

PROMOTING SOUTH AFRICA AS AN INTERNATIONAL FILM TOURISM DESTINATION

by

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ABSTRACT

Film tourism is fast becoming a recognised and lucrative sector within the tourism industry. Film tourism combines knowledge from the tourism industry with that of the film industry in such a manner that it offers an attractive opportunity that can be included when marketing South Africa as a destination.

The purpose of the study is to explore the attractiveness of the film tourism market for destinations, identify the unique aspects involved when marketing a destination through film tourism, explore the marketing strategies used by the local South African DMOs and local and foreign film commissions/offices in attracting international film producers, determine what local South African DMOs and local and foreign film commissions/offices perceive as important factors in attracting international film producers, determine and describe the factors influencing international film producers' selection of a location, determine international film producers' perceptions of South Africa as a film location in terms of these factors, develop a model for promoting South Africa as an ideal film location to international film producers and then relate the developed model to guidelines in accordance with the services marketing mix (7 Ps).

The results obtained identified a number of factors that influence international film producers' selection of a location and the model can be used to assist DMOs in developing effective marketing strategies in order to attract international film producers to South Africa. This was a qualitative study where three data collection instruments were used on four participant groups; secondary data was also analysed. It was found that South African DMOs do not yet have a working relationship with the relevant film industry leaders; that local film commissions'/offices' current marketing activities are in line with foreign film commissions'/offices' marketing strategies; that local DMOs and local and foreign film commissions/offices are more often than not aware of the factors influencing international film producers' selection of a location and that South Africa has a positive image as a film destination.

This research contributes to tourism literature by developing a model and suggesting guidelines that could be used by South African DMOs to attract more international film producers to the country and thus ultimately increase the number of film tourists who visit.

All South African DMOs should consider the suggested guidelines when developing a marketing strategy for promoting South Africa as a preferred film destination to international film producers.

KEYWORDS: Destination marketing, film producers, film tourism, model, guidelines, service marketing, qualitative research

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CHAPTER 1: INTRODUCTION TO THE STUDY

1.1 BACKGROUND

Films, as a form of entertainment distributed internationally, have the recognised potential to influence tourists' perceptions of and motivation to travel to a specific destination or destinations featured, which inherently increases visitation numbers to these locations. This phenomenon is known by many labels, including movie-induced tourism (Busby & Klug, 2001; Im & Chon, 2008; Riley, Baker & Van Doren, 1998), screen tourism (Connell & Meyer, 2009; Kim, 2010; Tooke & Baker, 1996), film-induced tourism (Beeton, 2006; Bolan, 2010; Hahm & Wang, 2011; O'Connor, 2010; Saltik, Cosar & Kozak, 2011) and film tourism (Croy, 2010; Grihault, 2003; Hudson & Ritchie, 2006a, 2006b). The term film tourism, as defined by Hudson and Ritchie (2006a), is used throughout this study: "tourist visits to a destination or attraction as a result of the destination being featured on television, video, DVD or the cinema screen".

Research on film tourism has increased significantly in the last decade, addressing various aspects of this phenomenon, such as film tourism as a phenomenon (Beeton, 2006, Im & Chon, 2008; Riley *et al.*, 1998), the effect of film tourism on the film locations (Busby & Klug, 2001; Grihault, 2003; Tooke & Baker, 1996; Young & Young, 2008), the effective marketing of a destination through films in order to attract film tourists (Hahm & Wang, 2011; Hudson & Ritchie, 2006a, 2006b; O'Connor, 2010; Riley & Van Doren, 1992; Saltik *et al.*, 2011), displacement (Bolan, 2010; Bolan, Boy & Bell, 2011), the tourist gaze as endlessly reproduced and recaptured through film (Urry, 2002) and the impact of films on destination images (Beeton, 2001; Bolan & Williams, 2008; Campo, Brea & Muñiz, 2011; Croy, 2010; Kim & Richardson, 2003; Tasci, 2009).

As one can see from the above paragraph, scores of published articles and books acknowledge the existence of film tourism and the important role of Destination Management Organisations (DMOs) in capitalising on the marketing opportunities resulting from their destination being featured in a film (Bolan, 2010; Bolan & Williams, 2008; Dore

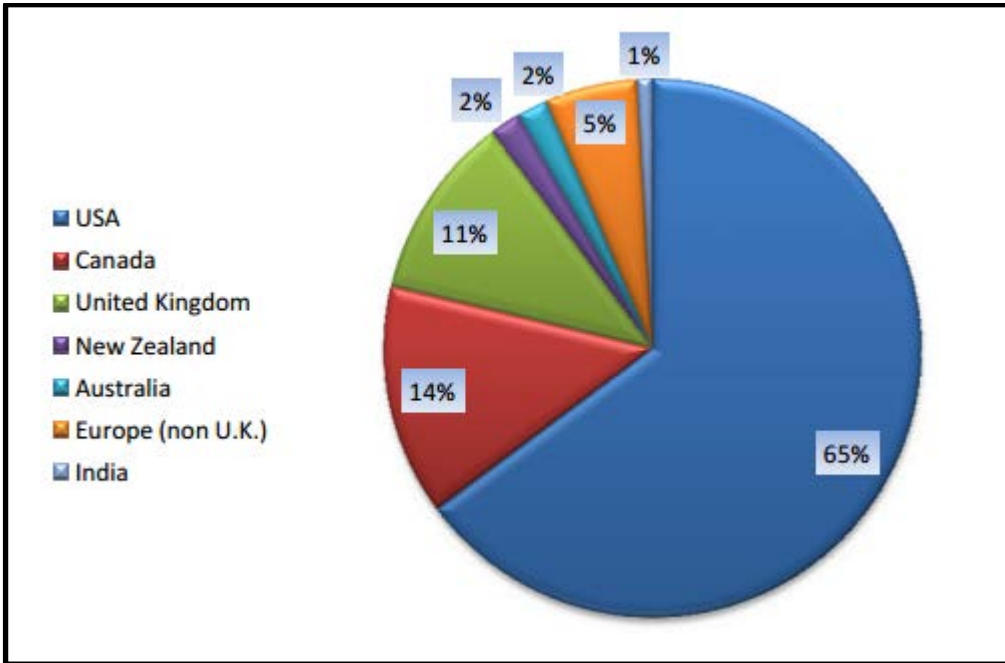
& Crouch, 2003; Hahm & Wang, 2011; Hudson & Ritchie, 2006; Kim, 2010; Kim, & Richardson, 2003; Riley *et al.*, 1998; Saltik *et al.*, 2011; Young & Young, 2008). Many of these articles emphasise the importance of collaboration between DMOs and film commissions at a destination, as well as with international film producers in order to realise the full potential of film tourism (Bolan, 2010; Bolan & Williams, 2008; Dore & Crouch, 2003; Hahm & Wang, 2011; Hudson & Ritchie, 2006; Kim, 2010; Kim, & Richardson, 2003; Riley *et al.*, 1998; Saltik *et al.*, 2011; Young & Young, 2008). O'Connor, Flanagan and Gilbert (2010a) developed a Film Marketing Action Plan (FMAP) to be used by DMOs when marketing their destination in conjunction with a film. Grihault (2003) notes that it is important to bear in mind that before marketing a destination, the DMO first needs to determine whether or not the film is compatible with the destination's image.

Despite this array of literature covering various aspects of the film tourism phenomenon, there appears to be a gap in the available literature on how DMOs can effectively market a destination, to international film producers specifically, as a preferred film location (Hudson & Ritchie, 2006b). Alfred and Lambert (2012) point out that there is a significant lack of research on the factors influencing film industry managers' selection of a location. Furthermore, limited the available literature directly links suggested managerial actions with the 7 Ps of the services marketing mix (product, price, promotion, place, process, physical evidence and people). As tourism is considered a service, it is imperative for DMOs to fully understand how to market a destination at the hand of the 7 Ps of marketing (Schofield, 1996). As explained by Otto and Ritchie (1996:165), "[t]ourism is essentially a service industry or, perhaps more accurately, an amalgam of service industries".

According to Lonely Planet (in The Age, 2011), the 10 most-used movie locations for 2011 are located in England, the Czech Republic, Spain, France, Canada and the USA. The most famous movie locations, as stated by Reid (2011), are located in the USA, New Zealand, Canada and the Bahamas. Kaufman (2010) lists the top 10 movie locations worldwide for 2010 as Australia, California, Canada, Connecticut, Georgia, Louisiana, Michigan, New Mexico, New Zealand and Utah. As is evident from these sources, the most popular locations are situated in the USA, Australia, New Zealand, Canada and the UK. These locations form the basis for the methodology section.

Figure 1 (p. 3) represents more recent statistics on the most popular film location, based on the number of films produced during the year 2013.

Figure 1: Films produced per country (2013)



Source: FilmL.A. Research (2014:5)

Figure 1 (p. 3) indicates the countries who produced the most films in the year 2013 are, from most popular to less popular, the USA, Canada, UK, New Zealand, Australia, Europe and India (FilmL.A. Research, 2014). According to this recent data, Europe and India have recently emerged as popular film locations. This does not differ significantly from the locations used in the methodology of this study.

Similar to the above mentioned countries, South Africa's diverse and beautiful natural landscapes and scenery, as well as its many man-made attractions make it the ideal location for any film. The country boasts majestic mountains, clear blue oceans, lush forests, desert-like terrain, rolling green hills and beautiful cities. Yet, it does not feature on any of the major film location listings. Given the importance of tourism to the South African economy in terms of its contribution to the gross domestic product (GDP), it is crucial for South African DMOs to tap into a greater variety of market segments to promote sustainable growth.

1.2 PROBLEM STATEMENT

Even though the available literature recommends that DMOs tap into the benefits offered by film tourism, these organisations have been slow to respond to the suggestions (Bolan & Williams, 2008; Hudson & Ritchie, 2006). Di Cesare, D'Angelo and Rech (2009) blame this on the lack of a clear strategy to benefit from the relationship between films and tourism.

South Africa has been referred to as 'a world in one country' (Rassool & Wits, 1996), yet it has not reached its full potential in marketing itself to and generating major business from international film producers, compared to other countries, with South Africa's contribution to global output at a mere 0.4% (Visser, 2013). Although South Africa has received some attention in the international film industry, it is still a largely untapped location for major international films (ChartsBin Statistics Collector Team, 2009). It is not clear whether DMOs in South Africa understand the criteria used by international film producers when choosing a location, which could assist them in effectively promoting themselves as a film location to international film producers in terms of these criteria.

Based on existing literature, there is an apparent gap on how to market a destination to international film producers as a preferred film location, using a model with guidelines based on the 7 Ps of service marketing. Furthermore, a very limited amount of literature is available on film tourism within the South African context.

1.3 PURPOSE STATEMENT

The main purpose of this study is to prepare a model with guidelines for South African DMOs, based on international film producers' selection criteria of a location, in order to best market South Africa, with its versatile landscapes and cities, as an ideal film location. The study starts by exploring current literature on the topic of film tourism. From the literature study, empirical research is undertaken to explore the marketing activities performed by local and foreign DMOs and film commissions/offices and identify factors influencing international film producers' selection of a location. Using these factors

identified, a model was prepared and guidelines created and aligned with the 7 Ps of the services marketing mix. The FMAP, developed by O'Connor, Flanagan and Gilbert (2010a) focuses on marketing activities DMOs can conduct before and after the release of a film to attract film tourists, whereas the current study aims to identify marketing activities that can be conducted to attract international film producers.

1.4 RESEARCH QUESTION AND OBJECTIVES

The following core research question remains unanswered: How can South Africa effectively be marketed as a film location to international film producers?

This study endeavours to answer the research question through the following research objectives:

- to explore the attractiveness of the film tourism market for destinations;
- to identify the unique aspects involved when marketing a destination through film tourism;
- to explore the marketing strategies used by the local South African DMOs and local and foreign film commissions/offices in attracting international film producers;
- to determine what local South African DMOs and local and foreign film commissions/offices perceive as important factors in attracting international film producers;
- to determine and describe the factors influencing international film producers' selection of a location;
- to determine international film producers' perceptions of South Africa as a film location in terms of these factors; and
- to develop a model containing guidelines related to the 7 Ps of services marketing for promoting South Africa as an ideal film location to international film producers.

1.5 ACADEMIC VALUE AND PRACTICAL CONTRIBUTION OF THE STUDY

Many studies have stressed the important role of DMOs in marketing a destination as a film location to film producers, yet insufficient guidelines exist on how to achieve this (Bolan, 2010; Campo *et al.*, 2011; Dore & Crouch, 2003; Hahm & Wang, 2011; Hudson & Ritchie, 2006; Kim, 2010; Kim & Richardson, 2003; Riley *et al.*, 1998; Saltik *et al.*, 2011; Young & Young, 2008); this points to a clear gap in literature. Some of these studies provide suggestions on how the DMOs can be involved in the marketing process, but no study has previously attempted to create a model with guidelines, based on the 7 Ps of marketing, for promoting a destination as a film location to international film producers. The current study aims to fill this gap by creating a model with guidelines which will contribute to the existing body of knowledge.

The model will enable South African DMOs to better understand the importance and process of the promotion of film tourism and marketing the country as a film location to international film producers. It further aims to inform the industry of international film scouts' views of South Africa as a film location. Furthermore, the purpose of the model will be to increase the use of South Africa as a film location, which could ultimately lead to an increase in film tourism, should the DMOs continue to market South Africa to film tourists.

1.6 DELIMITATIONS AND ASSUMPTIONS

1.6.1 DELIMITATIONS

This study has several delimitations pertaining to the context and units of analysis. Firstly, it is limited to the context of tourism generated through films, DVDs and films repeated on television, while excluding television shows, straight to video films, advertisements and books. Secondly, local film commissions/offices as representative bodies are approached, while local film producers are excluded. The reason for excluding local film producers is their inability to secure foreign investments and spending. The purpose of this study is to

attract foreign film producers who will generally spend more than local producers, as they have bigger budgets.

The views of international film producers themselves are not included. Rather, location scouts are used as the representative voice for the producers as they are knowledgeable about film producers' location needs and because film producers do not look for film locations themselves, but usually commission location scouts. Location scouts from the USA, India and Australia (the countries producing the most films per year), were approached. South African location scouts were also approached as they work closely with foreign film producers.

International DMOs included in the study only include those from the most popular film locations, namely the USA, Australia, New Zealand, Canada and the UK, excluding the recently popular Europe and India. The local DMOs in South Africa included in the study are those from Gauteng, Kwazulu-Natal (KZN) and the Western Cape, as these are the three main areas in South Africa that are usually considered by international film scouts.

1.6.2 ASSUMPTIONS

Hofstee (2006) defines assumptions as “things that you take to be true without checking whether or not they are true”. It is assumed that the theoretical framework (literature review) accurately presents and defines the concept of film tourism and reinforces its existence as a recognisable phenomenon. It is also assumed that the variables under investigation (factors influencing film producers' selection of a location and current marketing strategies of South African DMOs and film commissions/offices) are measurable. Furthermore, it is assumed that qualitative research and the associated thematic data analysis is the most appropriate methodology to address the research topic. Lastly, it is assumed that the participants participated willingly and that they provided honest and accurate answers.

1.7 RESEARCH DESIGN

The study was conducted from an interpretivist point of view, which traditionally makes use of qualitative research methods, as it requires the researcher to conduct in-depth investigations among small samples. The study was an empirical study and exploratory and descriptive in nature. The research was primarily set in the tourism industry, although it incorporates knowledge from the film industry. Local location scouts; provincial DMOs and film commissions from Gauteng, KZN and The Western Cape; foreign DMOs from the USA, Australia, New Zealand, Canada and the UK; film commissions from Canada and Australia; and location scouts from the USA, India and Australia were approached. The selection of participants was based on non-probability, purposive/judgement sampling and a final sample of 15 participants was achieved.

Data collection for primary data was conducted through face-to-face, e-mail and Skype interviews. Three data collection instruments were used (refer to Appendices A, C and E). To prepare the data for analysis, the data collected through interviews with the local DMOs and local film commissions/offices in Gauteng, KZN and the Western Cape were transcribed by the researcher, while the data collected from international location scouts and DMOs were originally obtained in electronic format. Thematic analysis was used to analyse data and data was categorised according to their meanings.

The secondary data collected for this study was collected through a thorough analysis of the various websites mentioned above. For all DMOs, the websites were analysed to discover whether these DMOs encourage film producers and film tourists to visit their destination. The film commission/office websites were analysed to discover what data they offer to producers and location scouts on the website.

1.8 DEFINITION OF KEY TERMS

This document contains a number of key terms, as defined in the following.

Destination brand: “[S]electing a consistent element mix to identify and distinguish [a

destination] through positive image-building, and has been considered identical with (re)positioning, image-building, and the image-restoration of a destination” (Park & Patrick, 2006:262).

Destination image: Echtner and Ritchie (2003:39) provide many definitions of a destination image as given by other researchers. From these definitions, the core definition for ‘destination image’ can be said to be a set of beliefs a person has about a certain destination based on previous information received.

Destination Management Organisations: It is the responsibility of the DMO to market a specific region or destination and do any planning, while considering all stakeholders. DMOs typically have all the resources and power essential to achieving their strategic objectives (Buhalis, 2000).

Destination marketing: Destination marketing aims to raise awareness of a destination and subsequently increase tourism to the destination through the creation of a unique brand to place and distinguish the destination in the minds of potential tourists (Jago, Chalip, Brown, Mules & Ali, 2003).

Displacement: “Displacement in the film-induced tourism context refers to the situation where a movie is shot in one place but in reality is representing somewhere else entirely” (Bolan, 2010). Displacement can also be referred to as “location dissonance” (Frost, 2009:85).

Film commissions: A film commission is a government-sanctioned company that promotes and aids film production within a certain area. Sometimes they also form part of tourism boards (Honthaner, 2001).

Film location: A film location is the actual, physical location where the film was shot. The location may represent a different film setting (Bolan, 2010; Bolan *et al.*, 2011).

Film setting: The film setting is the location represented in a film, although it may not always necessarily be where the actual film was shot (Bolan, 2010; Bolan *et al.*, 2011).

Film tourism: “Tourist visits to a destination or attraction as a result of the destination being featured on television, video, DVD or the cinema screen.” (Hudson & Ritchie, 2006a:256).

Inauthenticity: Inauthenticity occurs when a film represents the location/destination inaccurately; this phenomenon is aggravated when the film is shot at a different location from what it represents (Bolan, 2010).

Location scout: The person responsible for finding appropriate locations for filming (IMDb.com, Inc., 2013d).

Movie maps: A movie map is an electronic (or sometimes hard copy) map which indicates the locations of all the films filmed at a specific destination (MovieMaps, n.d.). These maps vary in size, from a movie map of a city, state/province, country and even worldwide.

Product bundling: “The practice of marketing two or more products and/or services into a single ‘package’ for a special price” (Guiltinan. 1987:74).

Product placement: Balasubramanian (1994) defines product placement as a message concerning a product aimed at influencing film audiences, making use of the deliberate but discreet entry of a branded product into a film. For the purpose of this study, destinations and destination brands are included in this definition.

Services: “An act or performance offered by one party to another. Although the process may be tied to a physical product, the performance is essentially intangible and does not result in ownership of any of the factors of production” (Lovelock, 2000:3).

Services marketing mix: Borden (1964:9), the creator of the marketing mix, defines a services marketing mix as “a list of the forces that bear on the marketing operation of a firm and to which the marketing manager must adjust in his search for a mix or program that can be successful”.

Table 1 (p. 11) contains a list of abbreviations used in this document.

Table 1: Abbreviations used in this document

Abbreviation	Meaning
4 Ps	Product, price, promotion, place
7 Ps	Product, price, promotion, place, process, physical evidence, people
AFCI	Association of Film Commissions International
CTFS	Cape Town Film Studio
DIFF	Durban International Film Festival
DMO	Destination Management Organisation
DTI	Department of Trade and Industry
FMAP	Film Marketing Action Plan
GDP	Gross Domestic Product
IDC	Industrial Development Corporation
KZN	KwaZulu-Natal
NFVF	National Film and Video Foundation
SAFI	South African Film Industry
SASFED	South African Screen Federation
Wesgro	The Western Cape Destination Marketing, Investment and Trade Promotion Agency
WOM	Word-of-Mouth

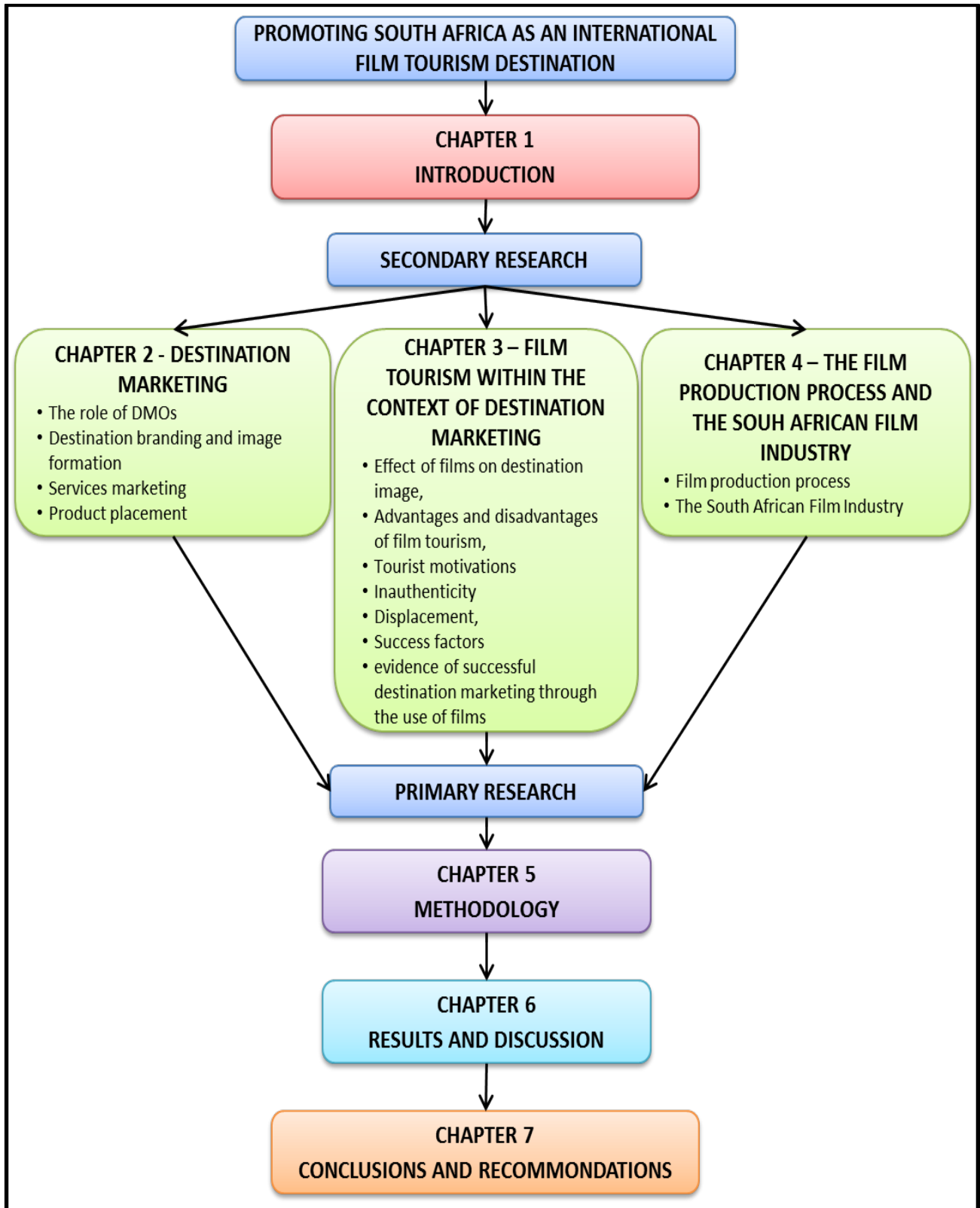
1.9 ORGANISATION OF CHAPTERS

Chapters 2, 3 and 4 make up the literature review section of this dissertation. In Chapter 2, destination marketing is discussed, specifically referring to the role of DMOs, destination branding and image formation, services marketing and product placement. Chapter 2 forms the basis for destination marketing through films. In Chapter 3, film tourism is linked to destination marketing through the discussion of the effect of films on destination image, the advantages and disadvantages of film tourism, tourists' motivations behind their decision to partake in film tourism, the issues of inauthenticity and displacement, film tourism success factors and evidence of successful destination marketing through the use of films. Chapter 4 concerns the film production process and the South African Film Industry (SAFI).

Chapter 5 reviews the research methodology used in this study, in detail, and Chapter 6 discusses the results obtained. The study concludes with Chapter 7, which provides a thorough overview of the results and the literature and provides recommendations for future research.

Figure 2 (p. 12) represents the layout of the dissertation.

Figure 2: Layout of the dissertation



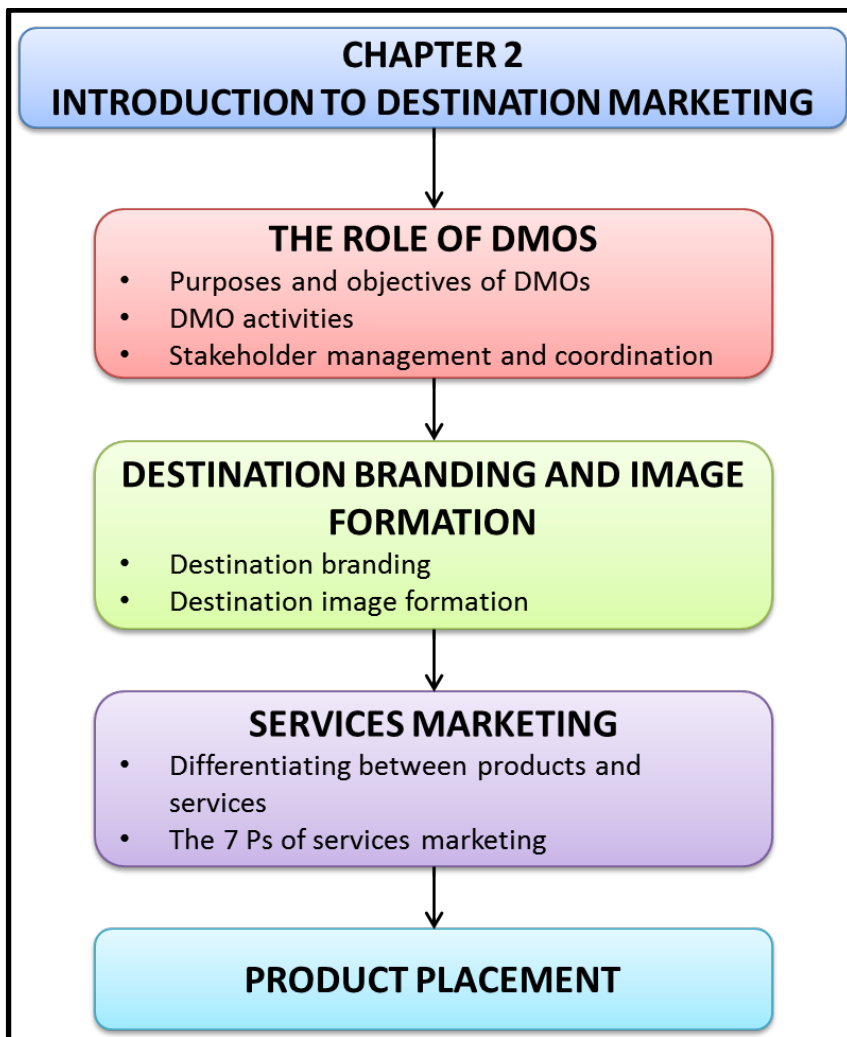
CHAPTER 2: INTRODUCTION TO DESTINATION MARKETING

2.1 INTRODUCTION

Destination marketing aims to raise awareness of a destination and subsequently increase tourism to the destination through the creation of a unique brand to place and distinguish the destination in the minds of potential tourists (Jago *et al.*, 2003). During the destination selection process, some destinations may not even be considered, as they may be unknown to the potential visitor (Gartner, 1993); this indicates a lack of successful destination marketing and destinations must ensure that they do not fall prey to this. Destination marketing entails a broad range of many actions and concepts, including DMOs, branding, image, services marketing and product placement. The concepts thought to be most relevant to this study, e.g. the role of DMOs, destination branding and image formation, services marketing and product placement, are discussed in this chapter. It is important to have a fundamental understanding of destination marketing in order to achieve the final and main objective of this study, namely to develop a model containing guidelines related to the 7 Ps of services marketing for promoting South Africa as an ideal film location to international film producers.

The layout of this chapter is represented in Figure 3 (p. 14).

Figure 3: Layout of Chapter 2



2.2 THE ROLE OF DMOS

Due to the complex relationship between stakeholders, destinations are considered extremely difficult to market and manage (Bregoli, 2013; Buhalis, 2000, Konecnik & Go, 2008). Destinations are not single products; they consist of various products and services, such as food services, entertainment, accommodation, attractions, arts and culture and the natural environment (Morgan, Pritchard & Piggot, 2002). Fyall, Garrod and Tosun (2006) state that “the destination lies at the very heart of the travel and tourism system, representing as it does an amalgam of products that collectively provide a tourism experience to consumers”. Due to this complex nature, DMOs are required to oversee the marketing of specific regions and destinations; they are also responsible for product development (Elbe, Hallén & Axelsson, 2009; Socher, 2000). Pike and Page (2014:207)

state that “the focus of DMO activities lies in developing and leading collaborative marketing communication strategies that *match internal (destination) resources with macro environment (market) opportunities*”.

2.2.1 PURPOSES AND OBJECTIVES OF DMOs

Dore and Crouch (2003) state that the main purpose of a DMO is to market a destination. Buhalis (2000) argues that a DMO’s objectives are to boost the sustained wealth of locals, enhance the effects of tourism by establishing a balance between environmental and socio-cultural costs and the economic benefits of tourism, and finally to maximise visitor satisfaction and enterprise profitability.

The destination elements that DMOs must manage or address are attractions at the destination, amenities available (such as infrastructure and accommodation establishments), the accessibility of the destination (roads, seaports and airports), destination image and the price of travelling to, from and around the destination (Carter & Fabricius, 2007). DMOs also need to manage the prices of all other products or services likely to be consumed by visitors during their stay (Carter & Fabricius, 2007).

2.2.2 DMO ACTIVITIES

DMOs typically have all the resources and influence essential to achieving their strategic objectives: they can form part of either the local, national or regional (provincial) government; and they may possess the political and legislative power, as well as the financial backing to manage a destination’s resources and guarantee long-term benefits for all stakeholders in the region or destination (Buhalis, 2000). Socher (2000) warns that although DMOs form part of the government structure, they still act independently and must not fall too heavily under the government’s influence.

With the rapid increase in technology and visitors becoming more technologically literate, booking, payment and decision-making patterns have changed significantly (Fyall, Fletcher & Spyriadis, 2010). It is thus imperative for DMOs to monitor developing trends to ensure

that they are able to adapt their strategies to effectively manage tourism at the destination level (Fyall *et al.*, 2010). This rapid increase in technology is a big factor for DMOs to consider when promoting a destination, as tourists have increased control over all aspects of the travel experience, including how they gather and respond to information (King, 2002).

As DMOs play a big role in the competitiveness of a destination they are encouraged to do the following (Dwyer & Kim, 2003):

- A DMO must coordinate the stakeholders in order for the destination to achieve sustainable tourism practices and thus become a competitive destination. In order to encourage all stakeholders to work together, the DMO needs to present the stakeholders with a general direction for the development of tourism at a destination, involve these stakeholders in all tourism-related decisions and raise awareness of sustainable tourism among stakeholders. This statement is supported by Carter and Fabricius (2007) and Elbe *et al.* (2009).
- Furthermore, if a destination manages to gather and use information successfully, they can develop a better competitive position through understanding tourists' needs, developing appropriate products for these tourists and creating successful marketing campaigns within the public, as well as private sectors.
- In order to formulate the necessary policies and strategies, DMOs must continuously monitor and scan the competitive environment. This includes, but is not limited to, evaluating the effectiveness of previously implemented policies and strategies.

