="list-style-type: none"> Persistent negative perceptions internationally regarding safety and security No real existing local film industry An absence of coordinated industry programmes to retain and develop scarce skills Unsustainable production volumes particularly in the local feature film industry Lack of transformation All other brands are perceived as a weaker brand than 'Cape Town' which is widely known internationally, particularly from a locations perspective Lack of co-ordination between national, provincial and local agencies Distance from major international markets Limited Skills exist



- Financially unsustainable film festivals
- Location constraints: poor responsiveness from some public bodies, excessive film permit fees, speed and transparency of permitting processes and decisions, constrained access to some locations, poor support from local authorities
- Declining cost-competitiveness and erratic Rand exchange rate
- Access to seed funding
- Lack of local financing means international partners are left with greater level of control
e.g. intellectual property
- Scarce skills and general business acumen
- In some areas industry standards and professionalism still lacking/
undeveloped
- Limited market intelligence
- Poor broadband capacity

External environment

Opportunities

Threats

- Service hub for productions shooting in remote and exotic locations
- Cost advantage relative to Europe and the United States of America
- Development of technological expertise and infrastructure
- Development of training and skills development programmes
- Development of the distribution sector
- Use of new business and financing models
- Cape Town Film Studios will bring more

- Uncertain long-term sustainability of industry due to volatile market and protracted industry crises
- Low-cost destinations in South America, Eastern Europe and Africa
- Piracy and illegal downloading
- Increased film activity in other provinces
- Increasing Rand volatility
- Competition with foreign content
- Overexposure of locations
- Lack of re-investment in studios and other



<p>international productions to SA, and GR&KK can benefit from providing services</p> <ul style="list-style-type: none"> • Opportunity to link with ICT sector • Using film to address pressing social needs • Link with provincial and municipal efforts to promote GR&KK and support growth of sectors, clusters and precincts • Align with other sectors i.e. tourism, music, visual arts etc. • Leverage co-production and international cultural treaties • Expand on the 'Film Friendly' campaign to build pride and local involvement • Develop soft incentives i.e. hospitality and travel discounts • Improve skills and industry standards • Working with WESGRO, the National Film and Video Foundation (NFVF), other provincial film commissions and film bodies in neighbouring and regional countries to create a stronger regional network of film commissions in order to improve the visibility of the sub-continent and region in general 	<p>infrastructure leaving the province uncompetitive when the next economic upturn comes</p> <ul style="list-style-type: none"> • Locations 'fatigue' in prime locations with businesses and communities becoming hostile towards productions • Perceived lack of transformation resulting in less government sector support • 'Brain drain' worsening scarcity of skills
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5. STRATEGY ALIGNMENT

There is an opportunity to align the sector growth path with strategic initiatives of government aimed at growing the national and provincial economies. The New Growth Path (Republic of South Africa 2010:34) for example identifies tourism not only as a priority sector but calls for strategies to ensure that proposals are developed for tourism growth to support employment creation in the cultural industries including crafts, film, music and drama.



Similarly, the national Industrial Policy Action Plan (Republic of South Africa 2010: 77-78) calls on a number of interventions to address pervasive sectoral constraints including:

- Addressing key skills gaps in respect of business, entrepreneurial and scriptwriting capabilities
- Growing indigenous languages scriptwriting talent
- Co-ordinating skills transfer from international production and co-production
- Audience development to address the lack of public infrastructure which hinder access to cinema by large segments of the population
- Developing a clear strategy on how to finance an increasing number of quality productions across the development, production and marketing/ distribution phases
- Develop strategies to facilitate private investment

At a regional and local municipality level Eden District Municipality and the B Municipalities can assist with the following as part of the bigger partnership:

- Transforming the local economy through improved efficiency
- Sustainable employment creation
- Increasing economic equity and ownership
- Investing in people
- Social cohesion and sustainable communities
- Maximise the resources and infrastructure currently in the province and region
 - Co-ordinate the efforts of government
 - Invest in further development of the creative workforce, creative clusters and the enterprises that constitute them
 - Develop and promote the products and services of the creative clusters and enterprises
 - Invest in the support and development of creative communities through programming, infrastructure development and maintenance and create access to cultural activities and opportunities, and
 - Create a range of sector specific initiatives in identified growth areas.



