



text

The Media Cities project is an international research programme that examines cities around the world and considers how they meet the needs of the film industry



The Media Cities Project: Is Durban 'film friendly'?

THERE IS ALWAYS a measure of public interest in the functions of our local film industry. Producers, distributors, prospective film financiers, market researchers, sales agents, academics and consultants, among others, all have need for reliable data. In February 2011 CCMS students from the Centre for Communication, Media & Society (CCMS) began cutting-edge research to assess Durban's 'film friendliness'. Titled 'Durban as a Cinema City', and conducted in liaison with the Durban Film Office (DFO), the initiative is part of a larger research track, "Media Cities South Africa", an initiative to map media environments in Durban, Cape Town and Johannesburg.

Film friendliness refers to a city's

By Nyasha Mboti

preparedness to host dynamic local and international film and TV productions. Global cities that boast established film friendliness status include Los Angeles, Rome, Prague, Berlin, Hong Kong, London, New York and Sydney. Film friendly status is only accorded to production precincts that, upon realising the immense cultural and economic value of the industry, demonstrate increasing willingness to provide incentives and assistance to producers, and to prepare local communities and stakeholders for production.

Data generated in 'Durban as a

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Cinema City' provides information on the scale of the industry and enable network, skills and trends analyses. The role and place of such data is still, it seems, poorly understood. Not only does reliable data inform general understanding of the industry for all sorts of people from technology providers to policymakers and academics, but information is also needed by producers for preparing business plans for films and for investors to judge the value of doing business in the local film industry. There are, in Durban, hundreds of relevant companies and freelancers, covering several sub-sectors – training, development, production, facilities, VFX, distribution, exhibition – organised loosely in their own trade associations. There are also first-time producers and micro-budget filmmaking representing significant areas of activity, both in their likely scale and as a formative stage in career building.

The 'Durban as a Cinema City' project focuses on information gaps in all the sectors of the local industry: training, development, production, post-production, distribution and exhibition. The local industry is made up of a small

number of large companies and a very large number of small companies which have an occupationally diverse and multi-skilled workforce characterised by **high levels of freelancers** working in the **production** sector. There is also a wide range of specialist, high-end creative and technical skills employed in the film industry. DFO is doing something to plug the information gaps with its well analysed and publicly available film data which undercuts exorbitant market research fees often charged by private consultants.

CCMS research teams are studying the film services that are at the heart of the city's film industry, identifying and following the footprints of its value chain. Such an exercise enables forecasting and analysis of developments, trends and

drivers of change and competitiveness. Quality services are seen to be the main drivers of change and competitiveness in the Durban film industry.

To know how the film sector is performing as an industry – and if there is to be any sort of strategic planning as an industry – there has to be sector-specific, strategic intelligence on which to plan. Furthermore, if there is no tracking or measuring of industry performance, there is no establishing with any degree of certainty whether policies and action plans are having any effect. But film friendly status is something to which all big cities should aspire. At the end of CCMS's 'Durban as a Cinema City' project, we will know for sure how film friendly a city Durban is.

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What is the Media Cities Project?

THE 'MEDIA CITIES South Africa' initiative proposes to *map and analyse* industry networks characterising specific media environments of South African cities, especially in relation to interlinks between global and local media production precincts. The aim of such *network analysis* is to achieve a clearer understanding of the political, social and economic drivers of change, competitiveness and relevance within local media industries in the context of global trends, mechanisms, development initiatives and pressures. The project will be linked to CCMS's Research Track entitled 'Challenges of Globalisation: perspectives from the Global South'.

This track is conducted under the auspices of the UNESCO Chair in Communication for South Africa held by Professor Ruth Teer-Tomaselli, and essentially involves the mapping of broadcasting and telecommunications ecology in Southern Africa. This larger research initiative aims to create a topographic 'map' of the media and communication of selected Southern African countries. Research institutions based in Cape Town, Johannesburg, Port Elizabeth, Pretoria etc. will, ideally, replicate the study in their own respective cities, making it a nation-wide media city network map survey.

What is the Durban as a Cinema City Primary Research Track?