One of the most important roles of DMOs is to create a destination brand and image (Carter & Fabricius, 2007; Day, Skidmore & Koller, 2002; Hankinson, 2007). The creation of a destination brand and image is best done after conducting thorough market research to identify the right target groups, set up appropriate tourism product and service combinations and forecast demand (Buhalis, 2000; Dwyer & Kim, 2003). Furthermore, it is important to continue this research after a tourist has visited the destination to identify strengths and weaknesses as well as ways of benefiting from such information. The importance of this research, as mentioned by Carter and Fabricius (2007), is to understand competitors; recognize and divide the target market; keep abreast of local and global travel

trends; monitor own performance; recognise economic, environmental and social impacts; and identify product changes and supply trends.

In an increasingly competitive industry, the DMO must manage the destination in a more professional, dynamic and innovative way (Fyall *et al.*, 2010) to create a sustainable competitive advantage over other destinations. This is especially important as visitors have more disposable income and leisure time available; they also have higher expectations and are more sophisticated (Fyall *et al.*, 2010).

2.2.3 STAKEHOLDER MANAGEMENT AND COORDINATION

The DMO is there to advise tourists on products and services best suited to their needs; they are not responsible for selling tourism products directly to tourists and must take care not to promote any individual products or services against other suppliers within a destination (Buhalis, 2000).

Buhalis (2000) suggests that in order for all tourism stakeholders within a destination to equally benefit from tourism activity within that destination, DMOs must use management and legislative tools during both the planning and management processes of the destination. Failure to do so may result in negative relationships between stakeholders; it may also stall the achievement of the destination's strategic objectives, its competitiveness and its wealth. The four strategic management and marketing objectives for destinations as listed by Buhalis (2000), include enhancing the long-term wealth of locals; enchanting visitors by increasing their level of satisfaction; maximising profitability of local businesses; and optimising the impact of tourism by ensuring a sustainable equilibrium between environmental and social-cultural costs and economic benefits. Buhalis (2002) goes on to say that DMOs must also ensure that sustainable practices are followed to ensure the regeneration of all resources used in producing the tourism product.

As most stakeholders at a destination already have their own marketing strategies and DMOs are unable to control these activities, the DMOs must do their best to coordinate and guide these individual efforts to fit in with the abovementioned strategic management

and marketing objectives (Buhalis, 2000). The most important challenge faced by DMOs is bringing all destination stakeholders together to collaborate, not contend, and to group their resources towards developing an integrated service marketing mix and delivery structure (Buhalis, 2000). Socher (2000) explains that if an individual organisation at a destination markets itself separately from the destination, the consequences could be that tourists become aware of the destination, but choose to make use of a different organisation's services that are less expensive due to the fact that they did not incur additional marketing costs by marketing themselves separate from the destination. Thus, other organisations stand to gain from independent marketing efforts by organisations. This can be avoided by stepping into a collaborative marketing campaign with other organisations at a destination. Such collaboration will also be important in the creation of a value proposition to for example film producers to present the offerings of the destination.

Hundreds of published articles and books acknowledge the existence of film tourism and the important role DMOs play in capitalising on the marketing opportunities resulting from their destination being featured in a film. The majority of these articles emphasise the importance of collaboration between DMOs and film commissions/offices at a destination, as well as with international film producers in order to realise the full potential of film tourism (Bolan, 2010; Hahm & Wang, 2011; Riley *et al.*, 1998; Saltik *et al.*, 2011). Film tourism is discussed in more detail in Chapter 3, while the next section elaborates on the task of destination branding and image formation.

2.3 DESTINATION BRANDING AND IMAGE FORMATION

In this section, the branding of a destination and image formation are discussed in detail. When considering brands, Morgan, Pritchard and Piggott (2003) state that brands arouse emotions, provoke beliefs and initiate behaviours; furthermore, they create a promise of product/service value and product differentiation. Echtner and Ritchie (2003) provide many definitions of a destination image as given by other researchers, but as these definitions are very vague, for the purpose of this study, 'destination image' is defined as a set of beliefs a person has about a certain destination based on information received. Branding and image formation are discussed because films create certain branding for and images

of destinations and this has a big impact on tourists' perceptions of and motivations to travel to a destination.

2.3.1 DESTINATION BRANDING

Destinations offer great selections of tourism services and products that are all brought together under the destination brand (Buhalis, 2000; Hankinson, 2007; Konecnik & Go, 2007). A great deal of research has been conducted on destination image, while destination branding is somewhat of a new concept (Campo *et al.*, 2011; Gartner & Ruzzier, 2011; Konecnik & Go, 2007; Pike, 2005). Destination branding is considered one of the most powerful tools available to destination marketers (Morgan *et al.*, 2003; Pike, 2005). Furthermore, it is becoming increasingly difficult to differentiate a destination based on attractions and services offered (Morgan *et al.*, 2003; Pike, 2005; Qu, Kim & Im, 2011). There are many creative destination branding campaigns currently running globally. South Africa, for example, is currently marketed under the brand "South Africa: Inspiring new ways" (Brand South Africa, 2012).

2.3.1.1 The importance of branding

Branding a destination is valuable to both the stakeholder companies and the potential tourists as it helps them identify products and services and differentiates them from competitors (Gnoth, 2002). Holiday experiences occur at three levels, namely functional, experiential and symbolic (Gnoth, 2002). Competitors can easily copy the functional aspects of an experience, but the experiential and symbolic levels, where branding is created, are where DMOs can create different and exclusive experiences (Gnoth, 2002). The functional level relates to the features of the product or service, the experiential level relates to the corporeal aspects of an experience, and the symbolic level relates to the meaning of the experience to the tourist (Gnoth, 2002).

By implementing successful marketing campaigns, a destination itself can be transformed into a brand, which leads to considerable social, cultural and investment benefits (Hankinson, 2007). Gartner and Ruzzier (2011) state that a strong brand, to which people

have a positive connection, will ultimately increase the number of tourists to the destination, their length of stay and their spending levels, as opposed to an underperforming brand. It is important to establish strong relationships among stakeholders within a country, from various regions, in order to avoid conflicting marketing strategies with regional brands falling under the country's umbrella brand (Hankinson, 2007). In order to achieve brand consistency, the destination brand must reflect and in turn be reflected by, its related sub brands and stakeholders (Hankinson, 2007; Konecnik & Go, 2008). This is difficult to manage, as DMOs have no control over their stakeholders and operate within strictly regulated budgets (Hankinson, 2007). Even though DMOs have no control over them, these stakeholders may still be inclined to work together to maximise the collective benefits from a good destination brand (Hankinson, 2007). The contribution of film tourism to a strong destination brand will be discussed in Chapter 3.

2.3.1.2 Challenges of branding

The branding of a destination faces many challenges (Laws, Scott & Parfitt, 2002) as there are many stakeholders over which little management control can be exercised (Bregoli, 2013; Konecnik & Go, 2007; Morgan *et al.*, 2002; Morgan *et al.*, 2003). The process of branding a destination is a complex one as there are many theories and components that play a role in this process (Konecnik & Go, 2008). Morgan *et al.* (2002) mention that when positioning a destination brand the DMO needs to research the destination's core values and its brand values and make sure that they are relevant, durable and communicable to potential visitors. Morgan *et al.* (2002) further suggest determining what the country represents and transforming this into a brand personality. Konecnik and Go (2008) suggest a three-phased structure for developing a brand, namely: the pre-analysis of all strategic processes, a destination brand analysis and a post-brand implementation process.

Pike (2005) gives six reasons as to why destinations are more difficult to brand than other products or services. Firstly, destinations have more dimensions than traditional products, and in order to be effectively branded, DMOs must stimulate the interest of potential tourists through a distinct message that focuses on one, or a few, brand associations. Secondly, DMOs need to develop a branding strategy that appeals to all potential tourists,

in all targeted geographic areas, across all target segments. Thirdly, there is often confusion over who has the power to decide on a brand for a destination. DMOs are reliant on government funds and thus need to consider the government's policies and current activities when creating a branding campaign. Furthermore, certain influential board members may believe they have more say over matters such as destination branding. Fourthly, a DMO can brand a destination in a certain way, but it is up to the tourism community to deliver on the brand promise; the DMO has no control over this and the tourism community may fail to correctly deliver on the brand promise. Fifthly, it is difficult for DMOs to stay in touch with previous visitors and foster a sense of brand loyalty when they do not have access to the contact details of all the previous visitors. Lastly, DMOs often have desperate cash flow problems, as they do not benefit from an increase in tourist numbers to their destination; they often have to vie for private and public funding in order to perform their duties as a DMO. When a destination appears in a film, the film may influence the destination brand and so help overcome some of the abovementioned challenges. At the same time it may also present more challenges.

2.3.1.3 Brand components

Mittal (1999) suggests differentiating a brand on the following attributes: inputs (showcasing the physical, e.g. hotel lobbies, waiters, etc.), processes (efficiency, responsiveness, speed, friendliness and creativity) and lastly, outputs (benefits the customer gets from the service). Morgan *et al.* (2002) suggest marketers stick to a brand's essence once it has been identified and refining the expression of brand values when necessary. The brand personality must continually be enriched and evolved by building on its original strengths in order to broaden their target markets (Morgan *et al.*, 2002). The process of creating a brand incorporates the identification and crafting of the brand values (Morgan *et al.*, 2003). Even though it is easier to brand products, due to the limited number of attributes (Gnoth, 2002), it is widely acknowledged that a destination is not a product and thus must not be branded and marketed as such (Morgan *et al.*, 2003). Konecnik and Go (2007) warns that when branding a destination, one should take care when transferring the standard product branding principles to the branding of a tourism destination.

Brands have many characteristics and while there are some similarities, it is imperative to acknowledge that destination brands differ significantly from product brands. A product brand can be seen as stable, as customers know they will always get the same product and quality anywhere they purchase it. A destination brand is subject to seasonality as well as developmental changes and neither tourists nor the destination managers can predict, for example, the weather, or how developmental changes will affect the destination's popularity. Furthermore, it is important to take into account the experiential factors; products can be felt and seen before purchase and aren't high-risk purchases, as most products can be easily returned, whereas tourism products are purely experiential and are different for each tourist, thus it contains a greater element of risk. Despite these differences, product and destination brands are the same in that they must both provide an experience or product that is different from what the competitors offer; this is referred to as novelty. It is not as simple as a destination stating that it is different: novelty must be earned and made known to consumers so that they may value this difference before they select a destination (Gartner & Ruzzier, 2011).

Both product and destination brands have the following dimensions: value, awareness, quality, image and loyalty. Awareness is vital, as a potential tourist must be aware of a destination before they can consider it as a potential destination to visit. Quality is difficult to measure, as it is very subjective; it is often measured by the degree to which service meets or exceeds expectations. As destinations offer many products and services from various stakeholders, it is difficult to deliver a consistent level of quality. Loyalty is measured by repeat visits to a destination, or in the case of products, by repeat purchase.

Out of all the various components of branding, the concept of image has received more attention than the rest of the dimensions in terms of research (Gartner & Ruzzier, 2011). The meaning and role of destination image is discussed in the next section.

2.3.2 DESTINATION IMAGE FORMATION

Branding has become a central component for destinations, with image being one of the most important elements of the brand (O'Connor, Flanagan & Gilbert, 2010b). A destination's image is used to distinguish destinations from one another and greatly

influences potential travellers' decision processes (Baloglu & Brinberg, 1997), including their search for information, their evaluation of possible alternatives and, ultimately, their final destination selection (Chen, Chen & Okumus, 2013). It is crucial for a destination to differentiate itself from its competitors and be favourably positioned in the minds of its target markets. Therefore, it is important for a destination to create an image in the minds of potential tourists, as image is an integral part of the destination selection process and potential tourists will only consider a destination which they are aware of and for which they have formed an image in their minds (Baloglu & Brinberg, 1997; Chen, Chen & Okumus, 2013; Gartner, 1993; Qu *et al.*, 2011).

A study conducted by Chen *et al.* (2013) concluded that a destination image is directly affected by travel constraints, but also that a positive destination image has the power to overcome travel constraints. Furthermore, image is the core construct in destination positioning (Pike & Ryan, 2004) and many factors influence the formation of a destination image in the minds of tourists. These factors include traditional advertising (such as print and advertising campaigns), popular culture or general media (including films, news, magazines and books), opinions of others or word-of-mouth (WOM) and previous experience (Echtner & Ritchie, 2003; Mercille, 2005). These factors can be classified into secondary and primary sources of information (Gartner, 1993). These information sources can also be classified as being either organic or induced (Kim & Richardson, 2003), although Chen *et al.* (2013) state that once a tourist visits a destination, induced images turn into complex images.

Gartner (1993) categorises and explains all these factors or agents in a way that is very easy to understand. He identifies eight categories, namely: Overt Induced I, Overt Induced II, Covert Induced I, Covert Induced II, Autonomous, Unsolicited Organic, Solicited Organic and Organic. Figure 4 (p. 24) displays the abovementioned image formation agents and compares their credibility with tourists (low, medium or high), market penetration (low, medium or high) and the cost to the destination (medium, high or indirect).

Figure 4: Image formation agents

Image change agent	Credibility	Market penetration	Destination cost
Overt Induced I	Low	High	High
Overt Induced II	Medium	Medium	Indirect
Covert Induced I	Low/Medium	High	High
Covert Induced II	Medium	Medium	Medium
Autonomous	High	Medium/High	Indirect
Unsolicited Organic	Medium	Low	Indirect
Solicited Organic	High	Low	Indirect
Organic	High	-	Indirect

Source: Gartner (1993:110)

These image formation agents are discussed below:

- **Overt Induced I:** These factors consist of traditional forms of advertising, including radio, magazines, television, billboards and other forms of traditional media. These forms of advertising are used by destination marketers in an attempt to form a particular destination image in the minds of potential visitors.
- **Overt Induced II:** These factors consist of information gathered from organisations such as tour operators and wholesalers which are not directly linked with any individual destination, but rather have an interest in the travel decision process as a whole.
- **Covert Induced I:** As traditional forms of advertising (as used in Overt Induced I) lack a certain degree of credibility, destinations make use of a familiar spokesperson to support the desired image to the target audience.
- **Covert Induced II:** In this case, the person influenced is not aware that destination marketers are involved in the image formation process. This form of media includes stories, articles and reports from a seemingly unbiased source, about the destination.

This agent may involve the use of films to alter the image of a destination, although films are generally classified under the next agent, Autonomous.

- Autonomous: This consists of independently produced documentaries, movies (films), reports and news articles. Furthermore, this category can be subdivided into two categories, namely: news and popular culture. When a destination appears in the news, the destination marketers generally have no control over the image being portrayed and as news is considered by most to be completely unbiased facts, the image formed from news is very strong in the minds of potential visitors and destination marketers have a difficult time changing that image. An example of popular culture is feature length films, which are seen as unbiased depictions of destinations. Due to the high credibility and market penetration of Autonomous sources, they are considered the only image formation factors that are capable of radically altering a destination's image quickly. Destination marketing through films is discussed in detail in Chapter 3.
- Unsolicited Organic: This entails unrequested WOM information received from people who have visited a destination; this type of information is received on a regular basis.
- Solicited Organic: When visitors are interested in travelling to a particular destination, they will actively search for information about this destination from knowledgeable sources. Solicited Organic differs from Overt Induced II in the sense that the source of information consulted does not have any interest in the outcome of the decision to travel to the destination.
- Organic: This is formed based on previous experience from travel to a specific destination (Gartner, 1993).

From the representation in Figure 4 (p. 24), one can conclude that Autonomous is the most desirable image formation agent, as it carries high credibility with potential tourists, it has high market penetration and the cost of the exposure is not carried by the DMO. It is important to note that some forms of advertising may fall into more than one of the abovementioned categories; an example would be advertising a destination through a feature film, which may fall into Covert Induced II, as well as Autonomous. Organic images are formed from sources whose main intent is not to promote a destination whereas induced images stem from destination marketing efforts (Campo *et al.*, 2011; Gartner, 1993).

Image formation can involve all of the senses, including touch, smell, sight, taste and sound (Campo *et al.*, 2011; Echtner & Ritchie, 2003). Tasci (2009) stresses that the visual element is the most important factor in image formation as it gives potential visitors a pre-taste and actual representation of the destination until it can be experienced. This is achieved through the appearance of a destination in a film; this phenomenon will be discussed in Chapter 3.

A visitor's image of a destination has a greater impact on their decision to travel than any factual information received (Henkel, Henkel, Agrusa, Agrusa & Tanner, 2006). Destination image also has the potential to influence visitor satisfaction (Jenkins, 1999). For the tourist, it does not matter if the image they hold in their mind is true or not, the existence of the image is more important than what the destination can offer the tourist. In order to effectively manage a destination's image, the destination marketer must understand the potential tourists' attitudes towards and interests in the destination (Laws *et al.*, 2002). Jenkins (1999) states that the existence of a destination image in the mind of potential visitors is more important than whether the image is a truthful representation of the destination and what the potential visitor might expect to experience. Day *et al.* (2002) state that for a destination image to be effective, it must "be valid, be believable, be simple, have appeal, [and] be distinctive". Barich and Kotler (1991) urge marketers to implement an image tracking and management system in order to identify unfavourable changes in a destination's image and act to correct those, identify the destination's strengths and weaknesses compared to their competitors' and track whether their corrective efforts have paid off.

Gartner (1993) mentions three components that are present during the image formation process: the cognitive, affective and conative components. These components are defined as follows:

- The cognitive component of an image stems from details received from external sources concerning the product, whether they are true or not; this is essentially a tourist's beliefs and knowledge about a destination.
- The affective component of an image stems from the tourist's motivation to travel and what he/she gains from visiting a destination.

- The conative component of an image stems from the final destination choice and is dependent on the images formed by the cognitive and affective components.

Tourist perceptions are central to a destination's image. A destination must be aware of the perceptions the international community has of the destination in order to understand the best way to market the destination to potential tourists or to educate those with a false perception of the destination. Furthermore, it is important that the perceptions of the destination residents are in line with potential tourists' perceptions (Henkel *et al.*, 2006).

Gartner (1993) identifies four characteristics of a destination image:

- Images change more slowly the bigger an entity is;
- Attempts to formulate induced images must be long-term and focused;
- Entities that are small in relation to the whole have little chance of developing an independent image (for example Mpumalanga will find it difficult to develop an image that differs significantly from South Africa's image); and
- A successful image change will depend on an evaluation of currently held tourist images.

DMOs need to formulate an attractive slogan that provides a link between the brand as intended by the DMO and as perceived by the market. A destination cannot, however, rely solely on a slogan to differentiate itself from other destinations (Pike, 2005). In order for a DMO to develop an appropriate image for their destination, they need to use the correct combination of image formation agents, as described by Gartner (1993). The selection of these agents depend on a number of factors, such as the funding available for image formation, target market characteristics, demographic characteristics, timing (during which stage of the decision-making process the tourist is exposed to the image), the type of image being projected and lastly, the product (Gartner, 1993). Hankinson (2007) further states that in order to create a positive brand image, a hands-on marketing approach is required. Various organisations and individuals can have a profound influence on a destination's brand image; these include suppliers, government agencies, shareholders and distributors (Hankinson, 2007). It is important to note that a destination image is seldom formed by one information source and uses a combination all the above mentioned factors and components to create an image (Campo *et al.*, 2011).

Both destination branding and image formation fall within the broader marketing strategy of a destination. The next section analyses the concept of services marketing and its components as it applies to tourism.

2.4 SERVICES MARKETING

Schofield (1996) states that, as tourism is considered a service, it is imperative for DMOs to fully understand how to market a destination at the hand of the 7 Ps of service marketing. Service is defined as “an act or performance offered by one party to another. Although the process may be tied to a physical product, the performance is essentially intangible and does not result in ownership of any of the factors of production” (Lovelock, 2000). It has long since been accepted that the marketing of products and services differ significantly. This section focuses on the differences between products and services; it also discusses the 7 Ps of the services marketing mix and how and why it evolved from the 4 Ps of the marketing mix.

2.4.1 DIFFERENTIATING BETWEEN PRODUCTS AND SERVICES

The marketing of products and services differ significantly, as products are tangible and services are intangible and cannot be stored as they are perishable (Lovelock & Gummesson, 2004; Shostack, 1977; Tarn, 2005a). The four commonly agreed upon distinctive characteristics of services are their intangibility, inseparability, heterogeneity and perishability (Wyckham, Fitzroy & Mandry, 1975). Intangibility refers to the fact that a service cannot be touched or seen, inseparability means that the production and experience of a service cannot be separated as it occurs simultaneously, heterogeneity reflects how services cannot be standardised, and services are considered perishable as they cannot be stored and used at a later stage (Edgett & Parkinson, 1993; Hill & Gandhi, 1992; Rushton & Carson, 1989; Vargo & Lusch, 2004). Levitt (1981) states that when buying a service, one is fundamentally buying a promise.

George and Berry (1981) further note that “the quality of the service rendered is inseparable from the quality of the service provider”; this means that if one employee is rude, the customer will feel the entire service experience was bad. The tourism product is the holiday experience and consists of a number of services (Gnoth, 2002) delivered by various stakeholders at a destination. Due to the intangibility of a service, service industry organisations find it very difficult to differentiate themselves; products can be differentiated based on packaging, design and branding, whereas services have no physical attributes (George & Berry, 1981; Levitt, 1981).

With regards to the tourism industry, vacations create memories and experiences (Bowen & Ford, 2002). It is important to mention that services create experiences (Millet, 1999) and that tourism services should be marketed with this in mind. Pine and Gilmore (1999) note that “[e]xperiences occur whenever a company intentionally uses services as the stage and goods as props to engage an individual. While commodities are fungible, goods tangible and services intangible, experiences are memorable”. This definition serves to increase the dissimilarity between products and services by including the intangibility of the memory of an experience formed through dealings between a customer and an organisation (Bowen & Ford, 2002). Bowen and Ford (2002) suggest that the elements needed to create a memorable experience for a customer include a tangible or intangible product (a meal or a concert), the service setting (a restaurant or a concert venue) and a service delivery system (the staff, systems and equipment).

When delivering a service, it is important to note that both the employee delivering and the customer receiving the service is involved in the production process (Bowen & Ford, 2002; Edgett & Parkinson, 1993). For this to be successful, the production setting as well as the production process must be designed in such a way to facilitate customer co-production and all employees must be trained in managing and working with co-producing customers (Bowen & Ford, 2002). In the service industry, it is a critical objective and key hiring condition to find employees who are capable of effectively creating great service experiences for customers (Bowen & Ford, 2002).

When designing a marketing campaign, marketers need to consider whether it has positive effects on contact personnel, promises what is possible, provides tangible clues,

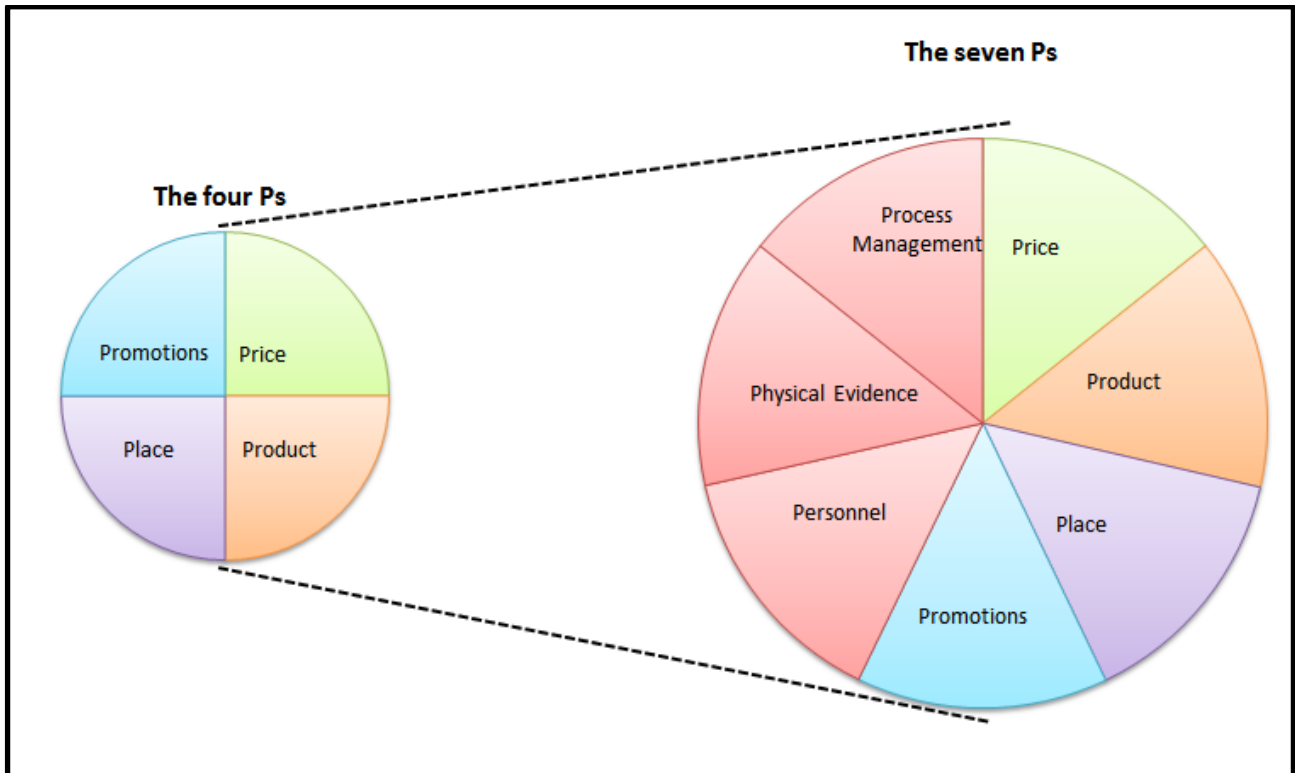
contributes to continuity, capitalises on WOM, and makes the service easier to understand (taken from George & Berry, 1981; Levitt, 1981; Mittal, 1999; Shostack, 1977; Tarn, 2005a; Tarn, 2005b). It is important to note that in the service industry, customers expect a certain level of service and the customer is for the most part unaware of when they are being served well (Levitt, 1981). Levitt (1981) explains this in the following way: “The most important thing to know about intangible products is that the *customers usually don’t know what they are getting until they don’t get it*. Only then do they become aware of what they bargained for; only on dissatisfaction do they dwell. Satisfaction is, as it should be, mute. Its existence is affirmed by its absence”. Mittal (1999) confirms this by stating that customers find it difficult to evaluate the level of service received.

2.4.2 THE 7 PS OF SERVICES MARKETING

The 4 Ps of the marketing mix, as classified by McCarthy (1960), consist of product, price, promotion and place. The additional concepts of process and physical evidence were later added by Booms and Bitner (1980). Furthermore, Judd (1987) and Glassman and McAfee (1992) suggested adding people/personnel to the mix, resulting in what is now known as the 7 Ps of services marketing. The original 4 Ps were deemed insufficient for the marketing of services (Magrath, 1986; Schofield, 1996).

Figure 5 (p. 31) shows the original 4 Ps of the marketing mix and how they evolved into the 7 Ps of the services marketing mix.

Figure 5: Expanding the traditional marketing mix for service businesses



Source: Magrath (1986:45)

Magrath (1986) states that it could be disastrous should a company that provides a service, not implement these additional three Ps, as the original 4 Ps disregard the crucial service marketing necessities of personnel, physical evidence and process management. Developing an effective destination marketing mix (also services marketing mix) is not easy as the DMO needs to consider the destination, its target markets and various other issues in the external environment (Buhalis, 2000). The elements of the services marketing mix are discussed in the following and applied to the tourism context. It is important to elaborate on each component as this study aimed to establish a model with guidelines for each respective component within a film tourism marketing strategy.

2.4.2.1 Product

A destination consists of specific products, including tourism services such as accommodation establishments, food services, transport services, entertainment and travelling organisations, and public commodities such as scenery, landscape, atmosphere,

natural phenomena and socio-cultural settings (Buhalis, 2000). All of these products together create the tourism product, which will differ for each tourist. Products need to be enhanced and differentiated by DMOs in order to emphasize their distinctiveness (Buhalis, 2000). DMOs can do this by not focusing on their most prominent resource, but by assessing the supporting resources, using these to advertise to a range of target markets, each with a specific need (Buhalis, 2000; Morgan *et al.*, 2002). 'Product' is the marketing aspect expected to be affected the most by the intangibility of services (Rushton & Carson, 1989), as there is seldom a physical tourism product.

2.4.2.2 Price

This element pertains to specific pricing policies and levels to adopt (Borden, 1964; Glassman & McAfee, 1992), and could include where to place the destination against other similar destinations in terms of price. This is a difficult process, as the pricing is more often than not determined by the policies of individual stakeholders. Therefore, implementing and coordinating a destination-wide pricing strategy is near impossible. Elements that further influence pricing include international economic market conditions and national economic policies. DMOs can, if deemed appropriate, set guidelines and standards on minimum and maximum prices in order to discourage severe competition between small enterprises and protect tourists from being taken advantage of. Ensuring adherence to these guidelines and standards is very difficult and can be accomplished by forming partnerships with the local enterprises and training their managers to understand the reasons behind these policies and guidelines (Buhalis, 2000).

Pricing within, at, as well as to and from destinations, play a big role in the image formation process in the minds of potential tourists, as they consider their budget before looking at possible destinations (Buhalis, 2000; Dwyer & Kim, 2003). At times, tourists might be inclined to sacrifice quality to make the experience more affordable (Buhalis, 2000). Due to the intangibility of services, tourists may not understand why a destination charges certain prices, as they cannot see exactly what it is they are buying (Rushton & Carson, 1989).

2.4.2.3 Promotion

This refers to finding the best, most creative way to create awareness of the product/service and to promote the product/service to potential tourists through creating appropriate communication channels (Borden, 1964; Buhalis, 2000; Glassman & McAfee, 1992; Magrath, 1986). For a destination marketing campaign to be successful, all stakeholders must work together to create a coordinated strategy. As this is such a difficult task to accomplish, DMOs generally create and lead advertising campaigns and stakeholders are asked to participate and contribute in any way they can. When the destination is considered the product, this element ensures that the destination is marketed and made available to the right target markets, during the right season and at the right price. Therefore it is important to make use of the appropriate distribution channels to reach the various markets (e.g. travel agents, corporate travel offices, destination websites, etc.). DMOs can use two promotional strategies: above or below the line. Above the line activities include television, radio, press and poster advertisements, while below the line activities include participation in trade and travel fairs where DMOs meet with partners in the industry and promote themselves to travel agents, tour operators and other similar organisations (Buhalis, 2000).

2.4.2.4 Place

This pertains to the distribution of the service, or the place where the service will be performed (Borden, 1964; Glassman & McAfee, 1992; Rushton & Carson, 1989). The objective of distribution is to ensure that the right amount of product is available at the right time, at the right place, at the right price and to the right consumer (Buhalis, 2000; Glassman & McAfee, 1992). A destination's location is essential in attracting tourists, thus the destination must be marketed to the correct target market who has the means to reach the destination fairly easily (Dwyer & Kim, 2003), or has the motivation and means to travel to a far location.

2.4.2.5 Process management

A service must be delivered according to a certain process in order to ensure consistent

quality (Magrath, 1986). The service delivery process must be flawless and all departments must work together to deliver the service in the most effective and efficient manner (Magrath, 1986). One way to ensure a customer is confident in an organisation's ability to deliver a promised service is to showcase the entire service process to the customer, explaining each step in detail (Karim & Strzelecki, 2012; Mittal, 1999). In the tourism industry, this would apply to the effectiveness of, for example, processing a visa application (even though this is not performed by the tourism industry, the process still needs to be effective as it has a great impact on tourism to a country), making an accommodation or flight booking and making payment. Considering the film industry, this would directly apply to the effectiveness and lead time when applying for film permits, crew visas, flight tickets, assistance from a local film office and government tax breaks. The film production process is discussed in more detail in Chapter 4.