The GR&KK Film Office therefore also needs to ensure that it:

- Targets production-enhancing ‘activities’ and sourcing investors to fund the “activities”
- Provide additional support for new activities, while assisting existing activities by removing regulatory or infrastructure-related obstacles
- Promote an environment conducive to experimentation with products, production and distribution e.g. Innovation hubs
- Reduce information gaps and red tape that may limit private-sector economic activity, and avoid creating economic opportunities for some firms and not others
- Addresses the need for alignment between Eden District Municipality and the different B Municipalities as well as between the District, Provincial & National Governments

6. PARTNERS AND KEY ROLE PLAYERS

6.1 EDEN DISTRICT MUNICIPALITY

Overall responsibility for coordinating the marketing effort and interaction with Wesgro and Provincial Government structures and to support the GR&KK Film office.

6.2 B- MUNICIPALITIES

Supporting the film office, local permitting and by laws and infrastructure support to the production companies

6.3 WESGRO AND THE CAPE TOWN FILM OFFICE

Important for marketing and promoting the region as an alternative location destination and to avoid duplication of agreements entered into with CTFO

6.4 SCEP

Enable a partnering and co-operative approach across boundaries and sectors to stimulate economic growth. SCEP can play a facilitation role in the earlier stages



6.5 LANDOWNERS OTHER THAN MUNICIPALITIES

Entities such as SanParks, Cape Nature, MTO, Transnet and others are the landowners and custodians of many of the ideal locations that will be forming part of the film location guide, and applicable agreements must be entered into with them by the GR&KK Film office (and for the interim the Eden District Municipality) until the Film Office is fully operational. Some of these landowners already have permitting processes and service providers in place, and that will be honoured as far as possible (Cape Nature and Permitz as an example <http://www.permitz.co.za/>)

6.6 PRIVATE SECTOR PRODUCTION SERVICES AND TRAINING PROVIDERS

The private sector is an important partner to ensure the local growth of the industry through a structured approach, to minimise duplication but at the same time to allow natural market forces to prevail.

7. SECTOR SUPPORT INITIATIVES

National government, through the NFVF, the Industrial Development Corporation (IDC) and the DTI, is the principal investor in the local film production industry. In addition, the SETAs oversee skills development funds based on skills levies collected while the National Lottery Distribution Fund allocates grant funds to film projects.

- National Film and Video Foundation
- Industrial Development Corporation
- Department of Trade and Industry
- South African Revenue Service Tax incentives
- National Lotteries Distribution Trust Fund
- Media, Advertising, Information, Communication and Technologies SETA
- Media Development and Diversity Agency
- National Electronic Media Institute of South Africa
- Regional film commissions

A number of regional and local film bodies have been set up over the past decade to market their regions. The Cape Film Commission, Gauteng Film Commission (GFC), Durban Film Office (DFO) and Cape Town Film Permit Office seek to create an enabling environment for



filmmakers while also undertaking location marketing. The commissions in particular offer a range of services and advice. The GFC's support programmes, for example, include assistance with funding and finance facilitation, as well as negotiation of co-productions and partnership projects with broadcasters.

In addition, it must be noted that the private sector plays an important part in developing the industry.

Private distribution companies that are exploring ways to provide expanded access to markets for filmmakers

- Specialised companies that support access to markets and film financing, e.g. identification and facilitation of product placement
- Education and training institutions such as film schools, academies and universities
- Industry publications and directories that play an important role in providing information to the industry (e.g. Screen Africa, The Callsheet, The Whole Lot) and regularly sponsor and host industry networking events
- Production and post-production companies, which may have internal training and skills development programmes.