Durban as a Cinema City is a 4 to 5 year primary

research project being carried out by Honours and Masters students from the Centre for Communication, Media & Society (CCMS) at the University of Kwa-Zulu Natal. Coordinated with the Durban Film Office (DFO), the project is part of the larger *Media Cities* initiative. The purpose of the project is to generate information and intelligence without which the local film sector will be poorer, specifically through *mapping* the film services that are at the heart of the city's film industry. Mapping is a research activity by which we identify and follow the footprints of core features in the value stream or value chain of the film industry from Development, Production, Facilities, Distribution to Exhibition. The major objective of the mapping initiative is to establish Durban's 'film friendliness'. Such an exercise enables forecasting of developments in the media, screen, audiovisual and cultural industries based on an analysis of trends and drivers of change and competitiveness. In the *Cinema City* project, film services are assumed to be the main drivers of change and competitiveness in the Durban film industry. The project is a continuation of the allied efforts to support integrated research tracks that prioritise Durban as a future Creative Industry Precinct. The project acknowledges a gap, or gaps, in data about Durban's film industry. Such a gap, partially filled by the Durban Film Office, remains. Because authoritative, high quality analyses of the industry are sparse, and a culture of evidence-based planning in the industry needs to be clearly embedded, research of this nature is critical.

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Media Cities South Africa: Network and Value Chain Analysis

The following studies have been undertaken;

Media Cities South Africa: Network and Value Chain Analysis
— Keyan G Tomaselli

Durban as a Cinema City: Mapping Durban's Film Services Industries
— Nyasha Mboti

A Comparative Mapping of Film Production Services in Durban and Berlin – with particular reference to 'principal photography' services
— Claudia Frindte

A Network Analysis of the Durban Film Industry Value Chain: Attack of the Indian Werewolf
— Lynette Naidoo

Growing Skills Glocally: a Study of the Structure and Nature of the Provision of Film Training Services in Durban
— Temitope Ogunlela

Durban Talent is Global Talent: Casting processes with reference to Izulu Lami/my Secret Sky
— Abulele Njisane

G/localisation in Durban: Location Services on Izulu Lami/My Secret Sky
— Duduzile Zwane

Durban film Office and Globalisation: Film Friendliness
— Lungelo Dakile

Durban as a Film City Project (DFCP)

The Centre for Communication, Media and Society (CCMS), University of KwaZulu Natal, with the Durban Film Office

The test of 'film-friendliness'

Ø This test of Objective #5 was also a test of Durban's 'film friendliness'. Film friendliness is a test of a city's film industry's dynamism i.e. **potential** and **preparedness** to grow locally as well as in terms of hosting international co-productions

by Nyasha Mboti

Research Question

Ø The film friendliness test (Objective #5) led us to the research question: **Is Durban a 'film-friendly' city?**

Ø The research problem follows from the observation that all important global film cities (Hong Kong, Los Angeles, Berlin, Prague, Toronto, London, Sydney, Rome and New York etc.) tended to be highly rated in terms of 'film friendliness'.

Organising Assumption

Ø We started from the organising assumption that Durban's film industry is made up of a series of **interlinked** 'film services' that **place** service providers, film practitioners, film practice and audiences in the centre of interactive production networks.

What are film services?

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Ø Film services are processes without which a film industry would not function or grow.

Ø Examples are locations, studio complexes, casting

agencies, training schools, principal photography services, film offices, ICT industries (digital content and applications), transport services, and so on.

Film Services framework

Ø The Film services approach focuses on the importance of 'components' rather than 'total product'.

Ø Any person or body that may be affected by filmmaking in a place is a film services component.

Ø For instance, **intermediate inputs** in set design and construction, production design, location management and line producing, special effects and postproduction are recognized as valued creative inputs – also police and emergency services, transportation services and agencies, health and safety officials, tourism, and even real estate and place marketing.

What do film services do?

Ø Film services bring together local, regional, and sometimes national government

agencies, business associations, film-related businesses and organizations, infrastructure owners and operators, representatives of the local community, 'environment managers' (those responsible or with an interest in the use of places that filmmakers might want to shoot in) to ensure that the needs of filmmakers are prioritised in order to make the experience of filmmaking in a place as straightforward as possible.

Objective 1

To study the interaction of film production networks within Durban's film industry

Objective 2

To map the film services that are at the heart of the city's film industry.

