



# Research on Return on Investment on Film Markets and Film Festivals

2014 - 2021

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# DOCUMENT INFORMATION

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## 1. INTRODUCTION

Urban-Econ has been appointed by the KZN Film to conduct research on the return on investment for KZN Film on markets and festivals. The purpose of this study is to understand how film festivals and markets have been used to advance and grow the film industry and how they can contribute further to the economic development of the KZN province.

### 1.1. BACKGROUND OF THE PROJECT

KZN Film has, since its inception in 2013, encouraged and supported the hosting of several KwaZulu-Natal based film festivals and markets. It is generally perceived that film festivals and markets assist in promoting and developing the KwaZulu-Natal (KZN) film industry.

Film festivals and markets are a sub-sector within the film sector. Film festivals and markets play different roles in the sector value chain and therefore have different impacts on the development of the industry and the economy.

Film festivals may be defined as sector events where films are screened to audiences which include the public, media organisations, and stakeholders active within the film sector value chain. Film festivals are mainly aimed at presenting and showcasing the abilities of the (local) film industry to the public and media organisations through the output products of the value chain i.e., the completed films. Film festivals, in addition to the screening of the films, often host information sharing and networking sessions in a variety of formats, such as, panel discussions, and masterclasses held by industry professionals for special interest groups (e.g., scriptwriters and actors).

In contrast to film festivals, film markets are events centred around the business and commercial aspects of mainly film production and distribution. These are special events where only the supply-side of the sector, which includes producers, filmmakers, buyers, investors, and distributors, meet, and conclude trade agreements. The markets are generally only open for industry trade purposes and entry fees are normally charged to limit the attendance to industry stakeholders. At these events, films are often screened to potential buyers, referred to as licensee holders. Like film festivals, these events normally take place over a specified period at a defined location and may have a pre-regulation/ selection procedure by which participants are approved to attend the market event (Hall, 2013).

Film festivals and markets play an important role in the development and growth of the film sector. They play a pivotal role in bringing a diverse spectrum of interested parties involved in the film sector together. The festivals and markets are often significant events on the film sector's calendar that facilitate exchanges of information and interests. It is during these events that new ideas are often formulated and where new relationships and liaisons are formed. The viewing of the films is only a part of the total spectrum of activities that take place at these events. Facilitating opportunities for networking between the participants is an important activity, since this often creates a space for developing new innovative ideas and concepts in the production and marketing of the films.

The benefits of the film festivals and markets are reported to be wide ranging and include, for example, the general marketing of the KZN film sector, showcasing the abilities of the KZN film producers to local, national, and international markets, encouraging networking between interest groups, facilitating information sharing, and leading to new creative and innovative ideas and concepts being developed in the industry<sup>1</sup>.

Every year a KZN Film delegation attends selected markets and festivals to; market the province as a destination for filming, showcase the work of local filmmakers, network, and forge partnerships for future projects. KZN Film also supports local film festivals. The funding and support allow filmmakers to attend the various film festivals

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<sup>1</sup> The term "sector" is used in this report to refer to the all-inclusive value chain of activities in the film market. The term "film industry" is used in a narrower context and refers to the actors involved mainly in the filmmaking process, i.e., film production companies, film studios, screenwriters, distributors, film directors, actors, and film crew personnel.

that take place abroad and locally, this allows filmmakers to network with filmmakers from other countries and to stay ahead of industry trends while creating relationships either for further funding, distribution, or co-production opportunities.

From 2014 to 2021, KZN Film has supported a number of filmmakers to attend national and international markets and festivals to showcase their products on various platforms. The following is a list of some of the festivals attended and supported by KZN Film (KZN Film, 2022):

- KwaZulu-Natal African Film Festival (KAFF),
- Kwasukasukela Film Festival (KFF),
- Durban International Film Festival (DIFF)
- Durban Film Mart (DFM), and
- UGU Film Festival (UGUFF).
- Nature Environment Wildlife Film Congress (NEWF)
- Mzansi Reel Stories
- Umgungundlovu Film Festival.



Collectively, over 10 000 people attended these film festivals, which illustrates the significant exposure that these festivals have for the film industry (KZN Film, 2022).

In 2020/21 film markets and festivals programmes were mostly affected by the COVID-19 regulations. Some international and national markets and festivals were either postponed or cancelled during that period. Others offered online participation, but there was a very low response from local filmmakers to participate. However, the local film festivals such as Kwasukasukela Film Festival, KwaZulu-Natal African Film Festival, Mzansi Reel Stories, Umgungundlovu Film Festival did take place in various modalities – virtual/both.

## 1.2. PROJECT OBJECTIVES



**The primary objective of this study is to determine the return on investment for KZN Film on the film festivals and markets attended over the period of review (2014 – 2021)**

The key objectives of this research are:

- i. To identify all the markets and festivals attended by KZN Film during the period 2014-2021
- ii. Conduct a comprehensive national benchmarking analysis of film commission practices concerning film festivals and markets, aiming to extract valuable insights applicable to KZN Film.
- iii. Identify and categorise the engagements/presentations, and formal and informal meetings held by the delegations during the period.
- iv. Quantify, measure, and estimate the investment made during the period.
- v. Identify the projects that came to the province because of the engagements.
- vi. Identify projects that came to SA but not to KZN but were discussed with the delegation and analyse why the projects were taken to other provinces.
- vii. Provide recommendations based on the findings on how best KZN Film can handle and participate in markets and festivals.
- viii. Develop a tool that the KZN Film can use going forward to track outcomes at festivals and markets and enable reporting on an annual basis.

### 1.3. APPROACH & METHODOLOGY

Both primary and secondary sources of data will be collected in this research, with each of the data sources described below.

#### 1.3.1. PRIMARY DATA SOURCES

**Stakeholder engagement forms a key component of the study.**

Urban Econ engaged relevant industry players, film festivals and markets organisers and attendees to establish and track outcomes at festivals and markets and enable reporting of their role in the film sector. Local film markets and festival organisers, and filmmakers were interviewed through accessing contact details via KZN Film, the NFVF database of festivals, and through social media platforms.

Interviews were conducted through a range of digital platforms, such as telephonically, through email correspondence, and virtually. Pre-designed, open-ended questions were developed to guide and facilitate the discussions and interviews. Each interview was conducted to allow the respondent to provide their own interpretations on experiences about the sector as well as their own assessments of the potential of the film markets and festivals. Please see Annexure A for further information.

#### 1.3.2. SECONDARY DATA SOURCES

**Secondary Data Collection: Desktop Research**

An extensive desktop review of existing reports, studies and available research material was undertaken, with the following types of documentation reviewed but not limited to:

- i. Annual reports of film festivals and film markets.
- ii. Websites of film festivals and film markets.
- iii. Funding applications for KZN based film festivals.
- iv. News articles.
- v. KZN research documents.
- vi. Journal publications and articles.
- vii. Previous research conducted into the film sector by various organisations in the public and private sector.

### 1.4. STRUCTURE OF THE REPORT

The following table shows the structure of the report.

**Table 1: Structure of the report**

	Heading	Description
1	Introduction	This introductory section provides context to the report. It lays out the purpose and scope of the report and the methodology which has been utilised for the writing of the report.
2	Literature Review	This chapter gives an analysis of research previously done on film markets and festivals, highlighting the differences between the two, giving historical context and giving a review of the major film markets and festivals both global and locally.
3	KZN Film	This section looks at KZN Film. Its role, initiatives and partnerships, local and international film festivals supported by KZN Film.
4	Benchmarking	This chapter looks at various film commissions as a way to benchmark the KZN Film performance against similar film commissions.
5	Stakeholder Engagements	This section gives a comprehensive summary of the stakeholder engagements.
6	Return on investment	This section uses both the primary and secondary research findings to determine the spending on film festivals and markets and to show what the return has been thus far.
7	Conclusion	This chapter sums up the report and gives an overview of the findings.



## 2. UNDERSTANDING FILM FESTIVALS AND MARKETS

In the ever-changing landscape of the film industry, film festivals and markets form an essential part of the value chain, each contributing to the promotion and distribution of films worldwide.

Film festivals and markets play a vital role in the growth and progress of the film industry. They serve as key platforms that bring together a diverse range of individuals involved in the film sector. These events hold significant importance on the film calendar, fostering interactions, and sharing of information and interests. Notably, they serve as hubs for new ideas and the formation of fresh connections and collaborations.

While film viewing is a part of these events, their scope goes beyond just screenings. Facilitating networking opportunities among participants is a crucial aspect that allows for the development of innovative ideas and concepts in film production and marketing. By creating a space for fruitful exchanges, these festivals and markets become catalysts for driving creativity and industry advancement.

Film festivals and markets offer a wide array of benefits that contribute significantly to the growth and recognition of the KZN film sector. These benefits include marketing for the local industry, a showcase of KZN film producers on a global scale, opportunities for valuable networking, information sharing, and the development of ideas within the industry. The impact of these events extends far beyond mere screenings, leaving a lasting impression on the industry's progress and potential.

This chapter looks at film festivals and markets, exploring their respective functions and historical origins, examining the impact they have on the overall film industry.

### 2.1. FILM FESTIVALS

Film festivals are events held in various cities around the world that aim to showcase films to a live audience. The aim of these events is to allow filmmakers the platform to promote their work, network with other industry professionals to gain industry recognition, engage with the audience to receive feedback and gauge their reactions of the films. Lastly, the events also promote cultural exchange, giving filmmakers the opportunity to see what is being done globally.

The first film festival was the Venice International Film Festival. This event was held in 1932 and obtained great popularity, such that it became an annual event thereafter.<sup>2</sup> Due to its popularity, it was then followed by several film festivals such as the Cannes Film Festival in 1939, the Locarno Film Festival, the Edinburgh Film Festival, and the Karlovy Vary International Film Festival in 1946, and the Berlinale in 1950.<sup>3</sup>

It wasn't until the 1960s when African countries started hosting their own arts festivals with a significant presence of films. The first regular film festival on the continent was the Festival International du Film Amateur de Kelibia (FIFAK), which began in Tunisia in 1964. After that, other festivals like Journées Cinématographiques de Carthage (JCC) in Tunisia (1966), Festival Pan-African du Cinema et de la Télévision de Ouagadougou (FESPACO) in Burkina Faso (1969), Cairo International Film Festival in Egypt (1976), and the Durban Film Festival in South Africa (1979) were also established. Apart from African-based festivals, there were also festivals outside Africa that focused on African films. One of the earliest examples is the Festival des 3 Continents in Nantes, France, which started in 1979.<sup>4</sup>

In the late 1990s, a new wave of film festivals began flourishing, particularly in Western Europe. In Africa, several new international film festivals took place, the first of which was the Zanzibar International Film Festival (ZIFF),

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<sup>2</sup> (VENEZIA, 2023)

<sup>3</sup> (Dovey, 2015)

<sup>4</sup> (Dovey, 2015)

founded in 1998. At this time, ‘A-list’ international film festivals, such as the Toronto International Film Festival (TIFF), began to introduce curators and programmes dedicated to films produced by Africans. <sup>5</sup>


The grading of film festivals is regulated by the International Federation of Film Producers Associations (FIAPF), an organisation that is responsible for the defence and promotion of the legal, economic, and creative interests of film producers globally. The federation recognises category ‘1’ or ‘A’ festivals around the world. There are currently 43 accredited festivals globally. Accredited festivals are required to meet the following standards:

- Good year-round organisational resources
- Genuinely international selections of films and competition juries
- Good facilities for servicing international press correspondents.
- Stringent measures to prevent theft or illegal copying of films.
- Evidence of support from the local film industry.
- Insurance of all film copies against loss, theft, or damage.
- High standards for official publications and information management.

Film festivals vary in size, scope and the genre of films exhibited. While some film festivals can be large, star-studded events like the Cannes International Film Festival or TIFF, others may be smaller, more intimate affairs that are attended by fewer individuals. Others may also focus on a wide variety of films while others aim for a more specialized approach and on a specific niche. However, despite their differences, they all share a fundamental purpose, which is to honour the craft of filmmaking and support the creatives behind the films.

Table 2 provides a list of notable global and local film festivals and their ratings. <sup>6</sup> It is important to note that there is no single authoritative rating system for film festivals and markets, and different organizations and publications may have their own rankings and evaluations. Additionally, the perception of a festival or market can change over time based on various factors, including the quality of each year's programming and industry trends. Using various industry publications, websites, and organizations such as Variety, The Hollywood Reporter, The International Federation of Film Producers Associations (FIAPF) and Film Critics association the following is a list of notable global film festivals as well as their description and rating.

**Table 2: Notable Global Film Festivals**


Region	Festival	Description	Ratings <sup>7</sup>
<b>Europe</b> 	<b>Venice Film Festival</b>	The Venice Film Festival was founded in 1932 as the Exhibition of Cinematographic Arts, which was a part of that year’s Venice Biennale, the second to be held under the aegis of the Italian fascist government. It is the world’s oldest film festival and by the 21 <sup>st</sup> century, the festival was screening over 150 films annually, with an average attendance of more than 50 000 film professionals. <sup>8</sup>	★★★★
	<b>Cannes Film Festival</b>	Beginning in 1946, the Cannes festival held in France became an international marketplace where producers and distributors could exchange ideas, view films and sign contracts. The phenomenon of international co-production began in Cannes in the late 1940s. The festival is now one of the best-known film festivals globally.	★★★★★

<sup>5</sup> (Dovey, 2015)

<sup>6</sup> Table 2 gives a list of notable film festivals around the world. The list is neither exhaustive, nor is it in any order.

<sup>7</sup> It is important to note that there is no single authoritative rating system for film festivals and markets, and different organizations and publications may have their own rankings and evaluations. Additionally, the perception of a festival or market can change over time based on various factors, including the quality of each year's programming and industry trends.

<sup>8</sup> (Britannica, 2023)

Region	Festival	Description	Ratings <sup>7</sup>
USA 	<b>Sundance Film Festival</b>	<p>With an attendance of 122 313 in 2019,<sup>9</sup> the Sundance film festival is one of the most respected and celebrated film festivals in the USA. It is a 10-day even that shows about 200 films. The event also hosts panel discussions, workshops, and musical events.</p> <p>First held in Utah, the idea was launched by the Uta Film Commission as a way to promote independent film and to bring the attention of filmmakers to the area. By the early 1990s, the festival became notorious for jump-starting the careers of American independent filmmakers.</p>	★★★★★
UK 	<b>BFI London Film Festival</b>	<p>Founded and hosted by the British Film Institute in 1953, the BFI London Film Festival was originally referred to as a “festival of festivals” as it only screened the best films from a selection of the best filmmakers.</p> <p>Over time, the number of films increased to include a more diverse range of talents. The aim however, which was to showcase upcoming films and films that otherwise may not make it to the British cinemas, has not changed over time.<sup>10</sup></p>	★★★
Canada 	<b>Toronto International Film Festival (TIFF)</b>	<p>Since it launched in 1976, the 10-day event has become one of the largest and most prestigious in the world, with an estimated 280 000<sup>11</sup> attendance rate, including filmmakers, distributors, and publicists.</p>	★★★★★
South Africa 	<b>Durban International Film Festival (DIFF)</b>	<p>Founded in 1979, DIFF is one of the longest running film festivals in Africa and is considered as one of the most prestigious film festivals in South Africa.</p> <p>While the festival showcases a wide array of film genres and styles, it places a strong emphasis on African cinema, showcasing the continents storytelling traditions. DIFF promotes the development of emerging filmmakers, cultural exchange, and social dialogue.</p>	★★★
	<b>Cape Town International Film Market &amp; Festival</b>	<p>Originally known as the Cape Winelands Film Festival when it was launched in 2007, the film festival has grown in both size and international participation. The programme has 160 features, short film productions and documentaries from 50 countries annually.</p> <p>The event is not exclusively just a festival but is also a market as from 2017. The market serves as a hub for industry activity such as networking, sales, distribution, and training.</p>	★
Africa 	<b>Cairo International Film Festival (CIFF)</b>	<p>Since its debut in 1976, the Cairo International Film Festival features around 100 films from 33 different countries and continues to be a growing event with a different theme every year.</p> <p>Ranked among the top 11 film festivals across the globe, CIFF also gives away different awards such as the Golden Pyramid and the FIPRESCI (Federation Internationale de la Presse Cinematographique) Prize. Three juries that are responsible for deciding the whole award scene include The International Jury for Feature Films, The Arab Jury for Arabic Films, and The International Jury for Digital Feature Films.</p>	★★★

<sup>9</sup> (Wilkinson, 2019)

<sup>10</sup> (LFF.org, 2020)

<sup>11</sup> (Wilkinson, 2019)

Region	Festival	Description	Ratings <sup>7</sup>
	<b>Zanzibar International Film Festival</b>	Founded in 1997 by Tanzanian filmmaker Martin Mhando, the film festival was a way to foster cross-cultural heritage. The festival, which began with only several films being included, has grown to include a larger variety of films with a focus on African films, including documentaries, short film, animations, and feature films. <sup>12</sup>	★


## 2.2. FILM MARKETS

Where film festivals focus on showcasing films within the film sector, film markets are events where professionals in the film industry such as producers, distributors, sales agents, and filmmakers come together to promote, buy, or sell their films or various projects. Film markets focus on the business side of film production such as financing, co-production opportunities, and distribution licensing arrangements. It allows for networking with the relevant stakeholders within the film industry.