8. DEFINING AND ALIGNING STRATEGIC ROLES AND RESPONSIBILITIES

WESGRO	GR&KK
<ul style="list-style-type: none"> • Effective relationships between provincial government, the film industry and regulatory bodies. • Assist with the access finance through public funding, private investments, the lottery and other means to provide and disburse funding for film development, production, exhibition marketing and training • Stimulate and advance skills development, film education and 	<ul style="list-style-type: none"> • To increase the number of local and international film productions using GR&KK Services, i.e. permits facilitation, locations promotion and logistical support. • To increase access to locally produced films, especially to under resourced area communities through screenings, workshops, cinema exhibitions and broadcast partnerships. • To increase number of jobs created in



<p>training.</p> <ul style="list-style-type: none"> • Monitor, measure and plan provincial strategies for the industry, and advise provincial government on national policy. • Identify and support local content and productions. 	<p>the film industry, through GR&KK support and facilitation</p> <ul style="list-style-type: none"> • To contribute to an increase in the number of locally filmed productions being showcased, exhibited and bought locally.
<ul style="list-style-type: none"> • To develop South African film and television audiences for the appreciation of locally produced materials. • To develop film exports, and attract international productions and investment. • To help reflect South African culture and language to both local and international audiences. • To conduct relevant film industry research. 	<ul style="list-style-type: none"> • To develop small, medium and micro enterprises (SMME) for the effective growth of the industry and transform the film industry by increasing enterprise ownership and participation by previously disadvantaged groups, i.e. Blacks, Women and people with Disabilities.

GR&KK and local authorities

In the absence of a local film office it is apparent that there is a need to engage more rigorously with the district and local municipalities, in particular in respect to the issuance of permits and the facilitation of logistical support, a function that has largely been assumed by Cape Town companies to date. It is clear that this situation is not sustainable. The district and local municipalities need to play a much more supportive role of industry efforts and the establishment of a local film office, linked to and in support of Cape Town based offices.

GR&KK and the private sector

The GR&KK work with other entities of the region and need to find ways in which to resuscitate the Eden Film Festival and truly make it an annual event, and implement a full GR&KK Film Indaba to create a platform from which the private sector could engage



provincial and local governments on policy and strategy imperatives. Similarly, the role and function of the SCEP needs to be integrated and the Partnership be broadened to be reflective of a wider range of industry interests. Importantly, the Partnership with the GR&KK need to work with industry bodies to find ways of achieving a more inclusive and transformed industry.

9. STRATEGIC INTERVENTIONS (IN PRIORITY ORDER)

9.1 FORMATION OF THE GR&KK FILM ENTITY AND FILM OFFICE

- A Film Office is usually a local level office of a Film Commission
- It can be a stand-alone office that performs a role similar to a Film Commission but at a more operational level.
- It plays a more operational role i.e. that of logistics support e.g. assistance with location selection, obtaining of permits, procuring of film resources, community relationship management. It can also play a strategic role i.e. facilitation or lobbying on issues such as marketing, funding and incentives, policy development, skills development etc. etc.

Independent and legal entity

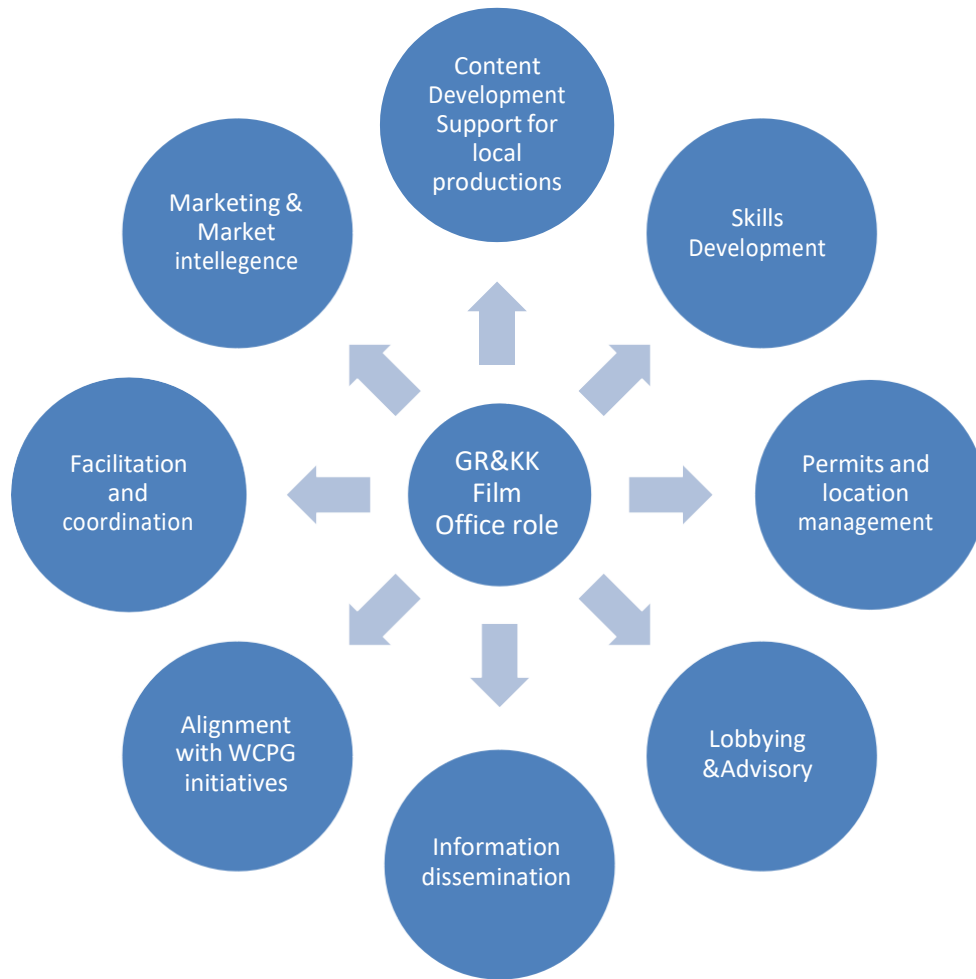
The film office must be an independent entity supported and managed by both the public and private sector, and funded by both parties on a sustainable business model. The model must also ensure own viability through commissions and support from visiting production companies, location permits and other income generating streams – such as income from festivals, events, sponsorships as examples.