2.4.2.6 Physical evidence

The service experience is enhanced by the setting in which it takes place as well as the physical assets used, but, often unseen, in the service delivery process (Magrath, 1986). This also concerns the location of the organisation and factors such as parking availability, access by road, building attractiveness and clarity of signage (Magrath, 1986). Any building and area where a tourist encounters a destination offering needs to be clean, attractive and accessible, and have enough parking and signage that displays all the necessary information the tourist may need. Buildings must be maintained and upgraded so they do not deteriorate beyond repair. The natural surroundings and buildings are especially important for film producers when considering a location for use in a film.

2.4.2.7 People/personnel

Personnel are very important in the service industry as they are the creators of the service, and they also deliver the service (Magrath, 1986). Glassman and McAfee (1992) stress the importance of successfully integrating and linking the marketing department and service personnel and state that without the right employees even the best strategy will be rendered ineffective. A study done by Karim and Strzelecki (2012) indicates the benefits of showcasing employees as part of the service marketing effort, as the quality of any service

is heavily reliant on a company's employees. Furthermore, it is important to have well-trained, professional employees so clients feel confident that the service being delivered will be delivered successfully by staff who can deal with potential issues, should they arise (Karim & Strzelecki, 2012). To ensure that a company hires competent staff, Glassman and McAfee (1992) suggest having strict employee selection programmes in place, establishing what training all new and current employees require and implementing employee reward programmes. When considering the tourism industry, personnel include all the people tourists come into contact with when making bookings, checking into a hotel, boarding a flight, taking a tour, eating at a restaurant and making use of transportation at a destination. It also includes the staff who operate behind the scenes and facilitate the aforementioned processes, such as chefs in a restaurant, housekeeping at a hotel, and crew on an airplane. All of these staff members need to be very well-trained in facilitating processes and dealing with issues that might arise. They must also have very good social skills so that tourists will feel comfortable in having them 'take care' of them. In terms of the film industry, this would include all the people producers have contact with when enquiring about shooting a film in South Africa, applying for film permits, tax breaks, recruiting local film companies and support staff, and any other service people they have contact with during and after filming.

A specific marketing technique pertinent to films is that of product placement. It will fall within the 'promotion' component of a marketing strategy. Because of its relevance to films and the promotion of destinations, it is discussed separately.

2.5 PRODUCT PLACEMENT

Product placement can be defined as a message that refers to a product, and which aims to influence film audiences, by making use of the deliberate but discreet entry of a branded product into a film (Balasubramanian, 1994). For the purpose of this study, destinations and destination brands are included in this definition and, even though this topic relates to film tourism, it is appropriate to discuss it within this section on destination marketing as a direct method to promote a destination in a film or similar production.

Due to a lack of measurable results produced by traditional marketing, marketers have chosen to move towards modern communication means like product placement to market products and even destinations (O'Connor *et al.*, 2010b). Product placement first occurred in the 1980s, when a specific brand of soap secured placement in a number of films (Hudson & Hudson, 2006). Product placement has become so common that it has become an industry in itself (Redondo, 2006). In order for marketers to effectively identify product placement opportunities, a firm specialising in liaisons with film studios is appointed. This firm is tasked with acquiring film scripts far in advance, identifying a desirable context for product placement and setting up deals for product placement with the film producers, should the context be desirable to both parties (Balasubramanian, 1994). Research has suggested that if the product brand is plainly related to the program content, audiences' responses to the brand are more likely to be positive (Karrh, McKee & Pardun, 2003). As films have a great influence on audiences' emotions, marketers are expected to be more inclined to place their product in programs that generate positive emotions among the audiences (Karrh *et al.*, 2003). Evidence has lead marketers to the realisation that by advertising products or communicating with target audiences by means of product placement, their efforts are more targeted, more effective and more widely spread than any form of traditional advertising (Hudson & Ritchie, 2006b).

Hudson and Hudson (2006) mention six elements that have an influence on the effectiveness of product placement: the media used, the brand characteristics, all supporting promotional activities, consumers' attitudes toward product placement, the placement characteristics and any regulations pertaining to product placement. If a brand's characteristics lend itself to product placement, it is more likely to be accepted by viewers. It has become quite common for organisations who partake in product placement to back this placement with supporting advertising campaigns of their own. Consumers have a positive attitude towards product placement, as they do not feel that the advertising is being forced on them. It also increases brand loyalty and customers feel their purchase decision is being validated. The placement characteristics are important, as the placement is more likely to be successful when the product and storyline are closely related and if the product is well-placed. Regulations regarding product placement in the USA are slack compared to stricter regulations found in other countries.

Russel (2002) states that product placement is often used by marketers to change consumers' attitudes towards a certain brand. Furthermore, consumers do not feel as if the product is being forced on them, but rather forms part of the film; they value the authenticity created through product placement. Russel identifies three categories of product placement namely visual, auditory and plot connection: this is called the Tripartite Typology of Product Placement. The visual dimension pertains to the appearance of the brand in the film; the auditory dimension refers to the brand being mentioned in the dialogue, as well as the context in which it is being mentioned; and the plot connection dimension refers to the degree to which the product or brand forms part of the plot.

Sellgren (2011) mentions that when the locations where films are set are woven into the film plot, it can be considered a form of branded entertainment or product placement, as just like services and products, a person needs to pay to use or own it. Morgan and Pritchard (1998) are of the opinion that placing a destination in a film is the ultimate form of product placement. Sellgren (2011) further states that destinations are crucial to any film, as a film has to be filmed somewhere and therefore viewers do not see it as product placement. Hotels and other attractions featured in films can also be labelled under product placement (Sellgren, 2011). Destinations and locations as part of product placement will be discussed in Chapter 3 and examples of successful campaigns will be provided.

2.6 CONCLUSION

The concepts thought to be most relevant to this study, e.g. the role of DMOs, destination branding and image formation, services marketing and product placement, were discussed in this chapter. From the above discussions, one realises what complex processes are involved in destination marketing and management, and how all the above mentioned elements of destination marketing are related and must be integrated in order to form a successful marketing strategy. When developing a destination brand, one must be sure to base advertising on the motivations for tourists considering the destination, as the tourist begins forming preconceived ideas of the holiday experience, based on the image portrayed by the brand. This may result in many opportunities to create unique

experiences associated with the distinctive represented services and products at the destination (Gnoth, 2002). In 1999, Tourism New Zealand launched their first-ever international marketing campaign entitled '100% Pure New Zealand' (Morgan *et al.*, 2002).

The creation of this branding strategy developed from the need to build and project a single brand, unique to New Zealand, across all markets (Morgan *et al.*, 2002). This brand strategy has been so successful that it is still being used. Morgan *et al.* (2002) suggested that in the future, destinations will not be differentiated based on price, but rather on customers' emotions toward the destination brand. Based on the recent information contained in this chapter, it can be concluded that that future has arrived.

Continuous market research needs to be conducted, as tourism demand is particularly dynamic and requires the destination marketing mix (service marketing mix) to constantly evolve (Buhalis, 2000). A company should identify one key services marketing mix element that presents the most compelling argument from a marketing point of view and which is most likely to convince potential tourists to respond to the marketing effort (Magrath, 1986). Karim and Strzelecki (2012) stress the importance of a unified message among all marketing efforts. This is very difficult to achieve, as a destination comprises of various stand-alone businesses that together create the service experience with the DMO having little control over the individual marketing efforts and service quality of these businesses (Hankinson, 2007). Hudson and Ritchie (2006) point out that product placement has an impact on both the viewers' attitude towards brands and the image they have of the destination.

It is important to have a fundamental understanding of destination marketing in order to achieve the final and main objective of this study, namely to develop a model containing guidelines related to the 7 Ps of services marketing for promoting South Africa as an ideal film location to international film producers.

In the next chapter, destination marketing through feature films will be discussed.

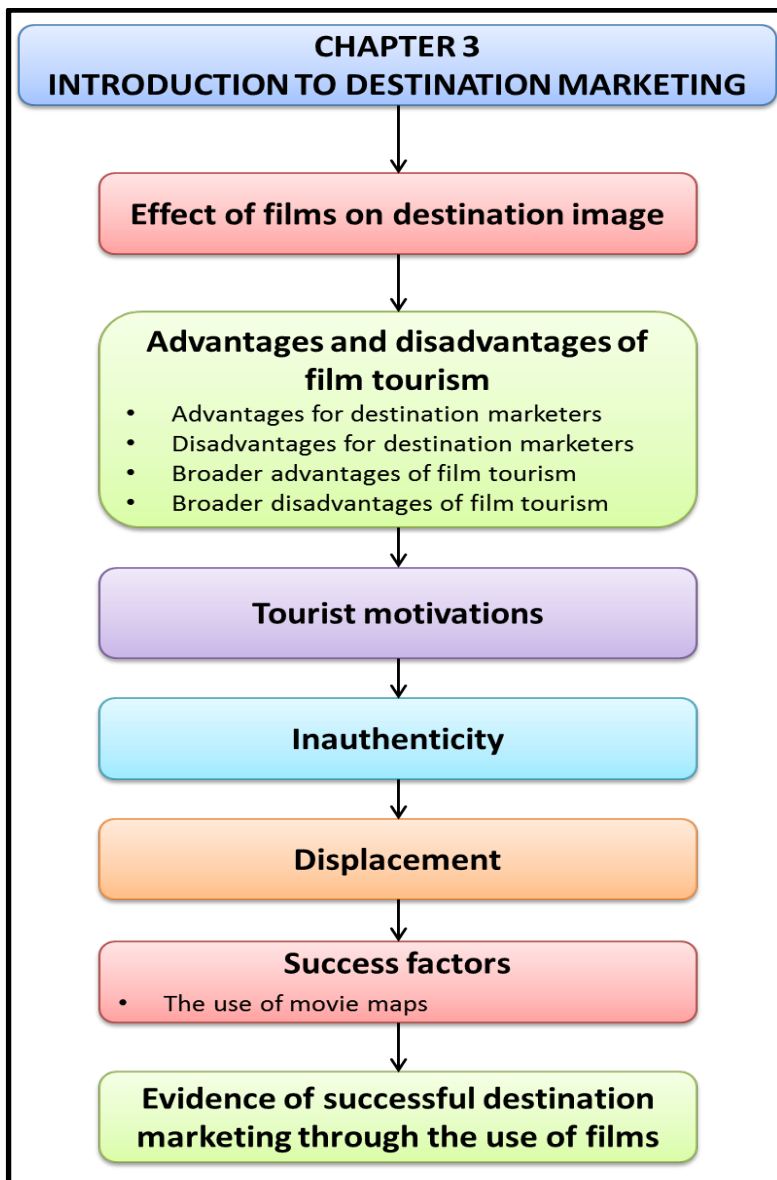
CHAPTER 3: FILM TOURISM WITHIN THE CONTEXT OF DESTINATION MARKETING

3.1 INTRODUCTION

In this chapter, the researcher aims to address the first two objectives of this study: to explore the attractiveness of the film tourism market for destination and to identify the unique aspects involved when marketing a destination through film tourism. This is attempted through a discussion of the effect of films on a destination's image, the advantage and disadvantages of film tourism, tourists' motivations for partaking in film tourism, the issues of inauthenticity and displacement, success factors of film tourism and evidence of successful destination marketing through films. It is important to have a fundamental understanding of film tourism in order to achieve the final and main objective of this study, namely to develop a model containing guidelines related to the 7 Ps of services marketing for promoting South Africa as an ideal film location to international film producers.

The layout of this chapter is presented in Figure 6 (p. 40).

Figure 6: Layout of Chapter 3



3.2 THE EFFECT OF FILMS ON DESTINATION IMAGE

There is a significant, well-documented link between visual media and the act of tourism. This is accentuated by a statement made by Beeton (2005:133): “Tourism, by its very nature of gazing and recording that gaze in photographs, video and so on, is closely associated with the image-making media such as fictional movies”. This is a powerful statement which stresses the important effect film has on tourism, to the entire tourism industry, researchers and academics. Furthermore, Riley and Van Doren (1992) describe films as “pull” factors in a “push” situation. The concept of “push” and “pull” factors will be discussed in more detail further on in this chapter.

As established in Chapter 2, image is a very important element of destination marketing, as it affects the entire destination selection process. Films reach millions of viewers globally and have the potential to define, praise, degrade or destroy a destination image (Campo, *et al.*, 2011). When watching a film, the audience virtually travels to the places portrayed in the film as they follow the story. These locations, when viewed in the film, leave long-lasting impressions in the minds of the viewers (Portegies, 2010). Films fall into a 'non-marketer-controlled' subcategory which allows a consumer to develop a more comprehensive destination image through vicarious exposure. Furthermore, films display a destination's attributes and attractions fairly accurately (Riley & Van Doren, 1992). Placing a destination in a film can lead to the formation of an enhanced image of the destination in the minds of the audience members which may lead to a desire to visit the location (Stalik *et al.*, 2011).

Many studies have been conducted on how films can create and alter destination images in the minds of potential tourists (Campo *et al.*, 2011). Mestre, Del Ray and Stanishevski (2008) suggest that due to the potential of a film to effortlessly capture audiences' subconscious, it can easily take over their imaginations as well. This is especially true with regards to fictional films, as the conditions under which the film is received in the cinema (on a big screen, in the dark, with surround sound) have the ability to relax the audience, who then ultimately surrender themselves completely to the film experience, living through the characters (Mestre *et al.*, 2008). Just as product placements influence viewers' attitudes toward a certain brand, so too do films have an impact on destination image if the destination is featured in a film (Hudson & Ritchie, 2006b). Destinations featured or placed in films have the potential to shape a tourist's image of the destination, without the disadvantage of the film being considered promotional material for the destination (Vagionis & Loumiotis, 2011). Unlike DMOs and their standard marketing campaigns, film producers as artists are more capable of and successful at depicting a sense of place through films, as the audience experiences people, colours, music, atmosphere and silence (Portegies, 2010).

There are various opinions available in the literature on how films can negatively or positively affect a destination's image. The researcher believes all these opinions have merit and the less generally expressed opinions should not be dismissed. Some

researchers indicate should the objectives of a DMO be in line with those of the film producers, films can effectively be used to develop the desired image in the minds of the target markets (Beeton, 2001; Campo *et al.*, 2011; Tooke & Baker, 1996). Sometimes this is not the case and films that are exceptionally successful at the box office, negatively impact the filmed destination's image (Campo *et al.*, 2011). On the other hand, negative images are not always bad for the destination's image and might still induce film tourism (Irimiás, 2012).

An example of a destination whose image has suffered negatively is Rio de Janeiro, as it is very often portrayed in films as a lawless retreat, where many dangerous criminals flee to (Campo *et al.*, 2011), for example in the film *OSS 117: Lost In Rio* (Hazanavicius, 2009). New Orleans, to name but one, is another location that has been negatively affected by the manner in which it has been portrayed in films (Campo *et al.*, 2011), for example *Parker* (Chasman, Hackford, Alexander, Kimmel & Mitchell, 2013) and *Stolen* (Kennedy, Joyne & Besson, 2012). One way to counter the effect of unwanted negative publicity is to 'demarket' the location (Beeton, 2001). Demarketing a destination involves entry controls, pricing strategies, a reduction in marketing and promotion and behavioural education; this is done in the marketing stage, before potential tourists make the decision to travel to the destination (Beeton, 2001). Demarketing can be used as a means to re-image a destination, empowering the local communities and ultimately leading to a sustainable future (Beeton, 2001).

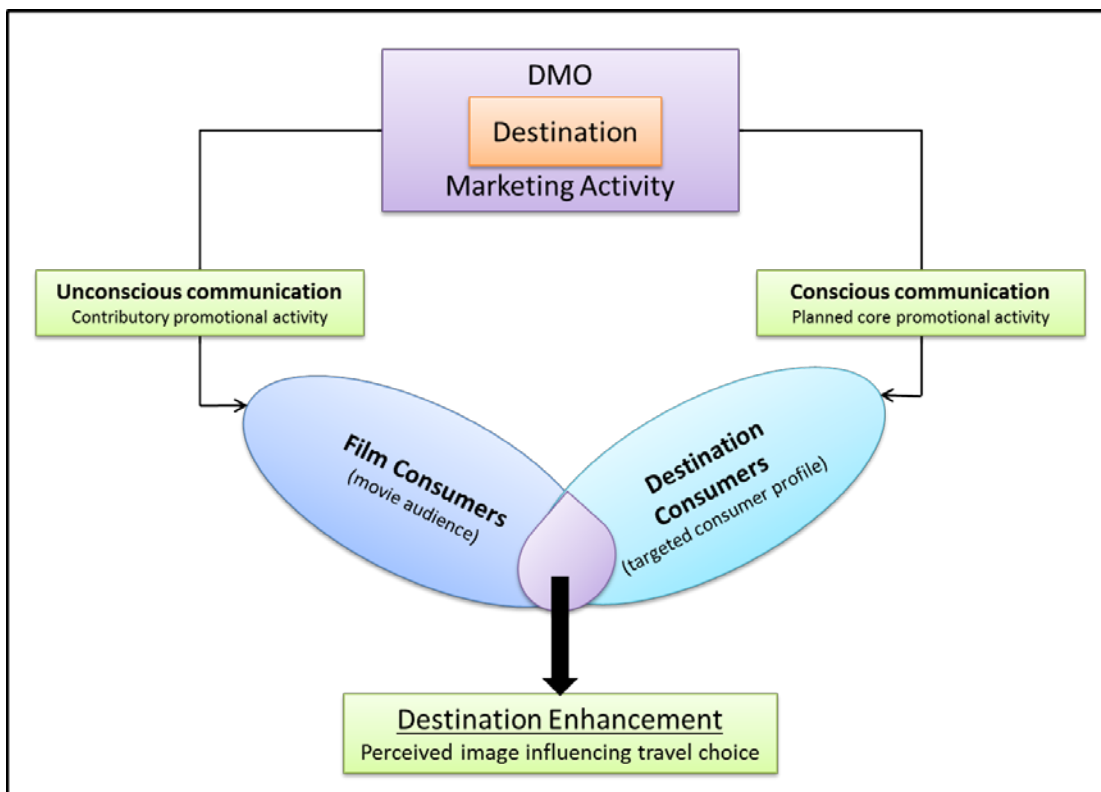
Negative images may in some exceptional instances lead to enhanced tourism, for example Wolf Creek, Australia, where *Crocodile Dundee* (Faiman, 1986) was filmed, was said to experience an increase in tourism after the release of the film (Bentham, 2006). In *Crocodile Dundee* (Faiman, 1986), Wolf Creek is portrayed as a dangerous place, thus this increase was attributed to the opinion that when a place is considered dangerous, it could be good for business and audiences sometimes find the 'danger factor' appealing (Bentham, 2006).

Avatar (Cameron, 2009), is another example of how films can help change a destination's image for the better. After the release of *Avatar* (Cameron, 2009), the Southern Sky column in Zhangjiajie, China, was renamed "Hallelujah" after the floating Pandoran Mountains featured in *Avatar* (Tzanelli, 2012). The Southern Sky column was the

inspiration for the Pandoran Mountains featured in *Avatar*, consequently the Hunan government decided to adopt the slogan “Pandora is far but Zhangjiajie is near” (Tzanelli, 2012).

Figure 7 (p. 43) indicates two ways through which images can be created: conscious and unconscious communication. Conscious communication refers to all planned promotional activities (Bolan & Williams, 2008), usually performed by the destination’s DMO and relates to induced images as mentioned by Gartner (1993). Unconscious communication refers to additional, unplanned communications to people other than the designated target markets targeted by the DMO. Image formation through films fall under this category, as the DMO has little to no control over how the destination is portrayed or who sees the film. This communication is not actively initiated by the DMO and can be viewed as a ‘bonus’ promotional activity (Bolan & Williams, 2008). Unconscious communication relates to organic image formation, as mentioned by Gartner (1993) and explained in Chapter 2 (Figure 4, p. 24).

Figure 7: Destination image enhancement through film



Source: Bolan and Williams (2008:387)

From Figure 7 (p. 43), it is evident that in order to capitalize on destination image enhancement, conscious and unconscious communications need to work together. Bolan and Williams (2008:387-388) state that “[d]estination enhancement recognizes that the image of a destination communicated via a movie enhances consumer perception of the destination product”.

In their research article, Mestre *et al.* (2008) classified films into three categories according to the image they project, including Icon Films, Pastiche Films and Tourist Poster Films. Icon Films, by portraying a destination’s most prominent cultural aspects, are used to develop a global image of a destination. Pastiche Films falsely portray a destination’s culture, distorts reality and is often used to reinforce certain stereotypes. Tourist Poster Films capitalize on the beauty of a place and make sure to feature many of the tourist attractions, such as hotels, museums and landmarks, in the film. These categories are, however, not rigid; one may find aspects of two or all three images projected, in one film.

The way a destination is featured in a film can have a strong global influence on the way that destination’s image is perpetuated, with these images being cumulative and sustainable (Campo *et al.*, 2011). Before travelling to a film location, film tourists have a predefined image of the destination/location in their minds, as well as certain expectations based on this image (Buchmann, 2010) and the actual experience will either affirm or break this image. It is crucial for DMOs to evaluate the destination image as it is being portrayed in various films (Di Cesare *et al.*, 2012).

In the next section, the advantages and disadvantages of a destination appearing in a film, as well as film tourism in general are discussed.

3.3 THE ADVANTAGES AND DISADVANTAGES OF FILM TOURISM

3.3.1 ADVANTAGES FOR DESTINATION MARKETERS

Many researchers have identified various advantages of film tourism for destination marketers. The most obvious advantage for destination marketers is the fact that the

placement of a location in a film is free publicity for the destination which may ultimately help increase tourist numbers (Busby & Klug, 2001). It has been said that it is the ultimate form of product placement when a destination features in a film, as images created in films produce identities, offer publicity and last for many years (Busby & Klug, 2001; Vagionis & Loumioti, 2011). This statement is repeated by other researchers who agree that films have a long life cycle, are globally distributed and foster identification with their viewers (Karrh *et al.*, 2003; Vagionis & Loumioti, 2011). Films have a great impact on the image of a destination and have the potential to eliminate problems of seasonality as film tourism is an 'all-year, all-weather' activity (Hudson & Ritchie, 2006b; Vagionis & Loumioti, 2011). As films reach millions of consumers, it has the potential to attract consumers who were not part of the DMO's original, targeted marketing strategies (Bolan & Williams, 2008; Stalik *et al.*, 2011).

A destination image can be enhanced when the destination is presented in a film; this effect is termed as "destination enhancement" and acknowledges that a destination image portrayed in a film may improve consumers' perceptions of the destination (Bolan & Williams, 2008). Research conducted by Riley *et al.* (1998) indicates a 54% increase in tourism to their studied film locations for up to five years after the release of films. Furthermore, they state that 'dark' films also have the potential to draw tourists – it is not always necessary for the location to be beautiful or the plot positive. 'Dark' films refer to films with a dark or depressing mood and theme (IMDb, 2013), such as *In Bruges* (McDonagh, 2008) and *Sweeney Todd: The Demon Barber of Fleet Street* (Burton, 2007). *In Bruges* (McDonagh, 2008) stimulated demand for tours to and in Bruges (Elliot, 2014).

The fact that the audience is exposed to the destination for a period of roughly two hours further strengthens the destination image and familiarises the audience with various aspects and attractions at a destination (Bolan & Williams, 2008; Kim & Richardson, 2003; Portegies, 2010). This allows tourists to experience the destination without having to travel there, which could entice consumers to visit a destination (Stalik *et al.*, 2011).

3.3.2 DISADVANTAGES FOR DESTINATION MARKETERS

Even though a movie may be extremely popular it will not automatically generate tourism, especially if the destination image portrayed differs from other images concerning the destination, or if the images portrayed are mostly negative (Beeton, 2004; Campo *et al.*, 2011; Soliman, 2011). Another disadvantage of a destination being portrayed in a film is the fact that the film may not represent the destination accurately, which may lead to a warped perception of reality in the mind of the potential tourist (Bolan & Williams, 2008; Soliman, 2011); this links with inauthenticity which is discussed later in this chapter. Film tourists' expectations vary based on the scenery, sense of community and adventures portrayed in films, therefore, expectations are primarily film specific and the tourists expect to visit film sets which have more often than not already been destroyed (Buchmann, 2010). Furthermore, the destination depicted rarely looks the same as in the film, as films distort distances and perspectives (Buchmann, 2010). Film producers are not concerned with how the film they are producing can change a destination's image in the minds of potential tourists (Beeton, 2001).

As DMOs have no say over how the destination is portrayed in a film and how this portrayal may affect the destination image (Beeton, 2001; Soliman, 2011), they may need to modify their promotional campaigns in order to relate the film image to the image of the destination (Soliman, 2011). This will allow marketers to influence and exploit the opportunities presented by film tourism (Beeton, 2004; Croy, 2010). This alteration affects tourism in a number of ways, but the most notable disadvantage of the change in image is that it may attract too many or even too few visitors and these visitors may not necessarily be the type of tourist the destination marketer was hoping to attract (Beeton, 2001; Soliman, 2011). Every film creates a unique image for the destination featured in the film. When multiple films are filmed at a specific location, these images are often contradicting and the DMO may find it difficult to secure a single image in the minds of potential tourists (Soliman, 2011).

Destination managers face the challenge of changing interest in a film into a promise for future travel to the featured destination, which is difficult to achieve, as many consumers do not have the financial means to pursue an interest in film tourism (Hudson & Ritchie,

2006b). When promoting a destination through film tourism, many DMOs do not consider whether the destination has the capacity to deal with a sudden influx of tourists (Soliman, 2011). Furthermore, DMOs need to consider how the drop in tourism after the novelty of the film wears off will affect sustainable tourism in the area (Soliman, 2011).

In the case of a film being filmed in an unknown location, that location's image is heavily influenced by the image depicted by the film, whereas a film made in a very famous tourist location, usually confirms the existing image (Di Cesare *et al.*, 2009); this can be considered both an advantage and a disadvantage for destination marketers. The advantages and disadvantages of film tourism for destination marketers are summarised in Table 2 (p. 47)

Table 2: Advantages and disadvantages of film tourism for destination marketers

Advantages for destination marketers	Disadvantages for destination marketers
Films provide free publicity for destinations (Busby & Klug, 2001)	Negative destination images portrayed in a film may lead to undesired effects on destination image (Beeton, 2004; Campo <i>et al.</i> , 2011; Soliman, 2011).
A destination appearing in a film is the ultimate form of product placement (Busby & Klug, 2001; Vagionis & Loumioti, 2011).	Inaccurate representation of a destination may lead to a warped perception of reality in the mind of the potential tourist (inauthenticity) (Bolan & Williams, 2008; Soliman, 2011)
Films have a long life cycle (Karrh <i>et al.</i> , 2003; Vagionis & Loumioti, 2011).	DMOs have no say over how the destination is portrayed in a film and how this portrayal may affect the destination image (Beeton, 2001; Soliman, 2011).
Films are globally distributed (Karrh <i>et al.</i> , 2003; Vagionis & Loumioti, 2011).	DMOs may need to modify their promotional campaigns in order to relate the film image to the image of the destination (Soliman, 2011).
Films foster identification with their viewers (Karrh <i>et al.</i> , 2003; Vagionis & Loumioti, 2011).	The way a destination is portrayed may attract too many or too few visitors and these visitors may not be the type of tourist the destination marketer was hoping to attract (Beeton, 2001; Soliman, 2011).
Films have a great impact on the image of a destination (Bolan & Williams, 2008; Hudson & Ritchie, 2006b; Vagionis & Loumioti, 2011).	When multiple films are filmed at a location, these images are often contradicting and the DMO may find it difficult to secure a single image in the minds of potential tourists (Soliman, 2011).
Films have the potential to eliminate problems of seasonality (Hudson & Ritchie, 2006b; Vagionis & Loumioti, 2011).	It is challenging to change interest in a film into a promise for future travel to the featured destination (Hudson & Ritchie, 2006b).
Films have the potential to attract consumers who were not part of the DMO's original marketing strategies (Bolan & Williams, 2008; Stalik <i>et al.</i> , 2011).	Many DMOs do not consider whether the destination has the capacity to deal with a sudden influx of tourists (Soliman, 2011).

<p>Many destinations experience an increase in tourism after the release of a film where the destination was featured (Riley <i>et al.</i>, 1998).</p>	<p>DMOs need to consider how the drop in tourism after the novelty of the film wears off will affect sustainable tourism in the area (Soliman, 2011).</p>
<p>Increased exposure strengthens the destination image and familiarises the audience with various aspects and attractions at a destination (Bolan & Williams, 2008; Kim & Richardson, 2003; Portegies, 2010).</p>	<p>In the case of a film being filmed in an unknown location, that location's image is heavily influenced by the image depicted by the film (Di Cesare <i>et al.</i>, 2009)</p>

Where the preceding sections focused on the advantages and disadvantages of using film tourism as a tool for destination marketing, the next two sections explain some of the broader advantages and disadvantages surrounding film tourism as a destination product offering.

3.3.3 BROADER ADVANTAGES OF FILM TOURISM

The effects a film has on visitor numbers to a location has the potential to last for at least four years (Young & Young, 2008). When a place is reflected in a positive light in a film, it can help diminish the perceived social and cultural differences and spaces; it can also help overcome stereotypes and biases (Tasci, 2009). When film tourism occurs, new business opportunities arise at the film destination (Bolan & Williams, 2008).

Even though films are not produced with the main intent of attracting tourists, researchers have classified films as hallmark events (Evans, 2004; Riley & Van Doren, 1992). The reason for this is that films are not produced with the purpose of inducing tourism; though, it is widely acknowledged that films, in particular feature films which attract big audiences, lead to an improvement of location and destination awareness and thus appeal to potential tourists (Riley and Van Doren, 1992). This sentiment is supported by Evans (2004) who refers to major films as franchises which give destinations an extended and continuous opportunity to appear in films. Though this might be considered a controversial opinion by some, the researcher feels all opinions are important in order to gain a holistic picture of film tourism. Ritchie (1984:2) created the concept of hallmark events and defined it as “[m]ajor one-time or recurring events of limited duration, developed primarily to enhance the awareness, appeal and profitability of a tourism destination in the short and/or long-term. Such events rely for their success on uniqueness, status or timely significance to create interest and attract attention”. As film tourism is considered a type of hallmark

event, the advantages and disadvantages of hallmark events can also be applied to film tourism. These advantages include increased expenditure and employment creation at the destination during production, increased awareness of the region and knowledge about investment at the location after release, improved infrastructure and the construction of facilities during and after production, permanent level of increase in interest, and strengthening of local values and traditions and an increase in local pride (Ritchie, 1984). Increased expenditure and employment creation can occur both during and after production.

During the production process, which lasts for a few months, the entire production crew makes use of local accommodation facilities and hospitality and transportation services. Traditionally, they will also work closely with local production companies and film commissions/offices and hire additional crew members for the production period (Irimiás, 2012).

The study conducted by Hudson and Ritchie (2006b) indicated that 80% of British residents indicate that they gather holiday information from films and that 20% of them will travel to the destinations identified in films. Since the release of the first *The Hunger Games* (Ross, 2012) film, fans of the movie have been visiting North Carolina, where the film was shot. Their local Division of Tourism, a new company called Hunger Games Fan Tours and various other tourism entities have designed a number of different tours and activities built around the film, varying in duration and cost (News Limited, 2012).

3.3.4 BROADER DISADVANTAGES OF FILM TOURISM

Although there are many advantages to film tourism, there are also many disadvantages. Research shows locals often complain of film tourists causing traffic jams and overcrowding at popular film locations. An uncontrollable increase in tourism to a film destination is a negative side-effect of film tourism as the destination may be unprepared for the sudden influx and may not have the necessary resources to accommodate all the tourists (Beeton, 2001; Stalik *et al.*, 2011; Tooke & Baker, 1996).

The disadvantages of hallmark events, as stated by Ritchie (1984), include local price hiking due to event, gaining a poor reputation if the facilities are not up to standard, unhealthy competition between well-established enterprises and new enterprises jumping on the bandwagon, environmental damage and overcrowding, and commercialization of previously special activities or locations. The broader advantages and disadvantages of film tourism are summarised in Table 3 (p. 50).