Film markets emerged decades ago, with one of the first being the Cannes Film Market, also known as Marché du Film. It was established in 1959 to address the growing demand for a space where professionals could buy and sell film rights and negotiate distribution deals. It was then followed by several film markets such as the European Film Market (EFM) in 1988 and the Hong Kong Filmart in 1997, among others.

The following table provides an overview of the world's notable film markets.<sup>13</sup>

**Table 3: Notable Global Film Markets**




Region	Market	Description	Ratings
<b>Europe</b> 	<b>Cannes Film Market</b>	The Marché du Film is the annual meeting for film industry professionals across the globe. With the growing influence of the film festival, there was a need to help industry professionals meet and do business over and above the showcasing of films, hence the birth of the Marché du Film. The event was launched in 1959 and it runs simultaneously with the Cannes Film Festival. The market provides business opportunities, reinforces international visibility, and puts industry professionals in the prime location to discover all the latest innovations in the rapidly changing film industry. Today, over 12 500 industry professionals attend the Cannes film market and festival with almost 4000 films and projects presented in 33 screening venues. <sup>14</sup>	★★★★★
	<b>European Film Market</b>	The European Film Market is one of the top three meeting places of the international film and media industries. Its close links with the Berlinale as a public film festival, and its position at the heart of Berlin's vivid creative economy, are defining characteristics of the Berlinale's film market. Yet the EFM is more than just an agile marketplace for trading film and audiovisual content – it has also positioned itself as a platform for innovation and change. Over a period of eight days, around 10,000 representatives of the international film and media industries, primarily producers, buyers and sales agents, distributors, and financiers, come together to network, exchange, inform themselves and do business. <sup>15</sup>	★★★★★

<sup>12</sup> (Africa, 2023)

<sup>13</sup> Table 3 provides a list of the world's most notable film markets. The list is neither exhaustive nor in any order.

<sup>14</sup> (film, 2023)

<sup>15</sup> (Berlinale, 2020)

Region	Market	Description	Ratings
<p><b>North America</b></p> 	<p><b>The American Film Market (AFM)</b></p>	<p>The AFM is a renowned global event that serves as a marketplace for the acquisition and development of films and also for networking opportunities. Over \$1 billion in contract agreements are sealed annually, comprising of both completed films and those that are still in the development stage. The event, held in Santa Monica every November, is attended by over 7 000 industry professionals from more than 70 countries. Among these attendees are acquisition and development executives, agents, attorneys, directors, distributors, festival directors, financiers, film commissioners, producers, writers, the global press, and numerous other professionals who cater to the needs of the motion picture industry.<sup>16</sup></p>	<p>★★★</p>
<p><b>Latin America</b></p> 	<p><b>Latino Media Market (LMM)</b></p>	<p>The LMM is a National Association of Latino Independent Producers (NALIP) 6 Signature Program created for content creators attending the NALIP Media Summit (NALIP, 2019). The market focuses on selected projects in the following categories:</p> <ul style="list-style-type: none"> <li>• Low-Budget Features in Development or Pre-production,</li> <li>• Documentary Works-in-Progress,</li> <li>• Scripted TV/Streaming concept/pilot,</li> <li>• Digital Web Series (NALIP, 2019).</li> </ul> <p>The market is designed as a steppingstone for NALIP fellows and their projects through meeting industry representatives who provide relevant information and advice on advancing and distributing their productions (NALIP, 2019). During the LMM one-on-one meetings take place for selected projects between filmmakers and other film industry professionals such as studio &amp; network executives, agents, distributors, and mentors (NALIP, 2019).</p>	<p>★★★</p>
<p><b>Asia</b></p> 	<p><b>Hong Kong Filmart</b></p>	<p>Referred to as the Filmart Online, the Hong Kong Filmart is a four-day virtual event organised by the Hong Kong Trade Development Council (HKTDC). The event has positioned itself as Asia’s premier film and television market. This event provides an important trading and publicity platform for film and television programmes as well as other production-related services.</p> <p>In 2022, the event hosted close to 8000 participants from 81 countries and regions and generated close to 2500 business opportunities for distribution and promotion.</p> <p>The market provides strong support for the Chinese filmmakers and other industry professionals. This platform serves as the place for Chinese filmmakers, television programs creators, and animation and industry players to promote their productions to buyers from both experienced and emerging markets, especially from Asia.</p>	<p>★★★</p>
	<p><b>Asian Contents and Film Market (ACFM)</b></p>	<p>This film market is a product of, and is hosted along, Busan Film Festival (see Busan International Film Festival (BIFF)). Formerly known as the Asian Film Market, ACFM has positioned itself as one of the leading film business markets in Asia for an array of film industry events that include financing, production, post-production, sales, and distribution. Associated with this market are the Asian Project Market, and Entertainment Intellectual Property Market</p>	<p>★★★</p>

<sup>16</sup> (AFM, 2023)



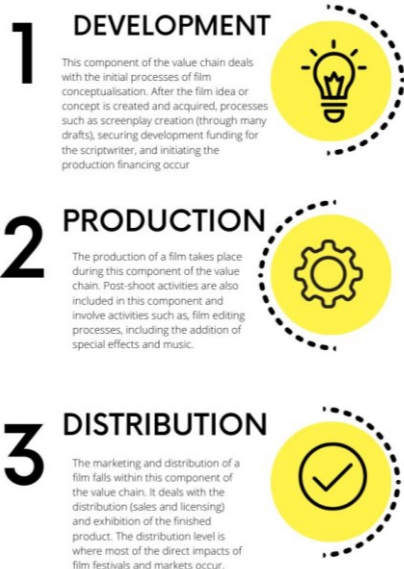
Region	Market	Description	Ratings
		which provides diverse business opportunities to participants during the BIFF (BIFF, 2020). In 2019, the market hosted 2 188 professionals from enterprises located in 56 countries participated and actively engaged in production, acquisition, distribution, and sales for film, broadcasting, and original content rights (ACFM, 2020). The number of enterprises participating in booths has increased by 17% from the previous year, to promote and sell a wider range of content and copyrights (ACFM, 2020).	
	<b>Durban Filmart</b>	The Durban FilmMart (DFM) is one of the most prominent film markets in Africa and is held annually in Durban, KwaZulu-Natal. DFM takes place in conjunction with the Durban International Film Festival (DIFF). It focuses on promoting African and African diaspora cinema, fostering collaborations, and supporting emerging filmmakers. The market provides a platform for filmmakers to pitch their projects to potential investors, co-producers, and sales agents.	★
	<b>Discop Africa</b>	The Discop Film Market is a global event that focuses primarily on the distribution of content in both Africa and the Middle East. It is a platform where industry players such as content creators, distributors, producers, broadcasters, and other professionals can network and showcase their productions. Founded in 1991, Discop aims to help promote local talent, and exchange content both locally and globally and to foster growth of the industry. The programme consists of workshops, seminars, and panel discussions	★

### 2.3. THE ROLE OF FILM MARKETS & FESTIVALS IN THE VALUE CHAIN

Film festivals and film markets play different roles in the sector value chain and therefore have different impacts on the development of the industry and the economy. Figure 2 displays the generic film value chain, which has three main components.

#### GENERIC FILM VALUE CHAIN

##### MAIN COMPONENTS

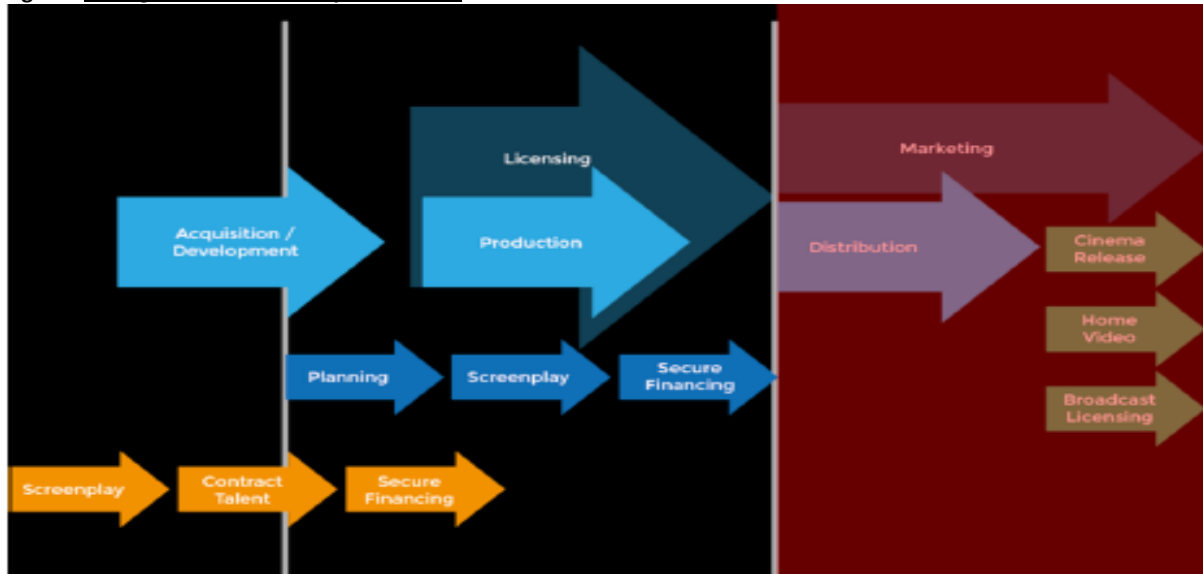


**Development** – This component of the value chain deals with the initial processes of film conceptualisation. After the film idea or concept is created and acquired, processes such as screen play creation (through many drafts), securing development funding for the scriptwriter, and initiating the production financing occur.

**Production** – The production of a film takes place during this component of the value chain. Post-shoot activities are also included in this component and involve activities such as, film editing processes, including the addition of special effects and music.

**Distribution** – The marketing and distribution of a film falls within this component of the value chain. It deals with the distribution (sales and licensing) and exhibition of the finished product. The distribution level is where most of the direct impacts of film festivals and markets occur.

Figure 1: The generic film industry value chain



Source: Adapted from (Benghozi, et al., 2015)

Film markets and film festivals play distinct but interconnected roles in the film industry value chain. They serve as crucial components in the process of financing, development, distributing, and promoting films.

Table 4: Film Festivals and Film Markets Role in the Film Industry Value Chain

ROLE	FILM SECTOR VALUE-CHAIN COMPONENTS	
	DEVELOPMENT	DISTRIBUTION
Meeting of film industry role players	FM	FF
Networking and concept generation	FM	FF
Knowledge transfer amongst industry stakeholders	FM	FF
Business agreements and conclusion of contracts	FM	
Film screenings by audiences		FF
Impacts on tourism and hospitality		FF
Networking and knowledge transfer		FF

FF = Film Festivals; FM = Film Markets

As seen in Table 4, the activities of the film festivals fall primarily within the distribution component of the value chain, whereas the film market activities fall mainly within the development component of the value chain. Film festivals and markets have a negligible direct impact on the production of films.

The following is an outline of the key functions and role that film markets and film festivals play in facilitating growth and development of the film sector.

**Film Markets**

1. **Financing and Pre-Production:** Film markets are essential for securing financing and distribution deals for films in the early stages of development. Filmmakers often attend film markets to pitch their projects to potential investors, production companies, and distributors. These film markets help secure funding and partnerships needed to move from script to production.
2. **Distribution and Sales:** Film markets provide a platform for the sale and acquisition of film distribution rights. Distributors, sales agents, and streaming platforms attend film markets to purchase the rights to distribute films in various regions or platforms. This is a critical step in the value chain, as it determines how and where a film will be seen by audiences.

3. **Networking and Collaboration:** Film markets are hubs for networking and collaboration among industry professionals. Producers, directors, and other stakeholders can meet with potential collaborators, including financiers, co-producers, and sales agents, to discuss projects and partnerships.
4. **Market Research:** Film markets also serve as avenues for industry professionals to gauge market trends, assess competition, and gather insights into audience preferences. This information informs decision-making in the production and distribution phases.

### Film Festivals

1. **Premieres and Exposure:** Film festivals provide a platform for the premiere of films, where they can be seen by a broad audience, including industry insiders, critics, and the general public. A successful festival premiere can generate buzz and create anticipation for a film's release.
2. **Awards and Recognition:** Festivals offer the opportunity for films to receive awards and accolades, which can significantly impact their commercial success and critical acclaim. Winning awards at prestigious festivals can lead to increased distribution opportunities and higher box office revenues.
3. **Distribution Deals:** Distributors and sales agents often attend film festivals to identify promising films for distribution. Films that receive positive reception at festivals may secure distribution deals that allow them to reach a wider audience.
4. **Networking and Promotion:** Filmmakers and industry professionals use festivals as a platform for networking and promoting their work. They can connect with potential collaborators, investors, and distributors and build relationships that benefit future projects.
5. **Audience Engagement:** Festivals engage with audiences and generate word-of-mouth buzz, helping to build a fan base and generate interest in a film before its official release. This can be particularly valuable for independent and niche films.
6. **Cultural and Artistic Impact:** Film festivals contribute to the cultural and artistic enrichment of society by showcasing a diverse range of films that often challenge conventions and explore important social issues.

The following table gives a summary of the reasons stated in literature for attending film festivals or film markets.

**Table 5: The Role of Film Festivals or Film Markets**

FILM MARKETS	FILM FESTIVALS
Distribution Opportunities	Networking and collaboration
Financing and Co-Production	Promotion of independent films
Content Licensing	Audience interaction
Global Networking	Film Education
Market Access	Cinematic exploration
Market Trends and Research	Cultural and Artistic Impact
Financing and pre-production	Audience Engagement
Distribution and sales	Networking and Promotion
Market research	Distribution Deals
	Awards and Recognition
	Premieres and Exposure

In summary, film markets primarily focus on the business side of the film industry, facilitating financing, sales, and distribution deals, while film festivals combine artistic and commercial elements by premiering films, generating publicity, and celebrating artistic achievements. Together, they play a vital role in connecting filmmakers with audiences and industry professionals while driving the success of films within the value chain.

## 2.4. FILM COMMISSION SUPPORT FOR FILM FESTIVALS AND FILM MARKETS

Film commissions are government or regional organizations responsible for promoting and facilitating filmmaking within their jurisdictions. Film commissions such as KZN Film can play a significant role in supporting filmmakers to capitalize on film festivals and markets.