The recommended business registration type should be a **NON PROFIT COMPANY**

- and could be called the **Garden Route & Klein Karoo Film Office NPC**



Figure 1 - The roles of a typical film office



Provisional budget requirements

Start-up costs	Rand
Signage	10 000
Banners	12 000
Business cards	2 000
Furniture and fittings	20 000
Office supplies	1 000
IT equipment, laptops, networks, telephones	15 000
Website development	20 000
Total	R 80 000-00



Annual income in rand	2017/18	2018/19	2019/20
Municipal contribution	636 000	325 000	200 000
Dti and grant / donation funding		300 000	300 000
External income streams		100 000	300 000
Total income projections	R 636 000	R 725 000	R 800 000
Annual costs in rand			
Admin person salaries	60 000	66 000	72 000
Film Office Manager salaries	240 000	265 000	300 000
Entertainment	12 000	13 200	14 500
Promotional events	30 000	35 000	40 000
Office costs (printing, stationary etc)	6 000	7 000	8 000
Vehicle costs	36 000	40 000	45 000
Telephones and internet	18 000	20 000	22 000
Website maintenance	9 000	10 000	11 000
Office rent	24 000	26 400	29 000
Electricity	12 000	13 200	14 500
Security	3 000	3 300	3 600
Insurance	6 000	6 600	7 200
Miscellaneous	20 000	22 000	24 000
Accounting	10 000	11 000	12 000
Advertising	100 000	110 000	120 000
Travel & Accommodation – Film Fairs	50 000	55 000	60 000
Total expenses projections	R 636 000	R 703 700	R 775 600

A total of R 716 000 will be required in Year 1 to get the film office operational and as it will take time to establish the office, as well as to market the region as a film destination, it is recommended that the District and 7 local municipalities pro rata contribute 100% of the budgeted amount in year 1 as seed funding. As the office establish itself and can generate / access external funding by itself, municipalities can contribute less each year until the office is fully self-sustainable. Targets must be set to the Manager of the office to generate own income streams and be less “grant” reliant and more commercially focussed. Interns can also be employed as an interim measure to save on the admin salaries for the first year or two.

Potential income streams

- Commissions on location fees
- Marketing and logistical support to local product and service providers
- SETA funding for training (The office need to register itself as a levy payer to assist in accessing the funding)
- Commission on Dti and other funding access for local companies
- Events such as film festivals
- Sponsorships and donations
- Training of local service providers



9.2 LOCATIONS CATALOGUE

Strategic objective: Searchable and up to date locations database

- The GR&KK is developing a searchable and up to date locations database showcasing a variety of locations available in the region
- Filming guidelines for the region will be made widely accessible.