Objective 3

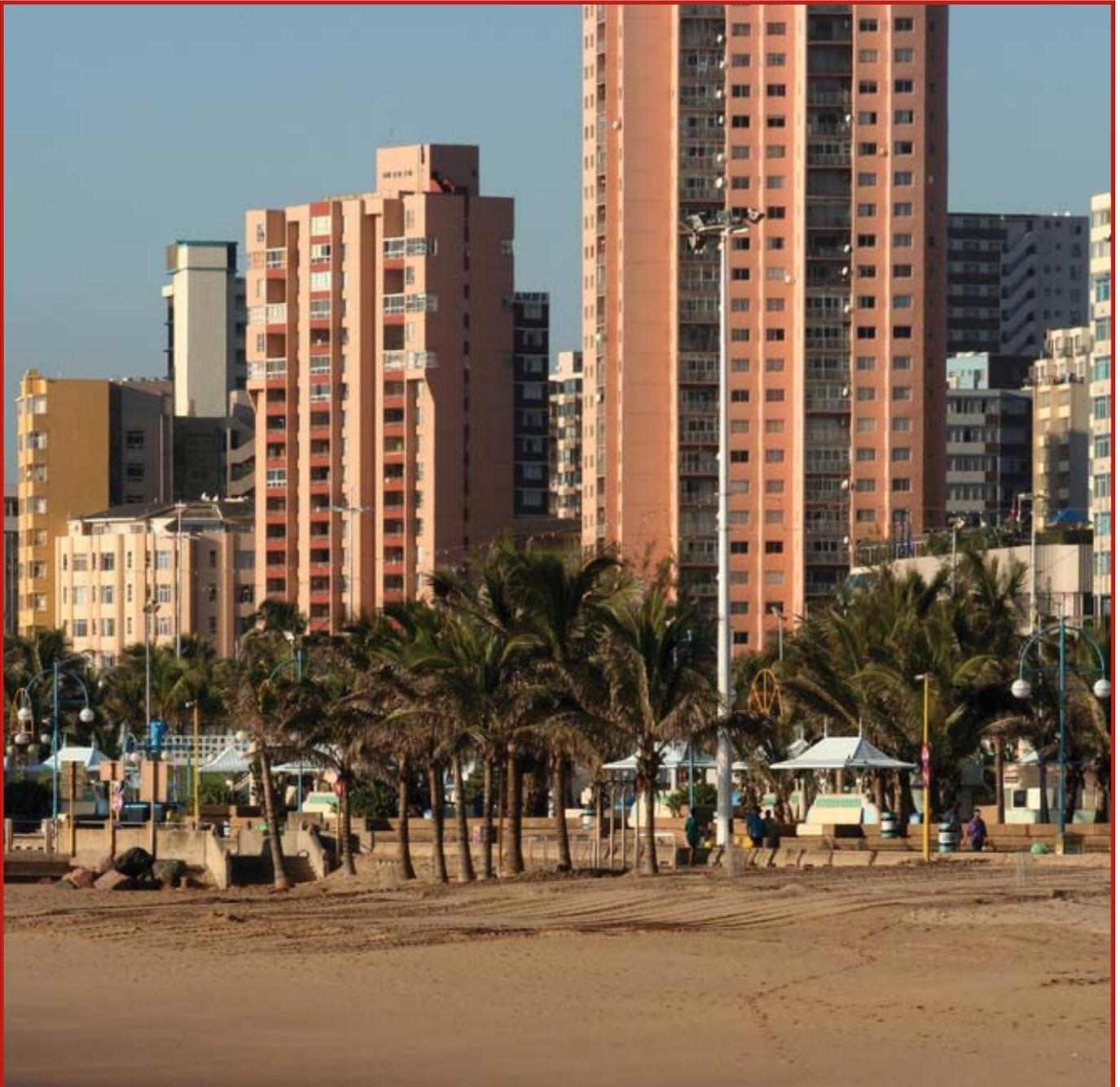
Chart the size, shape and characteristics of the Durban film industry

Objective 4

Establish the extent to which Durban can be called a 'film services' hub

Objective 5

To test the strength of the film services that are at the heart of the city's film industry.



From film services to film city

Ø A cohesive network of film services is what defines a city such as **Durban as a film city** in the mold of other established film cities such as Hong Kong, Los Angeles, Berlin, Prague, Toronto, London, Sydney, Rome and New York.

Research Method

Ø We used case studies to find out more about the interaction of core features in the value stream or value chain of the Durban film industry.

Expected Outcomes

Ø More concrete knowledge of broad film industry scenarios, sector trends and needs, gaps, priority skill areas, skills needs, skills development and skills impact and drivers of change and competitiveness in the Durban film industry.