Table 3: Broader advantages and disadvantages of film tourism

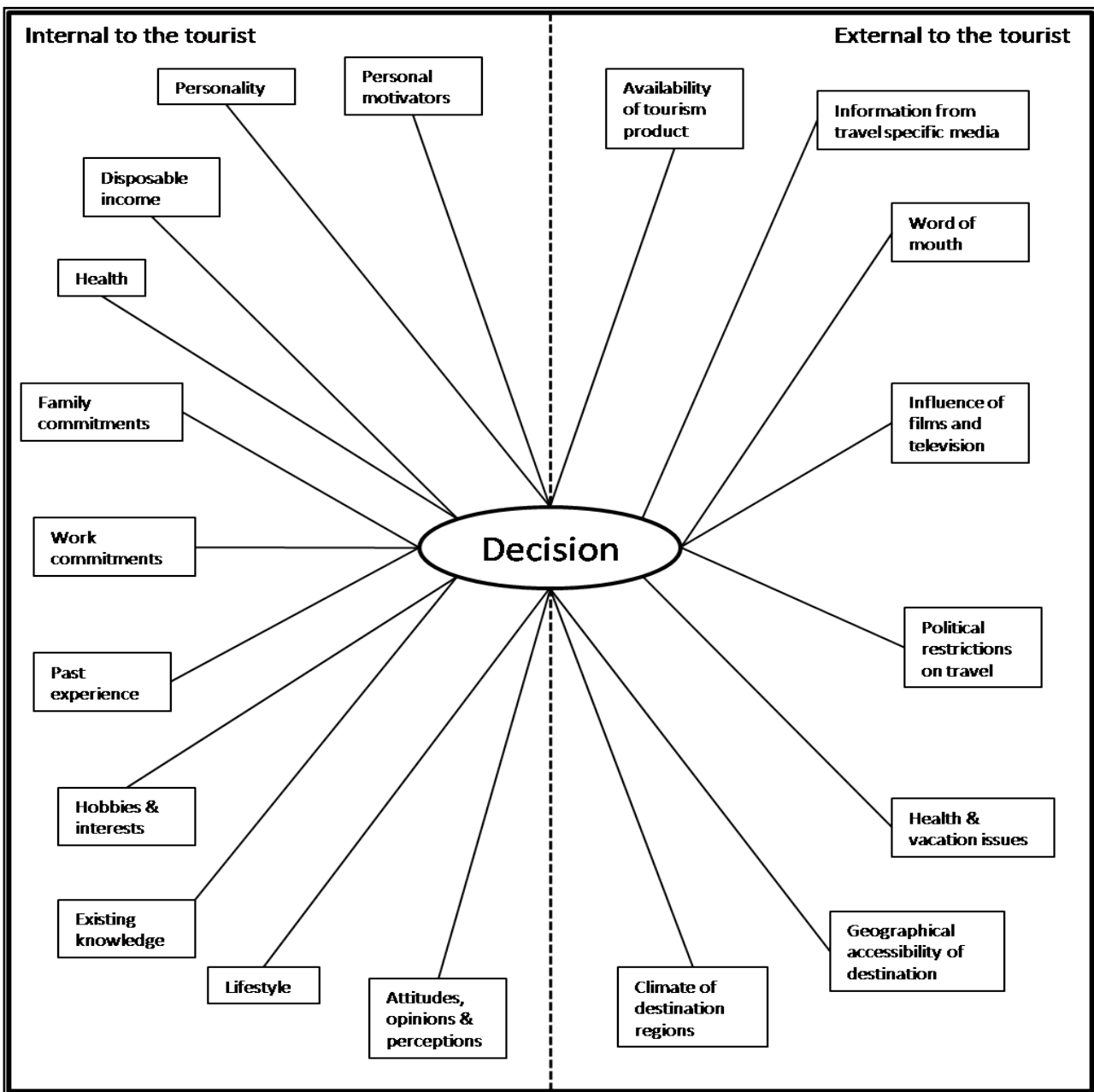
Broader advantages	Broader disadvantages
The effects a film has on visitor numbers to a location has the potential to last for at least four years (Young & Young, 2008).	Research shows locals often complain of film tourists causing traffic jams and overcrowding at popular film locations (Beeton, 2001; Stalik et al., 2011; Tooke & Baker, 1996).
Positive portrayal of a destination can help diminish the perceived social and cultural differences and spaces; it can also help overcome stereotypes and biases (Tasci, 2009).	The destination may be unprepared for the sudden influx of tourists and may not have the necessary resources to accommodate all the tourists (Beeton, 2001; Stalik et al., 2011; Tooke & Baker, 1996).
New business opportunities arise at the film destination (Bolan & Williams, 2008).	Local price hiking (Ritchie, 1984).
Expenditure and employment creation at the destination during and after production, both in the hospitality and services industry (Irimiás, 2012; Ritchie, 1984).	Gaining a poor reputation if the facilities are not up to standard (Ritchie, 1984).
Increased awareness of the region and knowledge about investment at the location after release (Ritchie, 1984).	Unhealthy competition between well-established enterprises and new enterprises jumping on the bandwagon (Ritchie, 1984).
Improved infrastructure and the construction of facilities during and after production (Ritchie, 1984).	Environmental damage and overcrowding (Ritchie, 1984).
Permanent level of increase in interest (Ritchie, 1984).	Commercialization of previously special activities or locations (Ritchie, 1984).
Strengthening of local values and traditions and an increase in local pride (Ritchie, 1984).	

In the next section, various theories attempting to explain tourists' motivations for partaking in film tourism is discussed.

3.4 TOURISTS' MOTIVATIONS BEHIND THEIR DECISION TO PARTAKE IN FILM TOURISM

While it is impossible to present a single theory which encompasses all tourist travel motivations due to the “heterogenous nature of tourism itself and the complexities of human behaviour” (Bolan *et al.*, 2011:104), many researchers have attempted to identify various motivational factors. Tourists are usually ‘pushed’ and ‘pulled’ by various factors or forces to visit a destination (Crompton, 1979; Suni & Komppula, 2012). Motivational variables are the forces that ‘push’ a tourist into making a travel decision, while the ‘pull’ is created by the destination area itself (Suni & Komppula, 2012). The ‘pull’ factors that entice people to travel to a destination are the attractions, features and attributes of the destination; the ‘push’ factors relate to the wants and needs of the potential tourist (Crompton, 1979; Suni & Komppula, 2012). The ‘push’ factors are often described as the reasons for a person wanting to travel, while ‘pull’ factors relate to the reason for choosing a specific destination (Crompton, 1979). The factors influencing the tourist’s decision to travel can be either internal (push) or external (pull) to the tourist (Bolan & Williams, 2008; Gartner, 1993); these factors are represented in Figure 8 (p. 52).

Figure 8: Factors influencing the travel decision



Source: Bolan and Williams (2008:386)

As seen in Figure 8 (p. 52), the internal factors include personality, personal motivators, disposable income, health, family and work commitments, past experience, hobbies and interests, existing knowledge, lifestyle and attitudes, and opinions and perceptions. Henkel *et al.* (2006) emphasise that destination image plays a critical role in tourists' decision to visit a destination. External factors, which could be related to some of the 7 Ps of services marketing, include, but are not limited to, the availability of the tourism product (product), information from travel-specific media (promotion), WOM (promotion), the influence of

films and television (promotion), political restrictions on travel, health and vaccination issues, and the geographical accessibility and climate of the destination (place). Gartner (1993:192) states “most destination selection models recognize that motives spring from unmet needs in the home environment and destinations selected are expected to fulfil those needs”. From this figure, one can see that films are external factors, but they can be linked to internal factors such as personal motivators, interests, existing knowledge, attitudes, opinions and perceptions.

Macionis (in Hudson & Ritchie, 2006a; Soliman, 2011; Suni & Komppula, 2012) identified three types of film tourists, namely the specific (purposeful), general and serendipitous film tourists. The specific film tourist proactively seeks out film locations to visit, the general film tourist partakes in film tourism activities at a destination although their reason for visiting the location was not driven by film tourism, and the serendipitous film tourist coincidentally happens to vacation at a film location (Macionis in Hudson & Ritchie, 2006a; Soliman, 2011; Suni & Komppula, 2012). Furthermore, Macionis (in Suni & Komppula, 2012) lists a number of push factors for each type of tourist mentioned above, which motivates them to travel to a specific destination. Serendipitous movie tourists are motivated by novelty and social interaction; general movie tourists by escape, education, novelty and nostalgia; and specific movie tourists by nostalgia, fantasy, self-actualisation, self-identity, ego-enhancement, energetic experiences and status (Macionis in Suni & Komppula, 2012). The specific film tourist in reality forms a niche market (Benjamin, Schneider & Alderman, 2012; Di Cesare *et al.*, 2012; Jewell & McKinnon, 2008). Some researchers even compare dedicated film tourists to pilgrims (Buchmann *et al.*, 2010; Riley & Van Doren, 1992). Furthermore, Di Cesare *et al.* (2012) suggest that in order to overcome the incidental nature of film tourism mentioned above, DMOs at the destination must work proactively and take initiative when marketing their resources and planning their destination placement strategy in order to capitalize on films and film sites and their effect on tourism.

Film tourism sites can be classified into three groups, namely official, semi-official and unofficial; these different sites will attract different tourists, each with unique motivations for travelling to the site. Official sites display a clear relationship between the copyright holder of the intellectual property associated with the site and the site itself. These sites are usually film studios that offer tours of these studios; they explicitly promote tourism, but the

experiences and tours are very rigidly structured. Semi-official sites encourage mass tourism, especially film tourism, but usually do not have any relationship with the copyright holder and can thus easily distance themselves from film tourism or limit it to a certain degree. Because of the lack of relationship, restrictions may sometimes exist in what they are allowed to offer tourists in terms of the film experience; this is usually not the case with older films. Unofficial sites with no institutional structure enable individuals to create tailor-made experiences. This is done by simply identifying locations featured in films, without announcing any official association with the film, and allowing tourists to merely visit sites where films were produced, purely for the thrill of 'being there' (Karpovich, 2010).

Busby and Klug (2001) identified nine forms of film tourism. Each form of film tourist, as mentioned by Busby and Klug (2001) and represented in Table 4 (p. 54), has a unique set of characteristics and motivations for partaking in film tourism.

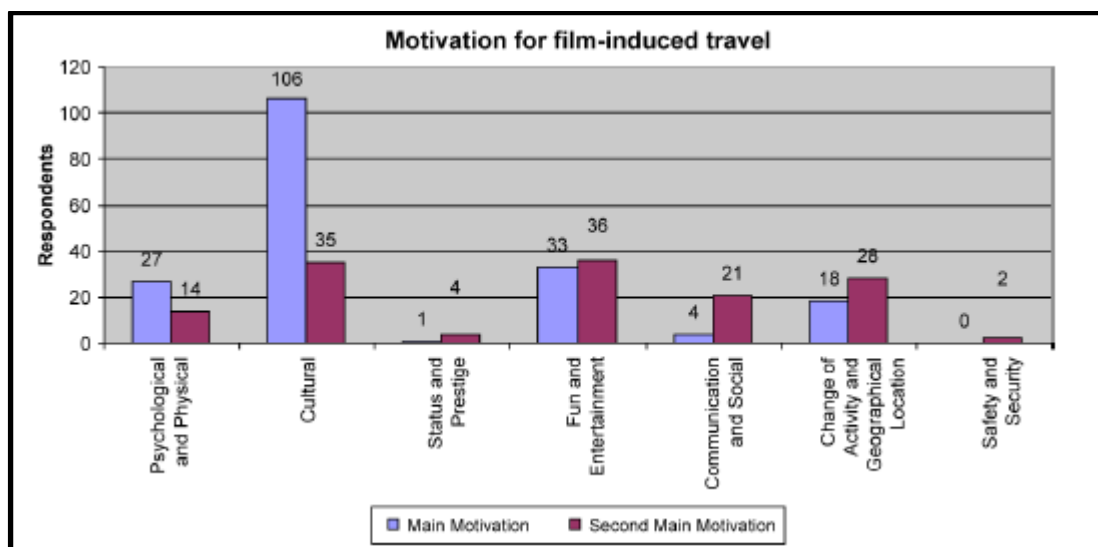
Table 4: Forms and characteristics of film tourism

Forms	Characteristics
Film location as an attraction in its own right	In some cases, movie locations were not considered to be tourism destinations until they were seen on screen, while others were already perceived as attractive destinations.
Movie tourism as part of a main holiday	Some tourists will visit a TV or film location or book a tour while on holiday without any previous knowledge of the location.
Movie tourism occurring as the sole and main purpose out of special interest	The booking of a holiday to a special destination as a direct result of its profile on TV.
Movie tourism packages created by the private sector	Coach companies and tour operators set up packages.
Movie tourism icons for tourists to gaze upon as focal point for visitation	Natural scenery, historical background, storyline theme, actors, symbolic content and human relationships can serve as icons and 'hallmark events' for movie tourism.
Movie tourism to places where the filming is only believed to have taken place	Visitors go to the places represented even if the film represents a different actual setting. The fact that the place filmed is not in every case the place represented does raise questions about illusion, reality and authenticity in the context of what visitors are expected to see and why.
Movie tourism as part of the romantic gaze	The romantic tourist likes to gaze on places which have been constructed and reinforced by TV and film in solitude and privacy, establishing a semi-spiritual relationship with the place that is gazed upon.
Movie tourism for reasons of pilgrimage, nostalgia and escape	Movie tourism elevates the consumer beyond the mundane reality of everyday life. The movie sites of the films <i>Field of Dreams</i> and <i>Steel Magnolias</i> became pilgrimage points in their own right. In the case of the latter example, the notion of escape was taken literally as people imitated the storyline by committing suicide.
Travel programmes	A vehicle through which places and people have been reinterpreted and communicated to wider audiences.

Source: Busby and Klug (2001:318)

Riley and Van Doren (1992) list escape, pilgrimage and nostalgia as reasons for participation in film tourism. For some tourists, merely walking through a building/area represented in a film and experiencing and touching elements of it is enough to justify a trip to a destination featured in a film (Campo *et al.*, 2011). Another reason tourists may partake in film tourism, is because of the celebrities featured in a specific film: tourists want to walk where they have walked, touch what they have touched, eat where they have eaten (Lee, Scott & Kim, 2008). This phenomenon is referred to as “celebrity fandom” (Lee *et al.*, 2008). Furthermore, Iwashita (2008) lists image, myths, emotions and icons as motivators to partake in film tourism. In a study conducted by Basáñez and Ingram (2013), the researchers asked a number of participants their main motivation for travelling to a well-known film location. The results of this study are represented in Figure 9 (p. 55).

Figure 9: Motivation for film-induced travel



Source: Basáñez and Ingram (2013:48)

As depicted in Figure 9 (p. 55), the study revealed cultural experience as the main reason for film tourism. This is in line with the recent acceptance of film tourism as a form of cultural tourism (Campo, Brea & Conzález, 2014).

A study done by Buchmann (2010) reveals that film tourists to New Zealand are eager to experience both the fictional Middle-earth portrayed in the *Lord of the Rings Trilogy* (Jackson, 2001, 2002, 2003) and the ‘real New Zealand’; they expect sincere, authentic experiences for both. In the same study by Buchmann (2010:82), it is repeatedly revealed

that tourists value “emotions, embodiment and shared physical adventure” when participating in film tourism. In his study on displacement and inauthenticity, Bolan (2010) identified eight film factors influencing tourists’ decision to travel to a film location, of which scenery, narrative/story and characters rank the highest. The other factors include actors, music/film score, emotional attachment/romance, nostalgia and a combination of these factors. The eight factors are represented in Figure 10 (p. 60), located in the section on displacement.

In the following section, inauthenticity in film tourism is discussed. Authenticity, to some degree, affects tourists’ motivations for partaking in film tourism, but as it is such an important factor in film tourism, it is discussed separately.

3.5 INAUTHENTICITY

MacCannell (1973) introduced the phrase “authenticity” to the tourism industry and states that in their quests for authenticity, tourists may not realise whether what they are experiencing is in fact authentic, or staged authenticity (MacCannell, 1973). Authenticity can be considered a relative term as the criteria for authenticity differs from tourist to tourist (Cohen, 1988). Even though authenticity is relative, tourists assign a high value to experiences and places they perceive to be authentic (Buchmann *et al.*, 2010). Steiner and Reisinger (2006:309) suggest that “authenticity is a choice that people make when circumstances allow”. Tourists perceive authentic experiences as more enjoyable than experiences they perceive as inauthentic (Waller & Lea, 1998). When a film showcases the authentic aspects of a destination, tourists are more inclined to visit the destination after experiencing it through a film (Grihault, 2003). It is important to keep in mind that films seldom present an authentic view of a destination (Bolan & Williams, 2008).

Hughes (1995) suggests that authenticity does not occur naturally, but rather is produced by various entrepreneurs, guides, animators and advertising agents. This statement suggests that authenticity and inauthenticity is greatly affected by the promotional factor of the 7 Ps. Hughes refers to this as the “production of reality” and states that these simulations have become so authentic to tourists that they are perceived as reality. This phenomenon is also known as staged authenticity. When relating this to the film tourism

industry, it suggests that authenticity at a film location can be created through modelling the film tourist's experience at the destination around various aspects of the film. This can be done by advertising a 'film package', including guided tours of the film locations and various film memorabilia.

Through their research, Waller and Lea (1998) identified four factors which could possibly affect the authenticity of a tourist's experience:

- Direct contact with the host culture, be it in the form of historical building, the local language, or traditional local events;
- The number of tourists at the destination (too many tourists lead to a feeling of inauthenticity);
- The tourist's level of independence (when tourists arrange their own schedule, they feel the experience is more authentic); and
- The degree to which the experience conforms to the stereotype of the country (a trip to Austria should include mountains, snow and skiing).

Frost (2009) identified sources of information which may alter tourists' perceptions of authenticity at certain locations. The factors include DVD special features, books about films, movie maps, WOM, tours, destination guidebooks, movie databases on the internet and blogs. In the study by Buchmann (2010), it is stated that the service delivery process, where tourists and employees work together to create the service, results in authentic film tourism experiences. Jewell and McKinnon (2008) on the other hand, state that authenticity is reliant on a number of factors such as myths, imagination and facts, "an experience and a new reality based on tangible remains" (the location), instead of "scientific historical evidence".

The most inauthentic film-motivated tourist site, as mentioned by a number of scholars, remains the Disney theme parks (Karpovich, 2010), even though these draw more tourists annually than closely situated famous tourist sites, such as the monuments in the US capital (close to Walt Disney World) and the Eiffel Tower (close to Disneyland Paris) (Karpovich, 2010). Karpovich (2010) states that "the cynicism which underlies the Disney experiences is part of what renders them so clearly inauthentic". This statement is based on the fact that every aspect within these theme parks is carefully controlled and

monitored; nothing happens by accident and every item serves a specific purpose (Karpovich, 2010). Where Disney presents an inauthentic experience through infinite control to recreate the setting portrayed in movies, Paris is portrayed in an inauthentic manner but without the actual setting being manipulated to match the portrayed images. Paris comes across as a place where holidaymakers and Parisians alike can experience infinite pleasures, a place where everyone comes across as careless holidaymakers or tourists (Mazierska, 2002).

Cohen (1988) states that tourists are constantly seeking authenticity in an increasingly inauthentic society. Buchmann *et al.* (2010) back this statement by noting the irony that film tourists appreciate authenticity in an altogether simulated world and trades directly on the line between reality and fantasy. Tourists have various criteria with which they measure authenticity and these differ across various sites and experiences (Karpovich, 2010). These criteria are often influenced by a tourist's beliefs and understanding, originating from their social group's understanding and beliefs; it may also be determined by the tourist's individual subjectivity (Karpovich, 2010). Finally, a tourist's experience of authenticity is often an intricate assembly based on social processes, place, embodiment and personal history and knowledge (Buchmann *et al.*, 2010).

Authenticity and displacement are closely related, as displacement often leads to a feeling of inauthenticity. Displacement is discussed in the next section.

3.6 DISPLACEMENT

“Displacement in the film-induced tourism context refers to the situation where a movie is shot in one place but in reality is representing somewhere else entirely” (Bolan, 2010). Displacement can also be referred to as “location dissonance” (Frost, 2006).

Films often portray a certain location but are in fact filmed somewhere else; this leads to displacement and inauthenticity which in turn leads to unrealistic expectations from and unexpected experiences by the tourists. It is also difficult to determine beforehand whether the film location or the story setting will benefit from resulting tourism (Bolan *et al.*, 2011). One of the main reasons displacement occurs is due to the increasingly complex and risky

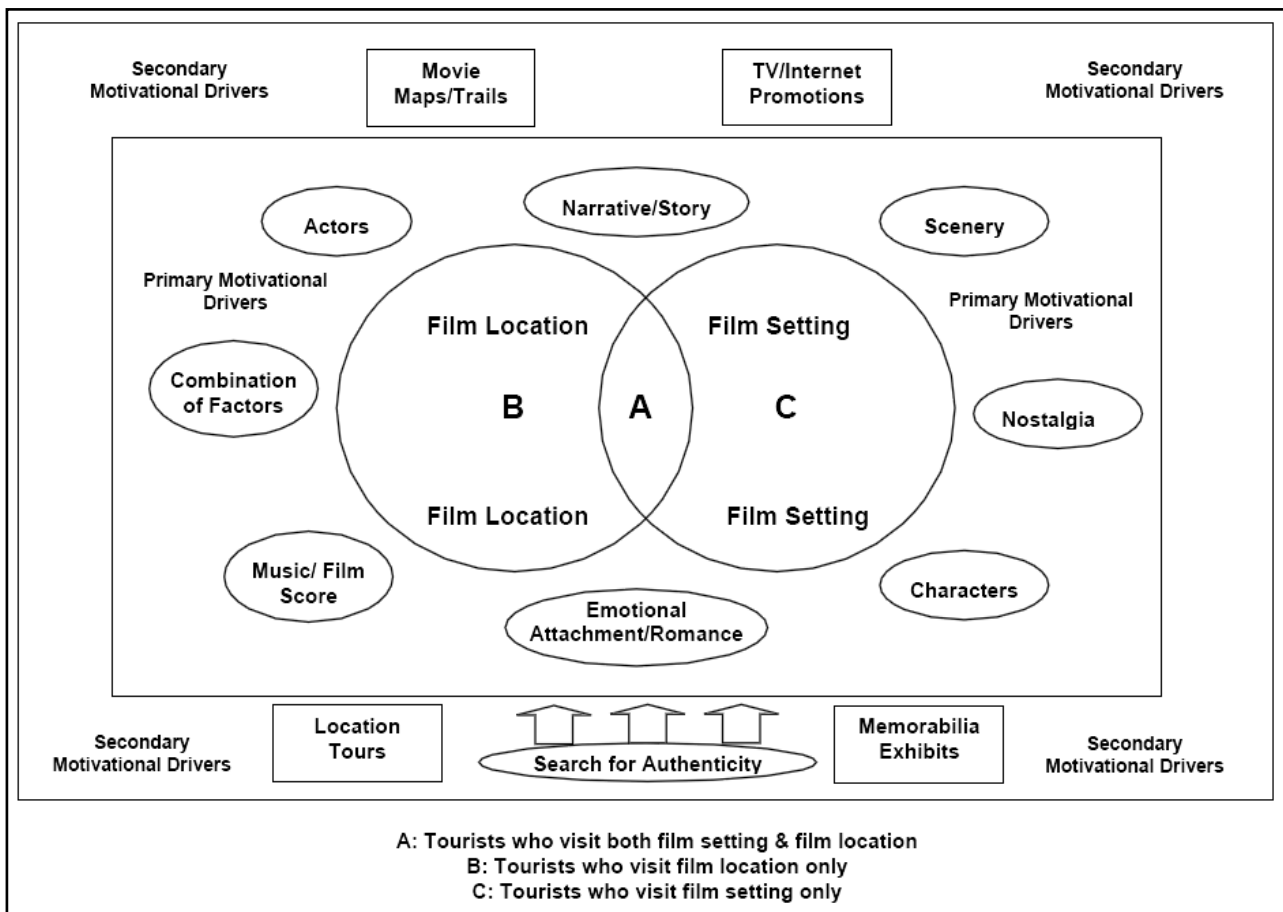
nature of filmmaking (Irimiás, 2012). To overcome or minimise the financial risks involved and to maximise the potential profit, film producers are constantly on the search for alternative, cheap, film-friendly locations (Irimiás, 2012).

Well-known examples of displacement include:

- *Braveheart* (Gibson, 1995), filmed in Ireland but representing Scotland (Bolan, 2010);
- *Saving Private Ryan* (Spielberg, 1998), filmed mostly in Ireland and the UK, but representing Normandy, France (Bentham, 2006);
- *Gangs of New York* (Scorsese, 2002), filmed in Italy but representing the USA (Bolan, 2010);
- *The Count of Monte Cristo* (Reynolds, 2002), filmed in Ireland but representing France and Italy (Bolan, 2010);
- *Cold Mountain* (Minghella, 2003), filmed in Romania but representing the USA (Bolan, 2010);
- *Memoirs of a Geisha* (Marshall, 2005), filmed in the USA but representing Japan (Bolan, 2010);
- *Brokeback Mountain* (Lee, 2005), filmed in Alberta, Canada, but representing Wyoming, USA (Bentham, 2006); and
- *The Da Vinci Code* (Howard, 2006), part of it filmed at Lincoln Cathedral, but representing Westminster Abbey (Bentham, 2006).

Bolan (2010) identifies three categories of tourists who exist in relation to film tourism. These categories are especially relevant when displacement occurs. The categories consist of those tourists who will prefer to visit only the film location (B), those who will visit the film location as well as the story setting (A) and those who will visit the setting portrayed (C). These categories are represented in Figure 9 (p. 60).

Figure 10: Model of displacement in film-induced tourism



Source: Bolan (2010)

There are many primary motivational drivers influencing the decision to travel to either one or both locations (Bolan, 2010). These include the actors, narrative, scenery, nostalgia, characters, an emotional attachment and music from the film; it can be either one or a combination of these factors that motivate tourists to travel to the destination (Bolan, 2010). The degree of the tourist's search for authenticity will also determine whether they will visit the film location, the film setting, or even both (Bolan, 2010). Secondary motivational drivers include location tours, memorabilia exhibits, movie maps or trails and TV or internet promotions (Bolan, 2010).

Both inauthenticity and displacement can have far reaching consequences for destination branding and image formation. Inaccurate presentation of a destination can be detrimental to desired images being formed by members of the destination's target market. Some potential film tourists are unaware of the reality of authenticity and displacement. An effective way to overcome this ignorance is to consult a movie map, where it is indicated

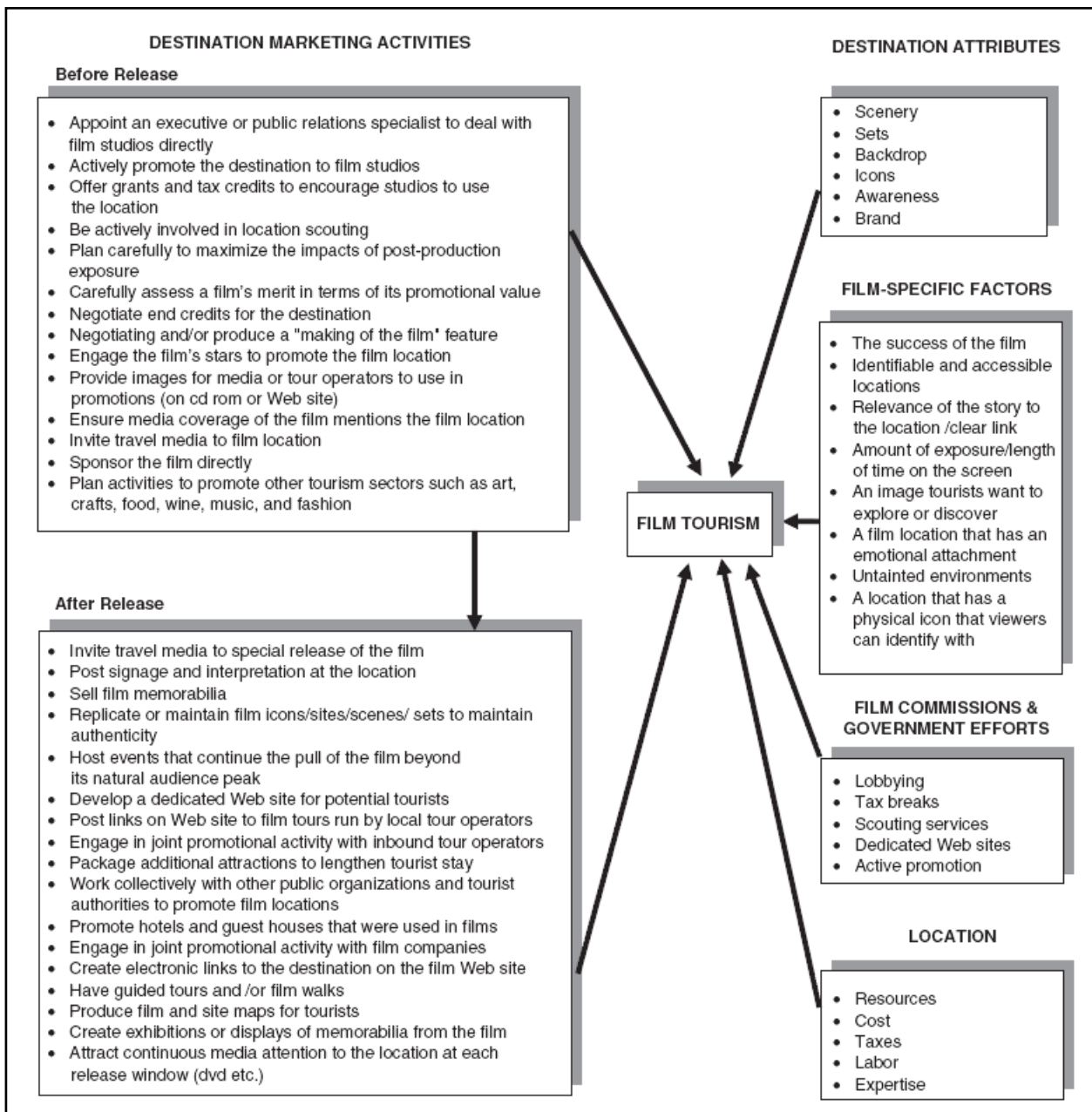
whether a film was shot at a certain location, or if a location is merely represented in a film. This again relates to place, as it needs to be the right location, and the promotional factors, as movie maps are used as marketing tools, of the 7 Ps of services marketing.

Film tourism success factors and the uses of movie maps are discussed in the next section.

3.7 FILM TOURISM SUCCESS FACTORS

Many activities need to be undertaken to ensure the success of film tourism. Hudson and Ritchie (2006b) created a model for exploiting film marketing opportunities; this model states that film tourism depends on a few critical factors. These factors are location feasibility, film commission/offices and government efforts, film-specific factors, destination attributes and destination marketing activities. The model is presented in Figure 11 (p. 62).

Figure 11: Film tourism - a model for exploiting film marketing opportunities



Source: Hudson & Ritchie (2006b:390)

Figure 11 (p. 62) lists 14 destination marketing activities which DMOs should consider before the release of a film, as well as 17 activities that should be considered after the release of a film. Many of these activities mentioned can be related to the 7 Ps of services marketing. Following these suggestions will ensure that the DMO is involved in every step of the production process and might subsequently be able to control or affect the way the destination is portrayed in the film. The most important of the activities to be undertaken before release is actively promoting a destination to film studios (and producers) in order

to make them aware of the destination before they start scouting for locations; the study by Hudson and Ritchie (2006b), aimed to identify the most effective ways of doing this. This relates to the promotional factor of the 7 Ps of services marketing. Furthermore, it is evident that the scenery, sets, backdrops, icons, awareness and brand of a destination, as well as resources, cost, taxes, labour and expertise at the location, are very important (Hudson & Ritchie, 2006b). These elements relate to the place, product, personnel, physical facilities and process management factors of the 7 Ps of services marketing. The government can help promote the destination by offering tax breaks, scouting services and setting up websites dedicated to the promotion of the destination as a film destination (Hudson & Ritchie, 2006b).