9.3 LOCATION SUPPORT & PERMITTING

Strategic objective: Quick and efficient response to locations and permit requests

- Launch an online permit application system and dedicate staff to deal with location and permit requests in order to ensure that professional support is given to the Film & TV industry.
- Have ongoing communication and interaction with industry bodies and role players.

GR&KK must be proactive and investigate best practices in respect of location marketing and support. Activities must include:

- Studies to investigate film permit issuance processes and constraints
- The Development of location filming guidelines
- Dedicated location filming staff to assist the industry with enquires and permit applications
- Stakeholder relations management
- Establishment of a location filming forum
- A 'Film Friendly' campaign

Despite the efforts there might still be significant challenges that need to be considered and addressed:

- Increases in location fees (both public and privately owned)
- Transnet restrictions introduced nationally on filming on railway lines
- 'Off limits' locations
- Lack of official support and recognition by local governments



- Lack of coordination amongst support services that influence or affect the environment in which film production occurs.
- Disjointed, unclear and inconsistent application processes
- A number of decision-makers involved
- Time-consuming application and review processes
- Lack of industry understanding of internal government decision-making processes
- Late applications
- Lack of information about film activity generally
- Failure to use technology and web-based services to manage permits

As a way forward, the establishment of centralized permit offices at local levels needs to be investigated. As a priority the Eden District and B municipalities needs to be engaged at the highest level to discuss industry concerns and generic permit application processes and by-laws management.

9.4 SKILLS CATALOGUE

Further to the stakeholder and other service provider skills that need to be identified, a skills catalogue will be created to include the services listed below:

Legal advisors & Accountants	Accommodation & tours	Childcare services
Caterers	Emergency, paramedics and fire protection services	Runners and stagehands
Set-builders, painters & riggers	Stunt performers	Seamstresses
Transport & Shuttle services	Walk-on and supporting actors	Security services
Equipment rentals	Pilots and light aircraft	Nurseries and Green-men
Cleaning services	Hairdressers and make-up	...and others
Engineers and technicians	ICT	

Training, Skills development and talent management

A number of existing support programmes of national and regional bodies offer enterprise and skills development support. Examples include (adapted from Kaiser Associates Economic Development Practice 2010:9-13):



- Skills development incentives
- Skills and training needs assessments
- Funding and coordination of skills development and placement programmes
- Skills development programmes
- NFVF bursary and internship support
- Film industry events - Film festivals workshops, seminars and courses
- Internship programmes
- Guidance on and oversight of Black Economic Empowerment (BEE) Codes of Good Practice - Incorporation of BBBEE standards into the DTI rebate
- Industry association member support programmes
- Industry standards and codes of conduct - development of codes of conduct and minimum skills standards by Associations
- The DTI rebate scheme, NFVF funding, IDC financing and Section 24F
- Local content quotas, indigenous language requirements etc.
- Access to film pavilions at international markets and festivals
- Co-production treaties with Germany, Italy, UK, Canada and France and with Australia in progress
- Funding from the National Lottery Fund
- Support programmes run by film festivals e.g. DIFF and Durban Filmmart
- Support for seminars with visiting commissioning editors.

GR&KK should not attempt to duplicate training programmes but rather to work in partnership with other bodies to address the training needs of the industry.

However, this can only happen on the basis of relevant and reliable information informed by research – an area that has traditionally been weak in the sector.

An option that should be investigated is the establishment of a regional-specific Skills Fund with the assistance of the Eden District Municipality. This could comprise of:

- contributions from film production companies
- contributions from film companies for specific projects
- funding from the NLDTF
- partnership investment from training providers



As existing Skills Levies are mandatory, it is likely that such a fund will have to be based on voluntary contributions, possibly channelled through industry associations. It must be noted that companies may also be resistant given historical problems experienced with the SETAs and Skills Fund so therefore some incentive from government may be required. Such an initiative will also require greater collaboration with film schools and training academies as well as the proposed national Film Academy.