The CCMS Project

Ø Eight Honours and Masters students from CCMS carried out 1 to 3-month projects into Durban's potential as a film city.

Ø Each student commenced a case study on the following: Durban locations; casting agencies; film office's work; training services; principal photography services provision; digital content situation; value chain analysis; off-the-radar production.

Case studies

Because the film industry is made up of **five** different sectors (Development, Production, Post-production, Distribution, and Exhibition) students projects focused on selected case studies from these 5 areas in order to develop **sector-specific** analyses.

Training Services in Durban

Case Study: Durban University of Technology's TV School, A research project by Temitope Ogunlela, CCMS Honours student

Ø Temitope's research question was: **How might a local training institution be (re)structured in order to adequately respond to both local needs and local demand(s) for skills as well as to multiple skills gaps in an increasingly globalised world?**

Training in Durban: findings

Ø There is a need for stakeholders to further invest in training, and in the marketing of locally available film resources and film services

Ø Training in Durban needs to be even more spread to cater for all the screen industries from television, advertising, film, gaming and animation, among others. Quite clearly, there is space for establishing a film school in Durban.

Ø Training services in Durban may need to aggressively reflect the city's growing potential as a future **Digital Content Hub** in South Africa.

Ø The following are some of the courses that are a part of a growing skills demand in the local industry: **Composing for Film and Television; Digital Post Production; Directing; Animation; Directing Documentary; Directing Fiction; Games Design and Development; Producing; Production Design; SFX/VFX; Sound Design for Film and Television; Production Management for Film and TV; Live Action; 2D Animation on Paper; 2D Animation on the Computer; 3D Animation and Compositing.**

Value Chain Analysis of a Wholly Locally-financed film

Student: Lynette Naidoo, Honours student.

Case Study: *Attack of the Indian Werewolf* (Masood Boomgaard)

Ø Applied the value-chain approach to study how a low-budget locally produced movie got made.

Ø The study examined the extent to which local films follow conventional value-chain models.

Findings

Ø The "Studio-Complex", a one stop-shop Precinct for film production, would go a long way to solving some of the problems faced by local film services industries.

Ø Some local movies do not always fit the conventional 'value-chain' model (see the diagram below) assumed by established film industries. Rather, local movies tended to follow their own idiosyncratic value chain links, threads and nodes in tandem with uniquely local problems and opportunities.

Ø Alternative exhibition platforms must be explored.

Value of Durban's Locations

Student: Duduzile Zwane, CCMS Honours student

Case study: *Durban film locations used in the local drama Izulu Lami* (Madoda Ncayiyana, 2009)

Findings:

Ø The study revealed that Durban actually stood a bigger chance of selling its locations to diversified international co-productions by promoting locally made movies such as *Izulu Lami* as a way of building preparedness and film-friendliness, rather than 'expensively' courting often 'disinterested' Hollywood.

Durban's Casting Potential

Student: Abulele Njisane, Honours student,

Case study: The dynamism – or lack thereof – of local casting agencies.

Findings:

Ø No systematic qualitative studies to measure the value that locally-cast talent adds to the value chain have, to the best of the researcher's knowledge, been attempted.

Ø The contribution of local actors to the value stream needs to be assessed and known – and supported.