**Table 6: Type of support offered to filmmakers by Film Commissions for film markets and film festivals**

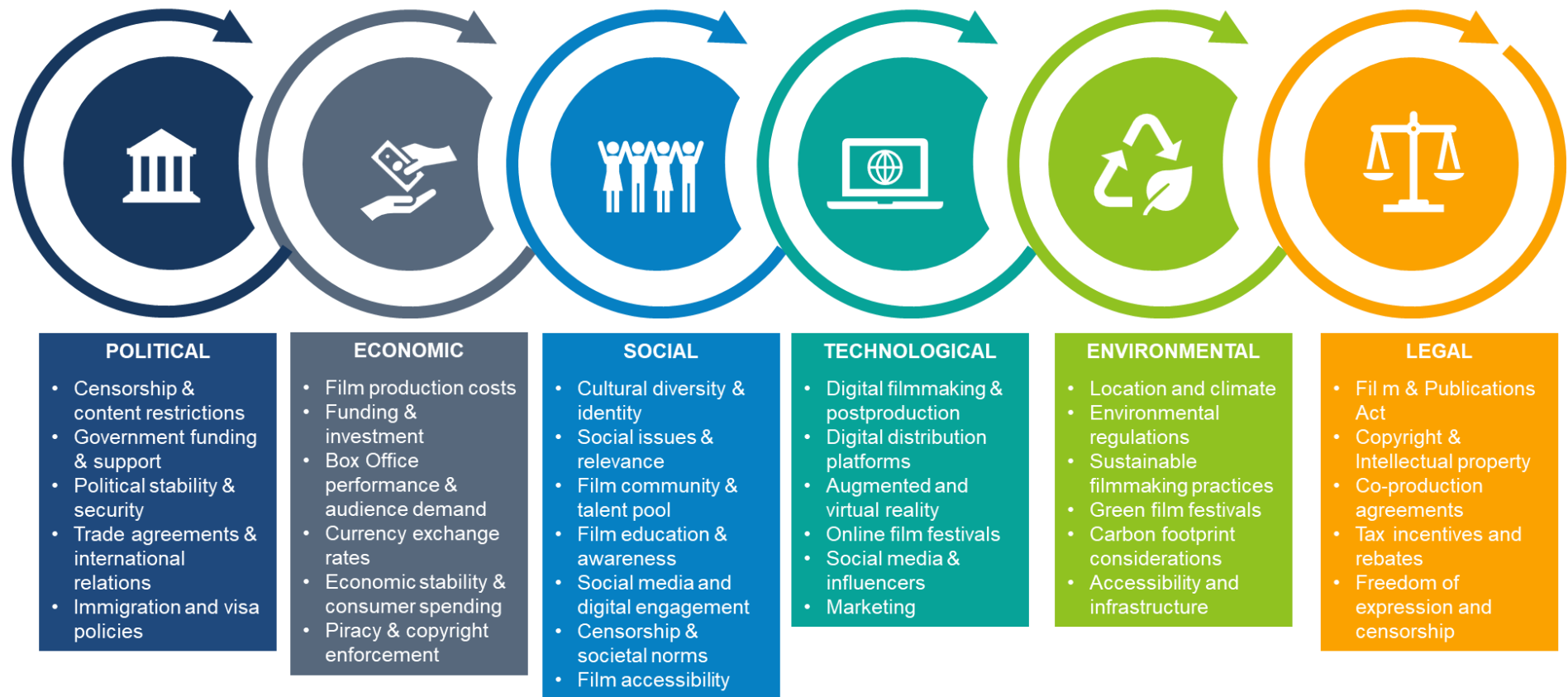
	Type of Support	Description
1	<b>Financial Support</b>	Financial assistance or grants to cover the logistical costs of attendance, festival submission fees or subsidies for market attendance, making it more affordable for filmmakers to submit their films to a wider range of festivals. This is especially beneficial for emerging filmmakers who may not have the financial resources to attend on their own.
2	<b>Logistical Support</b>	Provision of dedicated booths or spaces at prominent film markets or film festivals where filmmakers from their region can conduct meetings and promote their projects.
3	<b>Market Access and Information</b>	Provision of market insights, including which festivals and markets are best suited to their projects, which companies to target for distribution, and emerging industry trends.
4	<b>Networking Opportunities</b>	Hosting of events or receptions during festivals and markets, providing a platform for filmmakers to network and showcase their work.
5	<b>Promotion and Publicity</b>	Film commissions can assist in promoting films from their region at festivals by providing marketing materials, arranging interviews with local media, and leveraging their brand to raise the profile of films and filmmakers and increasing their visibility during festivals.
6	<b>Facilitating Deals and Partnerships</b>	Connecting filmmakers with potential distributors or sales agents who attend festivals and markets. Identifying co-production opportunities or funding sources, especially at markets where co-production deals are common.
7	<b>Education and Training</b>	Organising workshops, seminars, or informational sessions to prepare filmmakers for festivals and markets. These sessions can cover topics like pitch preparation, marketing strategies, and effective networking
8	<b>Post-Festival Support</b>	Leveraging success by assisting with distribution negotiations, marketing efforts, and further opportunities for their projects

Overall, film commissions serve as valuable partners for filmmakers by offering financial support, market insights, industry connections, and promotional assistance. Their role is to create an environment that enables filmmakers to showcase their work effectively and make the most of the opportunities presented by film festivals and markets.

### 4.1. PESTEL ANALYSIS OF FILM FESTIVALS AND MARKETS

In this section, an analysis of film festivals and markets within a PESTEL framework is conducted. This is a tool used to analyse the macro-environmental or external factors including the political, economic, social, technological, environmental, and legal factors that may have an impact on film festivals and markets and their return or benefits. The tool is used to identify any potential threats and weaknesses that may be relevant to the industry. The following diagram shows a summary of the findings of the PESTEL analysis and is followed by the detailed analysis thereafter.

Figure 2: Pestel Analysis



By conducting a thorough PESTEL analysis based on these factors, a comprehensive understanding of the external forces shaping the film industry and film festivals and markets in KZN can be gained. This analysis can inform strategic decision-making, risk assessment, and the identification of opportunities for growth and development in the local film sector. Additionally, it can help stakeholders adapt to changing circumstances and make informed choices to enhance the success and sustainability of film-related activities in KZN.



Table 7: Film Festivals and Markets PESTEL Analysis

		Factor	Description
P	POLITICAL	<b>Censorship and Content Restrictions</b>	Political decisions related to censorship and content regulation can affect a filmmaker’s creative freedom and influence the type of stories told and the way in which they are presented in the country. If strict regulations are implemented, the result could be a limited scope of films being shown at festivals, stories which do not truly represent South Arica.
		<b>Government Funding and Support</b>	Government support, grants, and subsidies can significantly impact the success of film festivals and the growth of domestic film industries. Changes in government funding policies can lead to shifts in festival programming, as festivals may need to cater to the political priorities of the ruling party to secure funding.
		<b>Political Stability and Security</b>	This can have a major impact on the country’s international relationships. Political instability and security issues may deter international industry professionals from attending festivals and markets in the country, which would affect the ability of local creators to network and co-produce with international filmmakers and broadcasters.
		<b>Trade Agreements and International Relations</b>	Closely linked with the above, trade agreements and international relations can affect the distribution of films, international collaborations and may lead to the exposure of South African films in global markets.
		<b>Immigration and Visa Policies</b>	Visa policies and immigration regulations can affect the ability of filmmakers, actors, and industry professionals to attend international film festivals. Stringent visa requirements or travel bans can hinder cross-border cultural exchange.
E	ECONOMIC	<b>Film Production Costs</b>	The cost of producing films can determine the number and scale of local productions. The higher the cost, the more likely there will be reduced outputs and the reliance on international co-productions may decrease. On the other hand, lower production costs can attract more filmmakers and increase local content creation.
		<b>Funding and Investment</b>	Government funding, private investment, and international partnerships are vital to the performance of film markets and festivals. These resources can provide the financial ability to organise festivals, promote local films and attract international participation.
		<b>Box Office Performance and Audience demand</b>	Understanding audience preferences is crucial because it can influence a film’s success. Audience preferences can determine the kind of films that are shown at the various festivals and influence distribution strategies in the market. Preferences also influence the box office performance of the film, which directly influences the revenue of the film and can attract more audiences and investors.
		<b>Currency Exchange Rates</b>	Film festivals and markets allow for the co production of films and film imports. Any fluctuations in currency will impact the accessibility of films to various audiences across the globe. Appreciating exchange rates might make the purchase of foreign films more expensive.
		<b>Economic Stability and Consumer Spending</b>	The overall performance of the economy, especially economic downturns, will have a negative impact on consumers disposable income and their overall spending decisions including cinema attendance.
		<b>Piracy and Copyright Enforcement</b>	The threat of piracy negatively impacts the potential revenue to be made by films and can discourage filmmakers from investing in the South African film market. It is, therefore, crucial that there are proper effective copyright enforcement measures put in place to protect the intellectual property of creatives.
S	SOCIAL	<b>Cultural Diversity and Identity</b>	South Africa is a culturally diverse country which consists of people of different ethnicities and languages. In that regard, cultural diversity, language preferences and racial and gender representation can influence audience choices and shape the types of films produced and screened. Film markets and festivals play a crucial role in bringing together these different cultures and exposing people to international culture. There is also a social aspect of festivals, such as networking and panel discussions enhance the experience and serve as a learning opportunity.

		Factor	Description
		<b>Social Issues and Relevance</b>	Given the diversity and history of South Africa, films that address social issues such as poverty, inequality, racism, and environmental factors, tend to resonate more with audiences. Festivals within the country and those looking to tell African stories may prioritize these socially relevant films to attract audiences and provoke discussions.
		<b>Film Community and Talent Pool</b>	The diversity that exists within the film industry makes for a vibrant and talented community, which is crucial for the overall growth of the industry. Appreciating this diversity can lead to a wider range of films being showcased at festivals and markets.
		<b>Film Education and Awareness</b>	The amount of film knowledge and awareness among the public can affect how interested people are in movies. Understanding and appreciating films can lead to a more discerning audience that supports a greater variety of films at festivals and in the market.
		<b>Social Media and Digital Engagement</b>	Social media and technological advancements which have allowed for digital platforms have transformed the way films are marketed, promoted, and consumed. Social media assists in giving the filmmakers access to a broader audience and to create hype around their project.
		<b>Censorship and Societal Norms</b>	The level of censorship imposed on films and the content permissible at festivals and in the market can be influenced by societal norms and values. Filmmakers must consider these when deciding what their movies will be about and how they will present them.
		<b>Film Accessibility</b>	The ease of watching films, whether in cinemas, theatres, or on digital platforms, can affect how many people can see them. Making films more accessible can help create a more inclusive movie market.
T	TECHNOLOGICAL	<b>Digital Filmmaking and Post-Production</b>	New improvements in digital filmmaking technologies have completely changed the industry. Now, filmmaking can be easier and cheaper. Filmmakers can use digital cameras to shoot high-quality movies, and editing and visual effects can be done more efficiently with digital tools
		<b>Digital Distribution Platforms</b>	The rise of online streaming platforms has changed how films are shared with audiences. Now, filmmakers can reach people directly through platforms like Netflix, Amazon Prime Video, and local services like Showmax. This has allowed South African films to be seen by more people beyond just the traditional cinema setting.
		<b>Augmented and Virtual Reality (AR/VR)</b>	These technologies are being used to create different experiences related to films and film festivals. This includes virtual screenings, interactive content, and promotional campaigns.
		<b>Online Film Festivals</b>	Technological advancements have led to the rise of online film festivals, where films are screened digitally to a global audience. This allows for increased accessibility and the possibility of reaching a wider range of viewers.
		<b>Social Media and Influencer Marketing</b>	Social media platforms are crucial for film promotion and audience engagement. Influencers and viral marketing campaigns can significantly impact a film's reach.
		<b>Remote Collaboration Tools</b>	Filmmakers can now collaborate remotely, making it possible for South African film creators to forge relationships with international filmmakers.
E	ENVIRONMENTAL	<b>Location and Climate</b>	The natural environment and climate of a filming location can affect production schedules and costs. Extreme weather conditions may disrupt shooting schedules, leading to delays and increased expenses.
		<b>Environmental Regulations</b>	The rules and permits related to the environment can influence where films are made and how they are produced. It is important for filmmakers to follow these regulations to reduce the impact on the environment during the production process.
		<b>Sustainable Filmmaking Practices</b>	There is an increasing focus on sustainable filmmaking practices globally. Adopting eco-friendly measures in film production, such as using renewable energy sources, minimizing waste, and promoting responsible use of resources, can improve the industry's environmental impact.

		Factor	Description
		<b>Green Film Festivals</b>	Certain film festivals are actively taking initiatives to raise awareness about the environment and support sustainability. These "green" film festivals specifically focus on showcasing movies that revolve around environmental issues. Moreover, these festivals adopt eco-friendly practices during their events to minimize their own environmental impact. By doing so, they aim to not only entertain the audience but also inspire them to think about and act for a healthier planet.
		<b>Carbon Footprint Considerations</b>	Film productions and events have the potential to generate significant carbon emissions, primarily from transportation, energy consumption, and waste disposal. However, there is a growing awareness of the environmental impact of the film industry, leading some filmmakers and festivals to take responsibility for their carbon footprint.
		<b>Accessibility and Infrastructure</b>	The state of infrastructure and accessibility in certain locations can affect the viability of film festivals in those areas. Proper infrastructure can facilitate smooth event logistics and improve the overall festival experience.
L	LEGAL	<b>Film and Publications Act</b>	This Act regulates the distribution and exhibition of films in South Africa. Among other things, the Act provides age classification guidelines, which regulate the appropriate age limits for the viewing of films, which affects the target audience for certain films and their accessibility in the market.
		<b>Copyright and Intellectual Property</b>	Intellectual property rights are used to protect the work of filmmakers and content creators for them, as the property owners, to reap the financial benefits of their work. In the film industry, it is crucial for industry players to understand copyright laws to safeguard the rights of filmmakers and ensure they are compensated for their work.
		<b>Co-Production Agreements</b>	International co-productions are subject to certain legal agreements or treaties between countries. To facilitate cross-border or international collaborations requires a level of understanding and adherence to the co-production arrangements put in place. By doing so, the reach of South African films to international markets could be expanded.
		<b>Broadcasting Regulations</b>	Broadcasting regulations can impact film distribution, especially when it comes to content aired on television or online platforms. Compliance with broadcasting standards is important as it can also expand the reach of South African film.
		<b>Tax Incentives and Rebates</b>	Government tax incentives and rebates for the film industry can encourage local and international filmmakers to choose South Africa as a filming location. Understanding and qualifying for these incentives can significantly impact the financial aspects of film production.
		<b>Freedom of Expression and Censorship</b>	The South African constitution allows for the freedom of expression, however, there is a level of censorship that the film industry is subjected to. Filmmakers need to be aware of the guidelines and limitations imposed and the potential censorship implications when dealing with controversial topics.

## 2.5. SWOT ANALYSIS OF FILM FESTIVALS AND FILM MARKETS

A SWOT Analysis is a tool used to evaluate the internal and external factors that can impact an organization, project, or a decision. The following table looks at a SWOT Analysis that can be used by KZN Film to evaluate some of the strengths, weaknesses, opportunities, and threats associated with investing in film festivals and markets.

**Table 8: Film Festivals and Markets SWOT Analysis**

<b>S</b>	<b>STRENGTHS</b>	Locations and tourism boost	KZN has an array of beautiful locations, consisting of beaches, mountains, and urban landscapes, making it an attractive destination for film productions. Film markets and festivals can also attract local and international tourists, leading to increased revenue for the local economy.
		Local Talent Pool	Talented actors, directors, producers, and crew members based in KZN.
		Local Film Festivals	Presence of successful and established film festivals in KZN, which can serve as platforms for showcasing local talent and attracting international attention.
		Institutional Support	KZN Film offers funding, training and other forms of support to the film industry and film festivals in the region.
		Cultural Promotion	These events provide a platform for showcasing the rich cultural diversity of KZN, which can enhance the region's image and promote cultural exchange.
		Economic Development	Film markets and festivals can stimulate economic growth by creating job opportunities and supporting local businesses, including those in the film industry.
		Investor Attraction	Successful events can attract investment in the local film industry, infrastructure development, and associated businesses.
<b>W</b>	<b>WEAKNESSES</b>	Funding challenges	Despite government support, funding for local productions and film festivals in KZN can be limited, hindering the growth of the industry. Filmmakers and festivals face challenges in securing funding and financial resources for their projects.
		Lack of Awareness and Promotion	Many talented filmmakers and projects from KZN struggle to gain recognition on a national or international scale due to lack of effective marketing and promotion of local films and festivals, hindering their visibility and reach.
		Skills Gap	Gaps in specialized skills or training within the local film workforce and in various aspects of the film industry, which can affect the quality and competitiveness of local productions and events.
		Uncertain Returns	The ROI of such events can be unpredictable, as it depends on factors like attendance, ticket sales, and sponsorship deals, and projects received by filmmakers, which may not always be guaranteed.
		Sustainability	Maintaining the success of local film markets and festivals over the long term can be challenging, especially if funding and support fluctuate.
<b>O</b>	<b>OPPORTUNITIES</b>	Strategic Partnerships	Collaborating with filmmakers, sponsors, and tourism boards can increase the ROI by sharing costs and expanding the reach of the events.
		Tourism Synergy	Opportunities to align film production and festivals with the tourism industry in KZN, attracting film tourists and generating economic benefits
		Cultural Exchange	Leveraging cultural exchange programs and film festivals to promote KZN's culture and heritage globally.
		Leveraging on emerging technologies	Embracing emerging technologies and digital platforms for film distribution and online festivals. Digital platforms used for virtual events or online promotions can reach a broader global audience and enhance ROI.