9.5 ENTERPRISE DEVELOPMENT AND SUPPORT

The soon-to-be-launched Garden Route Film Studios will play an important role in some of the development and support processes in the region, as some of their services will include:

- Potential office space for the film office.
- Film studios, film sets, sound stages
- Production offices & Production company offices
- Edit suites
- Service companies facilities
- Auditorium / Seating for audiences for live recordings
- Film Academy
- Archive facilities
- Research facilities

9.6 PRODUCTION INFRASTRUCTURE DEVELOPMENT

Enterprise support is an important element of developing and transforming the industry. The ultimate goal must be to enable South African producers to develop a slate of projects while encouraging sustainable business practices. An incubation system can be considered as an option to manage this process.

Support schemes need to be formulated that are aimed at the enterprise level, the sector professional level as well as the practitioner/ technician level.



- Emerging producers, directors and scriptwriter support
- Developing scripts in indigenous languages
- Mentorship programmes
- Pilot films support

9.7 COORDINATED MARKETING EFFORTS

The GR&KK marketing approach should be approached undertaken with the following objectives in mind:

- Positioning GR&KK as a preferred filming destination to local and international filmmakers
- Increasing the number of local and international film productions using GR&KK services
- Promoting and maximizing the economic participation of local made content, locations, content creators, facilities, infrastructure, exhibitors, distributors, broadcasters, talent, and support services.

Strategic objective: GR&KK to participate at key national and international film festivals and markets.

Strategic objective: Participate in local exhibitions and events and support local film festivals.

Strategic objective: Targeted Inbound Trade Missions (Familiarisation Tours whereby targeted groups of filmmakers and producers are invited to tour the Garden Route.)

Strategic objective: Grow the Eden Film Festival into an annual event attracting different industry role players, government, business and the community together to discuss relevant issues aimed at growing the local Film & TV industry, and to also promote **audience development** at the same time



Strategic Partnerships

- Partnerships with SA Embassies & High Commissions in foreign countries.
- MOUs with District Municipality, other key municipalities and government departments will be signed in order to streamline processes.
- Partnerships with industry bodies like the CPA, IPO, DFA, CFC etc.
- Partnerships with other international film commissions for information sharing.
- MOU's with WESGRO and partnerships with Gauteng Film Commission, Durban Film Office and CTFO
- SLA's with industry representation where applicable and on a project to project basis – CFC, local studios and local industry companies such as Storyteller Films, Garden Route Locations, Hartland to name but a few
- Memberships of relevant film bodies nationally and internationally for example AFCl

Marketing efforts:

- Grow media awareness through targeted media campaigns, regular press liaison and public relations. These programmes will be supported through the production and distribution of relevant promotional items.
- In order to ensure ongoing visibility of the film initiative, the GR&KK will investigate to advertise in local and international industry publications. General publications will also be used to communicate to the general public.
- Create a website with up to date and relevant information.
- Sponsored articles in industry supplements
- Community Outreach campaign - educating businesses and residents about the importance and economic contribution of film with the aim of them welcoming and opening up to filmmakers.



Marketing Objectives

- Increase productions filmed in the region and promoting locations to the film & TV industry locally and internationally
- Increase in the use of the website and electronic newsletter
- Increase the number of people using GR&KK services
- Keep abreast of film & TV industry trends and international benchmarking
- Increase awareness and visibility of the GR&KK brand, region and its services especially in under resourced communities and general users
- Increase the number of locally filmed productions being showcased and consumed locally.

10. CONCLUSION AND WAY FORWARD

The proposed film office and subsequent support of the film industry in the Garden Route & Klein Karoo will be beneficial to the region in both economic and tourism growth. There are vast opportunities in the industry, and proper branding and marketing, as well as market development can see the region as a film destination of choice in the near future. Industry players, service providers, skills development and training and development must also be pursued to ensure a proper one-stop service in the region, together with what the local industry can already offer in terms of diverse locations and a “film friendly” environment



Timelines	Nov – Feb	Feb 2017	Mar 2017	Apr 2017	May 2017	June 2017	July 2017
Completion of draft strategy and circulated for comment as well as presentations to the film steering committee							
Registration of NPC							
Website and email domains							
Completion of final strategy							
Presented to relevant municipal structures for approval							
Budget approval and funding							
Appointment of advisory board from industry and municipal structures							
Facilities and infrastructure procurement, staff appointments							
Commencement of operations							

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