It is the emerging responsibility of the DMO, not just the film commission/office, to negotiate with foreign production companies with the aim of attracting film productions to designated locations. Furthermore, they must also discuss with these producers how the area will benefit from being utilized as a film. Various public figures, or experts, can be commissioned to help promote a destination for film purposes. These can include public relations experts, product placement experts, sport personalities, movie stars and political figures (Vagionis & Loumioti, 2011).

Grihault (2003) states that the success of a film has a great influence on the success of film tourism to the film location. This stems from the reasoning that if a film does well at the box office, a great number of people have consequently been exposed to the destination and thus more people are likely to visit the location. It is important to note, however, that even if a film is not a box-office hit, it may still attract its fair share of tourists. Other factors that might influence the success of film tourism to a location are the successful link between the film and the location, the amount of time the audience is exposed to the destination in the film and, of course, the location must be identifiable and accessible. To this end, Hudson and Ritchie (2006b:390) mention the use of movie maps as an after-release activity.

3.7.1 THE USE OF MOVIE MAPS

Movie maps have proven very successful in the promotion of a destination as a film tourism destination (Grihault, 2003; Soliman, 2011). Often a DMO will create movie maps dedicated to specific high-profile movies (Hudson & Ritchie, 2006b). Visit Britain and Visit Scotland alike have developed movie maps for their destinations, listing all the movies filmed in their country and all the destinations tourists can visit that are connected to the films (Bolan & Williams, 2008). There are many international movie maps, not created by any specific DMO, with the most popular being www.themoviemap.com, www.movielocationsguide.com, www.movie-map.com and www.moviemaps.org. These are very informative, but they do not strive to promote one country above another.

The key features of a movie map, as identified by the British Tourist Authority (in Busby & Klug, 2001), are to identify:

- the main purpose of the movie map;
- the main target markets and segments;
- the tourists' main reasons for visiting film locations;
- well-known characteristics of the film tourists; and
- the possibility of competing with other destinations for film tourists.

Ultimately, in order to maximise a film's production benefits, both artistic and economic, film producers and DMOs need to work together (Di Cesare *et al.*, 2009). If their efforts are coordinated effectively, it could lead to the destination's occupational, social and economic growth (Di Cesare *et al.*, 2009).

3.8 EVIDENCE OF SUCCESSFUL DESTINATION MARKETING THROUGH THE USE OF FILMS

Many authors stress the importance of local tourism authority and government collaboration with film organisations to market the destination in conjunction with a film in order to maximise the marketing effort and resulting film tourism (Bolan, 2010; Campo *et al.*, 2011; Dore & Crouch, 2003; Grihault, 2003; Hahm & Wang, 2011; Hudson & Ritchie,

2006; Kim, 2010; Kim & Richardson, 2003; Riley *et al.*, 1998; Saltik *et al.*, 2011; Sellgren, 2011; Young & Young, 2008). Sellgren (2011) mentions that a few DMOs have recognised the potential of encouraging film producers to visit their destination. This has been achieved through the development of multimillion-dollar campaigns and the offering of incentives by DMOs (Campo *et al.*, 2011). The abovementioned campaigns include the Film in Singapore! Scheme and various campaigns run by Visit Britain.

The United Kingdom has managed to attract tourists through popular films such as *Four Weddings and a Funeral* (Newell, 1994), *Braveheart* (Gibson, 1995), *Notting Hill* (Michell, 1999), The *Harry Potter* film series (Columbus, 2001, 2002, 2007; Cuarón, 2005; Newell, 2005; Yates, 2009, 2010, 2011) and *Robin Hood* (Scott, 2010) (Campo *et al.*, 2011; Iwashita, 2008). This increase in tourist numbers is attributed to the increased exposure the UK received from being featured in these films (Campo *et al.*, 2011). As if to acknowledge the importance of films to the tourism industry, *Harry Potter* (Columbus, 2001, 2002) received the Outstanding Contribution to English Tourism award from the government minister Kim Howells in 2003 (Bentham, 2006).

In October 2012, Visit Britain launched their biggest film tourism campaign to date. This campaign coincided with the 50th anniversary of the James Bond (007) brand and was centred on the release of the latest Bond instalment, *Skyfall* (Mendes, 2012). The campaign involved various outdoor, digital, press and cinema advertising in countries such as Australia, the USA, Brazil and Germany (Visit Britain, 2012).

New Zealand has been used as a commercial film location since 1914, with a number of international films being filmed there, but *The Lord of the Rings Trilogy* (Jackson, 2001, 2002, 2003) sparked renewed interest in New Zealand as a film location and has since become a very popular film location (Buchmann, 2010). After the success of *The Lord of the Rings Trilogy* (Jackson, 2001, 2002, 2003), Air New Zealand made a move to attract their fair share of the increase in business by branding four of their planes with Lord of the Rings decor and labelling themselves as the 'Airline to Middle-earth' (Buchmann, 2010). Beeton (2006) states that while the filming of *The Lord of the Rings Trilogy* (Jackson, 2001, 2002, 2003) created great awareness of New Zealand as a tourism destination, a mere 9% of international tourists stated film tourism as the reason for their visit.

Mexico, Brazil and Argentina produced a number of local films, including, but not limited to *Central Station* (Salles, 1998), *Amores perros* (Iñárritu, 2000), *And Your Mother Too* (Cuarón, 2001), *Son of the Bride* (Campanella, 2001), *Bus 174* (Padilha & Lacerda, 2002), *City of God* (Meirelles & Lund, 2002) and *The Crime of Padre Amaro* (Carrera, 2002) which won a number of awards and widely distributed the destination image. The release of these films led to an increase in tourism and stimulated the growth of new business (Campo *et al.*, 2011). After the release of *The Sound of Music* (Wise, 1965), 75% of American tourists to Salzburg, Austria, indicated the movie as the reason for their visit (Bentham, 2006). When *Captain Corelli's Mandolin* (Madden, 2001) was released, it sparked great interest in Cephalonia, Greece, with some tourism companies experiencing up to a 75% increase in bookings (Bentham, 2006). The release of *Lara Croft: Tomb Raider* (West, 2001) caused an increase in tourism to Kenya, *Gorillas in the Mist* (Apted, 1988) increased tourism to Rwanda, and *Madagascar* (Darnell & McGrath, 2005) led to an increase in tourism figures to Madagascar (Bentham, 2006). Perhaps the country to have generated the most travel interest through films is the USA; this is because the majority of films are still being filmed there (Bentham, 2006). One of the many examples is the increase of tourists to Southport where Nicolas Sparks' *Safe Haven* (Hallström, 2013) was filmed. Approximately 50% of visitors to Southport indicate that they have seen the film and are there to learn more about the locations used in the film (Dineen, 2014).

The available literature contains many examples of tourism figure increases to film destinations; these are represented in Table 5 (p. 66).

Table 5: Tourism number increases to film destinations

Destination	Film	Year	Tourism increase
Devil's Tower National Monument, Wyoming, USA	Close Encounters of the Third Kind	1977	74%
Australia	Crocodile Dundee	1986	21%
Louisiana	Steel Magnolias	1989	48%
Fort Hays, Kansas, USA	Dances with Wolves	1990	25%
Wallace Monument, Scotland	Braveheart	1995	300%
Normandy, France	Saving Private Ryan	1998	40%
Thailand	The Beach	2000	22%
Alnwick Castle, England	Harry Potter	2001	100%
Cephalonia, Greece	Captain Corelli's Mandolin	2001	22%
New Zealand	Lord of the Rings	2002	9%

Source: Derived from Beeton (2006); Busby and Klug (2001); Hudson and Ritchie (2006a); Hudson and Ritchie (2006b); Tooke and Baker (1996); Young and Young (2008)

In a study conducted by Dore and Crouch (2003), a few DMOs who ran successful publicity programs in marketing themselves as film destinations have identified that their programs were generally designed to:

- encourage and increase audience desires to visit their location;
- increase awareness of the destination;
- foster positive destination images in the consumers' minds; and
- encourage various television crews and media companies to visit the location.

Some authors suggest that film tourism is a niche market (Di Cesare et al., 2012; Irimiás, 2012; Jewell & McKinnon, 2008) and although small, it is still very lucrative and worth investing time and effort into to promote and grow it.

3.9 CONCLUSION

In this chapter, the researcher aimed to address the first two objectives of this study: to explore the attractiveness of the film tourism market for destination and to identify the unique aspects involved when marketing a destination through film tourism. This was attempted through a discussion of the effect of films on a destination's image, the advantage and disadvantages of film tourism, tourists' motivations for partaking in film tourism, the issues of inauthenticity and displacement, success factors of film tourism and evidence of successful destination marketing through films. It is important to have a fundamental understanding of film tourism in order to achieve the final and main objective of this study, namely to develop a model containing guidelines related to the 7 Ps of services marketing for promoting South Africa as an ideal film location to international film producers.

In recent years, it has come to marketers' attention that traditional forms of advertising were not having the desired or expected effects on tourists' purchase decisions and habits; it has also come to their attention that product placement is a targeted, widely received and more sophisticated way of advertising their product (Vagionis & Loumioti, 2011). This statement is true for products, services and destinations. From the information contained in this chapter, it is evident that the film industry offers destinations and their DMOs the

opportunities to showcase their strengths on a global scale; film production also offers job creation opportunities. Films are considered the most effective image-creation medium available to DMOs and this is even truer for cases where the image and storyline are closely related (Soliman, 2011). According to Bolan and Williams (2008), “planned deliberate marketing activities from DMOs and other players in the tourism arena can never achieve the marketing reach of a commercially popular feature film”. This is a powerful statement for DMOs to consider when planning promotional campaigns and they must actively try to generate interest in their destination as a film location.

Film tourism is made easy through the recent increases in affordability and convenience of travel, but increased participation leads to increased popularity and appeal to others; awareness is created through media and WOM (Karpovich, 2010). It is evident that many countries have, and are still benefitting, from exposure in films.

Furthermore, it is evident that the film tourism industry faces many challenges and is an extremely competitive market to practice in. In order to gain a competitive advantage, film tourism organisations must increase training and operate in a more professional manner (Buchmann, 2010). When considering pursuing film tourism, DMOs need to pay special attention to the timing of publicity campaigns and the threat of stagnation; this threat can be overcome by introducing new attractions at the destination (Buchmann, 2010).

Through an analysis of the literature, a number of best-practice promotional activities to be undertaken by DMOs to advertise their destination as a preferred film location to international film producers have been identified and are presented in Table 6 (p. 68).

Table 6: Best-practice promotional activities to attract international film producers

Appoint an executive or public relations specialist to deal with film studios directly
Actively promote the destination to film studios, focusing on the scenery at the destination
Offer grants and tax credits to encourage studios to use the location
Be actively involved in location scouting and offer scouting services
Have websites dedicated to advertising the destination as a film location
Locations must be identifiable (suggests the use of a location guide)

Source: Hudson & Ritchie (2006b)

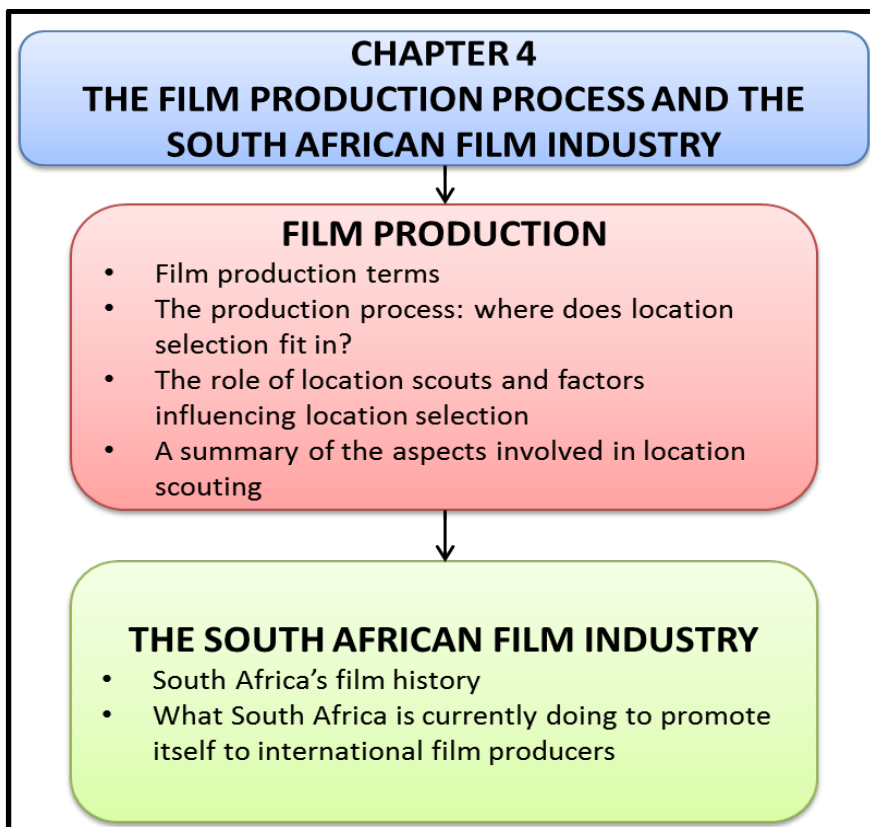
The researcher believes more factors will come to light during the data analysis stage of the research study. The abovementioned best-practices will be used in Chapter 7 to develop the model with guidelines based on the 7 Ps of the services marketing mix. This model is intended for use by DMOs when attempting to market South Africa to international film producers as a preferred film location. The film production process and the South African film industry are discussed in the next chapter.

CHAPTER 4: THE FILM PRODUCTION PROCESS AND THE SOUTH AFRICAN FILM INDUSTRY

4.1 INTRODUCTION

In this chapter, the researcher aims to address the sixth objective of this study, from a theoretical perspective: to determine and describe the factors influencing international film producers' selection of a location. This is attempted through a discussion of the general theoretical aspects of the film production and location selection process. The history and current state of the South African Film Industry (SAFI) will also be discussed in order to provide the reader with a theoretical understanding of the SAFI. It is important to have a fundamental understanding of the film industry in order to achieve the final and main objective of this study, namely to develop a model containing guidelines related to the 7 Ps of services marketing for promoting South Africa as an ideal film location to international film producers. The outline of this chapter is presented in Figure 12 (p. 70).

Figure 12: Layout of Chapter 4



4.2 FILM PRODUCTION

The film production process is a long, tedious and complex one; all aspects must be carefully evaluated and all necessary permissions must be acquired before production can start. This study will focus on providing an explanation of location selection, as the purpose of the study is to understand the factors influencing location selection. In order to do this, it is necessary to understand the location selection process.

4.2.1 FILM PRODUCTION TERMS

Actor/actress: This refers to the person portraying/playing the role of a character in a film (IMDb.com, Inc., 2013a).

Art director: This refers to the person in charge of the actors and people who build the sets (IMDb.com, Inc., 2013a).

Casting: This takes place when recruiting and hiring actors to play/represent characters featured in the script. This is done by the casting director with occasional help from the director, producer and studio (IMDb.com, Inc., 2013b).

Crew: The entire team involved with in the production of a film; these team members do not appear in the film and are usually the subordinates of the production team (IMDb.com, Inc., 2013b).

Director: This term refers to the primary creative artist at the film set. This person is more often than not the main artistic source behind the film process and dictates the way scenes are to be acted out. The director is involved in casting, scrip editing, shot composition and editing (IMDb.com, Inc., 2013c)

Location: The location refers to the place where scenes for a film are shot and it is usually a natural setting or a man-made structure that serves the purpose of the scene (IMDb.com, Inc., 2013d).

Location manager: The location manager manages various aspects of filming on location; these duties include arranging permission with authorities for shooting at certain locations (IMDb.com, Inc., 2013d).

Producer: The producer is the person in charge of the entire production and is also the person to whom everyone else, except the director, reports. The producer's duties include raising money for the production, appointing essential personnel and arranging for the film to be distributed (IMDb.com, Inc., 2013e).

Set: The place used for filming. The set is usually located within a production studio and represents only a small portion of the environment defined in the script, but looks sufficient for filming from a specific camera angle (IMDb.com, Inc., 2013f).

4.2.2 THE PRODUCTION PROCESS: WHERE DOES LOCATION SELECTION FIT IN?

All films have six phases, namely development, pre-production, production, post-production, distribution and exhibition. The production team consists of producers, the director, a unit production manager, a production accountant, the production supervisor, the production coordinator and first and second assistant directors (Honhaner, 2001).

The producer, studio, director, line producer and location manager are all responsible for selecting a location in the pre-production phase (Honhaner, 2001). Often, in this phase, the film has not yet been given the go-ahead by producers and actors have not been cast (Go For Locations Inc., 2005). After receiving word from the studio to go ahead with the film, the location manager needs to secure the location and acquire the necessary permits, parking and neighbourhood approvals (Honhaner, 2001). This permission is acquired through the signing of a Location Agreement between the studio and the owner of the location or property to be used. Furthermore, the location manager is responsible for preparing maps to the locations and securing police and fire officers and security and emergency medical vehicles where necessary (Honhaner, 2001). In the pre-production phase, all the necessary funding has been acquired and the studio has given the

producers permission to start with the project. This phase sees the selection and securing of the location along with the hiring of crews and acquiring the necessary permissions for various activities (Honhaner, 2001).

4.2.3 THE ROLE OF LOCATION SCOUTS AND FACTORS INFLUENCING LOCATION SELECTION

As mentioned previously, producers make use of location scouts to find suitable film locations, especially when filming abroad. These location managers or scouts will go to various locations, where they will meet with regional film officers and location managers in order to exchange critical information, determine if the location meets the requirements and to reach agreements.

A location scout works under the supervision of the location manager and assists the location manager with all tasks leading up to, during and after production (Skillset, 2007). In low-budget films, the location manager and the location scout may be the same person; the manager scouts locations and then takes over the management tasks. The terms location scout and locations manager will be used interchangeably for the purpose of this study. Location scouts are responsible for finding a setting that best represents the graphical notion of the production designers, directors and producers of a film; they are vital members of the design team (Go For Locations Inc., 2005; The Location Managers Guild of America (LMGA), 2011b; Skillset, 2011). This process is facilitated through research, photography and scouting; a combination of insight and understanding, particularly concerning architectural design, makes it easier for location scouts to determine the best setting in terms of how it will enhance the story and character growth (LMGA, 2011b). Should filming take place in various locations, across various countries, more than one location scout may be appointed to find locations (Honhaner, 2001).

Before a location is selected, a location scout must perform various tasks, all of which will be discussed in the following section.

A location manager is responsible for the identification and everyday management of all locations, which include the following pre-production and production activities:

- Identify all locations required, both inside and outside, according to the script;
- Discuss the requirements of each location with the production designer, director, producer and art director;
- Get a tentative filming schedule where preliminary shooting times are indicated;
- Contact film commissions or offices in order to start gathering information on possible locations;
- When visiting a location to scout, the location scout must present him/herself to the property owner/manager and get the required permission to access the location in order to take pictures and videos;
- Identify any other properties or neighbours within the vicinity who will be affected by the filming process;
- Meet with the production designer, director and producer and present the photos and videos to them, together with any related fees, required permits, security and safety needs, approvals and insurance requirements;
- Arrange for site visits for the production designer, producer and director to visit the locations they think most suitable;
- Have meetings with all neighbours or merchants who are directly affected by preparation, shooting or wrap activities;
- Notify neighbours of special effects and extended hours and gather signatures where required;
- Negotiate the contracts, location fees and associated paperwork with the necessary parties;
- Apply for filming permits with all relevant authorities, listing all filming undertakings in detail;
- Discuss any legal issues with attorneys;
- Identify nearby hotels and accommodation establishments where crew can be housed while filming at the location;
- Work closely with the local Transport Department to ensure that parking provisions meet both production and neighbourhood needs;
- Arrange for the presence of security personnel, fire safety officers and police;

- Coordinate with the production company's safety department and oversee environmental authorisation and training;
- Set up designs for traffic plans and street closures and put them in place;
- Prepare and set up guiding signage and maps; and
- Act as link between the local community and the film crew (Go For Locations Inc., 2005; Honthaner, 2001; LMGA, 2011b; Skillset, 2011).

Considering the 7 Ps of services marketing and a location scout's duties, it can be deduced that location scouts look at a combination of the 7 Ps when viewing a location.

The skills required to be a location scout include people skills, initiative, a sense of adventure, budgeting skills, a strong imagination, stamina, the ability to work on a computer, oral and written communication skills, reliability and flexibility, organisational skills, troubleshooting skills, management skills and photography skills (LMGA, 2011a; Skillset, 2011). Due to the long hours required of a location scout, an exceptional degree of motivation and enthusiasm is required (Skillset, 2011).

There are numerous websites which can be used to search for locations and location scouts across the globe. The most popular websites include Go For Locations Inc., The Location Managers Guild of America, The Location Guide and LocationsHub.

Once the location scout has identified locations that can be used for a film, the producer will make the final selection. Many factors will influence the selection of a film location, including but not limited to the following:

- The suitability of the location in relation to the requirements stated in the script;
- The ease of accessing the location;
- The ease of acquiring permits and visas for all crew and staff members;
- The quality of local film production services;
- The availability of a good customs broker in the desired country;
- Insurance coverage;
- The availability of local medical and emergency services; and
- The availability of services, supplies and materials (Honthaner, 2001).

It is expected that additional factors will be identified through interviews with the industry participants, specifically focusing on a South African context.

The location's scenery, backdrops, icons, sets and awareness, brand of a destination, resources, cost, taxes, labour and expertise at the location are very important factors that influence the location selection process (Hudson & Ritchie, 2006b:390). Furthermore, research done by Alfred and Lambert (2012) indicates that relationships with local service providers, casting agencies, crews and infrastructure, affect the location selection process significantly. The abovementioned factors identified in theory can all be related to the 7 Ps of services marketing.

All of these elements involved in location scouting and management is summarised in the next section.

4.2.4 A SUMMARY OF THE ASPECTS INVOLVED IN LOCATION SCOUTING

Table 7 (p. 76) summarises the aspects mentioned in the above sections and presents them in the order in which they occur.

Table 7: Summary of aspects

Production phase	Activities to be performed	What this involves	Who are involved in this phase?
Pre-production	Identify location criteria	Break down the script into locations and identify the time of day the various scenes need to be filmed.	<ul style="list-style-type: none"> • Location manager/scout • Producer • Director • Production designer • Art director
	Work with film commissions, the local tourism board/embassy and local authorities	Gather information from film commissions and local authorities regarding locations, permits, approvals and fees. Review photos of possible locations and weigh pros and cons of each location, such as weather, tax incentives, and labour rebates. Identify travel agents who are familiar with arranging travel and accommodation for film crews. Contact immigration and	<ul style="list-style-type: none"> • Location manager/scout • Producer • Production manager • Production coordinator/supervisor

Production phase	Activities to be performed	What this involves	Who are involved in this phase?
		inquire about the number of work visas your production may acquire, as some countries, in an effort to protect the local film industry, restrict the number of foreign crew members allowed	
	Select locations	Select locations that meet the specified criteria, visit the locations with the director and producer and then decide on final locations.	<ul style="list-style-type: none"> • Location manager/scout • The studio • Producers • Director • Production manager
	Secure locations	Negotiate location fees with property owners, apply for permits and approval where necessary and request location payment from studio. Arrange for parking at the location.	<ul style="list-style-type: none"> • Location manager/scout • Production manager
	Identify local production companies/managers	Identify and appoint a local production company that knows the area and can assist with production.	<ul style="list-style-type: none"> • Location manager/scout
	Determine the closest hospital with emergency facilities	Find the closest hospital that offers emergency services and alert them to your planned activities and arrange for an ambulance and emergency personnel to be at the set during filming.	<ul style="list-style-type: none"> • Location manager/scout
	Scout and arrange for location travel and hotel accommodation	Ideally, the accommodation should be close to the film location.	<ul style="list-style-type: none"> • Location manager/scout • Production manager • Production coordinator/supervisor
	Acquire legal representation in the foreign country	This must be discussed with the production company's resident attorneys as they may have trusted colleagues in the country where production will take place.	<ul style="list-style-type: none"> • Location manager/scout
	Contact the local centre for disease control	Find out if the cast and crew require any vaccinations when visiting the foreign country and ensure that all crew and cast members are vaccinated before departing for the location.	<ul style="list-style-type: none"> • Location manager/scout
	Apply for insurance	Ensure that the production company's permanent insurance provider is aware that the production is taking place in a foreign country and arrange for additional coverage for all cast and crew members. Also apply for additional insurance in the foreign country if necessary.	<ul style="list-style-type: none"> • Location manager/scout

Production phase	Activities to be performed	What this involves	Who are involved in this phase?
Production	Prepare maps and signage to location	Prepare maps to hand to crew and signage to put up next to the road in order for the crew to find the location easily.	<ul style="list-style-type: none"> • Location manager
	Secure police and fire officers and security and emergency medical vehicles	Arrange for police officers, fire officers, an ambulance and emergency personnel to be at the set during filming.	<ul style="list-style-type: none"> • Location manager
	Ensure the presence of management at each location	The location manager or an assistant location manager must be present at all locations during filming. Local location managers can be appointed if they are familiar with the area.	<ul style="list-style-type: none"> • Location manager
Post-production	Ensure that locations are left in the same condition as found	Hand the location back to the owners in the same or pre-negotiated state.	<ul style="list-style-type: none"> • Location manager
	Ensure payment has been made for use of locations	Ensure that all invoices for the use of the locations have been paid in full.	<ul style="list-style-type: none"> • Location manager • Production accountant

Source: Derived from Honthamer (2001)

In the next section, the history of South African films and South Africa's film industry will be discussed.

4.3 THE SOUTH AFRICAN FILM INDUSTRY

South Africa has an exciting, fast-growing film industry and the industry's international reputation and competitiveness is continually increasing (Brand South Africa, 2013). A study by the Cape Film Commission has shown that the South African film industry has an annual turnover of over R2.65 billion, while contributing at least R3.5 million to South Africa's Gross Domestic Product (GDP) annually (Brand South Africa, 2013). Film makers, both local and foreign, have started taking advantage of South Africa's varied and unique locations (Brand South Africa, 2013). South Africa's low production costs and favourable

exchange rate makes it a cheap film location, compared to Europe and the USA (Brand South Africa, 2013).

4.3.1 SOUTH AFRICA'S FILM HISTORY

In this section, all locally produced films as well as films shot partly or fully in South Africa are mentioned. The purpose of this section is to show how SA is already being utilised and growing as a film location for international productions and how South Africa's own film industry has grown over the years as the number of locally shot and produced films increase. The first film to be shot and produced in South Africa was *Die Voortrekkers* (Shaw, 1916). South Africa became a viable film location in 1995, after apartheid ended in 1994 (Brand South Africa, 2013).

4.3.1.1 Locally shot and produced films

The South African film industry has experienced a boom in recent years, with many films being produced and released annually. The most recent films are represented in Table 8 (p. 79), with the more extensive list of films presented in Appendix H, Table 24 (p. 205).

Table 8: A selection of South African produced films

Release year	Film name
2013	Fanie Fourie's Lobola
	Bakgat! 3
	Khumba
	Spud 2
	To the Power of Anne
2012	Mad Buddies
	Agter die ligte
	Semi-Soet
	Pretville
	Wolwedans in die skemer
	Stilte
2011	Hoofmeisie
	Platteland
	Getroud met Rugby
	Saak van Geloof

Release year	Film name
	Roepman
	Superhelde
	Skoonheid
	Ek joke net
	Ek lief jou
	Bloedsuiers
2010	Die Ongelooflike Avonture van Hanna Hoekom
	Spud
	Liefeling
	Bakgat! 2
	Egoli: Afrikaners is Plesierig
	Stoute Boudjies
2009	District 9
	Karate Kallie
	Hond se dinges
2008	Bakgat!
	Skin
	Vaatjie sien sy gat
2007	Poena is Koning
	Ouma se slim kind
	Meisie
2006	Number 10
2005	The Flyer
2005	Tsotsi
2004	Yesterday
2003	Stander

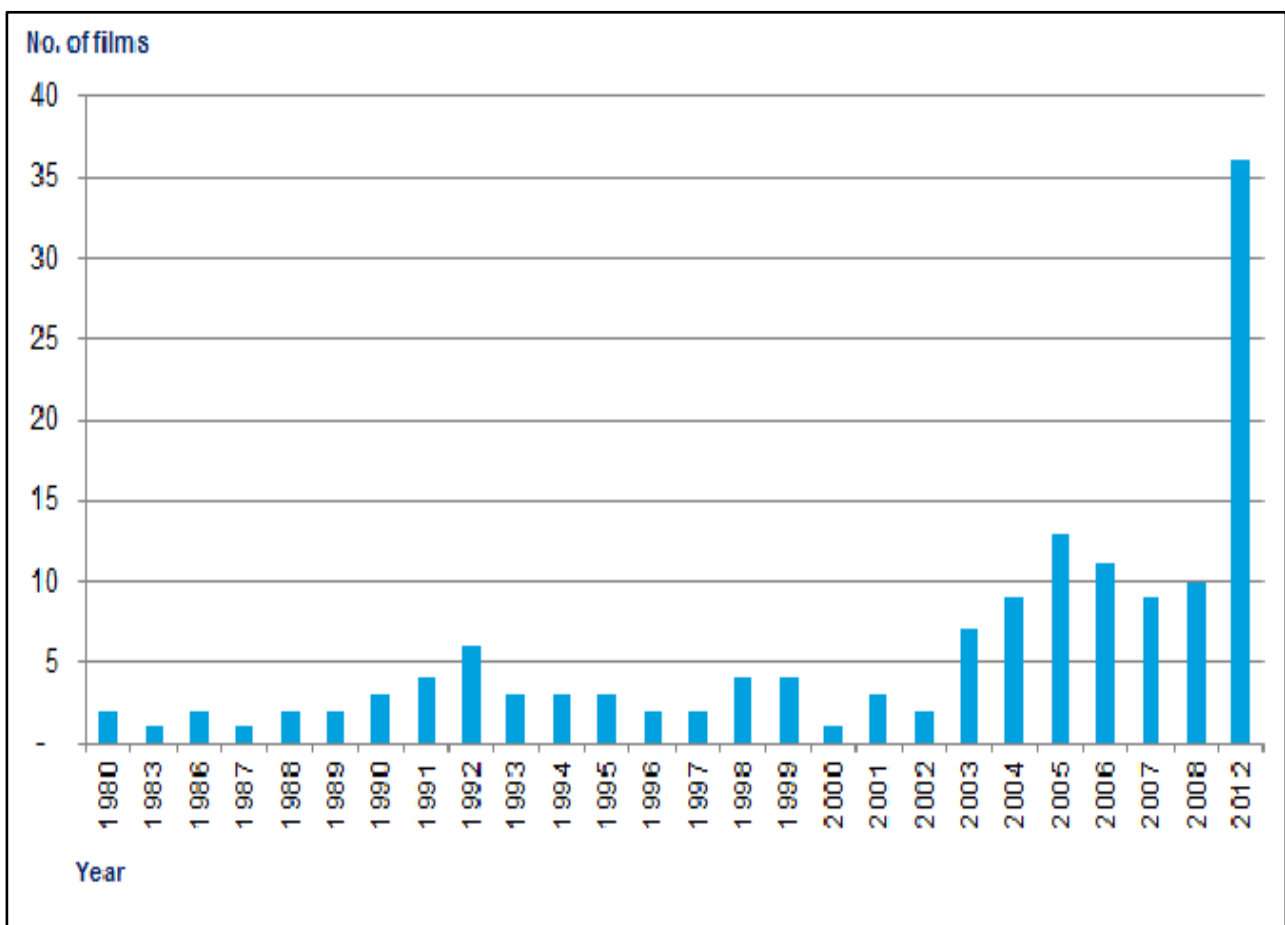
Source: Carltkorb (2011)

Funding for films in South Africa has been and remains a major concern for film makers (NFVF, 2013). In order to produce a film, a producer must first raise 25% of the production costs. Once 25% has been raised, the producer can apply for the film incentive from the DTI (NFVF, 2013). When a producer has secured 50% of the production costs, they may apply for further funding from the Industrial Development Corporation (IDC). The IDC aims to create a sustainable local film industry through their Media and Motion Pictures Strategic Business Unit which funds local films' budgets; they will fund up to 49% of a project's budget (Brand South Africa, 2013). Reasons for the lack of funding include poor investor returns and abuse of film allowances (NFVF, 2013).