<b>T</b>		Talent Development	Investing in local talent through training programs and workshops can lead to the creation of high-quality content, improving the overall ROI.
	<b>THREATS</b>	Market Saturation	Over-saturation of film festivals and markets can reduce the uniqueness and appeal of KZN's events.
		Regulatory Challenges	Changing regulations, especially in the context of public health and safety (e.g., Covid-19 Pandemic), can disrupt event planning and reduce ROI.
		Not meeting planned ROI	When the expected return on investment is not met, it can strain financial resources, lead to budget shortfalls, and jeopardize the overall financial health of the organization. This is a potential threat because it undermines the sustainability and success of the endeavor.
		Competition	Competition from other regions or countries for film production and festival attendance.
		Changing Consumer Preferences	Shifts in audience preferences, such as a preference for streaming services over traditional cinema experiences.
		Piracy and Copyright Issues	The threat of piracy and copyright infringement that can impact revenue and distribution.



## 2.6. CONCLUDING REMARKS

In conclusion, this comprehensive literature review has provided a panoramic view of the dynamic and evolving landscape of film festivals and film markets through the exploration of various scholarly works, industry reports, and critical analyses. From their historical origins to their contemporary roles, film festivals and markets have emerged as powerful platforms for showcasing cinematic artistry, fostering cultural exchange, and advancing the careers of filmmakers worldwide. The review has underscored the significance of these events as catalysts for artistic innovation, economic growth, and cross-cultural understanding. There is often an overlap between film festivals and film markets as many festivals are hosted concurrently with film markets however they both contribute as epicentres for the distribution and acquisition of films, facilitating the industry's global reach, connecting filmmakers with financiers, distributors, and audiences, thus emphasizing the pivotal role and function of both film festivals and film markets.

There are factors that could have an effect on film festivals and markets, and the film industry in its entirety, that need to be considered by the film commission. Namely, political, economic, social, technological, environmental, and legal factors. Being aware of these can help improve the effectiveness of film festivals and markets in KZN. The SWOT analysis conducted for film festivals in KwaZulu-Natal (KZN) also reveals a complex landscape rich with potential and challenges. By carefully examining the internal strengths and weaknesses and external opportunities and threats, valuable insights into the current state of the industry and its future prospects are examined.

KZN boasts a pool of local talent, a diverse cultural heritage, and breathtaking natural settings that serve as compelling strengths. The presence of established film festivals and government support further bolster the region's film industry. However, limitations in infrastructure, funding challenges, and the need for effective promotion represent internal weaknesses that require attention. The external environment offers numerous opportunities for growth and development. Synergies with the tourism industry, international collaborations, emerging technologies, and educational initiatives hold significant promise. These avenues can lead to increased recognition, economic growth, and cultural exchange. Concurrently, KZN Film must remain vigilant about potential threats, including economic fluctuations, competition from other regions, changing consumer preferences and piracy. Addressing these threats through proactive strategies and risk mitigation measures is paramount to the industry's resilience. Leveraging the strengths, addressing the weaknesses, seizing the opportunities, and mitigating the threats identified in this analysis will enable KZN Film to harness its full potential as a thriving hub for film festivals and film markets.

The next section looks at the role of KZN Film in the film industry and its effect on film festivals and markets

### 3. BENCHMARKING

In this section, a case study model is used to benchmark KZN Film against current best practices implemented by other film commissions across South Africa.

#### 3.1. KWAZULU NATAL FILM

##### 3.1.1. THE ROLE OF KZN FILM



KZN Film is a South African film commission that supports and promotes the growth of the film and television industry in the KwaZulu Natal province. It is an agency established with the aim of creating jobs, supporting local content creation, attracting international productions, and promoting the region as a filming destination.

Some of the roles of the KZN Film include:

- Providing financial support and incentives to filmmakers, including grants for production, development, marketing, and training.
- Assisting filmmakers to find suitable locations for their projects.
- Skills development and training programs to nurture up and coming talent in the industry.
- Promotion and marketing of KwaZulu Natal as a desirable film destination
- Collaboration and partnerships with various stakeholders to create a supportive, well-functioning ecosystem for the film industry in the province.
- Supporting and participating in film festivals and markets in the province.

##### 3.1.2. INITIATIVES AND PARTNERSHIPS

###### 3.1.2.1. Durban FilmMart

The Durban FilmMart (DFM) is a non-profit company that was founded in 2020 that facilitates local and international trade and investment in African film content. The primary goal of the organisation is to make projects from Africa more known and to help filmmakers meet potential co-production partners. It also encourages African filmmakers to work together to create content that can reach other countries. The programmes run by DFM are listed below.

###### 1. Talents Durban

Talents Durban is an initiative founded in 2007 as a partnership between the Durban International Film Festival and Berlinale and has since become a project of the Durban FilmMart Institute. It is an annual 5-day training and development programme which consists of workshops, seminars, master classes and hands-on development programmes for screenwriters, directors, or producers. The programme allows filmmakers to interact with other established industry professionals to gain insights into the industry.



The key components of the programme include, workshops and masterclasses, project labs and pitching sessions, mentorship and networking, screenings and discussions, and career development. More specifically, the programme consists of:

- Storytelling lab: Where stories in development are given advanced consultation and mentoring by script editors, and it involves scriptwriting workshops.
- Doc lab: A training programme where three Durban participants with documentaries are mentored.
- Animation Lab: Which focuses on animation projects and offers character development, visual development and focuses on the business of animation in Africa.
- Talent press: Mentorship for emerging African film critics and journalists.

###### 2. DFM Jumpstart

The Jumpstart programme is an initiative of the Durban FilmMart institute and presented at the DFM Market,

that aims to introduce emerging filmmakers to writing and packaging. Filmmakers are taught key techniques and tools for scriptwriting and storytelling processes, with the aim of creating projects that can be shared in the international market.<sup>17</sup>

### **3. DFM Pitch and Finance Forum**

This is an initiative where 20-30 African fiction and documentary projects are selected to present to a panel of potential co-producers, sales agents, broadcasters, and film funds. It consists of public pitching, meetings with decision makers and mentorship leading up to the film market.

### **4. DFMI Business lab**

This is a 12-week digital programme of workshops on financial management, business skills, entertainment law and IP, and distribution strategies. The aim of this programme is to provide emerging and med-level filmmakers with the necessary skills to engage with a global market. They are equipped with the necessary tools for the development of their company.

### **5. DFM Access**

DFM Access is a 12-week programme for entry level producers. Its aim is to provide the necessary skills to improve their scripts and project packages. This program helps storytellers shape their stories, improve how they present their projects, and understand the market so they can plan their careers better. They get personal guidance and learn from experts in the industry. After 12 weeks, they showcase their projects to a panel. The best three projects get a chance to be part of the Durban FilmMart.

### **6. Future mentors**

The goal of the Future Mentors Programme is to solve the problem of not having enough mentors from Africa. At the same time, it aims to teach the upcoming mentors in Africa the important skills they require.

### **7. Filmmart.Africa**

Filmmart.Africa is an online platform for film professionals to connect, present new projects, and access resources and support. The platform aims to provide up-to-date, trusted business information that will help the industry collaborate and develop.

## **3.1.2.2. DURBAN INTERNATIONAL FILM FESTIVAL**

The Durban International Film Festival (DIFF) is a well-known event that features productions from around the world. It provides a platform for filmmakers to showcase their work to a wide audience. People gather to watch and appreciate a variety of films, making it a significant event in the KZN and South African film industry.

### **Isiphethu Hub**

The Isiphethu Industry Development Programme is a DIFF programme that is designed to support and nurture emerging creatives in various fields, including film, television, music, and fashion. The goal of the programme is to provide a platform for talent development, collaboration, networking, and business growth within the industry.

The programme consists of seminars and workshops to help develop the industry and it also involves a community outreach programme to assist marginalised audiences with a chance to have a festival experience.<sup>18</sup>

The key components of Isiphethu Hub include:

- Skills development
- Entrepreneurship support
- Collaboration and networking

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<sup>17</sup> (DFM, 2023)

<sup>18</sup> (TV, 2023)

- Access to resources for the creation and development of projects

**Independent Filmmakers Project/Gotham**

KZN Film partnered with the Independent Filmmakers Project (IFP),<sup>19</sup> a nonprofit organization founded in 1979, which is established to provide support to independent filmmakers. It provides resources, mentorship, networking opportunities to help filmmakers develop their projects and understand the film industry.

Filmmaker support programs include:

- Gotham awards
- Independent Film Week and Conference for scripts and documentaries
- Labs for mentorship and feature films
- Sponsorship and membership

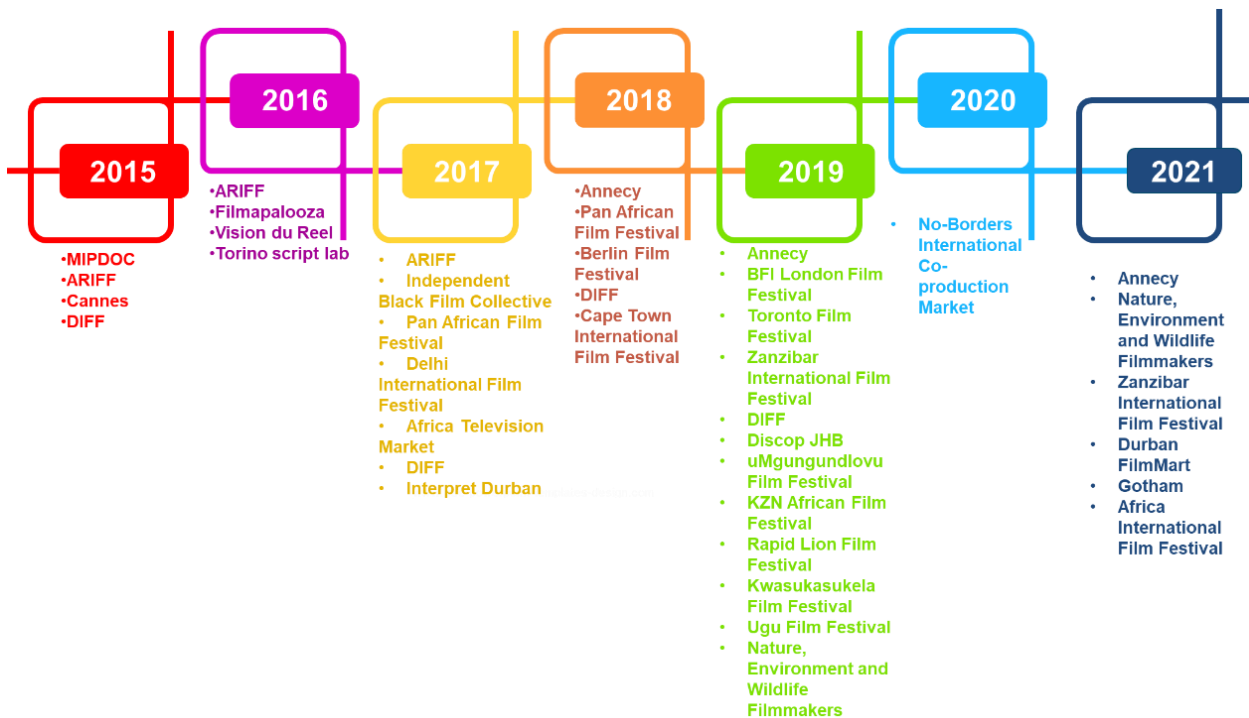
The overall goal of the IFP is to foster growth of independent filmmaking, assist filmmakers in developing their projects and to promote unique and diverse voices in cinema.

**3.1.3. FILM FESTIVALS SUPPORTED BY KZN FILM**

The KZN Film allocates funding to allow filmmakers to support filmmakers and to provide opportunities for them to attend the various festivals that take place both locally and abroad. The aim of this funding is to stimulate the growth of the film industry in the province, to allow filmmakers to network with filmmakers from other countries and to be aware of industry trends and to forge relationships with distributors or financiers or for co-production opportunities.

Some of the Film festivals and markets supported by KZN Film over the years are shown in the following figure:

**Figure 3: Film Festivals and Markets Attended 2015 - 2021**



Source: KZN Film Annual reports

KZN Film initiates a delegation by issuing a "call for interest" to filmmakers. Those filmmakers meeting the established criteria receive support including transportation, lodging, subsistence allowance, and related expenses to attend and participate in film festivals and markets. Additionally, filmmakers may independently

<sup>19</sup> (KZN Film, 2022)

apply to KZN Film for financial backing to participate in markets and festivals, driven by factors like their film being chosen for festival screening or planned meetings with essential potential sponsors. Once funding is approved, delegates are required to produce a report about the outcome of the engagements they had at the festival.

### 3.1.4. LOCAL FILM FESTIVALS SUPPORTED BY KZN FILM

KZN Film also has an Audience Development initiative, where local content creators get to showcase their films at local film festivals in various communities across the province. The aim of this initiative is to develop a culture of consuming local films and to promote and market local content. Local film festivals that have received support or collaboration from KZN Film are presented in the following table.

**Table 9: Local (KZN) Film Festivals Supported by KZN Film**

<b>FESTIVAL</b>	<b>DESCRIPTION</b>
<b>Amajuba Film Festival (AFF)</b>	AFF is a Newcastle based festival which takes place on a hybrid format to accommodate its target audiences, with an outreach programme in the three local Municipalities in the Amajuba District. The aim of this film festival is to empower emerging filmmakers by enabling them to watch a variety of films, to attend workshops and to discuss trends and issues faced in society. The festival consists of film screenings, panel discussions, and conversations on the new ways things are done in the industry. <sup>20</sup>
<b>Kwasukasukela Film Festival</b>	This is a festival held in the uMkhanyakude District Municipality, which consists of mainly rural towns such as Mtubatuba, Hluhluwe, Mbazwane, Jozini and Ingwavuma. The festival caters to Zulu speaking, unemployed youth, and women. The aim is to inspire young people to consider film and TV as a prospective career choice.
<b>KwaZulu-Natal African Film Festival (KAFF)</b>	KAFF is a community-based film festival founded in 2003, which focuses on the screening of African and international films and documentaries. It is run at community venues with the main venue being the KwaMashu Ekhaya Multi-ARTS Centre. The festival also has a five-day developmental workshop programme which is facilitated by funders, filmmakers, and producers. <sup>21</sup>
<b>Mzansi Reel Film Festival</b>	The Mzansi Reel Film Festival introduces the idea of showing films made in hostels around Durban to build an audience for local films. The event shows movies, promotes maskanda music, includes information sharing about the film industry, and provides networking opportunities. The festival is important because it aims to reach the many young people who migrate to Durban to have better access to opportunities and seeks to make them aware of the film industry, help with career guidance, provide learning opportunities and information on ways to find funding.
<b>uMgungundlovu Film Festival</b>	Launched in 2019, the uMgungundlovu Film Festival aims to support local storytelling and to nurture talent. The festival plays an important role in the growth and development of the film industry in the region. The festival showcases films and conducts educational workshops with the aim of equipping emerging filmmakers, in particular women and youth in the area with the knowledge and expertise needed to enhance their craft. The festival also aims to provide an opportunity to grow audiences in KZN and to encourage the consumption of local talent. <sup>22</sup>
<b>Ugu Film Festival</b>	The Ugu film festival is an event that accommodates all genres and is a platform where new filmmakers, both local and international, have the opportunity to showcase their films

KZN Film plays a crucial role in supporting local film festivals by providing benefits that contribute to the growth and success of these festivals and also to the artistic and economic development of the KZN province. They offer not only financial support to these film festivals but also offer workshops for information sharing and they help

<sup>20</sup> (AFF, 2023)

<sup>21</sup> (KAFF, 2023)

<sup>22</sup> (festival, 2023)



the growth of these events by way of marketing them and making people aware of the various roles each festival plays in the community. The commission typically works in partnership with festival organizers to ensure that the support provided aligns with the festival's goals and contributes to the growth and success of the local film industry. It is important to note that the specific level of support provided by KZN Film may vary from festival to festival and may depend on factors such as the festival's size, significance, and specific needs.