The Role of film offices and commissions

Student: Lungelo Dakile, Honours student

Case study: Durban Film Office

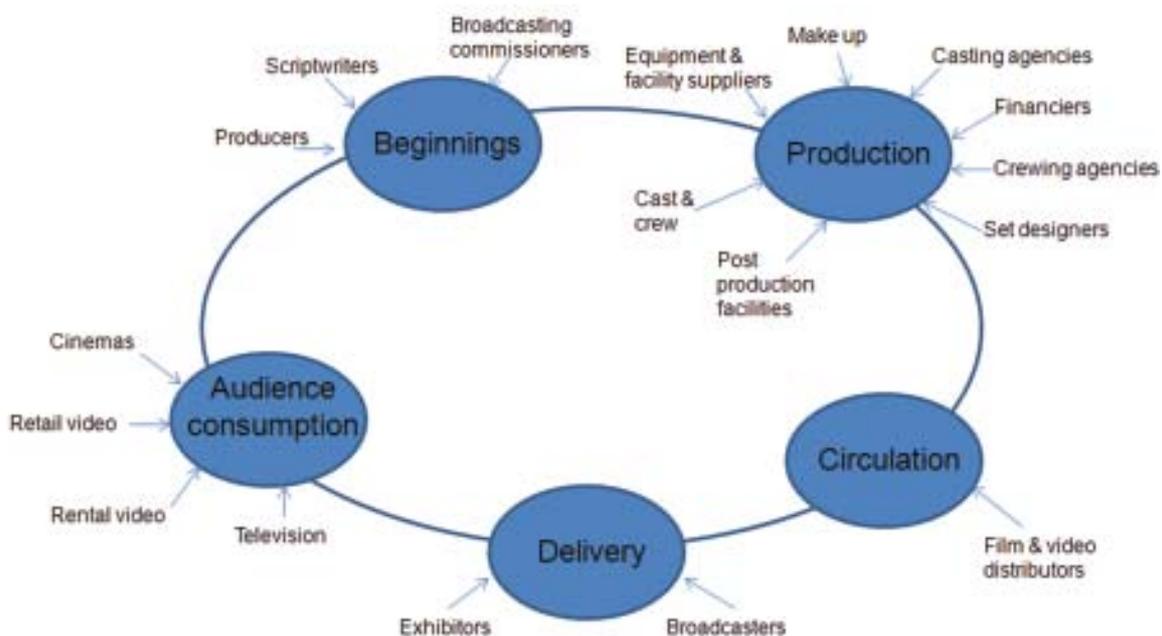
Findings:

Ø The DFO was established to sell Durban as a film-friendly 'destination'.

Ø The Film Office's mandate has diversified to promoting local film as well.

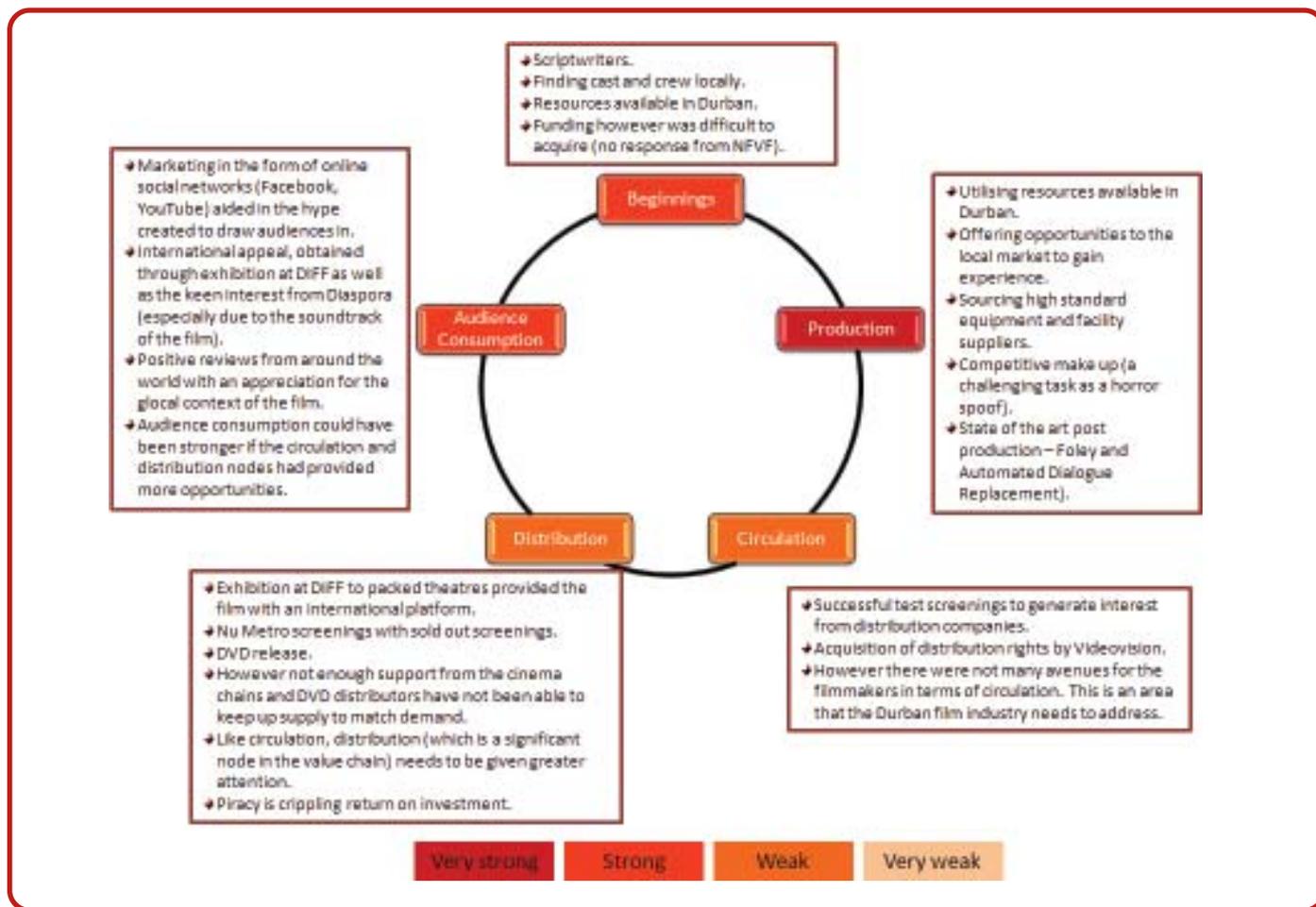
Ø To remain visible as a player, the DFO will need to keep reinventing itself challenge by challenge and opportunity by opportunity.