In 2008, local movies grossed over R48.3 million of which *Mr. Bones* was responsible for R34 million. In 2010, *Shucks Tshabalala's Guide to S.A.* (Hofmeyr, 2010) accumulated R38 million of the R87 million grossed by local movies. This shows that South Africans have developed a healthy demand for “good quality local content” (Brand South Africa, 2013; NFVF, n.d.).

Figure 13 (p. 81) shows how the local South African film industry has grown over the last few years.

Figure 13: Number of South African films produced per annum



Source: NFVF (National Film and Video Foundation) (2013)

The industry employment figures has grown from 4 000 people in 1995 to 30 000 a few years ago (Brand South Africa, 2013).

There are a number of locally hosted Film Festivals which promote the development and showcasing of local content. These include, but are not limited to, the Durban International Film Festival (DIFF), Encounters Documentary Film Festival, Out In Africa – Gay & Lesbian Film Festival, Tri-Continents Film Festival (a festival dedicated to films addressing human rights issues), Indie Fest and People-to-People Documentary Film Conference (NFVF, 2011). The DIFF is South Africa’s oldest and longest-running annual film festival (NFVF, 2011). Furthermore, the DIFF is considered one of the leading African and international film festivals (NFVF, 2011).

4.3.1.2 International films shot on location in South Africa

South Africa has been used as a primary location in quite a few international movies over the past decade. Many films also contain one or even a few scenes shot in South Africa. Table 9 (p. 82) contains the year of release, film names and locations within South Africa (where known) of these international films.

Table 9: A selection of international films shot on location in South Africa

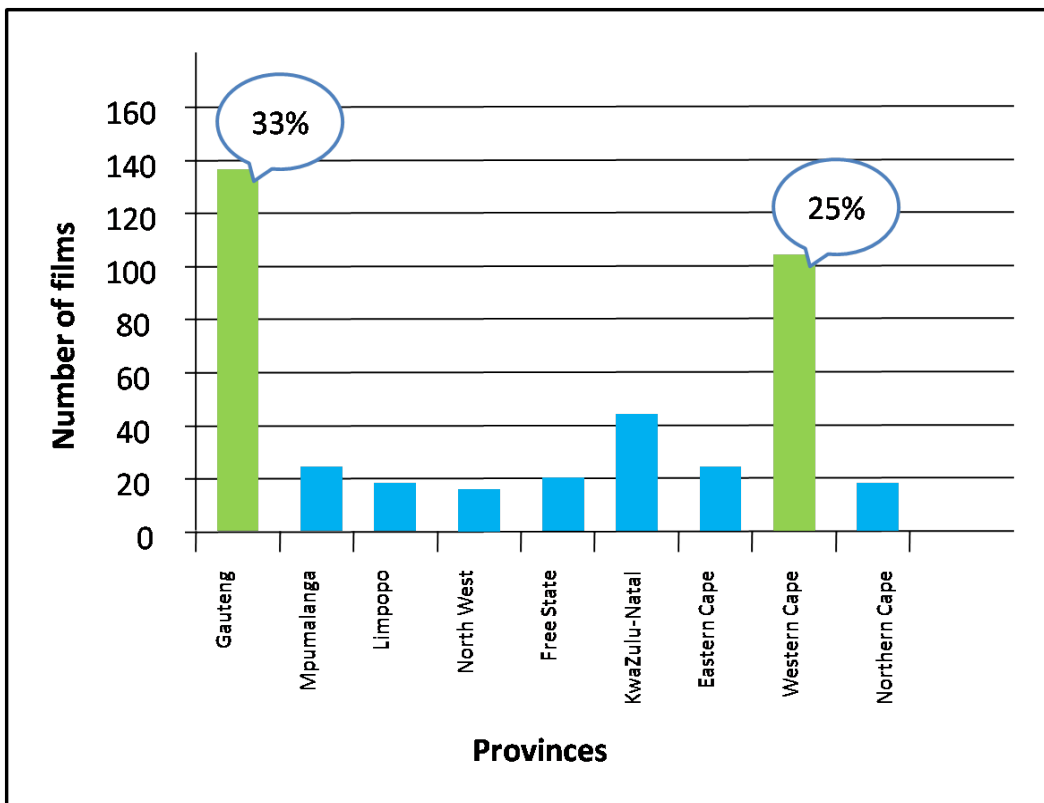
Release year	Film name	Location/s
2015	The Avengers: Age of Ultron	Johannesburg, Gauteng
2014	The Giver	Cape Town, Western Cape and Johannesburg, Gauteng
2014	The Salvation	Johannesburg and Cullinan, Gauteng
2014	Mad Max: Fury Road	Cape Town Film Studios (CTFS) and Cape Town, Western Cape
2014	Awesome Like Albert	South Africa
2014	Cavegirl the Movie	Cape Town, Western Cape
2013	Mary and Martha	South Africa
2013	Madras Cafe	South Africa
2013	Vehicle 19	South Africa
2012	What to Expect When You're Expecting	Karoo, Northern Cape
2012	Restless	South Africa
2012	Chronicle	Cape Town, Western Cape
2012	Safe House	CTFS and Cape Town, Western Cape
2012	Dredd	CTFS and Cape Town, Western Cape
2012	Dark Tide	Cape Town, Western Cape
2011	Machine Gun Preacher	Gauteng
2010	The Big Bang Club	Johannesburg, Gauteng

Release year	Film name	Location/s
2009	District 9	Johannesburg, Gauteng
2009	The Last House on the Left	Cape Town, Western Cape
2009	Invictus	Cape Town, Western Cape
2009	Endgame	Cape Town, Western Cape
2008	10,000 BC	Cape Town, Western Cape
2008	Doomsday	Cape Town, Western Cape
2008	24	Cape Town, Western Cape
2007	Rendition	Cape Town, Western Cape
2007	Hitman	Cape Town, Western Cape
2006	The Fall	Cape Town, Western Cape
2006	Blood Diamond	Cape Town, Western Cape
2006	Ask The Dusk	Cape Town, Western Cape
2005	Lord of War	Cape Town, Western Cape
2005	Racing Stripes	Pietermaritzburg, KZN
2005	Tsotsi	Johannesburg, South Africa
2004	Hotel Rwanda	Johannesburg, Gauteng
1996	The Ghost and the Darkness	Songimvelo Game Reserve, Mpumalanga
1995	Cry, the Beloved Country	Drakensburg, KZN
1979	Zulu Dawn	Isandlwana, KZN
1964	Zulu	Drakensberg, KZN

Source: IMDb.com, Inc. (2012)

Table 9 (p. 82) clearly indicates Western Cape, Gauteng and KZN as the most popular film locations within South Africa. This statement is confirmed by the information contained in Figure 14 (p. 84). In some of these films, the South African locations used represented other locations, either real or fictional. Some real locations represented were Lebanon, Colombia, Malibu, Iraq and the Urals in Russia (Perry, 2012). Furthermore, by using South Africa as a film location, a producer may save a lot of money according to *Dredd* (Travis, 2012) co-producer Michael Murphy (in Perry, 2011); *Dredd* was filmed at the Cape Town Film Studios and released in 3-D.

Figure 14: Breakdown of number of projects per province



Source: NFVF (2013)

As seen in Table 9 (p. 82) and Figure 14 (p. 84), a number of films were released in 2012 that were shot (either in full, or in part) in South Africa. Perry (2011) indicates that South Africa is fast becoming a very popular film location for international film producers as it offers versatile, convenient locations with very affordable, high quality production services. Recently, a major Hollywood blockbuster, *Mad Max: Fury Road* (Miller, 2015), was filmed in Cape Town. This is the largest feature film to be produced in South Africa thus far (Times Media Group, 2012). The most recent films to be shot in South Africa are *The Avengers: Age of Ultron* (Whedon, 2015), part of it filmed in Johannesburg, and *The Giver* (Noyce, 2014), filmed in both Cape Town and Johannesburg (IMDb, 2014; Screen Rant, 2014).

Foreign film producers filming on location in South Africa brings in foreign exchange, while co-productions lead to big sums of money being invested in a country (Brand South Africa, 2013).

4.3.1.3 The NFVF

The NFVF has a vital role to play in the growth and development of the South African film industry (NFVF, 2011). Their mission is “to create an environment that develops and promotes the South African Film and Video industry domestically and internationally” (NFVF, 2011:10). One way in which they accomplish this is by ensuring that South African films can find export channels and international distribution (NFVF, 2011). The NFVF further ensures that South Africa hosts and participates in international film festivals, thus positioning South Africa as a niche in the global film industry (NFVF, 2011).

The NFVFs website contains information about funding, filming in South Africa, markets and festivals, policies, research, education, screenwriting and publications. Under the “Filming in South Africa section”, local and international producers will find extensive information on co-production treaties, locations, a company database, crews, incentives, the weather in South Africa and sound studios (NFVF, n.d.).

The most recent figures indicate that the South African Film Industry (SAFI) currently employs 40 000 people and generates over R 5.5 billion annually (NFVF, 2011; NFVF, 2013). Production revenue accounts for roughly 89% of the income generated by the SAFI (NFVF, 2013).

To realise the objective of countrywide reach in their support initiatives and programmes, the NFVF has developed digital screens for rural areas and townships, where local content is exhibited (NFVF, 2011). Furthermore, the screening of local content in rural areas and townships realises another objective of the NFVF, namely to develop audiences and so continue to grow the SAFI (NFVF, 2011). The NFVF works closely with government departments (such as the Department of Trade and Industry (DTI) and the South African Screen Federation (SASFED)) and other stakeholders to accomplish a high standard of service (NFVF, 2011).

A discussion on what South Africa is currently doing to promote itself as a film location follows in the next section. This information is presented was gathered from the internet.

4.3.2 WHAT SOUTH AFRICA IS CURRENTLY DOING TO PROMOTE ITSELF TO INTERNATIONAL FILM PRODUCERS

In this section, the various organisations involved in marketing South Africa as a film destination and which aids in the growth of the SAFI, will be discussed. The local government acknowledges that the SAFI makes a significant contribution to South Africa's economic growth, helps strengthen South Africa's global profile in the creative environment and creates jobs (DTI, 2012).

The CTFS, built in 2010, is the first Hollywood-style studio in South Africa; it is backed by various local, provincial and national governments and supported by various private shareholders. It is located in one of the most sought-after locations world-wide and offers state-of-the-art facilities and services at a fraction of traditional film production costs. The CTFS focuses on attracting international film producers to South Africa. Their website contains all the information international film producers would require when considering South Africa as a film location (Brand South Africa, 2013; CTFS, 2011).

There are six film commissions/offices in South Africa and the purpose of these regional film bodies is to market their respective regions as film locations to national and international film producers (Brand South Africa, 2013). In June 2013, a National Film Commission, the South African Film Commission, was created (Lillie, 2013b). This national, independent film commission will be able to work with various agencies and industry bodies to develop the film industry in South Africa (Lillie, 2013b).

The objectives and aims of the South African Film Commission is to promote the film industry, filmmakers and job creation; they will achieve this through partnerships with the DTI and other local departments, including, but not limited to, Economic Development and Tourism (Lillie, 2013b).

As mentioned earlier, the NFVF and South African film commissions/offices attend various film festivals globally each year, including, but not limited to, the following:

- the Sundance Film Festival,
- the Berlin International Film Festival,

- the Hong Kong International Film & TV Market,
- the Cannes International Film Festival,
- the Toronto International Film Festival,
- the Pan African Film and Television Festival Ouagadougou, and
- the Tribeca Film Festival (Lillie, 2013c; NFVF, 2011).

The Cannes International Film Festival, held annually at the Palais de Festival, is considered one of the most prestigious film festivals, while also being one of the oldest. An SA Line Up event is hosted yearly at the Cannes Film Festival, where sales agents, festival programmers, distributors and territorial buyers are targeted and South African projects presented. The NFVF, together with their partners, further host a networking event at the Cannes Film Festival annually, where they aim to network, build and maintain relationships. The Toronto International Film Festival is considered the biggest Film Festival and Market in North America and offers the South African film industry, as well as other filmmakers, the ideal opportunity to engage especially the North American market (NFVF, 2011)

The South African Film and Music Festival was launched in Los Angeles in October 2013 (Lillie, 2013a). This offers a great opportunity for global growth in the South African film industry as it showcases the various locations South Africa has to offer.

Various rebates are offered to local and international film producers in order to encourage production within South Africa; the government also offers tax rebates to film owners (Brand South Africa, 2013). The South African government offers tax incentives to film production companies and investors, which include rebates on local expenses (Times Media Group, 2012). These incentives were revised in 2012 and named the Foreign Film and Television Production and Post-Production incentive (Brand South Africa, 2013). The objectives, benefits and eligible enterprises are listed in Figure 15 (p. 88).

Figure 15: Foreign Film and Television Production and Post-Production Incentive

<p>Objectives</p> <p>To encourage and attract large-budget films and television productions and post-production work that will contribute towards employment creation, enhancement of international profile, and increase the country's creative and technical skills base.</p> <p>Benefits</p> <ul style="list-style-type: none"> • Shooting on location in South Africa, the incentive will be calculated as 20% of the Qualifying South African Production Expenditure (QSAPE). No cap will apply for this incentive. • Shooting on location in South Africa and conducting post-production with a Qualifying South African Post-Production Expenditure (QSAPPE) of R1.5 million in South Africa, the incentive will be calculated at 22,5% of QSAPE and QSAPPE (an additional 2,5%, cumulative 22,5%) • Shooting on location in South Africa and conducting post-production with a QSAPPE of R3 million and above in South Africa, the incentive will be calculated as 25% of QSAPE and QSAPPE (an additional 5%, cumulative 25%). • Foreign post-production with QSAPPE of R1.5 million, the incentive is calculated at 22,5% of QSAPPE. • Foreign post-production with QSAPPE of R3 million and above the incentive is calculated at 25% of QSAPPE. <p>Eligible Enterprises</p> <ul style="list-style-type: none"> • Foreign-owned qualifying productions and South African qualifying post-production work with: • QSAPE of R12 million and above, provided that at least 50% of the principal photography schedule is filmed in South Africa, for a minimum of four weeks. • QSAPPE of R1.5 million and above, provided that 100% of the post-production is conducted in South Africa, for a minimum of two weeks. • An applicant must be a Special Purpose Corporate Vehicle (SPCV) incorporated in the Republic of South Africa solely for the purpose of the production and/or post-production of the film or television project. • An applicant must be the entity responsible for all activities involved in the production and/or post-production in South Africa and must have access to full financial information for the whole production and post-production worldwide. • Only one entity per production and/or post-production for film, animation and television drama or documentary series is eligible for the incentive. • The applicant must comply fully with its obligations in terms of the Legal Deposit Act 54 of 1997.
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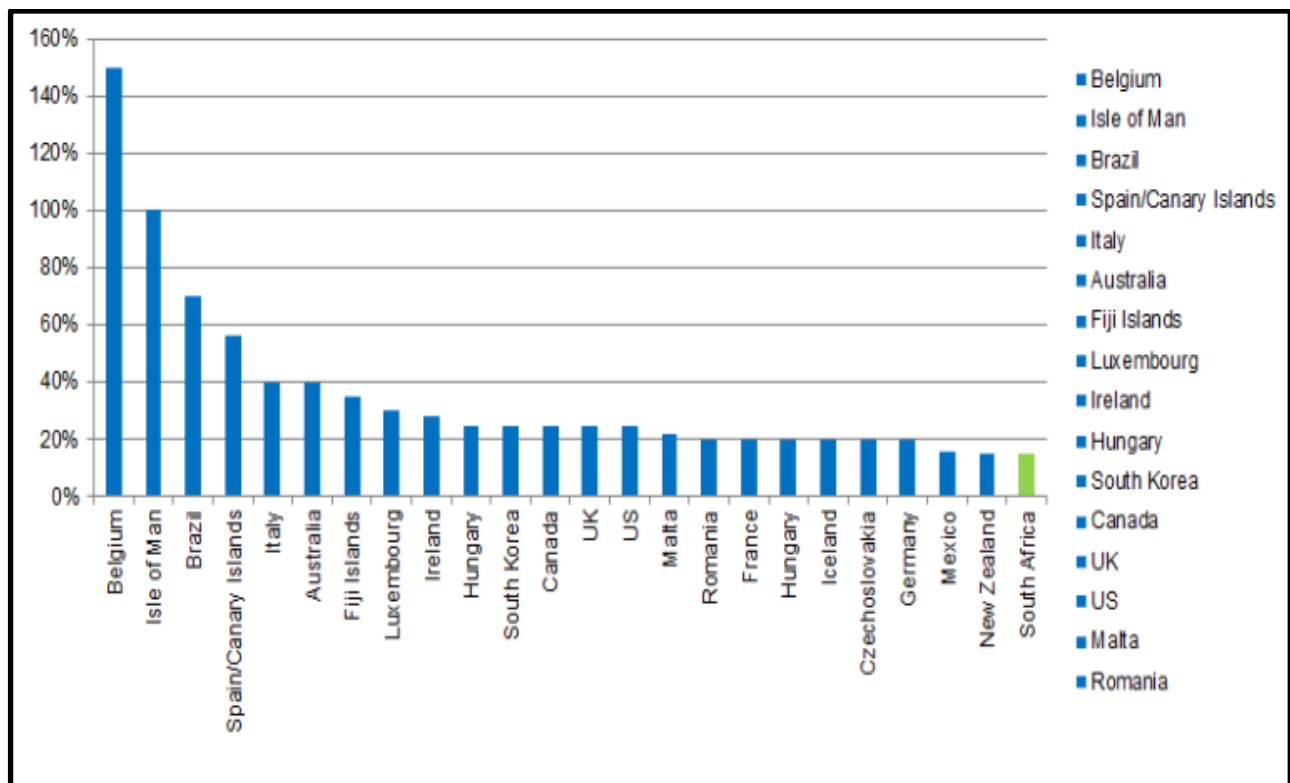
Source: DTI (n.d.)

The DTI attempts to attract international film productions to South Africa by offering a “20% tax reduction on production expenditure for foreign productions filmed in South Africa with a budget of [at least] R12-million” and a “22.5% to 25% reduction if filming and post-production [of at least R1,5-million] takes place in South Africa” (Brand South Africa, 2013).

South Africa has established co-production treaties with eight countries, namely France, Ireland, the UK, New Zealand, Canada, Australia, Italy and Germany (Brand South Africa, 2013; NFVF, n.d.). Germany is currently the leading partner and contributed to 18 co-produced films in 2010 and 2011 (NFVF, n.d.). When countries sign up to be co-production partners, all co-productions are regarded as a national production of all co-producing countries; this makes the production eligible for any benefits offered by the co-producing countries (Brand South Africa, 2013).

Incentives for local-content generation and the attraction of international film producers are being offered by the DTI (Brand South Africa, 2013). Offering incentives is very important in the film industry. As can be seen in Figure 16 (p. 89), Belgium (in first place) is far ahead of South Africa (in last place) in terms of offering incentives for films shot and produced in the country.

Figure 16: Comparison of international film incentives (2010)



Source: NFVF (2013)

As indicated in Figure 16 (p. 89), South Africa still has a long way to go in term of the quality and size of the rebates offered to international film producers.

4.4 CONCLUSION

In this chapter, the researcher aimed to address the sixth objective of this study, from a theoretical perspective: to determine and describe the factors influencing international film producers' selection of a location. This was attempted through a discussion of the general theoretical aspects of the film production and location selection process. The history and current state of the South African Film Industry (SAFI) was also discussed in order to provide the reader with a theoretical understanding of the SAFI. It is important to have a fundamental understanding of the film industry in order to achieve the final and main objective of this study, namely to develop a model containing guidelines related to the 7 Ps of services marketing for promoting South Africa as an ideal film location to international film producers.

Through the literature review, a number of factors influencing producers' selection of a film location came to light, as presented in Table 10 (p. 90)

Table 10: Theoretical factors influencing producers' selection of a location

Factors by Honthamer (2001)
The suitability of the location in relation to the requirements stated in the script.
The ease of accessing the location.
The quality of local film production services + The ease of acquiring permits and visas for all crew and staff members.
The availability of a good customs broker in the desired country.
Insurance coverage.
The availability of local medical and emergency services.
The availability of services, supplies and materials.

Source: Honthamer (2010)

The researcher believes more factors will come to light during the data analysis stage of the research study. The abovementioned factors will be used in Chapter 7 to develop the

model with guidelines based on the 7 Ps of the services marketing mix. This model is intended for use by DMOs when attempting to market South Africa to international film producers as a preferred film location.

In order for film tourism to become a successful reality, film producers, film commissions and tourism authorities (DMOs) need to work together. The reason being that these organisations all have a hand in tourism promotion, audio-visual production, or both, but each with different aims (Di Cesare *et al.*, 2012). Film producers aim to generate a profit through films, not promote tourism to a specific region (Di Cesare *et al.*, 2012:103). Film commissions aim to attract and support the production of films, television series and other audio visual productions to their designated area (Croy, 2010; Irimiás, 2012), but they rarely think to go one step further by seizing the opportunities created for tourism through these productions (Di Cesare *et al.*, 2012). DMOs are in charge of marketing and managing destinations using various tools and products and appealing to various markets, but as they are unfamiliar with the filmmaking process, it is important for them to collaborate with film producers and commissions in order to promote their destination through films (Di Cesare *et al.*, 2012). The most notable working relationships between film commissions and tourism industry stakeholders are those in the UK and Malta (Irimiás, 2012).

In order for a destination to become a viable film location, the location scout must be aware of the location and all it offers in the pre-production phase, as this is when the location scouts look for viable locations. To facilitate the location selection process, location scouts should have all the relevant information on permits, processes and fees for film production and location use at a destination. This study aims to advise South African DMOs, in association with South African film offices/commissions, on how to create awareness of South Africa as a film location well ahead of the pre-production phase.

The DTI (2012) recently made the following statement: “The South African government takes cognisance of the significant contribution that the film industry potentially has in stimulating the country’s economic growth, strengthening the country’s profile in the global creative environment and the facilitation of employment creation”. From this statement, it is evident the South African government recognises and acknowledges that the film industry

can generate major benefits. A way must be found to promote South Africa as a preferred film location and this study aims to accomplish that through the creation of a marketing framework for South African DMOs.

In 2010, international films accounted for 89% of feature films showed in cinemas across South Africa and local films accounted for 11% (NFVF, 2011). Of the international films, 64.2% were productions from the USA, 6.4% from the UK, 4.9% from India and 2% from France (NFVF, 2011). The 11% share held by South African films is a significant increase from the 0.7% share held in 2007 (NFVF, 2011). There can be no doubt that the SAFI is rapidly growing and the creation of the South African Film Commission is one of the first steps in creating a working relationship between the film and tourism industry within South Africa.

In the next chapter, the research methodology used in this study is discussed.

CHAPTER 5: METHODOLOGY

5.1 RESEARCH PARADIGM/PHILOSOPHY

This study was conducted from an interpretivism point of view as the research was conducted among human beings in order to understand their role as social actors within the tourism industry (Saunders, Lewis & Thornhill, 2009). An attempt was made to discover which factors influence international film producers' location decision, local DMOs' and film commissions'/offices' roles in advertising South Africa to international film producers, and foreign DMOs' marketing efforts with regards to film. An interpretivist approach is especially suitable when conducting management or business research, especially concerning marketing activities (Saunders *et al.*, 2009).

The ontology of interpretivism indicates that the researcher accepts their inseparability from reality and acknowledges that the knowledge is socially constructed. The epistemology of interpretivism states that interpretivists create knowledge reflecting their own goals, experience and culture. In order to produce this knowledge, the researcher has to socially interact with the participants and understand the reasons behind the participants' actions. The axiology of an interpretivist researcher suggests that the researcher is bound to the research being conducted and will thus be subjective (Saunders *et al.*, 2009).

An interpretivist point of view is usually coupled with qualitative research, as it requires the researcher to conduct in-depth investigations among small samples (Saunders *et al.*, 2009).

5.2 DESCRIPTION OF INQUIRY STRATEGY AND BROAD RESEARCH DESIGN

This study was an empirical, qualitative study: it is exploratory and descriptive in nature – fitting with an interpretivist point of view. Exploratory research aims to discover

new understandings of a certain phenomenon, in this case the location selection criteria used by international film producers (Saunders, Lewis & Thornhill, 2009). This study explored the factors affecting international film producers' selection of a location as well as describes how they perceive South Africa as a film location based on these factors. A descriptive study is structured and characterised by investigative research questions (Cooper and Schindler, 2008). Applied research is used to solve problems and expose answers to questions relating to action and performance (Cooper and Schindler, 2008). The research was primarily set in the tourism industry, although it endeavours to incorporate knowledge of the film industry.

Table 11 (p. 94) indicates the different descriptors of research design which was used in this study.

Table 11: Descriptors of research design

Category	Descriptor	Motivation
Degree to which the research question has been crystallised	Formal study	The purpose of a formal study is to answer specific research questions, as formulated in this study. The main research question has been mentioned in Chapter 1, along with research objectives and this study strived to achieve them as comprehensively as possible.
	Exploratory study	Exploratory studies are used to discover the 'what'. This study aimed to identify the factors used by international film producers when selecting a location as well as what South African DMOs and film commissions/offices are currently doing to promote South Africa to these international film producers.
Method of data collection	Communication study	A communication study is characterised by a researcher collecting answers from respondents, either personally or via other means. This study was locally conducted through personal interviews with local DMOs and film commissions/offices; internationally it was distributed electronically via email to location scouts, film commissions and DMOs from specific countries.
Power of the researcher to produce effects in the variables under study	Ex post facto	As no variables in this study can be manipulated, this study is classified as ex post facto. The researcher is unable to change any external factors which might influence the results or introduce bias.
Purpose of the study	Descriptive	This study can also be considered descriptive, as it strives to understand how international film producers perceive South Africa in terms of the factors used for location selection and ways in which South Africa can enhance its image as an ideal film location. Furthermore, it aims to describe South Africa's current marketing actions.

Category	Descriptor	Motivation
Time dimension	Cross-sectional	This study was performed only once, to capture the producers' selection criteria and perceptions of South Africa as a film destination and the current marketing strategies of local DMOs and film commissions/offices, at a specific point in time.
Research environment	Field setting	As the participants were not placed in a manipulated situation, the study took place in the field, where there were no factors affecting their answers.

Source: Cooper and Schindler (2008).

5.3 SAMPLING

5.3.1 SAMPLING METHOD

Non-probability, purposive/judgement sampling was used for this study. In non-purposive sampling, the probability of a participant being selected from the population is unknown (Saunders *et al.*, 2009). For the purpose of the study, in-depth knowledge was gained from a select few participants chosen for specific, theoretical reasons mentioned in Chapter 1 (Saunders *et al.*, 2009). Judgement sampling was chosen, as the participants were selected based on their ability to best meet the research objectives, as identified earlier (Saunders *et al.*, 2009). It cannot be accepted that the sample is statistically representative of the population (Saunders *et al.*, 2009).

The researcher endeavoured to contact the CEOs of the companies contacted, as it is assumed their opinions can be generalised as the opinions of the company because they ultimately make many decisions regarding marketing. In the cases where the CEO was not available, the marketing manager was approached.

5.3.2 UNITS OF ANALYSIS AND DATA SOURCES

The units of analysis and primary data sources for the study are as follows:

- Individuals managing three local regional DMOs from Gauteng, KZN and the Western Cape. These are the three major provinces in South Africa.

- Individuals managing the three big local film commissions/offices from Gauteng, KZN and the Western Cape. There is only one local regional film commission per province mentioned and only six film offices in South Africa. The other three film commissions were not approached, as two of them were recently established and not fully operational at the time of data collection and the other one is not located in a surveyed province.
- Individuals managing international film commissions/offices in Australia, Canada, New Zealand, the UK and the USA were approached, as these countries have been identified as the most popular film locations, with the exception of Australia. Australia is included in the data collection process as it has similar landscape and weather to South Africa and it is a long haul destination, much like South Africa. The latest statistics does, however, rate Australia as a popular film location, as mentioned in Chapter 1. The international film commissions were identified through each country's national website. The researcher managed to collect responses from Australian, Canadian and USA film commissions.
- Individuals managing location scouting companies globally were approached, as they have direct contact with international film producers and thus know what film producers are looking for in a location. The location scouts were identified through an internet search.

The units of analysis and secondary data sources for the study are as follows:

- Website analyses of local DMOs were done in order to identify whether these DMOs offer information to film producers on their respective websites. The local DMO websites analysed were those in Gauteng, KZN and the Western Cape, as well as South Africa's national DMO.
- Website analyses of foreign DMOs were done in order to identify whether these DMOs offer information to film producers on their respective websites. The international DMO websites analysed were Australia, Canada, New Zealand and the UK, for reasons stated above.
- Website analyses of local film commissions/offices were done to identify and compare the information offered to film producers or location scouts looking into filming at the respective destinations. The local film commission/office websites analysed were those in Gauteng, KZN and the Western Cape.

- Website analyses of foreign film commissions/offices were done to identify and compare the information offered to film producers or location scouts looking into filming at the respective destinations. The film commission/office websites analysed were Australia, Canada, New Zealand and the UK, for reasons stated above.

The researcher aimed to have a total of 14 respondents from the primary data sources and 16 secondary data sources. There is no set number of participants that are required to participate in a qualitative study to make the study valuable. Marshall (1996) states that “[a]n appropriate sample size for a qualitative study is one that adequately answers the research question. For simple questions or very detailed studies, this might be in single figures...”. Due to the fact that South Africa’s major provinces, namely Gauteng, KZN and the Western Cape have one regional DMO each and there is only one national DMO for South Africa, the number of local DMO respondents could not be increased. The same principal applies for the local and foreign film commissions.

5.4 DATA COLLECTION

The primary data for the study was collected using four data collection instruments, using a combination of face-to-face meetings, email and Skype data collection methods. All four of the instruments were semi-structured interview schedules. The first instrument (Appendix A, p. 181) was emailed to selected location scouts globally. Responses from five location management/scout companies were acquired. These respondents were from South Africa, India and from Australia.

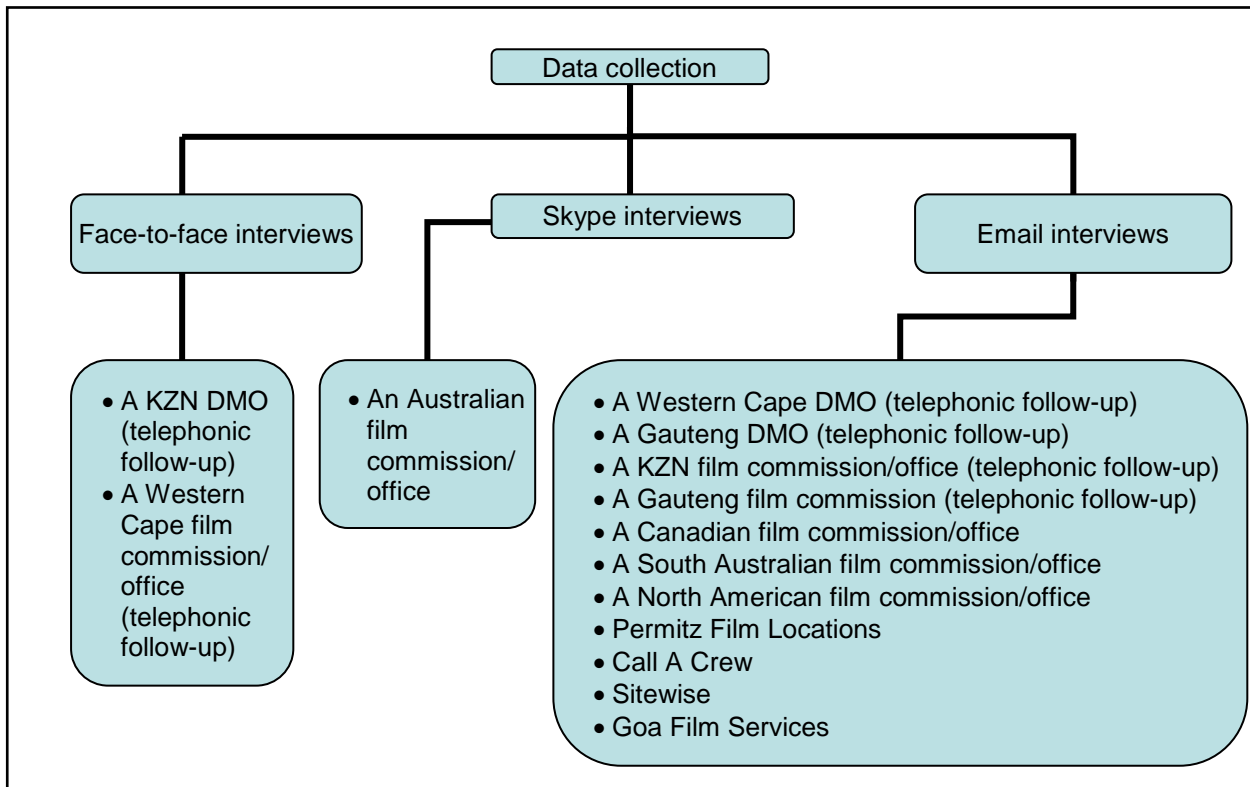
The second data collection instrument (Appendix C, p. 188) was emailed to local regional and national DMOs and some of these were interviewed face-to-face, where an interview could be arranged. Participants were asked to complete the schedule as comprehensively as possible then send it back to the researcher. In the cases where the researcher needed further clarification on the information provided, the participants were asked to further explain certain aspects. The reason for conducting the majority of these interviews through email is because sufficient funds were not available to travel to each location in order to conduct face-to-face interviews with the participants. Responses from three DMOs were acquired. These comprised of the KZN DMO, The Western Cape DMO and the Gauteng

DMO. Some of the participants were contacted telephonically for a follow-up interview, once it became clear there were unmentioned factors in the initial data received. The factors were mentioned to the participants and they were asked to indicate whether they perceived the factors to be important or not.