Overall, the support can lead to the preservation of cultural identity, talent development, economic growth, tourism promotion, enhanced education, and a positive reputation for the commission and the province.

### 3.2. THE NATIONAL FILM AND VIDEO FOUNDATION (NFVF)

#### 3.2.1. THE ROLE OF THE NFVF



The NFVF is a public entity operating under the Department of Sports, Arts and Culture (DSAC) and established in 1997, created to ensure equitable growth in the South African film industry. The NFVF aims to empower previously disadvantaged filmmakers through training, increase audience access to South African films, and to promote the South African film industry both locally and internationally.

The foundation plays a significant role in the growth of the South African film and video industry. This is achieved by providing:

- Funding for the development, production, marketing, and distribution of films.
- Training and development of filmmakers.
- Promotion of local talent.
- Industry development for the overall growth and sustainability of the South African film industry.
- Access to markets and festivals.
- International collaborations, connecting South African filmmakers with global opportunities and resources.
- Cultural preservation by supporting films that reflect the nation's diversity in terms of culture, languages, and traditions.
- Research and producing industry statistics to provide insights into the South African film industry.

In addition to the abovementioned activities, the NFVF continues to deliver on its mandate and objectives through various activations at markets and film festivals, along with media and public relations ventures, funding roadshows, and interactions with stakeholders. In alignment with the NFVF's mission and objectives of enhancing public reach to South African films, the organization consistently conducted a sequence of roadshows and initiatives at different festivals across the nation.

Overall, the NFVF serves as a vital entity in the film industry, which contributes to the development, growth, and sustainability of the industry, while promoting cultural diversity, creativity, and innovation.<sup>23</sup>

#### 3.2.2. INITIATIVES AND PARTNERSHIPS

##### 1. SEDIBA Masters scriptwriting training programme

This is a training programme for more established script writers who have worked in the drama series and feature film industry for at least five years, and who have a feature film concept that may appeal to the local market. It is a year-long programme which enhances the expertise of writing talent and concepts, developing them into a polished second draft through a series of various stages involving story and script development training. Additionally, the programme also teaches participants about other sectors of the film value chain, to understand their impact on the green light decisions for production and the film's audience appeal. Lastly, the programme

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<sup>23</sup> (NFVF, 2022)

also caters to script editors by providing training opportunities.

## 2. Training and mentorship for emerging female filmmakers

The NFVF in partnership with Blue Ice Pictures hosts a mentorship and hands on training programme for emerging female filmmakers. There are other training initiatives such as workshops and masterclasses, incubator programs where emerging filmmakers are assisted with the development and completion of their projects. These incubator programs offer mentorship, resources, and guidance to help produce high-quality films. One such incubator programme is the Film Hub; a programme developed by the NFVF in partnership with The Cortex Hub, which aims to promote the development of the South African film and media industry through the use of technology.

### 3.2.3. FILM FESTIVALS SUPPORTED BY THE NFVF

The NFVF provides funding to organisations to host film festivals and to filmmakers to attend both local and international film festivals with the aim of growing South African markets, and to stimulate demand for South African films. Funding is also provided to give an opportunity to audiences to view a variety of work, and for filmmakers to increase their networks in the industry.

The table below shows a list of the film festivals supported by the NFVF in 2021:<sup>24</sup>

**Table 10: Film Festivals Supported by the NFVF**

FESTIVAL	DESCRIPTION
<b>Kwasukasukela Film Festival</b>	A developmental film festival that aims to share stories, develop disadvantaged communities, and also serves as an audience development event. The NFVF was committed to develop an audio-visual sector initiative aimed at enriching, educating and entertaining Jozini audiences on film and content generation. The NFVF also provided masterclasses and training for three days.
<b>The Durban FilmMart (DFM)</b>	This was an online event focusing on filmmaking development, distribution, and marketing trends, with a Pan African focus and looked at how the future of cinema would navigate changes in the industry. The NFVF hosted the African Perspectives: Doc Rough Cut Lab.
<b>IFP/Gotham</b>	This is the oldest and largest forum in the USA for the discovery of new projects in development. It is made up of the Screen Forward Conference, which consists of a weeklong series of panel discussions.
<b>Berlinale/JETS</b>	This market brings together about 600 international film producers and financiers, with a focus on international co-productions. Through a partnership with the 10 <sup>th</sup> Silweskermees, the NFVF participated in a programme to prepare four selected filmmakers for the 2023 Berlinale co-production programme held in 2022. The Junior Entertainment Talent Slate (JETS) is an initiative to create co-production opportunities for selected emerging projects from filmmakers across the globe.
<b>Cameroon Film Festival</b>	The Cameroon International Film Festival - CAMIFF is an annual event established to help create a vibrant film culture throughout the region. The event seeks to engage and educate the local community, inspire filmmakers, and nurture the growth of the Cameroon and African film industry. <sup>25</sup>
<b>Annecy Animation Film Festival</b>	Annecy is a global animation film festival that brings together the most esteemed professionals from the sector to celebrate animation's creative and diverse styles and techniques. <sup>26</sup>
<b>Oslo Films from the South Festival</b>	The Oslo Films From the South Festival is the largest festival in Oslo, Norway that aims to find the best international film production outside of the western hemisphere. The festival is also connected to the production support fund, Sorfond and is responsible for

<sup>24</sup> (NFVF, 2022)

<sup>25</sup> (Freeway, 2023)

<sup>26</sup> (Festival, 2023)

FESTIVAL	DESCRIPTION
	marketing and organising the fund's annual pitching forum and hosting the Nordic premiere for the completed granted films. <sup>27</sup>
<b>Amajuba Film Festival</b>	The Amajuba Film Festival is a festival held in Newcastle KZN that aims to empower local and international filmmakers in the Madadeni township and beyond. The festival focuses on films produced from 2018. The festival educates audiences on social, art, business, and political issues that impact society, in an entertaining manner.
<b>Sheffield Documentary MeetMarket</b>	The MeetMarket is one of the world's largest documentary and factual markets and pitching forums. The market is open to all local and international documentary makers, up and coming or established filmmakers. The MeetMarket aims to introduce filmmakers to companies that are looking to support and invest in new documentaries. <sup>28</sup>
<b>Rotterdam International Film Festival (IFFR)</b>	The IFFR is an annual event held in the Netherlands that focuses on innovative and independent cinema. Founded in 1972, the IFFR is an initiative of the Rotterdam Arts Foundation. The festival hosts screening programmes which aim to address issues of contemporary social relevance and to promote cinematic innovation. <sup>29</sup>

Source: NFVF Annual Report 2022

In the 2020/2021 financial year, 30 filmmakers were funded by the NFVF to attend the various film festivals and markets mentioned above. Due to Covid-19 restrictions, the NFVF also supported online webinars such as The Marketing and Distribution webinar and the NFVF Youth and Female Slate Showcase Webinar. Spending on marketing and distribution for 2020 and 2021 was R24.2 million and R24.4 million, respectively.

The NFVF also offers grants in the following categories:

#### 1. Marketing and Distribution Grant

This grant allows independent filmmakers and local distributors to market and distribute their projects through various platforms.

#### 2. National Film Festival Grant

This grant is offered to local film festivals and its purpose is to provide financial support to individuals or organisations to host local film festivals which contribute towards audience development.

#### 3. Markets and Film Festival attendance

This grant assists African filmmakers by offering financial support towards the costs of attending global film festivals. This assists filmmakers in promoting their films, seeking distributors, financiers, and broadcasters, and also developing their filmmaking skills by attending film workshops.

#### 4. NFVF Activations at Local and International Markets and Festivals

The aim of this grant is to increase audience access to SA films. Activations create awareness of NFVF programmes and South African film opportunities, and also promotes the South African film industry locally and internationally.

The table below shows some of the NFVF successes of 2020-2022 regarding festival funding, marketing, and distribution.

**Table 11: NFVF Successes of 2020-2022 regarding festival funding, marketing, and distribution**

OUTCOME	OUTPUT	OUTPUT INDICATOR	2020/2021	2021/2022
To provide support to the industry in the areas of marketing and	Strategic support for festivals that meet set criteria	Develop audiences for SA films by awarding festival hosting grants	16 Festival Grants awarded to National Festivals	17 Festival Grants awarded to National Festivals

<sup>27</sup> (Frasor, 2023)

<sup>28</sup> (Fest, 2023)

<sup>29</sup> (IFFR, 2023)

OUTCOME	OUTPUT	OUTPUT INDICATOR	2020/2021	2021/2022
policy to better understand, enable and promote the SA Film Industry	SA filmmakers supported to showcase their work at markets and festivals	Position SA filmmakers at film markets and festivals	50 Filmmakers were funded to attend Markets and Film Festivals	30 Filmmakers were funded to attend Markets and Film Festivals
		Promote the SA film industry by awarding Marketing and Distribution grants	15 Marketing and Distribution grants awarded	15 Marketing and Distribution grants awarded
	Showcase SA content to strategic markets.	Local Brand Positioning and activations to promote the NFVF and SA Film Industry	23 brand activations were implemented	34 brand activations were implemented
	Strategically identified National Festivals aligned to NFVF mandate	Local activations and promotional events to showcase SA film and content	Activated at 8 National Film Festivals	Activated at 14 National Festivals 2 DSAC activations
	Position the NFVF and the SA Film Industry through international activations	Position the NFVF and SA film industry through international activations	Activated at 4 virtual International Festivals	Activated at 4 International Festivals. Activated at 1 African Focus Festivals and Market
		Showcase SA content to strategic markets		Activated at 2 strategic new markets

Source: NFVF Annual Report 2022

### 3.2.4. LESSONS FOR KZN FILM

Based on the information above, KZN Film can take the following lessons from the NFVF:

- **Build strong infrastructure and support systems.** The NFVF has developed a robust infrastructure to support and promote the South African film industry. KZN Film could investigate establishing similar support systems to nurture local talent and facilitate their growth.
- **Effective funding and grants.** The NFVF allocates millions into the marketing and distribution fund, which offers grants and support for filmmakers and helps to promote the South African film industry both locally and internationally. While KZN Film does allocate funds towards marketing and projects, it is necessary to find ways of raising higher levels of funding and attracting additional sponsors that would contribute towards the growth of this support initiative.
- **Evaluation and feedback.** The NFVF records and reports on its allocations and funding initiatives in greater detail compared to KZN Film, which allows for effective monitoring and evaluation of its processes and helps inform future decisions. KZN Film could implement detailed evaluation processes to gather feedback from participants, attendees, and industry stakeholders to continuously monitor outcomes from film festival and film markets attendance and improve their performance.
- **Networking and International Exposure.** The NFVF works to promote South African films and filmmakers on both local and international stages through its activation initiatives. While KZN Film does have a certain presence locally, more can be done to promote the province internationally as a film destination of choice in South Africa.

### 3.3. THE GAUTENG FILM COMMISSION (GFC)

#### 3.3.3. THE ROLE OF THE GFC



The Gauteng Film Commission (GFC) is an entity responsible for the development, promotion and coordination of the film and television production industry in the Gauteng province. The aim of the commission is to make the Gauteng province a world-class film destination and attracting local and international investments in the industry.

The role of the GFC includes:

- Promoting regional content and telling South African stories.
- Developing and supporting audiovisual content creators and enterprises.
- To facilitate and improve the way in which business is done in the audiovisual industry in Gauteng.
- Promoting Gauteng as a preferred audiovisual destination.
- To attract investment into the audiovisual industry.

#### 3.3.4. INITIATIVES AND PARTNERSHIPS

During the pandemic, the GFC adapted to the “new normal” by hosting a variety of programs and initiatives online. These initiatives were implemented through the following activities:<sup>30</sup>

##### 1. Online masterclasses

These masterclasses targeted youth, women, and industry practitioners with the aim of providing educational sessions that would positively contribute to the transformation of the sector, while navigating the effects of COVID-19. Conversations had during these masterclasses were centred around finding solutions to the key challenges faced by youth and emerging talent in the industry.

##### 2. Training virtual lectures

The aim of these training sessions was to help film SMMEs, the youth and emerging filmmakers to better understand the business landscape in the South African film industry. This allowed for the growth and expansion of businesses into the global market.

##### 3. Online (short) film festival

The film festival was hosted through watch parties using various digital platforms. Films that were presented were non-commercial and sourced strictly from students from the various film institutions.

##### 4. Marketing and distribution

The GFC supports various programmes and initiatives which aim to market South African films and projects both locally and internationally. One successful example is Sollywood, which is an initiative that provides a platform for local artists to showcase their talents to a broader audience. Sollywood has launched 68 books, 18 documentaries, 8 film festivals, 4 music festivals and an artists’ legal aid clinic.

#### 3.3.5. FILM FESTIVALS SUPPORTED BY THE GFC

One of the initiatives of the GFC is to support film festivals and markets. These events help showcase the work of the filmmakers, assists with industry networking, boosts the local economy, allows for education and discussion, and exposes filmmakers to both local and global distributors and financiers. Overall, the GFC’s support for film festivals and markets aligns with its mission to promote filmmaking, cultural exchange, creative expression, and industry growth on a global scale.

Below is a list of the film festivals supported by the GFC in 2021:

**Table 12: Film Festival Supported by the GFC 2021**

<sup>30</sup> (GFC, 2021)

PROJECT	DESCRIPTION
<b>Kasi Film festival</b>	The film festival aims to show how women play a crucial role in film production by hosting local movies produced and directed by women in townships.
<b>Reel to Reality</b>	The event showcases stories of Africans that promote creativity and knowledge production with the aim of providing skills development and knowledge sharing through screenings and panel discussions.
<b>Africa International Festival (ARIFF)</b>	Held in Johannesburg annually, this event focuses on creating a platform for those from previously disadvantaged and marginalised communities.
<b>Soweto Film Festival</b>	The aim of this event is to create a National Youth Service work integrated programme for TVET students, and other permanent employment for graduates.
<b>54 Houses Film Festival</b>	This is a platform for young aspiring writers, producers, and directors to showcase their work.
<b>National Youth Arts Festival</b>	The NYAF, founded in 2022, is an event run by the youth, for the youth. The event focuses on film, music, dance, theatre, and art, with the aim of giving young creatives a platform to showcase their work
<b>Yes Stru Film Festival</b>	This event promotes and assists filmmakers to understand the opportunities that exist in the industry.
<b>The Broke Ass Showcase</b>	The Broke Ass Showcase provides a platform to connect and celebrate South Africa's young film community whilst inspiring innovation and collaboration across the entertainment industry.
<b>MIC Film Festival</b>	This festival aims to preserve South African music heritage by showcasing all genres of music.