Ø For the Film Office to function at its maximum, stakeholders may need to overtly support film facilitation efforts in Durban.



Conventional Value Chain Model

Source: South African Film and Television Industry Report, 2008: 48



Model to illustrate the Durban value chain in terms of its role in servicing the film industry (Naidoo 2011)

Principal photography services

Student: Claudia Frindte, Masters student.

Case study: a comparison of principal photography services in Durban and Berlin

Findings:

Ø size, international experience, celebrity contingent, number of feature films, number of universities and colleges, number of companies and services in general are different between Durban and Berlin.

Ø Obviously, Berlin's reputation is much more established than Durban's. But apart from that, Durban offers nearly every production service that Berlin offers, though on a much smaller scale.

Ø Both cities' future growth strategies include programs, which could attract not just local but also international production companies.

Frindte's Recommendations

Ø Networking is essential for the Durban film industry, within itself and with other creative industry precincts;

Ø Further research to identify solutions concerning increasing Durban's market share in digital productions and platforms is essential;

Ø More useful comparisons of networks amongst global cities, from an academic research perspective, are needed.

Film Festivals

Case Study: How international is the Durban International Film Festival? A survey.

By Nyasha Mboti, CCMS postdoctoral fellow, and Navrisha Seebaluk, CCMS doctoral candidate

Ø Research aims to trace the international 'footprint' of the

DIFF brand: where it goes, its presence, impact, profile and size.

Ø The knowledge of a brand's 'sphere of influence' will be helpful in maximising and optimising impact.

General Conclusions

Ø Durban is rapidly shedding the largely unflattering tag of 'video city' through investing in production, especially on digital platforms.

Ø Durban, through the Durban Film Office, is showing an increasing willingness to provide incentives and assistance to producers and filmmakers.

Ø The "studio-complex", a one-stop shop type of production precinct, could be a key answer to some of the city's production challenges.

Ø Nascent attempts, again through the DFO, are being made to prepare local communities and stakeholders to host diversified production needs.

Recommendations

Ø More still could be done to prepare local communities and stakeholders for local production, international production and international co-productions.

Ø More could be done to delve deep into the guts of what the local filmmaking business is actually made of, instead of relying on 'dead' data and statistics. As such, researchers on the local film industry should be more 'outgoing'.

Ø Analysis of trends and drivers of change and competitiveness in the local film industry could be better. Collaboration between industry and researchers from academic institutions could be of help.

Howard College Campus, University of KwaZulu-Natal, Durban,
home of the Centre for Culture, Media & Society (CCMS)



Context

Strategic partnerships are the way of the future. CCMS is working with the Durban Film Office (DFO) on a Media City Project. This is a network mapping exercise aimed at analysing how film/video/media firms in Durban can be best coordinated via the DFO to:

i) ensure their own profitability; and
ii) to build city and industry infrastructure through public-private partnerships.

The idea is to enable Durban to attract productions from elsewhere to build local capacity, financial viability and to increase employment in the media sector. This issue of *SUBtext* summarises the first 2011 phase of research done by CCMS students on Durban as a potential Media City.

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