The third interview schedule (Appendix E, p. 196) was used for face-to-face, email and Skype interviews with film commissions/offices both locally and internationally. The local film commission interviewed was from the Western Cape. This face-to-face interview was voice-recorded and transcribed. The film commissions/offices from KZN, Gauteng, Australian, USA and Canada responded through email interviews. Some of the participants were contacted telephonically for a follow-up interview, once it became clear there were unmentioned factors in the initial data received. The factors were mentioned to the participants and they were asked to indicate whether they perceived the factors to be important or not.

Figure 17 (p. 98) below represents the data collection process and final sample in a diagram.

Figure 17: Data collection process



The data collection instruments were pre-tested through expert evaluation by using tourism industry professionals to evaluate the adequacy of the instruments. An example of a transcribed interview is contained in Appendix I (p. 210).

The secondary data collected for this study was collected through a thorough analysis of the various websites mentioned above. For all DMOs, the websites were analysed to discover whether these DMOs encourage film producers and film tourists to visit their destination. The film commission/office websites were analysed to discover what data they offer to producers and location scouts on the website.

5.4.1 HOW THE DATA WILL BE COLLECTED AND STORED

The primary data received was treated as confidential and has been stored confidentially on the researcher's computer, which is password protected. Some information was received electronically; other information was recorded on a tape recorder, after which it was electronically transcribed. Additionally, the information received was printed out and will be kept, for a period of 10 years, in the researcher's Home Department at the University of Pretoria, where only the supervisor and Head of Department will have access to the data.

The secondary data analysed is freely available on the internet and will therefore not be treated as confidential.

5.4.2 VERIFYING AND EVALUATING THE ACCURACY AND COMPLETENESS OF THE DATA COLLECTED

The researcher carefully read through all the primary data collected, taking care to ensure that the data received was rich and fully descriptive. Upon receiving the completed email interviews, the researcher checked it and in the cases where it lacked information, the participant was asked to elaborate on any specific areas where they might not have expressed themselves in enough detail. When evaluating the transcripts from the face-to-

face interviews, the researcher found the answers sufficient and clear, so no participants were contacted and asked to elaborate on any answers.

To verify the accuracy of the secondary data, the researcher consulted the respective webpages to establish the last time the website was updated.

5.5 DATA ANALYSIS

5.5.1 PREPARING THE DATA FOR ANALYSIS

The data collected through face-to-face and Skype interviews was carefully transcribed by the researcher. As the information is not sensitive in nature, the tone of voice and body language did not need not be observed or noted. The data collected in electronic format was ready for processing upon receipt. All personal details of respondents were removed and replaced with alternative labels (company name) in order for the researcher to maintain their anonymity. The researcher made sure all participants' collected data were saved in separate files. During the preparation stage, the researcher was able to start identifying patterns and themes in the data collected.

5.5.2 ANALYSING THE DATA

The primary data was analysed using a categorisation of meanings approach (Saunders *et al.*, 2009). This approach, which is very similar to a thematic approach, requires the researcher to develop categories and then connect data to these identified categories. The categories may be developed based on data from the literature review as well as the data collected. For this study, the structuring of the data was guided by the objectives listed Chapter 1.

Listed below are the steps that were taken by the researcher to organise the data into thematic categories, using Atlas.ti as a qualitative data analysis instrument:

- The data was categorised into main and sub categories, as deemed appropriate.

- Data from the various participants were grouped together in the identified categories and analysed in order to identify whether a generally positive or negative correlation exists between the data from the various participants.
- An attempt was made to identify any relationships between categories.
- Any additional categories identified were added and similarly analysed.
- The qualitative data was not quantified.

Content analysis was done on the respective websites, as secondary data sources, and it was established whether the selected local and foreign DMOs encourage film production and film tourism through their websites and the type and depth of information selected local and foreign film commissions/offices offer producers and location scouts was identified.

5.6 ASSESSING AND DEMONSTRATING THE QUALITY AND RIGOUR OF THE RESEARCH DESIGN

5.6.1 SOURCES OF BIAS OR ERROR

Discussed below are the sources of bias or error that can occur when conducting qualitative research.

5.6.1.1 Interviewer bias

Interview bias is characterised by the interviewer's body language, tone of voice and comments which might affect the interviewee's responses. This occurs when the interviewer consciously or subconsciously attempts to impose their own views or opinions on the respondent. Interviewer bias may also be present in the way the interviewer interprets the results (Saunders *et al.*, 2009).

5.6.1.2 Response bias

This can occur when the interviewee has certain positive or negative perceptions or opinions about the interviewer; it also may occur in response to interviewer bias. This is not always the case, as being interviewed is an invasive process and the interviewee may feel uncomfortable discussing certain topics. The researcher did not foresee any reasons for response bias in the study as the information sought was purely business-related and required no personal information from the participants (Saunders *et al.*, 2009).

5.6.2 PROVIDING EVIDENCE FOR THE QUALITY, CREDIBILITY AND RIGOUR OF THE RESEARCH

5.6.2.1 Reliability

The study attempted to achieve high reliability by making use of three data collection instruments across four primary data sources, after which the results were compared. These four data sources were location scouts, South African DMOs, South African film commissions/offices and foreign film commissions/offices.

For further reliability, the researcher incorporated secondary data analysis by analysing the websites of pre-identified local and foreign DMOs and film commissions/office. The process of verification of the data through the use of more than one data source is known as triangulation and is most commonly used in qualitative research studies (Cooper and Schindler, 2008).

5.7 RESEARCH ETHICS

The participants were required to sign an informed consent form prior to participating in the study; these forms are contained in Annexures B (p.186), D (p. 194) and F (p. 200).

Listed in the following are a few general ethical issues, as mentioned by Saunders *et al.* (2009:185-186), that may arise from any given study and how the researcher planned to overcome them:

- Participant privacy: This study required the participants to state their name and give consent, although the identities were replaced with company names when the data was being prepared for analysis.
- Voluntary participation with the right to withdraw at any given time: The informed consent forms state that participation is completely voluntary and that the participants may choose to withdraw at any stage during the interview.
- Consent and possible deception: The participants were not deceived about the nature or purpose of the study. The informed consent forms contained all the necessary information and were signed by the participants to indicate that they are aware of the nature of the research and gave consent to participate.
- Maintaining confidentiality: In cases where the participants revealed confidential information, the researcher adhered to the ethical guidelines and did not repeat this information in the study or to any third party.
- Participant reaction to data collection method: No participants were embarrassed, harmed or made uncomfortable by any of the questions in the data collection instruments.
- Behaviour of researcher: The researcher endeavoured to maintain an appropriate degree of professionalism throughout the interview and tried to make the participants feel as comfortable as possible.

In the next chapter, the results will be analysed and discussed in detail.

CHAPTER 6: RESULTS AND DISCUSSIONS

6.1 INTRODUCTION

In this chapter, the results obtained from the data collected are analysed and discussed. The results pertain to the third, fourth, fifth and sixth objectives of this study and are individually analysed and discussed under the following sections: marketing strategies used by the local South African DMOs and local and foreign film commissions/offices in attracting international film producers, what local South African DMOs and local and foreign film commissions/offices perceive as important factors in attracting international film producers, the factors influencing international film producers' selection of a location and international film producers' perceptions of South Africa as a film location in terms of these factors. Furthermore, analyses of local and foreign DMOs' and film commissions'/offices' websites were done in order to compare what South African organisations are doing, compared to what the most popular film locations' organisations, as identified earlier in this study, are doing in terms of marketing. These analyses are summarised in tables. The data gathered will ultimately contribute to the final objective of the current study: to develop a model containing guidelines related to the 7 Ps of services marketing for promoting South Africa as an ideal film location to international film producers.

6.2 MARKETING STRATEGIES USED BY THE LOCAL DMOS AND LOCAL AND FOREIGN FILM COMMISSIONS/OFFICES TO ATTRACT INTERNATIONAL FILM PRODUCERS

This section focuses on the responses provided by participants in terms of their current marketing strategies to attract international film producers. It includes an analysis and comparison of the incentives offered by the various destinations.

In order to gather information for this objective, participants were asked to explain what marketing activities or campaigns their organisation currently has in place to promote South Africa, or their destination specifically, as a desirable film location to international film producers. The response of each participating destination is discussed separately.

6.2.1 LOCAL DMOs

In this section, the activities performed by local DMOs to attract international film producers are discussed. Table 12 (p. 106) summarises the activities mentioned by the local DMOs to attract international film producers to South Africa or their areas; thereafter the results are discussed in detail.

Table 12: Marketing strategies used by local DMOs to attract international film producers

Organisation	Marketing through their website	Marketing directly to film producers	Marketing at international film events	No marketing activities
KZN DMO	They do not do this.	When they have the opportunity to meet film producers or location scouts, they present them with information on KZN and try to collaborate with the KZN film commission/office and Trade and Investment KZN to host them in KZN and show them around.	Due to budget limitations, they cannot afford to go overseas and market themselves as a film location.	"I wouldn't say we have anything specific for marketing KZN as a film destination"
Western Cape DMO	<i>Film-specific events and competitions are marketed through the website; data is posted on the website; social media is used*</i> .	"Always have a representative at film events" who can promote Cape Town directly to the producers.	"Always has a representative at [a number of] high-profile film events".	Not applicable.
Gauteng DMO	None.	None.	None.	They do not perform any marketing activities to attract international film producers to Gauteng.

**This information was gathered during the telephonic follow-up interviews.*

6.2.1.1 KZN DMO

With regards to marketing activities to attract international film producers, the representative from the KZN DMO stated the following:

“I wouldn’t say we have anything specific for marketing KZN as a film destination”.

The reasons given included budget limitations, as they cannot afford to go overseas and market themselves as a film location. Furthermore, the representative mentioned that when they have the opportunity to meet film producers or location scouts, they present them with information on KZN and try to collaborate with the KZN film commission/office and Trade and Investment KZN to host them in KZN and show them around. This shows that the KZN Tourism Authority is aware of the contribution that films can make to the influx of tourists.

The representative continued by stating the following:

“I think we still need to work in that respect, to try and make sure that we boost ourselves as well as for that type of a niche. We haven’t really exploited and focussed on it and I think it is something for our company to focus on and I think the greatest potential showed this far has been from the east, India”.

It is valuable that the KZN DMO knows that their most lucrative market is India.

6.2.1.2 Western Cape DMO

During the initial interview, the participant from Western Cape DMO (the only South African DMO to have developed any marketing strategies to date) was reluctant to divulge specifics, as their film tourism department is still very new and they have not yet finalised their marketing strategies. The participant, however, mentioned that they always have a representative at international film events in order to promote the Western Cape as a film location and to heighten the awareness of films shot in South Africa. These events include, but are in no way limited to events such as the Tribeca Film Festival, Cannes Film Festival, the Edinburgh International Film Festival, Ventura Film Festival, the Vancouver Film and TV Forum and the Vancouver International Film Festival. The representative is also tasked with meeting with various partners and stakeholders both locally and internationally in order to promote the Western Cape Region as a film location internationally.

During the telephonic follow-up interview, the participant mentioned, concerning website promotions, that all film-specific events and competitions are marketed through their website. Film-specific data collected from research conducted by them is posted on the website. They use social media to create awareness of the Western Cape as a desirable film location. On Twitter, they use a # phrase in all communications regarding South African films and, specifically, films filmed in the Western Cape.

6.2.1.3 Gauteng DMO

The Gauteng DMO stated that the organisation does not have any marketing activities specifically related to attracting international film producers or film tourists. This indicates a clear gap in their marketing strategy. Suggestions on how to address this gap will be given in the next chapter.

In the conclusion of this subsection, this information will be discussed and compared with the answers received from local and foreign film commissions/offices.

6.2.2 LOCAL FILM COMMISSIONS/OFFICES

In this section, the information provided by the respondents concerning their respective local film commission's/office's marketing activities performed to attract foreign film producers to their region is discussed.

Table 13 (p. 109) contains a summary of respondents' information concerning their respective local film commission's/office's marketing activities performed to attract foreign film producers to their region; thereafter the results are discussed in detail.

Table 13: Local film commissions'/offices' marketing activities

Organisation	Member of Association	Publishing	International exhibitions/conferences/festivals	Host film industry members
Western Cape film commission/office	Association of Film Commissions International (AFCI). Member of International Academy of Television Arts and Sciences.	<i>Variety Magazine.</i> <i>The Hollywood Reporter.</i> Newsletters to member database.	AFCI annual conference. Various film festivals.	No hosting activities mentioned.
KZN film commission/office	Not an AFCI member.	The KZN film commission/office regularly distributes press releases and reports to stakeholders, associations, politicians and the media. Internally generated material: <i>The Production Guide</i> , <i>Getting To Know Your Film Industry</i> and a DVD 'Showreel'.	AFCI annual conference. American Film Market. Various film festivals.	Through familiarisation tours, the KZN film commission/office hosts members of the international film industry.
Gauteng film commission/office	Not an AFCI member.	Various industry publications.	AFCI annual conference. Various film festivals.	No hosting activities mentioned.

6.2.2.1 Western Cape film commission/office

The Western Cape film commission/office is a member of both the AFCI and the International Academy of Television Arts and Sciences. The Western Cape film commission/office is the only South African film commission/office that is a member of AFCI. The members of AFCI meet biannually, in Europe and Los Angeles respectively, and then discuss how they are currently marketing their destinations to film producers. An annual conference is held in Los Angeles, where all AFCI members are invited to showcase and market their destinations to filmmakers and location scouts. The Western Cape film commission/office traditionally partners and sets up a stall with the NFVF, the Gauteng film commission/office and the KZN film commission/office to collectively promote South Africa, as well as the individual regions, as film locations. At this annual conference, the Western Cape, KZN and Gauteng film commissions/offices partner with the South African Consulate in Los Angeles to host a breakfast for approximately 150 representatives of the Los Angeles film community. Each film commission/office then has a chance to present their own region to those members of the film community. The CEO from CTFS also joins in and gives a short presentation on the studios and what they can offer. As a member of the International Academy of Television Arts and Sciences, the Western Cape film commission/office assist in judging the Emmy semi-finals and attend the Emmy awards evening in New York. This awards evening hosts roughly 300 film industry representatives, which creates the perfect networking opportunity for the Western Cape film commission/office to promote the Western Cape as a film location.

The Western Cape film commission/office often publish reports and updates on the Western Cape in various industry magazines, such as *Variety Magazine* and *The Hollywood Reporter* and various other industry magazines and supplements hosted throughout the world. A weekly email newsletter goes out to all their members; this newsletter contains updates on relevant film topics.

The Western Cape film commission/office recently approached South African Tourism and urged them to incorporate films into their destination marketing strategy.

6.2.2.2 KZN film commission/office

The KZN film commission/office has a very comprehensive marketing and communications plan which allows them to develop and promote the region's film and television industry. This plan consists of various activities, including print and online advertising campaigns, media releases, outbound missions and inbound missions. They understand the importance of growing the industry as it is a very lucrative industry which creates many job opportunities. In order to ensure good service delivery when international producers enquire about or arrive in KZN, the KZN film commission/office informs and educates staff, board members and the community on delivering KZN's new brand promise. The KZN film commission/office is not an AFCI member, but they attend the annual AFCI conference in Los Angeles with the Western Cape film commission/office each year. They also attend various other meetings and conventions where they promote KZN as a film location. Some of these events include, but are not limited to, the Rotterdam Film Festival, the American Film Market and the Toronto Film Festival.

The KZN film commission/office regularly distributes press releases and reports to stakeholders, associations, politicians and the media. Locally, these include advertising in *The Call Sheet*, *Screen Africa*, *KZN Review*, *Filmmakers Guide* and various local newspapers. Internationally, these include advertising in *The Hollywood Reporter*, *AFCI Locations Magazine*, *Cannes Lions Dailies*, *The Location Guide*, *Creative Handbook* and *Kemps International*. Internally, they have created marketing material such as *The Production Guide* (an A5 booklet that contains all the production information, contacts, and useful links needed when filming in Durban and surrounding areas), *Getting To Know Your Film Industry* (a booklet on the various positions and roles available within the film industry, also containing industry and production information) and a DVD 'Showreel' (a record of all the commercials made in Durban to date). These are all tools used for promoting the work of the KZN film commission/office to the relevant target markets.

The participant from the KZN film commission/office stated that the Office

“hosts influential groups and individuals, such as producers, directors, production specialists etc. on an ongoing basis, with the aim of exchanging ideas, showcasing

the country and the City of Durban as a location destination and attracting finance/funding for film projects and initiatives”.

The KZN film commission/office recognises the value of public relations management and uses public relations activities to strengthen relationships, improve communication between the film office and its target markets and to develop and maintain interest in the film office and its work. This is done through media liaisons and management, the creation of media releases and editorials, the targeted distribution of media releases to a custom-created media list, monthly newsletters and media monitoring.

6.2.2.3 Gauteng film commission/office

The Gauteng film commission/office representative was not very forthcoming about the organisation’s marketing plan to promote Gauteng or South Africa as a preferred film location to international film producers.

The Gauteng film commission/office is not an AFCI member and thus they do not receive any AFCI benefits. They do, however, attend the annual AFCI conferences with the Western Cape film commission/office. This offers them a chance to market themselves to the producers and location scouts who also attend the conference. Furthermore, the Gauteng film commission/office attends various film festivals globally where they are presented with opportunities to network and distribute promotional material. The Gauteng film commission/office occasionally advertises in a number of high profile industry publications.

From the information above, one can see that the strategies used by the Western Cape and KZN film commissions/offices do not differ significantly, although the Western Cape is a more popular film location than KZN. While there are no definite reasons for this, it may be because of the Cape Town Film Studios and the Western Cape’s natural landscape; KZN does not have a film studio yet and has a very tropical landscape; as mentioned earlier, they are in the process of building a film studio.

Similarly to the Western Cape and KZN film commissions/offices, the Gauteng film

commission/office makes sure to appear in various industry publications. Being present at annual conferences and film festivals is an activity undertaken by all the local South African film commissions. This increases international exposure and presents opportunities to make contact and network with international film producers and location scouts.

This information will be further discussed and compared with the answers received from local DMOs and foreign film commissions/offices, in the conclusion of this subsection.

6.2.3 FOREIGN FILM COMMISSIONS/OFFICES

In this section, the marketing activities performed by foreign film commissions/offices are discussed and analysed. A summary of the information is presented in Table 14 (p. 114); thereafter the results are discussed in detail.

Table 14: Foreign film commissions'/offices' marketing activities

Organisation	Member of Association	Publishing	International exhibitions/conferences/festivals	Host film industry members
Australian film commission/office	AFCI member	Annual advertising in Locations Magazine (International publication). Marketing material with the South Australian film industry brand "Endless possibilities".	AFCI annual conference.	Not mentioned.
USA film commission/office	AFCI member	Marketing in various industry publications.	AFCI annual conference. American Film Market.	Not mentioned.
Canadian film commission/office	AFCI member	Regular inclusion in industry periodicals.	Location Expo. American Film Market.	Not stated explicitly, but referred to close contact with industry leaders and on site representation in major markets.

6.2.3.1 Australian film commission/office

The Australian film commission/office is a member of AFCI and as such attends the biannual meetings and the annual conference hosted by AFCI.

Furthermore, the Australian film commission/office advertises yearly in Locations Magazine, an international publication. Internally, they have produced their own marketing material with the newly created South Australian film industry brand “Endless possibilities”, which includes flyers indicating incentives and the ‘Shades of South Australia’. Furthermore, they have published a ‘swath book’ featuring the different shades and locations of South Australia.

The representative from the Australian film commission/office stated that they rely on word of mouth from satisfied film production companies and location scouts to spread news of their incentive programmes. Furthermore, the representative considers Adelaide Studios, situated close by, a marketing tool in itself, as it encourages international film producers to consider South Australia as a location to shoot and produce films.

The Australian film commission/office is currently developing a new website dedicated to showcasing South Australian locations. The representative stated that this website will be interactive and extremely user-friendly.

6.2.3.2 USA film commission/office

The USA film commission/office is a division of their local Department of Economic Development. They are an AFCI member and as such attend the biannual meetings and the annual conference hosted by AFCI.

The Office relies on the marketing and work done by their project analysts who help location scouts and producers with various business needs, such as location data, coordination with state agencies, site and building services, community contacts and facilitation, and cost environment analysis.

The USA film commission/office has created a Sourcebook, which contains extensive information (searchable by category, crew position, company or name) on equipment rentals, the hire of experienced crew, transport, post-production facilities, sound stages, caterers and all other support services.

Furthermore, the USA film commission/office relies heavily on marketing through their own website, which contains information on tax incentives, crew available for hire, production and recording facilities, technology and support services, and interactive media developers. The website further offers links to a guide on location details and descriptions, contact details for local location experts, information on location uniqueness, flexibility and variability, and a list containing information pertaining to all the permit requirements for specific locations.

6.2.3.3 Canadian film commission/office

The Canadian film commission/office is an AFCI member and as such attends the biannual meetings and the annual conference hosted by AFCI. Regular inclusion in industry publications ensures that the film industry is constantly aware of the Canada film commission/office. Furthermore, the Commission maintains constant personal contact with industry leaders and have on-site representatives in major film markets.

The Canadian film commission/office prides themselves on delivering exceptionally good and reliable service; they constantly follow up on all enquiries and respond rapidly to industry problems and location complications with a sense of urgency as they work with producers on an on-going basis. Proactive research into upcoming productions and constant updating of location “phototeque¹” ensures that they can give timely and accurate information to potential producers and active location scouts.

As is evident from the information in this section, the foreign film commissions all follow similar marketing strategies in order to attract the attention of international film producers. The foreign film commissions/offices approached are all members of AFCI; this provides them with all the marketing and exposure benefits provided by AFCI through various

¹ “Phototeque” refers to a location guide where locations are listed and information provided.

platforms, including appearing on the AFCI website. Furthermore, the film commissions/offices ensure that they continuously publish reports and updates in various industry publications, both online and print, and they attend various film festivals, conferences and exhibitions globally.

In the conclusion of this subsection, this information will be discussed and compared with the answers received from local DMOs and local film commissions/offices.

6.2.4 CONCLUSIONS

The representatives from the Western Cape and KZN film commissions/offices stated that marketing South Africa is not an individual duty, but rather, as stated by the KZN film commissions/offices representative:

“[a] collaborative effort between other local role players such as the National Film & Video Foundation..., The Department of Trade & Industry..., and other Film Commissions, in conjunction with [our]...O[ffice]”.

The representative from the Western Cape film commission/office further stated that they have approached South African Tourism and urged them to work with the film commissions to encourage film producers to film on location in South Africa. The representative for the KZN DMO acknowledged the need for them as a DMO to work with their regional film commission/office to attract international film producers to South Africa, even though they are not currently doing so.

The Western Cape film commission/office is the only South African film commission/office that is a member of AFCI, although the Gauteng and KZN film commissions/offices advertise with the Western Cape film commission/office at the annual conventions and conferences. AFCI members receive numerous marketing benefits, especially through the AFCI website, where a global map (Location Inquiry Tool) plots all the AFCI members and provides their contact and website details (AFCI, 2013).

Regular publishing in industry magazines seems to be a favourite advertising strategy,

used by all the local and foreign film commissions/offices. Attending industry conferences and exhibitions is also a firm favourite among both local and foreign film commissions/offices, as many industry players and international film producers and location scouts attend these shows. These conferences and exhibitions are considered good networking opportunities for film commissions/offices as they have the opportunity to introduce producers and scouts to their destination.

The representative from the Western Cape film commission/office stated that they are exploring options on how to convince international producers to feature the Western Cape film commission/office in the credits of films that were filmed and/or produced in the Western Cape. The Georgia Department of Economic Development offers film producers an extra 10% tax credits when featuring “an imbedded...promotional logo in the qualified feature film”.

It appears that South African DMOs are not fully invested in the promotion of the local film industry (with the exception of the Western Cape DMO who recently introduced a “film tourism” marketing strategy), but the participants agree that film is becoming a very attractive and necessary market to focus on. The Western Cape DMO’s strategy involves attracting international film producers to the Western Cape. Furthermore, there appears to be a lack of working relationships between South Africa’s local DMOs and film commissions/office.

6.3 WHAT LOCAL DMOs AND LOCAL AND FOREIGN FILM COMMISSIONS/OFFICES PERCEIVE AS IMPORTANT FACTORS IN ATTRACTING INTERNATIONAL FILM PRODUCERS

To gather information for this objective, participants were asked to indicate what they, as the representative of a DMO or film commission/office, thought to be important location-specific factors for international film producers when considering a location for a film. This is a perception question; in the next section, location scouts’ responses to a similar question is discussed and the responses from this section and the next are compared in order to establish if local DMOs and local and foreign film commissions’/offices’

perceptions are in line with the actual factors influencing international film producers' selection of a location, as identified by location scouts.

In the rest of this section, the results obtained are discussed and the most important factors identified.

6.3.1 LOCAL DMOs

In this section, the factors perceived as important when attempting to attract foreign film producers to a location, as mentioned by local DMOs, are discussed.

Table 15 (p. 120) provides a summary of the factors perceived as important when attempting to attract foreign film producers to a location, as mentioned by local DMOs; thereafter the results are discussed in detail.

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Table 15: What local DMOs perceive as important factors to attract international film producers

Organisa-tion	Diverse	Unique	Exchange rates	Film industry infrastructure, quality and costs	Service industry infrastructure, cost and quality	Tax incentives	Accessible	Film cast and crews available	Weather
KZN DMO	<i>KZN is diverse*.</i>	<i>Unique locations might draw inter-national film producers*.</i>	<i>If favourable to inter-national film producer*.</i>	<i>Agreed it is important and the responsibility of the film industry*.</i>	<i>Agreed it is important*.</i>	<i>Can save international film producers money*.</i>	<i>Will have an effect*.</i>	Actors for minor roles in films.	KZN has pleasant weather, which is ideal.
Western Cape DMO	To find locations that look like other locations.	<i>If a unique location is required for a film, a producer will go to that location*.</i>	South Africa does better with a weaker rand value.	The availability of film studios. Low permit costs.	Offering world class services. Assured visas for cast and crew.	Rebates offered by local government.	<i>If it is easy to obtain visas and working permits for staff*.</i>	<i>Very important, Cape Town especially has high quality crews*.</i>	Nice weather.
Gauteng DMO	<i>Johan-nesburg can represent a number of foreign cities and has diverse cultures.</i>	<i>Important if a specific location is required in a film*.</i>	Exchange rate must be in favour of the film producer.	The availability of local film commissions and film support services.	<i>Does not believe it will greatly impact a decision*.</i>	Must offer good incentives and tax breaks.	<i>Important, especially if it adds to costs*.</i>	<i>Not very important as inter-national film producers can bring their own casts and crews along to a location*.</i>	Pleasant weather will encourage film producer to use a location.

**This information was gathered during the telephonic follow-up interviews.*

6.3.1.1 KZN DMO

The representative from the KZN DMO points out that KZN has very pleasant and year-round warm weather, which must be capitalised upon when attempting to attract international film producers. Furthermore, the representative stated that talented actors who can be cast for smaller roles in films could be considered a factor. Based on the initial information received from the representative of the KZN DMO, the DMO seems to lack knowledge on the film industry and what international film producers are looking for in a location. When considering their lack of a marketing strategy for attracting film producers and film tourists, this is understandable. The representative does, however, acknowledge that it is important for South Africa to be recognised as a preferred film location, as it will inevitably create invaluable exposure to potential tourists. The representative further acknowledges that this is not an activity for them to undertake alone, but that can only be achieved through a working relationship with the KZN film commission/office.

During the telephonic follow-up interview, the participant agreed that diversity, uniqueness, exchange rates, film industry infrastructure, quality and costs, service industry infrastructure, cost and quality, tax incentives and accessibility are important to attract international film producers. The participant stated that while KZN is unique in its landscapes, it is a very tropical region and can be used in films that require a jungle backdrop; the city of Durban also lends itself to represent various other coastal cities. With regards to uniqueness, the participant mentioned that KZN is very unique in its landscapes, infrastructure and culture; if a movie was to call for a scene in KZN or Durban specifically, it would be difficult to shoot elsewhere. The participant agreed that exchange rates favourable to the international film producer might tempt them to use a specific location, instead of a location where the exchange rate is less favourable to them. Furthermore, the participant acknowledged that film, service industry infrastructure, quality and cost might influence an international film producer's decision when selecting locations. It is important for destination managers to ensure the service industry is up to standard, and for the local film industry to ensure the film industry operates effectively; this includes having talented film cast and crew teams available. The participant stated that tax incentives could be a major drawing point for international film producers, as it saves them a lot of money. Lastly, the participant believes that

accessibility, in terms of distance and legal issues (such as visa requirements), might affect international film producers' location selection, unless that location is unique and needed for the film.

6.3.1.2 Western Cape DMO

The representative from the Western Cape DMO stated that South Africa is a more popular film location when the rand is weaker and this suggests that film producers are more interested in a location when the exchange rates are favourable to them. The participant mentioned that weather, the diversity of a location and the tax rebates offered by the local government plays a big role in influencing producers' selection of a location. If a unique location is required for a film, the participant believes a producer will travel to that specific location; this relates to uniqueness. Furthermore, this participant stated safety as a factor to be considered when choosing a film location.

During the follow-up interview, the participant agreed to the importance of world class service, which includes the timely procurement of visas for all cast and crew members; the participant mentioned that in South Africa, it is possible to obtain visas for film crew in as little as 72 hours. The availability of film studios, low permitting costs and fast permit processing were mentioned under film industry services as factors that influence international producers' location selection. The participant agreed that easily accessible locations are more likely to draw international film producers; the respondent relates short turnaround times on visas and working permits to this factor.

6.3.1.3 Gauteng DMO

Initially, the participant from the Gauteng DMO mentioned exchange rates, film industry infrastructure, quality and costs, incentives and tax breaks, and pleasant weather as factors that might influence international film producers' selection of a location.

The participant stated that if South Africa's exchange rate is in favour of the film producer, it will be better value for money for international producers to shoot a film in South Africa, as everything is cheaper. The availability of local film commissions and film support

services was mentioned as a major selling point to international film producers, as they need a good support structure when filming in another country. With regards to the availability of film casts and crew, the participant does not deem that very important, as international film producers might prefer to take their own crews and casts along when filming at a foreign location. The host location's government must offer good incentives and tax breaks as these make it viable for the producers to travel further. Lastly, pleasant weather, especially as in Gauteng, was mentioned as a factor that might encourage film producers to use a specific film location.