Source: GFC Annual Report 2022

### 3.3.6. LESSONS FOR KZN FILM

Based on information presented above, KZN Film can draw a few lessons from the GFC, namely:




- **Effective Infrastructure:** The GFC has established a solid infrastructure to support the local film industry, including funding opportunities, training programs, and facilities. The focus being developing local creatives and those from previously disadvantaged backgrounds. The aim has been to invest in, and develop the Gauteng film industry internally, while ensuring access to international stages. KZN Film could learn from the GFC's approach to create a supportive ecosystem for filmmakers in its region. By creating more inclusive training opportunities, funding more up and coming artists, marketing them both locally and internationally, could ensure the growth and success of KZN based creatives.
- **Inclusivity and Diversity:** The GFC emphasizes inclusivity and diversity in its initiatives, supporting projects from a wide range of voices, as can be seen by the variety of film festivals supported. KZN Film could focus more on developing a wider range of creatives in the industry.
- **Market Access and Promotion:** The GFC actively promotes Gauteng as a filming destination, attracting local and international productions. KZN Film could learn from their marketing strategies to position KZN as an appealing location for film and television projects. This can be achieved through increasing local productions at local and international film festivals and markets, and having presentations which promote KZN.



### 3.4. CONCLUDING REMARKS

The following table is a summary of the contrasts and comparisons of the different roles, initiatives and support given by the various Film Commissions identified in this section.

**Table 13: Comparative analysis of Film Commissions presented in this section**

	ROLE	INITIATIVES	SUPPORT GIVEN
 <p><b>KZN FILM</b> KWAZULU-NATAL FILM COMMISSION SOUTH AFRICA</p>	<ol style="list-style-type: none"> <li>1. Financial support and incentives to filmmakers</li> <li>2. Location assistance</li> <li>3. Skills development and training</li> <li>4. Collaboration and partnership with stakeholders</li> <li>5. Support for film festivals and markets</li> </ol>	<p><b>DURBAN FILMMART</b></p> <ol style="list-style-type: none"> <li>1. Talents Durban</li> <li>2. DFM Jumpstart</li> <li>3. DFM Pitch and Finance Forum</li> <li>4. DFM Access</li> <li>5. Future mentors</li> <li>6. Filmmart Africa</li> </ol> <p><b>DURBAN INTERNATIONAL FILM FESTIVAL</b></p> <ol style="list-style-type: none"> <li>1. Isiphethu Hub</li> <li>2. Gotham</li> </ol>	<ol style="list-style-type: none"> <li>1. Financial support given to filmmakers and to the various festivals.</li> <li>2. Marketing of KZN Film at the various festivals for career awareness, and of KZN as a film destination.</li> <li>3. Training and development and Information sharing platforms hosted at the various festivals for the growth and development of filmmakers and scriptwriters.</li> </ol>
 <p><b>NFVF</b> national film and video foundation an agency of the Department of Sports, Arts and Culture</p>	<ol style="list-style-type: none"> <li>1. Funding for development, production, marketing, and distribution of films</li> <li>2. Training and development of filmmakers</li> <li>3. Promotion of local talent</li> <li>4. Industry development for the overall growth and sustainability of the industry</li> <li>5. Access to markets and festivals</li> <li>6. International collaborations</li> <li>7. Cultural preservation</li> <li>8. Research and development.</li> </ol>	<ol style="list-style-type: none"> <li>1. SEDIBA Masters scriptwriting training programme</li> <li>2. Training and mentorship programmes</li> </ol>	<ol style="list-style-type: none"> <li>1. Financial</li> <li>2. Marketing</li> <li>3. Training and development and Information sharing platforms for the growth and development of filmmakers and scriptwriters</li> </ol>
 <p><b>GFC</b> gfc Gauteng FILM COMMISSION SOUTH AFRICA</p>	<ol style="list-style-type: none"> <li>1. Promote regional content &amp; telling of SA stories.</li> <li>2. Develop and support audiovisual content creators and enterprises.</li> <li>3. Facilitate and improve business practices in Gauteng.</li> <li>4. Promote Gauteng as an audiovisual destination.</li> <li>5. Attract investors.</li> </ol>	<ol style="list-style-type: none"> <li>1. Online masterclasses</li> <li>2. Training virtual lectures</li> <li>3. Online film festivals</li> <li>4. Marketing and distribution</li> </ol>	<ol style="list-style-type: none"> <li>1. Financial support given to filmmakers and to the various festivals.</li> <li>2. Marketing of Gauteng as a film destination.</li> <li>3. Training and development of scriptwriters and filmmakers.</li> <li>4. Information sharing platforms for awareness of industry best practices</li> </ol>

In this benchmarking section, the initiatives the NFVF and the GFC have, that not only contribute to the growth and development of filmmakers, but also contribute to the growth of the industry in Gauteng and in South Africa were explored. What was apparent in this analysis is that both the NFVF and the GFC invest significant resources into the growth of filmmakers through grants that aid in training and development, scriptwriting, and ensuring that the South African film industry is known both locally and internationally. While KZN Film does have funding available for filmmakers in production development and in markets and festivals, it is at a much smaller scale than the NFVF and the GFC. This is evidenced by the fact that the GFC and NFVF send larger delegations of filmmakers to international film festivals and markets. Additionally, the NFVF, and to a lesser extent the GFC, also focus on attracting investors, international collaborations, and facilitating proper business practices amongst local filmmakers. They also have larger promotion initiatives compared to KZN Film and have a focus on activation projects that assist in promoting the organizations globally.

Key lessons for the KZN Film through this benchmarking exercise include the need for proper infrastructure to enable the growth and development of creatives in the province. Additionally, there is need for KZN Film to source and allocate more funding that will go towards the development of filmmakers and their projects. KZN Film needs to allocate additional resources towards marketing KZN as a film destination of choice, which will also benefit the Commission in terms of attracting investors.

The following section gives a detailed analysis of the feedback received from stakeholders regarding film festivals and markets, their role in the industry, their experiences, and recommendations for KZN Film.

## 4. PRIMARY DATA FINDINGS

Stakeholder engagement formed an integral component of this research study. The study used primary research as a tool to get a more in-depth and relevant view of the film markets and festivals, and to understand their purpose and impact to the individuals who directly benefit from their success. Using this approach, the study was able to gain a deeper understanding of the context and nuances of the research problem by directly interacting with participants or subjects. This firsthand experience also provided valuable insights that are not available through secondary data and assisted in filling gaps in existing knowledge or literature.

**Note: The perspectives and viewpoints presented in this section belong to the participants and have been incorporated without modifications**

### 4.1. DATA COLLECTION PROCESS

For this research, key stakeholder one on one interviews were conducted virtually using the MS Teams platform as well as telephonically with the following key industry professionals in KZN:

1. Attendees and participants at various local and international film markets and film festivals supported by KZN Film from 2015 - 2021
2. Independent filmmakers,
3. Producers,
4. Directors,
5. Writers, and
6. KZN Film Festival organisers.<sup>31</sup>

45 stakeholders were identified however only 18 interviews were conducted. The following were the main challenges experienced during the data gathering process:

Challenges Faced	Mitigations
<ul style="list-style-type: none"> <li>• Non responsiveness</li> <li>• Some refusals</li> <li>• Gap contact details</li> <li>• Incorrect contacts</li> <li>• Scheduling issues</li> <li>• No shows</li> </ul>	<ul style="list-style-type: none"> <li>• Multiple attempts to make contact.</li> <li>• Telephone calls.</li> <li>• Rescheduling attempts.</li> </ul>

The main purpose of these interviews was to gather relevant information for the study and to get firsthand accounts from filmmakers, distributors, local film festival organisers and industry professionals and a nuanced perspective on the challenges and opportunities that shape the landscape of film festivals and markets.

The data collection tool used to guide the process was a pre-prepared a schedule of interview questions that was developed with input from the Audiovisual specialist on the project team. However, the interview process remained flexible allowing for responses from participants outside the parameters of the schedule of questions.

<sup>31</sup> A comprehensive list of delegates spoken to, with a list of their organizations is available in Annexure A.

**Figure 4: Schedule of Interview Questions used to guide the primary data collection process**

<ol style="list-style-type: none"> <li>1. Have you attended a film festival or a market?</li> <li>2. Which film festival/market did you attend, when and where was it held?</li> <li>3. What motivated you to attend the event?</li> <li>4. What were your expectations before attending the festival/market, and did the event meet or exceed them?</li> <li>5. What were some of the highlights of the festival/market?</li> <li>6. Did the event provide any opportunities to connect with filmmakers, producers, or industry professionals? Did these encounters enhance your experience? If so in what ways?</li> <li>7. Did you get any funding or coproduction opportunities as a direct result of attending the event? If yes, what was the project and where was it based?</li> <li>8. In your opinion, do you think these festivals/markets are worth attending?</li> <li>9. What value do you think the markets/festivals bring to the film industry?</li> <li>10. What more can KZN Film do to enhance the effectiveness of these events?</li> <li>11. Would you encourage others to attend film festivals or markets? Why/Why not?</li> </ol>	 <p><b>DATA COLLECTION TOOL</b></p>
	<ol style="list-style-type: none"> <li>i. Schedule of questions</li> <li>ii. Developed with inputs from Audio-Visual Expert (practical)</li> <li>iii. Developed to guide data collection process however is flexible</li> </ol>

#### 4.2. STAKEHOLDER CONSULTATION FEEDBACK

##### 4.2.3. MOTIVATION FOR ATTENDING FILM FESTIVALS AND MARKETS

Participants were asked to share their motivations and expected benefits from attending and participating at film festivals and markets. The following were the main reasons cited.

**Figure 5: Main Reasons for Attending Film Festivals and Markets**



Networking opportunities was the main reason and benefit highlighted by participants of film markets and film festivals. Film festivals connect filmmakers with other filmmakers, distributors, financiers, and other relevant

industry players. Another important reason for attendance that came out of the findings was information sharing. Through the various panel discussions, training sessions and presentations given at the various events, attendees have the opportunity to learn about key changes in the industry, gain exposure to new technologies and innovation and new industry methods. Additionally, attendance also provides an opportunity to meet and engage with key role players who are best aligned to their projects for distribution or coproduction opportunities.






Feedback for filmmakers:

- Go to festivals with a key purpose. There are many discussions and presentations at these events some of which take place concurrently. Therefore, it is imperative to prioritise and attend events that are strategically in line with individual interests and projects.
- It is more beneficial and productive to attend festivals or markets with a project in development in order to get the most benefit from participation at these events as well as to leverage on the networking opportunities with potential co-producers and distributors.
- To increase the chances of project take-up, funding or distribution opportunities, it is key to attend as many film festivals/markets and increase exposure.

#### 4.2.4. HIGHLIGHTS EXPERIENCED

Participants were asked to share the highlights from attending and participating at film festivals and markets. The following were the main responses given.

**Table 14: Highlights of attending film festivals or film markets.**

HIGHLIGHT	DESCRIPTION
 <p>Networking</p>	As one of the most popular highlights, networking allows filmmakers the chance to interact with key industry players they would otherwise have no access to without the festivals and markets. It allows for the building of relationships and partnerships that are beneficial.
 <p>Awards and Recognition</p>	Some of the respondents highlighted the fact that their projects won awards at the various international and local film festivals, which helped them to gain publicity, market themselves and the province and provide further opportunities. Moreover, these projects then have the chance to be taken up by large streaming platforms such as Showmax or Netflix.
 <p>Learning opportunities</p>	The panel discussions, presentations, question, and answer sessions were identified as highlights as they give attendees further insight into industry practices and developments. The various residencies and writers' labs available at these events further provide platforms for expanding their knowledge base and skills and enable networking and collaboration with other writers or filmmakers.
 <p>Social impact and Cultural Exchange</p>	Film festivals give a variety of film screenings from different countries giving filmmakers the opportunity for cultural exchange. Additionally, they also expose the world to the rich South African culture and experiences and in particular the rich Zulu culture and heritage and language. The events also touch on social issues, giving awareness to important issues.
 <p>Social Events</p>	Participants also cited that, markets in particular, have a lot of social parties and gatherings which are enjoyable and also provide additional less formal networking and marketing opportunities.

#### 4.2.5. FEEDBACK AND RECOMMENDATIONS FOR KZN FILM

Participants were asked to provide recommendations KZN Film to enhance the effectiveness of film markets and festivals and the main responses are represented in the following figure:

**Figure 6: Recommendations for KZN Film to enhance the effectiveness of participation at film markets and festivals.**



- **Access to Funding**

Delegates have indicated that the KZN Film should increase funding opportunities for attending film markets and festivals. Instead of being funded for one or two events, it would be beneficial to attend various local and international projects that align with their goal.

Delegates who are filmmakers have highlighted that it would help if projects were funded from the development stage right up until production.

Festival organisers spoken to have also indicated that access to more funding would enhance the effectiveness of the festivals. It would allow for better marketing, better resources, and the overall improvement of the programmes.

- **Increased Presence**

Having a greater presence at both local and international film festivals and markets would put the KZN province on the map and make it known as a film destination of choice. Currently, delegates have stated that when they are at film festivals, you hardly find KZN Film representatives promoting the commission or the province, but you find representatives from the Western Cape and Gauteng present. Some have indicated that having stalls and giving out promotional material would help make KZN known.

- **Policy Changes**

KZN Film should give out the call for festivals sooner. Currently, filmmakers have insufficient time to respond to these calls. Given a bit more time, they can put together a production pack and marketing materials.

- **Labs and Residencies**

Writers' labs and residencies contribute towards the growth and development of filmmakers and script writers. However, there are too few opportunities and are not easily accessible. KZN Film could assist by investing more in these initiatives, creating more space so that more creatives can benefit. KZN Film can also facilitate more round table discussions, even outside of festivals so creatives get together and strategize and learn from each other.

- **Service Providers**

Filmmakers have a limited budget for their production. By the time filming starts, the money has covered travelling expenses, accommodation, food etc. KZN Film, in partnership with KZN tourism, could foster relationships with service providers in the province so that it is easier to negotiate discounts.



- **Promotion of Participants**

Once filmmakers with projects in development are chosen to go to festivals, the KZN Film can help spread the word and promote these individuals so that when their work is being screened, there is already some knowledge about it. This would make networking easier.

- **From festival organisers**

KZN Film could be more innovative and adaptable to change. See how the industry is moving and changing then allow festivals to experiment with different ways of doing things, instead of just enforcing that things should be done the traditional way. There is some sort of censorship and a lot of ‘red tape’ which can be limiting.

KZN Film also has a graduate programme they support through some of the local film festivals. Once the programme is over, there needs to be a way to absorb these graduates and have some type of exit strategy for them.

KZN Film should have more activation programs and be more visible in communities so that they are aware of what the organisation is about and what opportunities are there for aspiring filmmakers.

### 4.3. CONCLUDING REMARKS

In this section, the responses from the various engagements with film festivals and markets attendees and other stakeholders were presented. The following table gives a comparison on reasons for attending from literature and those mentioned by stakeholders.

**Table 15: Role of Film Festivals and Markets**

FROM SECONDARY RESEARCH FINDINGS	FROM PRIMARY RESEARCH FINDINGS
Distribution and sales Opportunities	Networking
Financing and Co-Production	Financing opportunities
Content Licensing	Co-Production/Distribution opportunities
Global Networking and collaboration	Information sharing
Market Access	Promotion of independent filmmakers
Market Trends and Research	Cultural Exchange
Financing and pre-production	
Awards and Recognition	
Premieres and Exposure	
Cultural and Artistic Impact	

In conclusion, the primary data collection section, comprising the perspectives from in-depth interviews with attendees and participants of various film festivals and film markets, provided invaluable contributions to enhance the understanding of the dynamics of these events and provided recommendations to enhance the effectiveness of participation at these events. The main motivation that drives attendance at film festivals and markets is the pursuit of industry networking and funding and distribution opportunities. Recommendations to ensure that these events remain vibrant hubs of creativity, cultural promotion, and economic vitality for local filmmakers in KZN were outlined. The next section looks at establishing the return on investment for KZN Film.

## 5. RETURN ON INVESTMENT FOR KZN FILM

The previous section discussed the input received from different stakeholders and recommendations for KZN Film drawn from the engagements. This section attempts to establish the return on investment (ROI) of the film festivals and film markets supported by KZN Film over the period 2015 - 2021.

### Considerations

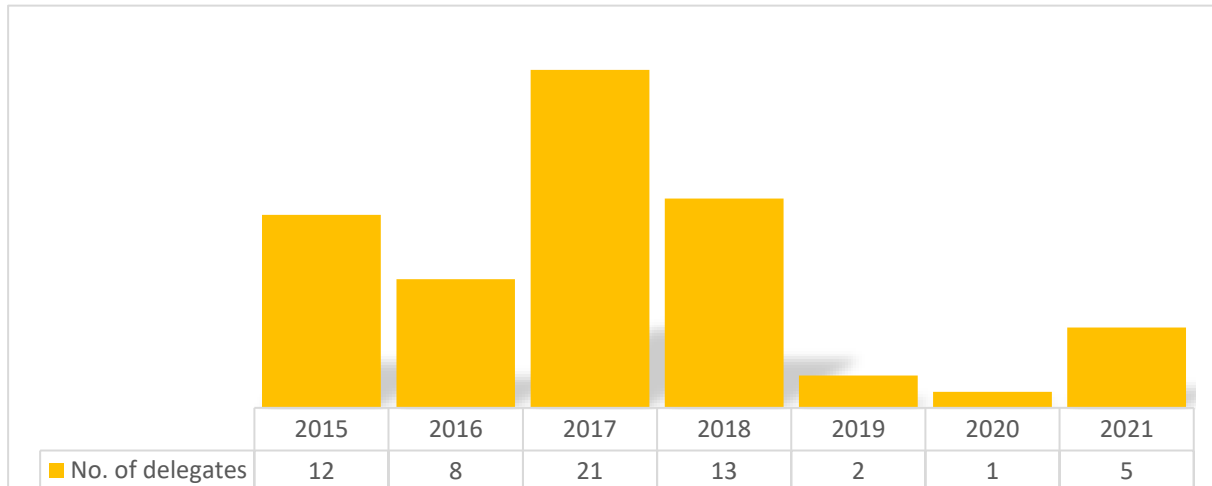
- The main source of information used in this section is adapted from the following sources namely:
  - KZN Film Annual Reports (2014/15 – 2021/22)
  - KZN Film Service Delivery Reports (2019-2021)
  - Primary data from local film festival organisers
  - Primary data from delegates that attended film festivals and film markets over the period 2015 – 2021. It must be noted that 45 delegates were identified however due to challenges experienced in data gathering only 18 (28%) provided inputs.
- Limitations
  - Data Availability: Comprehensive data on the outcomes of attending film festivals and markets was not available and opportunities or connections from attendance at film festivals and markets were not documented or easily traceable and thus could not be comprehensively established.
  - Gaps in information. The information used in the derivation of the ROI calculation is mostly based on information within the KZN Film Annual Reports. The information provided within these reports is at an aggregated level therefore it was not possible to ascertain the specific expenditures per film festival or market or the type of costs incurred.
  - Subjectivity: Measuring the ROI of attending film festivals and markets involves subjective elements, such as gauging the impact of networking, exposure, or new project opportunities. Different individuals and organizations may perceive these benefits differently, making it challenging to quantify them accurately.
  - Long-Term Impact: The full impact of attending a film festival or market may not be immediately evident. Opportunities, collaborations, or distribution deals that result from attending an event may materialize months or even years later, making it difficult to attribute them solely to the events attended within the period in question.
  - Diverse Goals: Filmmakers and industry professionals attend these events for various reasons, including networking, finding distribution, securing financing, promoting their work, and others, making it challenging to create a standardized ROI calculation.
  - Costs Variability: The costs associated with attending film festivals and markets can vary significantly depending on factors such as location, event size, and individual preferences. Tracking and accurately accounting for all expenses is complex. This is further compounded by the aggregated level recording of expenditure on film festivals and markets in KZN Film Annual Report.
  - Measuring Intangibles: Some of the most valuable outcomes of attending these events, such as building relationships or enhancing reputation in the industry, are challenging to quantify in monetary terms.

To address these limitations, it is recommended that KZN Film adopt a more holistic approach to evaluating the benefits of attending these events. This approach may involve a combination of quantitative metrics (e.g., tracking expenses, deals secured, distribution agreements) and qualitative assessments (e.g., networking success, industry reputation). While calculating a precise ROI may be challenging, a comprehensive monitoring and evaluation system can provide a more nuanced understanding of the value gained from participation in film festivals and markets.

## 5.1. INVESTMENT BETWEEN 2015 - 2021

### 5.1.1. NUMBER OF DELEGATES SUPPORTED PER YEAR

**Figure 7: Number of Delegates Sent to Film Markets and Festivals per year, 2015 - 2021**



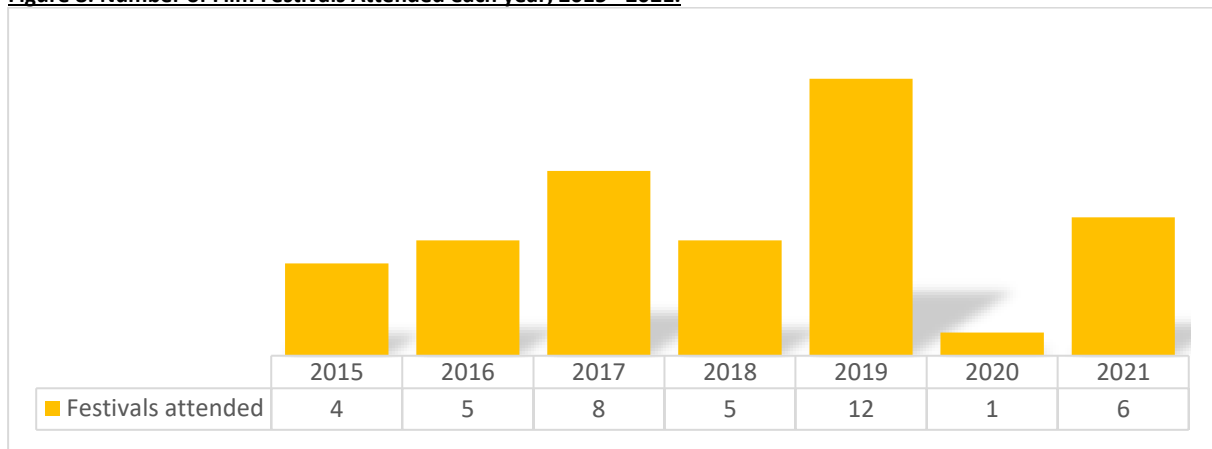
Source: KZN Film Annual Reports (2014/15 – 2021/22); KZN Film Service Delivery Reports (2019-2021)<sup>32</sup>

KZN Film is lagging in terms of number of delegates sponsored per annum in relation to other film commissions nationally (See Section 3). Additionally, the number of delegates fluctuates every year possibly owing to the selection processes. The highest number of recorded sponsorships was 21 delegates in 2017 while the lowest levels were in 2019 -2020 owing to the restrictions imposed by the Covid-19 Lockdown globally.

### 5.1.2. DIFFERENT FILM FESTIVALS AND MARKETS ATTENDED EACH YEAR

Over the years, a number of different local and international film festivals have been supported by KZN Film. The following figure and table give the number of events attended per year and a list of film festivals attended.

**Figure 8: Number of Film Festivals Attended each year, 2015 - 2021.**



Source: KZN Film Annual Reports (2014/15 – 2021/22); KZN Film Service Delivery Reports (2019-2021)

Before the pandemic a large number of local and international events were being supported by KZN Film and the levels have not yet recovered to pre pandemic levels. It is notable that KZN Film has provided support to the Durban International Film Festival and sent delegates to attend the event every year since 2015 to 2021.

<sup>32</sup> The number of delegates supported by KZN Film in 2019 could not be established with accuracy. The average number of delegates was utilised.

**Table 16: Film Festivals Attended Over the Period 2015 - 2021**

YEAR	INTERNATIONAL FESTIVAL/MARKET	LOCAL FESTIVAL/MARKET
2015	Mipdoc	Durban International Film Festival
	African Rising International Film Festival	
	Cannes	
2016	African Rising International Film Festival	Durban International Film Festival
	Filmmapalooza	
	Vision Du Reel	
	Torino Script Lab	
2017	African Rising International Film Festival	Durban International Film Festival
	Pan African Film Festival	Interpret Durban
	Delhi International Film Festival	Independent Black Film Collective
		Africa Television Market
2018	Berlin Film Festival	Cape Town International Film Festival
	Pan African Film Festival	Durban International Film Festival
	Annecy International Film Festival	
2019	Annecy International Film Festival	Durban International Film Festival
	BFI London Film Festival	Discop Johannesburg
	Toronto Film Festival	Umgungundlovu Film Festival
	Zanzibar International Film Festival	Kwazulu Natal African Film Festival
		Rapid Lion Film Festival
		Kwasukasukela Film Festival
		Ugu Film Festival
		Nature, Environment and Wildlife Filmmakers
2020	No-Borders International Co-Production Market	
2021		Nature, Environment and Wildlife Filmmakers
		Zanzibar International Film Festival
	Annecy	Durban International Film Festival
		Durban FilmMart
		Gotham
		Africa International Film Festival

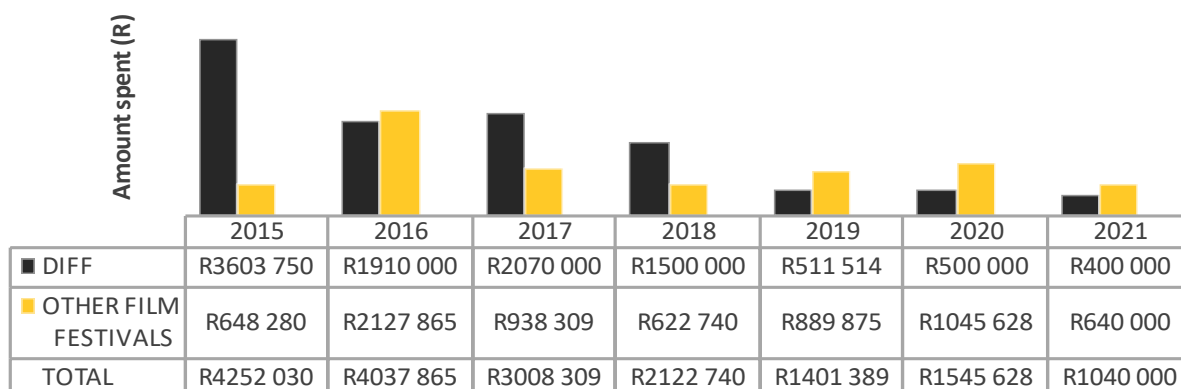
KZN Film Annual Reports (2014/15 – 2021/22); KZN Film Service Delivery Reports (2019-2021)

Initially, more international events were supported by KZN Film, however since 2019 more local film festivals have been supported by KZN Film. This may also be attributed to the establishment of more local film festivals in KZN.

### 5.1.3. SPENDING ON FILM FESTIVALS AND MARKETS

The following graph shows the amount spent by KZN Film on DIFF and other film festivals between 2015 to 2021.

**Figure 9: Amount spent on film festivals and markets 2015-2021 (Rands)**



KZN Film Annual Reports (2014/15 – 2021/22)

As per the KZN Film Annual Reports, spending is allocated to the DIFF and other film festivals. KZN Film has invested a total of R 17 407 961 from 2015 to 2021 with an average spend of R2 486 851.57 per annum and an

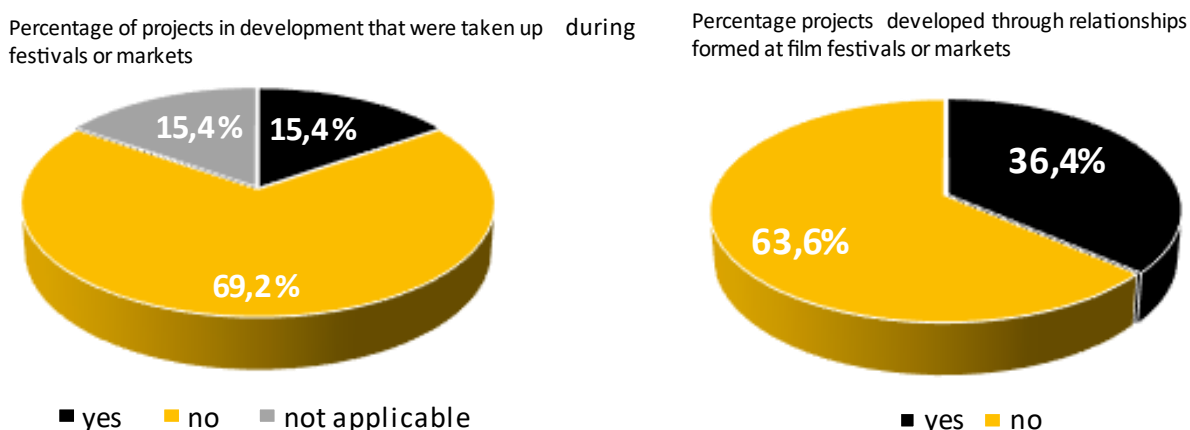
average cost per delegate of R280 773.56. However, spending per year fluctuates depending on factors such as location, event size, and individual preferences therefore a trend cannot be established. Additionally, it must be noted that spending also dropped significantly in 2020 and 2021 owing to the hosting of some events online.

## 5.2. RETURN ON INVESTMENT

### 5.2.1. PROJECTS OPPORTUNITIES FROM FILM FESTIVALS OR MARKET ATTENDANCE

The figure below shows the portion of delegates who have received co-production or funding opportunities or distribution opportunities for their projects directly from networking opportunities at a film festival or market.

**Figure 10: Direct project opportunities from Film Festival or Market Attendance**



*KZN Film Annual Reports (2014/15 – 2021/22); KZN Film Service Delivery Reports (2019-2021)*

From the figure, only 15% of the delegates engaged with in this study have formed successful project partnerships directly from attending a film festival or a market. These are those that went into a festival with a project in development, pitched their project and received co-production or funding opportunities. 69% of the delegates have not secured any partnerships or funding for their projects from film festivals and markets, and 15% of the delegates spoken to did not go to film festivals with the intention of finding projects, but rather went attended as organizers or from various institutions such as the NFVF. Those who did receive partnerships or financing were unable to give specific details or amounts.

Whilst not many filmmakers received co-production or financing partnerships for their projects as a direct result of a film festival, all the stakeholders have forged relationships with other industry players at those markets and have benefitted in some way. 64% of delegates engaged with in this study have formed partnerships for new projects and opportunities because of the relationships formed at the various film festivals and markets. Some have learned new information; others went into new fields due to various partnerships for example, moving from being just a filmmaker, to a writer for a television programme through connections made at film festivals or markets. Only 36.4% of the delegates spoken to have already worked on projects that have materialised from such relationships. However, of the 63% that have not secured these partnerships, majority indicated that they are in talks regarding future collaborations and partnerships.

### 5.2.2. RETURN ON INVESTMENT

The aim of this section is to determine the return on investment of film markets and festivals for KZN Film..

**Table 17: Return on Investment in Terms of Projects**

CRITERIA	UNIT	VALUE
Total Spend (2014-2021)	Rand	17 407 961
Total Number of Delegates supported	Number	62
Total projects	Number	16
Average Cost Per Delegate	Rand	R280 773.56
<b>Return in number of Projects per R1 million Spent</b>		<b>1.0</b>

Using information gathered from the annual reports and from the delegates engaged with, the number of projects per R1 million spent by the KZN Film can be determined. The findings show that on average for every R1 million spent by KZN Film, one project from the attendees receives partnership or financing as a result of film festivals or markets or other promotion or distribution benefits. It is worth noting that this result is subject to change depending on the information provided. A more complete return on investment would be achieved with more detailed information such as the cost per delegate and the number of projects that have received financing from festivals, and the value of the financing or the project. As it currently stands, the value of total spend not only focuses on how much was spent per delegate, but also includes other financial support provided to film festivals including grants and subsidies. There is a need for more disaggregated information regarding spending by the KZN Film allocated to film festivals and markets.

This section gave insight into the spending on film festivals by KZN Films, the number of delegates supported, and the projects that have been taken up either for funding, coproduction or distribution as a direct result of partnerships formed at film festivals or markets. However, the monetary value of projects that have received coproduction or financing opportunities from film festivals or markets, as well as the intangible benefits such as the networking and social benefits of participation at these events could not be included in the return-on-investment calculation.



## 6. STRATEGIC FRAMEWORK TO LEVERAGE ON FILM MARKETS AND FILM FESTIVALS

The following section outlines a strategic framework that KZN Film can use to leverage on film markets and film festivals and significantly enhance its return on investment (ROI) in the film industry.

### 6.1. STRATEGIC DIRECTION

**Table 18: Strategic direction to leverage film markets and festivals to enhance ROI**

No.	Strategy	Activities
1	Research and Select Target Festivals and Markets	1.1. Conduct extensive research to identify film festivals and markets that align with KZN's goals and strengths. 1.2. Prioritize festivals that have a history of promoting diversity and emerging filmmakers such as local and regional festivals and markets that showcase KZN and South African cinema.
2	Promotion and Marketing	2.1. Develop a compelling marketing campaign that highlights KZN as a vibrant film destination. Emphasize unique selling points, such as diverse locations, skilled local crews, and supportive infrastructure. 2.2. Create promotional materials showcasing KZN's film industry, including brochures, videos, and press kits. 2.3. Launch a dedicated website or section of KZN Film's website focused on festivals and markets, providing information about regional talent, incentives, and opportunities.
3	Industry Connections and Networking	3.1. Establish and nurture relationships with key industry players, including international distributors, production companies, and filmmakers. 3.2. Host networking events or receptions during festivals to connect KZN filmmakers with potential collaborators and investors. 3.3. Offer mentorship programs or workshops to help local filmmakers prepare for festivals and markets.
4	Film Selection and Showcase	4.1. Facilitate the selection of KZN-produced films to be screened at festivals and markets. Ensure a diverse representation of genres and talent. 4.2. Organize KZN film showcases, panels, or presentations at festivals to promote local content and foster industry discussions.
5	Data Collection and Analysis	5.1. Collect data on the impact of KZN's participation in festivals and markets, including the number of deals secured, films screened, and partnerships formed. 5.2. Analyse the ROI for each event to determine which festivals and markets yield the highest benefits.
6	Post-Festival Support	6.1. Provide support and guidance to KZN filmmakers after festivals, helping them negotiate distribution deals, secure funding, and market their films effectively. 6.2. Leverage the success of KZN films at festivals to attract further investments and co-production opportunities.
7	Collaboration and Partnerships	7.1. Collaborate with other regional film commissions, industry associations, and government bodies to amplify efforts and jointly promote KZN cinema

By implementing this strategic approach, KZN Film can effectively leverage film festivals and markets to promote its region as a filmmaking hub, support local talent, and stimulate economic growth in the film industry while maximizing its ROI.

## 6.2. STRATEGIC OBJECTIVES

Defining specific goals for KZN Film’s involvement in film festivals and markets will provide a strategic direction and a shared vision towards which to work. This will assist in future ROI calculation and interpretation.

**Table 19: Specific goals for KZN Film’s involvement in film festivals and markets**

	Objective	Specific Goal	Metrics
1	Increase Regional Film Industry Visibility	Raise awareness of KZN as a prime film production destination.	Measure increased mentions in industry publications, positive media coverage, and recognition as a film-friendly region
2	Attract International Productions	Attract foreign film productions to choose KZN as a shooting location.	Track the number of international productions filmed in KZN, job creation, and economic impact.
3	Promote Local Talent	Showcase and support emerging and established KZN filmmakers	Count the number of KZN-produced films screened at festivals, awards won, and talent development initiatives launched
4	Facilitate Economic Growth	Stimulate economic growth in the KZN film industry	Measure the increase in film-related investments, the number of jobs created, and the growth of local film businesses
5	Cultivate Partnerships and Collaborations	Foster collaborations between KZN filmmakers and international industry professionals	Track the number of collaboration agreements, co-productions initiated, and partnerships formed.
6	Maximize Return on Investment (ROI)	Ensure that the KZN Film Commission's involvement in festivals and markets generates a positive ROI.	Evaluate the financial investments versus the benefits gained, such as deals secured, film sales, and increased industry presence
7	Promote Regional Culture and Diversity	Highlight KZN's diverse culture and unique locations through films.	Monitor the inclusion of KZN's cultural elements in films, as well as recognition of KZN as a culturally rich film destination
8	Support Film Education and Training	Offer educational opportunities and training programs for local filmmakers to enhance their festival and market readiness	Measure the number of participants in training programs, successful transitions to festival participation, and positive feedback from participants
9	Strengthen Networking and Industry Connections	Facilitate networking opportunities for KZN filmmakers with industry professionals	Track the number of industry connections made, collaborations initiated, and distribution deals secured through networking
10	Measure Success at Festivals and Markets	Gauge the impact of KZN films at festivals and markets	Count awards won, distribution deals secured, and the number of KZN films screened at prestigious festivals.

These specific goals provide a clear direction for the KZN Film Commission's involvement in film festivals and markets and serve as measurable benchmarks to assess the effectiveness of its strategies and initiatives in promoting the regional film industry. The following are support frameworks and to tools to assist KZN Film monitor and evaluate the metrics given in the preceding table.

### 6.3. A STRATEGIC APPROACH TO ASSIST FILMMAKERS CAPITALISE ON FILM MARKETS AND FILM FESTIVALS

Filmmakers can prepare for film festivals and markets to maximize their chances of success and make the most of their experience. Preparing for festivals involves a combination of logistical planning, marketing and publicity efforts, and artistic considerations. The following table outlines a strategic approach can help filmmakers make the most of their festival experience, gain recognition, and advance their careers in the film industry.

**Table 20: Strategic approach to assist filmmakers capitalise on film markets and film festivals**

	STRATEGIC ELEMENTS	ACTIVITIES
1	Submission and Selection	<ul style="list-style-type: none"> <li>i. Researching and selecting festivals that are a good fit for each film in terms of genre, theme, and target audience.</li> <li>ii. Adherence to each festival's submission guidelines, deadlines, and entry fees.</li> <li>iii. Creation of compelling submission packages, including a high-quality screener of the film, a well-written synopsis, director's statement, and any other required materials.</li> </ul>
2	Film Finalisation	<ul style="list-style-type: none"> <li>i. Submission of fully edited, sound-mixed, colour-corrected, and subtitled (if necessary) films for consideration.</li> <li>ii. Meeting the festival's technical specifications for screener formats and deliverables.</li> </ul>
3	Publicity and Marketing	<ul style="list-style-type: none"> <li>i. Development of a professional press kit containing a film synopsis, director's biography, high-resolution stills, posters, and any relevant production notes.</li> <li>ii. Eye-catching posters, flyers, and promotional materials that showcase the film at the festival.</li> <li>iii. Creation of a website, social media profiles, and promotional content for your film to generate buzz and engage with the audience.</li> </ul>
4	Networking and Industry Engagement	<ul style="list-style-type: none"> <li>i. Familiarity with the festival's schedule, including screening times, industry events, and networking opportunities.</li> <li>ii. Identification of key industry professionals attending the festival, such as distributors, producers, and programmers, and plan to connect with them.</li> <li>iii. Participation in industry-focused panels, workshops, and networking events to expand networks and gain industry insights.</li> <li>iv. Distribution of business cards and promotional materials with potential collaborators and industry contacts.</li> </ul>

## 7. SUPPORT FRAMEWORKS AND TOOLS TO MONITOR AND EVALUATE RETURN ON INVESTMENT ON FILM FESTIVALS AND MARKETS

Film Commissions play a pivotal role in connecting filmmakers and industry players. To ensure their investment in film festivals and film markets is effective, it is essential to employ monitoring and evaluation tools. The aim of these tools is to provide valuable insights into the impact of their investment and initiatives, helping them adapt, improve, and thrive in an ever-evolving industry.

This section looks at some of the recommended monitoring and evaluation tools, outlined as frameworks that should be used by KZN Film to record and monitor information relating to participation and support for film festivals and markets. The significance of these tools will be explained, showing how they can be used to contribute to the success and growth of the KZN film industry.

### 7.1. PERFORMANCE MONITORING AND EVALUATION

KZN Film should adopt a performance evaluation tool to monitor their performance over time in terms of specific goals as measured by given output indicators. A performance evaluation tool is significant for several reasons, namely:

- Improvement and identifying strengths and weaknesses.
- Accountability and goal setting
- Feedback and decision-making
- Resource allocation by identifying the most and least productive areas.
- Overall efficiency

The following table is a recommended framework for monitoring and evaluating performance and the outcomes in terms of overall support for film festivals and markets. This serves as a guiding framework that may be refined and further customized by KZN Film.

**Table 21: Film Festivals and Markets Performance Evaluation Tool Framework**

OUTCOME	OUTPUT	OUTPUT INDICATOR	AUDITED ACTUAL PERFORMANCE (previous year)	PLANNED ANNUAL TARGET	ACTUAL ACHIEVEMENT	DEVIATION FROM PLANNED TARGET TO ACTUAL ACHIEVEMENT	REASONS FOR DEVIATION
<b>Increased support for regional content and the telling of south African stories</b>	Script development and research support	Number of script development projects supported					
	Support to audiovisual content productions	Number of Documentaries and Short films supported					
		Number of feature films					
		Number of emerging filmmaker productions supported					
<b>Enhanced market penetration of KZN produced content</b>	Enhanced market penetration of KZN produced content	Number of audience development initiatives supported					
		Number of individuals reached through audience development projects					
<b>Increased visibility</b>	Increased visibility of KZN Film at markets and festivals	Number of film festivals presented at					
		Number of film markets presented at					
<b>Increased film festival and market support</b>	Support and development of more local festivals and markets	Number of film festivals supported					
		Number of film markets supported					
		Number of delegates sent to film festivals					
		Number of delegates sent to film markets					

## 7.2. IMPACT MONITORING AND EVALUATION

The second recommended monitoring and evaluation tool is an impact evaluation tool, which allows KZN Film to assess the actual outcomes and impacts of their programs and support initiatives for film festivals and markets. By utilizing an impact evaluation tool, KZN Film can not only evaluate the impact of their investment, but the evidence generated by impact evaluations can be used as a value proposition to increase funding support and attract additional investors based on proven positive impacts. The following table is the recommended framework of the impact evaluation tool. This serves as a guiding framework that may be refined and further customized by KZN Film.

**Table 22: Film Festivals and Market Impact Evaluation Tool Framework**

STAGE OF THE VALUE CHAIN OF A FILM FESTIVAL	TYPES OF SOCIO-ECONOMIC IMPACTS / BENEFITS	ACTUAL IMPACTS AND BENEFITS	DURATION OF IMPACT: short term (3 months: medium term (1year), Long term (longer than 1 year)	INTENSITY OF THE IMPACT: Number of persons benefitting	GAPS IN THE KZN FILM MARKETS AND FESTIVALS	ACTIONS IN KZN TO EXTEND THE BENEFITS OF FILM MARKETS AND FESTIVALS
PLANNING AND PREPARATION	Funding and support	Financial				
		Other support				
	Marketing	Marketing of film festival/market				
		Marketing of selected films				
		Marketing of KZN Film				
	Number of delegates supported					
Number of films selected						
DURING THE EVENT	Information sharing	Entertainment value for attendees				
	Networking opportunities	Skills and capacity development				
AFTER THE EVENT	Awareness of KZN as a film destination					
	Impact studies and research					
	Projects taken up at FF/FM					



### 7.3. COST MONITORING AND EVALUATION

A cost evaluation tool for KZN Film Commission funding of film festivals is particularly significant for several reasons:

1. **Resource Allocation:** Film commissions often have limited budgets for supporting film festivals. A cost evaluation tool helps them allocate their financial resources efficiently by evaluating the estimated costs of various festival components, such as venue rentals, marketing, logistics, and guest services.
2. **Budget Control:** Film commissions can use cost evaluation tools to set realistic budgets for their festival funding initiatives. This ensures that festivals do not exceed their allocated funds, preventing potential financial shortfalls or overruns.
3. **Cost Tracking:** Due to the cost variability associated with attending film festivals and markets (costs can vary significantly depending on factors such as location, event size, and individual preferences) tracking and accurately accounting for all expenses is complex.
4. **Transparency:** Using a cost evaluation tool enhances transparency in the funding process. Film commissions can clearly communicate their evaluation criteria and the financial considerations behind their funding decisions to festival organizers and other stakeholders.
5. **Benchmarking:** Film commissions can use historical cost data from previous festivals to benchmark future funding decisions. This helps in setting reasonable expectations and assessing whether festivals are becoming more cost-effective over time.
6. **Continuous Improvement:** Over time, cost evaluation tools can contribute to the continuous improvement of the film commission's festival funding strategies. By analyzing cost data and outcomes, they can refine their funding criteria and prioritize initiatives that offer the most cost-effective benefits.

The following table is the recommended framework that should be used by KZN Film to evaluate the cost of supporting film festivals and markets. This serves as a guiding framework that may be refined and further customized by KZN Film.

**Table 23: Expenditure on Film Markets and Festivals Monitoring and Evaluation Tool Framework**

COST METRIC	AUDITED ACTUAL PERFORMANCE (previous year)	AMOUNT (current year)	DEVIATION	REASON FOR DEVIATION
Total costs				
Number of delegates				
Number of projects with co-production or financing partnerships from FF/FM				
Cost per delegate				
Projects Received				
Cost per project				
Avg. project per delegate				
Projects per R1M				

## 8. CONCLUSION

The aim of this report is to present the primary and secondary research findings of the study. The secondary research gave clear insight into the difference between film markets and film festivals. While some are held simultaneously, film festivals may be defined as sector events where films are screened to audiences and are aimed at presenting and showcasing the abilities of the (local) film industry to the public and media organisations through the output products of the value chain. They often host information sharing and networking sessions in a variety of formats, such as, panel discussions, and masterclasses held by industry professionals for special interest groups. Film markets, on the other hand, are events centred around the business and commercial aspects of mainly film production and distribution. These are special events where only the supply-side of the sector, which includes producers, filmmakers, buyers, investors, and distributors, meet, and conclude trade agreements. The report gave insight into the various local and international film festivals and markets, giving a brief description of each.

Film markets, with their focus on distribution and sales, have proven to be essential platforms for monetizing films. The potential for ROI in this context lies in securing distribution deals, licensing agreements, and international sales. However, success in film markets often hinges on effective marketing and networking strategies, and there are risks associated with competition and the unpredictability of market dynamics. On the other hand, film festivals offer filmmakers the chance to showcase their work and gain recognition in the industry. While the direct financial ROI from participating in festivals may not always be substantial, the exposure and accolades received can lead to increased opportunities for funding and distribution in the long run. The indirect benefits of prestige, critical acclaim, and building a dedicated fan base can significantly contribute to the overall success of a film.

It is essential to recognize that the ROI from film markets and film festivals can vary greatly depending on several factors, including the quality of the film, marketing efforts, timing, and the specific goals of the filmmaker or investor. A balanced approach that combines participation in film festivals with strategic engagement in film markets may offer the best chance of maximizing ROI.

KZN film is actively supporting local film festivals and markets. The support is not only critical financially, but it assists in terms of exposure, access to more training programmes, and promotes the various talent there is in KZN and the province as a viable film destination. To grow local film festivals, increased access to funding is necessary and KZN Film needs to have an increased presence at both local and international film festivals and markets.

Finally, a set of monitoring and evaluation tools was developed for KZN Film to allow KZN Film to not only have improved reporting practices, but also serve as a means of benchmarking performance against previous years.

**ANNEXURE A****STAKEHOLDER ENGAGEMENT LIST**

<b>ROLE</b>	<b>ORGANISATION</b>	<b>LEVEL OF ENGAGEMENT</b>	<b>COMMENT</b>
Delegates		One on one interviews Emails	45 identified delegates Input from KZN Film & AV expert 14 completed one on one telephonic interviews.
Film Commissions	1. WESGRO 2. NFVF 3. DFM	One on one interviews	1. GFC 2. DFO 3. DFM 4. NFVF Three interviews conducted with DFM & NFVF
Film Festival Organisers	1. The Music Imbizo film festival 2. Amajuba film festival 3. KAFF 4. Mzansi Reel Film Festival	One on one interviews Emails Telephone calls	7 organisers Identified. 7 contacts Received 4 Engaged with
International Film festivals & Film Market organisers	-	No Response	Intended to engage Identified 6 organisers. However, they were unresponsive

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