In the telephonic follow-up interview, the participant agreed that diversity, uniqueness and accessibility were important factors to attract international film producers. The participant stated that Johannesburg can represent a number of foreign cities and that South Africa in general is very diverse in its natural and cultural landscapes; the participant believes that a diverse location might attract international film producers to a location. The participant also believes that if a location is unique and a script calls for a specific location, international film producers might be more inclined to visit a particular location. The participant stated that accessibility of a location could affect international film producers' desire to use a specific location, as distant locations such as South Africa are considered long-haul and it could cost them a lot of money to travel here. The participant further stated that, even though he/she does not believe the service industry's infrastructure, cost and quality might attract producers to any destination, it might ultimately affect their decision, as producers' preferences in terms of service infrastructure, quality and cost vary.

From Table 15 (p. 120) it appears that the KZN DMO lacks an understanding of the factors identified in Table 10 (p. 90) that attract international film producers to a location; the representatives from the Western Cape and Gauteng DMOs appear to have a better understanding of what it is international film producers are looking for when selecting a location. Considering the initial data collected, there appears to be a clear gap in local DMOs' understanding of the film industry.

6.3.2 LOCAL FILM COMMISSIONS/OFFICES

Table 16 (p. 125) provides a summary of the factors perceived as important when attempting to attract foreign film producers to a location, as mentioned by local film commissions/offices; thereafter the results are discussed in detail. It appears that, compared with the local film commissions, local DMOs have a very limited perception on the factors that influence international film producers' selection of a location.

Table 16: What local film commissions/offices perceive as important factors to attract international film producers

Film commission / office	Diverse	Unique	Exchange rates	Film industry infrastructure, quality and costs	Service industry infrastructure, cost and quality	Tax incentives	Accessible	Film cast and crews available	Weather
Western Cape film commission/ office	<i>Cape Town can be used to represent other cities; around Cape Town there are many diverse landscapes *</i>	<i>Table Mountain is very unique*</i>	The exchange rate must be beneficial to the foreign producer	<i>Very important*</i>	Must offer good hospitality services, while still being reasonably priced	Offer tax incentives	Locations easily reachable	<i>Links with film industry infrastructure, quality and costs*</i>	<i>Producers can use a location that looks the same but has better weather*</i>
KZN film commission/ office	Diverse locations	<i>If a specific location has to be used, the producer will go there*</i>	<i>If the location's aesthetics are a match*</i>	Availability of studios	Cost of local services Local government support	Financial incentives	Proximity of locations	Availability of competent crew	Suitable weather patterns
Gauteng film commission/ office	Diversity	<i>If a specific landmark is required, yes*</i>	If the rand is weak, it is cheaper for international film producers to film in South Africa	Availability of studios and film industry organisations	Additional hospitality services offered and cost thereof	Financial incentives offered by government	How far out the locations is	<i>Easier and cheaper to hire local extras casts and crew teams</i>	<i>Might dissuade film producer from using a location</i>

* This information was gathered during the telephonic follow-up interviews.

6.3.2.1 Western Cape film commission/office

The representative from the Western Cape film commission/office stated that if the exchange rate favours the international producer, the producer might be more inclined to visit a location, as it will be cheaper. Furthermore, the representative indicated tax incentives as very important in attracting international film producers and it will benefit the location more if the incentive is based on the condition that the international producer partners with a local production company. Good quality accommodation and food services at a reasonable price were also considered important factors. Furthermore, it is important for the various locations being utilised to be close to one another and easily reachable from said accommodation establishments. The accommodation establishments in itself must also be close to basic services and civilisation.

During the telephonic follow-up interview, the participant agreed that diversity and uniqueness of a location; film industry infrastructure, quality and costs; film cast and crews available; and weather at a location may have an effect on international film producers' selection of a location. The participant was very adamant that Cape Town itself is very diverse, but also unique: Table Mountain is very unique, but the rest of the city can be filmed in such a way as to represent many other cities. Furthermore, within 2 hours' drive from Cape Town, one finds very diverse landscapes which could represent a long list of other locations, but if a film calls for a scene that involves Table Mountain, the film producer would have to travel to Cape Town. The participant mentioned that film industry infrastructure, quality and costs are all drawing factors for international film producers, as they need the support of the local film industry when producing a film in a foreign country. Cape Town is sufficiently geared up in terms of this, especially with the CTFS and the support that the Western Cape film commission/office themselves offer international film producers. The participant mentioned that the quality of the film industry in Cape Town is exceptional and the prices are very reasonable. The participant further mentioned that in order for the film industry to function efficiently, there needs to be a base of competent crews and casts available for hire by local and international film producers. Lastly, the participant agreed that weather might potentially influence the location selection decision, especially if the location required can be substituted with a location where the weather is more favourable.

6.3.2.2 KZN film commission/office

The KZN film commission/office representative listed diverse locations, proximity of locations (accessibility), suitable weather, cost of local services, availability of competent English-speaking crew, financial incentives and the availability of film services as factors that influence international film producers' decisions to use specific locations. Furthermore, the representative mentioned political buy-in and local government support as additional factors. Under local government support, the representative specifically refers to permit offices, which is why this factor was listed under 'service industry infrastructure, cost and quality'. Granting permits is a service offered to producers and location scouts, and the representative believes it is important that this service is delivered swiftly and without complications.

During the telephonic follow-up interview, the participant stated that it is possible for exchange rates to influence the location selection of international film producers, but only if the location meets the aesthetic requirements. Lastly, the participant agreed that uniqueness will definitely contribute to the location selection decision, because if a script calls for a certain location, the international film producer will travel to the location at all costs, "unless the location can be reconstructed in a studio".

6.3.2.3 Gauteng film commission/office

The representative from the Gauteng film commission/office mentioned the diversity of a destination as a factor that influences international film producers' decisions to use specific locations. The representative specifically referred to the number of locations at the destination that can be used for various scenes in the film being shot. Furthermore, the representative stated that in order to stay competitive, local governments must provide incentives to international film producers and even though a weak exchange rate is not beneficial to locals, it might encourage international film producers to choose a location as it saves money on production costs. With regards to the film industry infrastructure, quality and costs, the representative mentioned that studios with the latest technology and knowledgeable local production companies might encourage international film producers to choose a certain destination. The representative also mentioned the importance of the

availability of high quality hospitality services, such as accommodation, food services and transport services at reasonable prices. The accessibility of the location, specifically the distance from major cities, was mentioned by the representative as a factor that might influence international film producers' selection of a location.

During the telephonic follow-up interview, the participant indicated that uniqueness, the availability of film cast and crews and the weather could possibly affect international producers' selection of a location. The participant, using Paris as an example, stated that if a specific location or landmark, such as the Eiffel Tower is essential to the film, international film producers will be more inclined to spend money reaching this location. Furthermore, the participant indicated that weather might have the ability to dissuade international film producers from using a certain location, especially if the weather is not favourable and will make filming difficult. Lastly, the participant indicated that while the availability of film casts and crews might not necessarily attract international film tourists, it might possibly influence their location selection decision if the non-availability of casts and crews means having to spend money on flying their own crews to the location. It is cheaper to hire local extras and crews, provided they are experienced and knowledgeable.

It appears that, compared with local DMOs, the local film commissions have a better understanding of the factors that influence international film producers' selection of a location, as identified in Table 10 (p. 90).

6.3.3 FOREIGN FILM COMMISSIONS/OFFICES

Table 17 (p. 129) lists the factors perceived as important when attempting to attract foreign film producers to a location, as mentioned by foreign film commissions/offices; thereafter the results are discussed in detail.

Table 17: What foreign film commissions/offices perceive as important factors to attract international film producers

Film commission/ office	Diverse	Unique	Exchange rates	Film industry infrastructure, quality and costs	Service industry infrastructure, cost and quality	Tax incentives	Accessible	Film cast and crews available	Weather
Australian film commission/ office	The degree to which a destination can be used to represent various locations.	The degree to which it is original and different.	Not mentioned .	Film-friendly industry and cooperative government departments.	Not mentioned.	Support of the state.	Proximity from city or nearest township.	Not mentioned .	Not mentioned.
USA film commission/ office	Locations that can double as alternative locations.	Must have unique locations or backdrops.	Not mentioned .	Production facilities.	Not mentioned.	Tax incentives offered by the government .	Not mentioned.	Availability of crews for hire.	Not mentioned.
Canadian film commission/ office	Diverse locations that can double as other locations.	Unique locations offer a special look.	Not mentioned .	Film studios attract producers. Film equipment suppliers are important. The availability of post-production facilities.	Affordable housing.	Tax credits offered by the government .	Not mentioned.	Not mentioned .	Not mentioned.

6.3.3.1 Australian film commission/office

The representative from the Australian film commission/office listed uniqueness, versatility, a film-friendly atmosphere, state support and distance from nearest city or township as important factors to consider when marketing a location to international film producers.

A destination can gain popularity when it has very unique and difficult-to-duplicate locations, as well as versatile locations that can easily be used to represent another location. Even though these two factors are contradictory, they complement each other. The film-friendly atmosphere refers to how accommodating the government and other film bodies are in allowing film producers to effectively shoot a film at a specific location; this includes the ease of acquiring permits. Incentives offered by local governments play a significant role in attracting foreign productions. The last factor mentioned by the representative from the Australian film commission/office refers to the distance between locations and cities or townships where basic services are available. It is important to note that the township the representative referred to is quite different from South African townships, which international producers are not advised to enter.

6.3.3.2 USA film commission/office

The representative from the USA film commission/office listed tax incentives, flexibility/diversity, production facilities and availability of crew for hire as important factors when attempting to attract foreign film producers to a location. Under flexibility/diversity, the representative also mentioned uniqueness as an important factor. The participant indicated that tax incentives have great potential to attract international film producers to a given location; this is especially true if the location is very diverse and can be used to represent a number of other locations called for in the script. Furthermore, the participant stated that it is very important for a potential location to have the necessary support and production facilities (such as film studios) available for use by visiting film producers; competent crews and talented casts are also necessary to provide support.

6.3.3.3 Canadian film commission/office

The representative from the Canadian film commission/office stated the following:

“Having a good crew base, purpose built Studios, experienced equipment suppliers, a wide variety of Post-production facilities, highly competitive tax credits and a film friendly Film Commission counts for a lot when being considered as a potential base for a foreign film production”.

Furthermore, the representative explained that the more diverse the locations at a destination are, the more a producer will be able to save on travelling costs, as the producer will be able to shoot most or all of a film at the one destination, even though it calls for various different backgrounds or settings. Uniqueness was also mentioned as it offers something special to film producers. The representative suggested constantly researching and updating the destination’s location phototeque, as that makes the locations easily accessible and viewable to location scouts and producers and it shows that a destination is film-friendly.

The representative mentioned that the presence of film studios are “invaluable in attracting out of town producers”, but suggests that if there are no film studios, a well-researched list of large warehouses is also valuable. Complementing these studios are suppliers of film equipment, as it is generally more expensive to transport film equipment to a location than it is to hire equipment at the location where the film is being shot. It is important that this equipment is competitively priced and that there are a few suppliers available to choose from. Post-production facilities encourage film producers to remain at the destination to complete post-production activities, especially if the producer is incentivised with tax credits for completing these activities at the destination. The representative from the Canadian film commission/office stated that government tax credits play a big role in attracting foreign film producers, as it makes it worthwhile for the producer to travel outside their home territory to shoot a film. Not asking a fee for film permits makes a location more attractive to film producers, although this is not always a feasible option.

The representative mentioned that affordable housing for cast and crew and a reasonable cost of living encourage producers to choose certain locations above more expensive ones.

Looking at the tables in this chapter, there appears to be some discrepancies between the perceptions of local DMOs, local film commissions/offices and foreign film commissions/offices about the factors important to attract international film producers. All the foreign film commissions/offices interviewed agreed that location diversity and uniqueness, the state of the local film industry and infrastructure and the availability of tax incentives play a significant role in the final decision when producers select destinations for shooting films.

6.3.4 CONCLUSIONS

It appears that the KZN DMO is not fully aware of the factors that attract international film producers to a location; the representatives from the Western Cape DMO, the Gauteng DMO and the Gauteng film commission/office appear to have a better understanding of what it is international film producers are looking for when selecting a location.

From the results it is evident that local DMOs and local and foreign film commissions/offices agree that tax incentives offered by the local government is the most important factor that international film producers consider when selecting a location for shooting a film, as they were mentioned frequently. This is followed by the diversity of the location and its film industry infrastructure, quality and costs. Thereafter they listed service industry infrastructure, cost and quality; accessibility of the location; and the availability of film casts and crews.

The rest of the factors, namely exchange rates and weather were only mentioned by a few respondents, thus it can be concluded that they are not perceived by local DMOs and local and foreign film commissions/offices to be of great importance to international film producers when selecting a destination. Exchange rates were mentioned by the local DMOs and film commissions/offices only; this might be due to the fact that with the current global economy and South Africa's dimly low exchange rate, the local DMOs and film commissions/offices believe that South Africa might appear more attractive as a film location to international film producers. Similarly, weather was only listed as a factor by local participants. As South Africa has some of the best weather in the world, local

stakeholders might believe they can capitalise on this factor and attract international film producers.

Uniqueness was mentioned by some of the local respondents and all of the foreign film commissions/offices. As these foreign respondents represent film commissions/offices from some of the most popular film locations globally, it can be considered an important perceived factor in attracting international film producers.

During the telephonic follow-up interviews, the respondents were asked to express their opinions about the factors they did not mention in the initial interviews. Once these factors were mentioned to the participants, they agreed that they think those factors were also important in the location selection process of international film producers.

In the next section, the factors that in reality influence international film producers' selection of a location are analysed and discussed.

6.4 THE FACTORS INFLUENCING INTERNATIONAL FILM PRODUCERS' SELECTION OF A LOCATION

Participants were asked to answer the following question: "What factors, as observed by you as a location scout, influence film producers' decision when selecting locations for a prospective film?". This question, which is similar to the question that was posed to local DMOs and local and foreign film commissions/offices, was posed to location scouts as they often deal with film producers and know what these producers are really looking for in terms of location.

The participants listed diversity and accessibility as the most important factors influencing international producers' selection of a location; none of the participants in this section mentioned the uniqueness of a location. A few participants mentioned that the location has to fit in with what is required of the location as stated in the script. If this includes a unique setting, producers will go to the location where that setting can be found, regardless of the cost or distance. If a city's architecture is very diverse, scenes reflecting various cities across the globe might be shot in that one city.

The other important factors, as listed by die participants, are film industry infrastructure, quality and cost, service industry infrastructure, cost and quality, and tax incentives offered by the local government.

One participant was of the opinion that “[t]here are no influences that would determine the location used outside of the creative decision” which are “based on the needs of the film”. However, this respondent went on to list diversity of the location and weather as needs of the film.

Thus, the factors stated as most important in affecting international film producers’ selection of a location are as follows:

- Diversity of a location
- Film industry infrastructure, quality and costs
- Service industry infrastructure, cost and quality
- Tax incentives offered by the local government
- Accessibility of the location

These factors are mostly the same, albeit more limited, than the perceived factors listed by the local DMOs and local and foreign film commissions/offices in the previous section.

Table 18 (p. 134) provides a summary and a comparison of the factors listed by the local DMOs, local and foreign film commissions/offices and location scouts.

Table 18: Difference between perceived factors and actual factors influencing international film producers’ selection of a location

Local DMOs and local and foreign film commissions’/offices’ perceptions	Actual factors as provided by location scouts
Diversity of a location	Diversity of a location
Unique locations at a destination	
Film industry infrastructure, quality and costs	Film industry infrastructure, quality and costs
Service industry infrastructure, cost and quality	Service industry infrastructure, cost and quality
Tax incentives offered by the local government	Tax incentives offered by the local government
Accessibility of the location	Accessibility of the location
Film casts and crews available	

It is interesting to note that ‘uniqueness’ was only mentioned by foreign film commissions/offices, but not by any of the local DMOs, local film commissions/offices or location scout participants as a factor influencing international film producers’ selection of a location. This might, however, fall under the comments about the location fitting in with the creative needs of the film. If the script calls for a location that is unique and only found at one destination, the producers will use that location to shoot the film or specific scene, for instance the Statue of Liberty, which can only be found in New York, or the Eiffel Tower, which is in Paris. It appears that the availability of film crews and casts are not deemed important by location scouts, although it was mentioned by a local DMO, a local film commission and a foreign film commission.

From the analysis in this section, it appears that local DMOs and local and foreign film commissions/offices have a very limited idea of the factors influencing international film producers’ location selection decision, though foreign film commissions/offices have a better understanding than the local DMOs and film commissions/offices. Table 16 (p. 125), however, indicates that in general, these parties combined do, in fact, have an idea of the influencing factors.

6.5 INTERNATIONAL FILM PRODUCERS’ PERCEPTIONS OF SOUTH AFRICA AS A FILM LOCATION

The local DMOs and all the location scouts who participated in this study were asked to answer the following two questions respectively: (i) “As the representative of a local DMO, how do you experience international film producers’ interest in South Africa, or your region specifically, as a film location?”, and (ii) “How do international film producers perceive South Africa as a film location?”.

A local location scout respondent stated the following:

“There are many occasions that I have heard foreign producers heaping praise o[n] SA for its professional crews and effective infrastructure”.

The participant from the Western Cape DMO stated that South Africa is generally

perceived as a good location for shooting a film, as it is considered film-friendly, it has a favourable exchange rate, the weather is nice and the rebates are quite good. More specifically, Cape Town is considered safer than the rest of South Africa and the city is willing to accommodate film makers and easily grant them filming permits.

The consensus among the respondents is that South Africa is generally perceived as a very interesting and film-friendly location, especially Cape Town. A number of the respondents indicated that the good weather, incentives and diverse locations make South Africa a destination that has the ability to become a very popular film destination. It was mentioned that the favourable permit and permission procedures have earned South Africa a favourable reputation among international film producers. International film producers have recognised the potential that Cape Town and Johannesburg offer in terms of being used to represent other famous cities globally. South Africa is known to have talented and capable film crews, up-to-date equipment, good local film production companies, diverse population groups and pleasant, predictable weather patterns.

Not all of the responses were positive, with a foreign participant stating the following:

“Personally I would be more inclined to invest production funds in the country if it had ensured both black and white citizens benefitted equally from the new wealth generated since the end of apartheid. I visited the country last year and was shocked at the massive divide that still exists. I didn't visit during the apartheid regime but I imagine little has changed”.

Another foreign participant stated that

“South Africa still has that reputation, particularly Joburg, of violence and [being] an unsafe place”.

A local location scout stated:

“I do not see a rush of international film producers coming to South Africa despite our mass of talents and world class services”.

This particular respondent did not believe that international film producers are completely aware of all the amazing services and locations South Africa has to offer.

Another one of the local location scouts criticised the permit offices for not being effective and claimed that this is having a negative effect on the industry, even though other respondents were quite happy with the permit procedures in South Africa. Furthermore, a different local location scout mentioned that South Africa's cast rates are expensive and that this needs to be addressed in order to be more competitive internationally.

Table 19 (p. 137) highlights the differences in experienced interest in and perception of South Africa as a film location, as mentioned by location scouts and local DMOs. Local and foreign location scouts' responses are listed separately in order to highlight the differences.

Table 19: Interest in and perceptions of South Africa as a film location

Responses	Interest in South Africa as a film location	The perception of South Africa as a film location
Local DMOs (positive responses)	Perceived as a good location for films.	<ul style="list-style-type: none"> • Favourable exchange rate • Pleasant weather • Offers good rebates
Local DMOs (negative responses)	<i>"I do not see a rush of international film producers coming to South Africa despite our mass of talents and world class services".</i>	<ul style="list-style-type: none"> • <i>South Africa is not well-known</i>
Local location scouts (positive responses)	Perceived to be on the rise.	<ul style="list-style-type: none"> • Professional crews • Effective infrastructure • Effective permit procedures • Favourable weather • Diverse location • Good incentives
Local location scouts (negative responses)	<i>None.</i>	<ul style="list-style-type: none"> • <i>Expensive cast rates</i> • <i>Ineffective permit procedures</i>
Foreign location scouts (positive responses)	South Africa is a diverse location.	<ul style="list-style-type: none"> • Interesting location • Film-friendly location • Effective permit procedures • Favourable reputation among international film producers • Favourable weather • Diverse location • Diverse population groups • Up-to-date equipment • Good local film production companies
Foreign location scouts (negative responses)	<i>None.</i>	<ul style="list-style-type: none"> • <i>Violent and unsafe place</i> • <i>Lingering negativity about apartheid and its effect on the country/people</i>

As indicated in Table 19 (p. 137), the positives outweigh the negatives and it can be concluded that interest in and the perception of South Africa as a film location is mostly favourable, both locally and internationally. Foreign location scouts specifically indicate, in general, a very favourable perception of South Africa as a film location.

In the next section, website analyses of South African and the most popular foreign film locations' DMOs and film commissions/offices are done and a comparison is made; the comparison aims to establish how South Africa's website marketing compares to the most popular film locations' website marketing.

6.6 WEBSITES ANALYSES

This section contains the website analyses of a number of local and international DMOs and film commissions/offices.

6.6.1 DMO WEBSITES

The DMO websites were analysed to determine whether they provide information to both the film production industry and potential film tourists.

Table 20 (p. 139) shows whether or not the local and foreign DMO websites offer information on their destination as a film location to international film producers and holiday destination to film tourists.

Table 20: Film information available on local and foreign DMOs' websites

DMO	The website offers information to international film producers	Information offered to international film producers	The website offers information to film tourists	Information offered to film tourists
KZN Tourism Authority	No	No information to be found on the film industry in KZN. No photo or video gallery showcasing what KZN has to offer.	No	No information on film tourism or movie maps of locations where films have been shot.
Wesgro	Yes	Names the film studio, industry associates, incentives offered and useful links to film commissions and other industry players.	No	No information on film tourism or movie maps of locations where films have been shot.
Gauteng Tourism Authority	No	No information to be found on the film industry in Gauteng.	Yes	List of major films shot in Gauteng.
South African Tourism	No	No information to be found on the film industry in South Africa.	No	No information on film tourism or movie maps of locations where films have been shot.
Tourism Australia	No	No information to be found on the film industry in Australia.	No	No information on film tourism or movie maps of locations where films have been shot. Mentions film festivals in Australia.
Canadian Tourism Commission	No	No information to be found on the film industry in Canada.	No	No information on film tourism or movie maps of locations where films have been shot.
Tourism New Zealand	No	No information to be found on the film industry in New Zealand.	Yes	100% Middle-earth, 100% New Zealand. List of locations from The Hobbit.
Visit Britain	No	No information to be found on the film industry in UK.	Yes	Website marketing highlights from the UK film industry, including "Live like James Bond", "Film locations UK" and "Experience the Pride and Prejudice lifestyle" marketing campaigns.

Sources: Canadian Tourism Commission (2013); Gauteng Tourism Authority (2013); KZN Tourism Authority (2013); South African Tourism (2013); Tourism Australia (2013); Tourism New Zealand (2013); Visit Britain (2013); Wesgro South Africa (2013).

It appears that Wesgro is the only DMO analysed currently providing specific film industry information to international film producers, listing information on incentives offered, film studios available and offering links to industry associates and players, as well as film commissions (Cape Town Tourism, 2013).

Tourism New Zealand and Visit Britain are the only DMOs analysed who really capitalise on the number of film tourists their film industry can attract; this is evident on their websites. On the Visit Britain website, under “Culture”, one finds links to information on their “Live like James Bond”, “Film locations UK” and “Experience the Pride and Prejudice lifestyle” marketing campaigns. These information pages inform potential tourists about the locations used in each of these movies and suggests activities specific to the respective films. Under the “Film locations UK”, all the movies that have been shot in the UK are listed there, as well as the locations used (Visit Britain, 2013). Tourism New Zealand is currently running a 100% Middle-earth, 100% New Zealand campaign, based on The Hobbit film series that is being filmed in the country. This campaign, which has done wonders for the New Zealand tourism industry, can be found under the “Sector Marketing” tab on their official tourism website. Under the “Things to do” tab, there is a page named “Home of Middle-earth”, with information tailored specifically for film tourists, including a list of the locations where scenes were shot. Tourism New Zealand is capitalising on the money to be made from film tourism and is using every marketing strategy they can think of to make potential tourists aware of the fact that The Lord of the Rings and The Hobbit trilogies were/are currently being shot in New Zealand and that they have tours specifically tailored for film tourists. The “Discover Middle-earth” section on the website is very interactive and user-friendly (Tourism New Zealand, 2013). On the Gauteng Tourism Authority website, there is a list naming all the major films that have been shot in the Gauteng province.

The evidence suggests that the majority of the DMO websites analysed are seriously lacking when it comes to providing information to international film producers, as well as potential film tourists. Only Tourism New Zealand and Visit Britain are taking advantage of the opportunities provided by their film industry and tailoring advertising campaigns specifically aimed at attracting film tourists.

6.6.2 FILM COMMISSIONS' OFFICES' WEBSITES

Table 21 (p. 142) lists the information available on local and foreign film commissions' offices' websites respectively. The criteria on which the analyses were based were derived from the factors identified earlier as influencing international film producers' selection of a location (Table 18, p. 134), as this information should be freely available on the respective websites.

Table 21: Film information available on local and foreign film commissions/offices websites

Film Commission/ office	Information incentives offered by local government	Information on crews and casts available for hire	Information on production, recording and post-production facilities	Locations' details and description guide (offering information on uniqueness and flexibility)	Permit information	Local film industry contact details	List of movies filmed at destination	Information on film policy at destination
Cape Film Commission	Mentions incentives and provides links to government websites where information can be found.	Mentions casts and crews available, but offers no contact information.	Does not mention any of this.	Very well-organised gallery. Link to their other website, a comprehensive location guide.	A guide to film permits in the Western Cape.	No industry contact information available.	No films shot in the Western Cape mentioned.	No information on local film policies.
Durban Film Office	Links to industry organisations , but no mention of tax incentives.	Available under the directory.	Available under the directory.	No gallery featuring the best locations in Durban/KZN.	Provides downloadable application forms.	Available under the directory.	Complete "Filmo-graphy".	Full policy overview.
Gauteng Film Commission	Mentions incentives and provides links to government websites where information can be found.	The website has a "casting and crew" directory.	Directory contains numbers of all film industry members in Gauteng.	Very well-organised gallery.	Universal electronic permit application form for all locations available on website.	Full directory.	Complete with director and main actors'/ actresses' names.	Document entitled "Guidelines for Location Filming in Gauteng".
South Australian Film Corporation	Information on the various incentives	Complete crew and services directory.	Information on local film studio.	Very well-organised gallery providing	No information on permits available.	Complete directory on support services.	Organised gallery of films shot in Australia.	No local film policy information available.

Film Commission/ office	Information incentives offered by local government	Information on crews and casts available for hire	Information on production, recording and post-production facilities	Locations' details and description guide (offering information on uniqueness and flexibility)	Permit information	Local film industry contact details	List of movies filmed at destination	Information on film policy at destination
	offered by government departments.			detailed information on all locations.				
Montréal Film and TV Commission	Brief information on incentives and tax credits offered by government.	No crew and cast information available.	Information on film industry support services and Montréal as a production leader.	Very well-organised gallery.	Permit application forms.	No industry contact information available.	Complete list of films shot in Montréal.	Limited information on film policy and regulations.
Film New Zealand	Brief information on incentives and tax credits offered by government.	Available under the directory.	Information on film industry support services.	Very well-organised gallery.	Ample information on permit requirements.	Complete directory on support services.	Complete list of films shot in New Zealand.	Scattered information on local film policy and regulations.
British Film Commission	A complete page offering all the information concerning incentives and tax reliefs.	Offers links to three UK production directories where crews can be found.	Provides a list of studios, with links to their personal websites.	No gallery featuring locations, refers visitors to location managers and location libraries.	Provides information on acquiring permissions.	A complete list with links to industry players' websites.	Complete list of films shot in the UK.	Limited information on film policy and regulations.

Source: British Film Commission (2013); Cape Film Commission (2013); Durban Film Office (2013); Film New Zealand (2013); Gauteng Film Commission (2013); Montréal Film and TV Commission (2013); South Australian Film Corporation (2013).

The Cape Film Commission offers limited information to film producers considering the Western Cape as a film location. The location directory is very well-organised, albeit lacking detailed information on the specific locations. There is, however, a link to their other website, Locations Cape Town, where comprehensive location information can be found. There is no information on the local film policy and no mention is made of the studios, producers and other film industry members on the website; the contact details of these role players are also not provided. The website offers a downloadable guide to permit information in the region and mentions incentives offered by the government (Cape Film Commission, 2013).

The Durban Film Office website does not offer as much information as the Cape Film Commission's website. The website does not mention any incentives offered by local government departments, merely links to these departments' websites. There is no location directory with photos and information on locations in KZN. The directory contains information on and contact details for local crews, production, recording and post-production facilities and contact numbers for other service industry providers. The website provides a complete overview of the local film policy, regulations and legislation. The website also provides downloadable permit application forms (Durban Film Office, 2013).

The Gauteng Film Commission website offers all the information an international film producer needs in order to decide if Gauteng will suit his location needs. The location directory is very well-organised, although lacking in detailed information on the specific locations. The film industry directory is very well-organised and contains rich information on all the film industry players and support service providers in Gauteng. Incentives are mentioned on the website, but no specifics are communicated; there are merely links to the websites of the various organisations and government departments offering these incentives. There is a document entitled "Guidelines for Location Filming in Gauteng" which provides interested film producers with all the rules and regulations on filming in Gauteng. The Gauteng Film Commission is currently running a campaign called "Film Friendly Gauteng", where they encourage various film and service industry players to join them in assisting international film producers in receiving the assistance they need across all necessary fields (Gauteng Film Commission, 2013).

The South Australian Film Corporation website is very informative in most categories, but offers no information on permit requirements or the local film policies. The website has a complete crew, industry and support services directory, as well as a very comprehensive locations database, providing detailed information and descriptions on all locations. There is also an organised directory of all the films, TV series, commercials, documentaries and other visual media shot in Australia (South Australian Film Corporation, 2013).

The Montréal Film and TV Commission has an informative website, providing information on incentives and tax credits offered by the government, film industry support services and Montréal as a production leader, how to apply for film permits and a comprehensive list of local and foreign films and television series shot in the area. The locations gallery is well-organised, but lacks basic information on the featured locations; there are also no contact details for other industry players (Montréal Film and TV Commission, 2013).

Film New Zealand's website is very informative, offering information on permit requirements, incentives offered by the government departments, industry support services and contact details for industry support services and crew. Limited information is available on the local film policies and regulations; the information available is not well-organised, but scattered across the website. The locations gallery is very well-organised, but lacks detailed information on the featured locations. The website contains a comprehensive list of foreign films shot in New Zealand (Film New Zealand, 2013).

The British Film Commission website contains comprehensive information on most of the aspects mentioned in the above table, except a locations gallery. The website offers information on the incentives and tax breaks offered by the government, production studios, contact directories for supports services and crews, the local film policies and regulations, and a complete list of films shot in the UK.

Considering the information in Table 21 (p. 142), South African film commissions'/offices' websites do not lag behind in terms of the amount and quality of the information offered to international film producers. The most informative websites by far are the Gauteng Film Commission, Film New Zealand and British Film Commission websites, as these websites provide information on all the elements analysed.

When comparing the data collected from local DMOs to the data collected from local and foreign DMO websites analyses, it becomes clear that there is a link between the lack of marketing activities performed by local DMOs and the lack of film information to both international film producers and potential film tourists on their various websites. Furthermore, there is no link on the local DMO websites to the websites of the local film commissions, indicating a lack of a working relationship between South African DMOs and film commissions/offices.

The data gathered will contribute to the final objective of the current study: to develop a model containing guidelines related to the 7 Ps of services marketing for promoting South Africa as an ideal film location to international film producers.

In the next chapter, the dissertation is concluded, a model with guidelines developed, limitations acknowledged and recommendations made for further research.

CHAPTER 7: CONCLUSIONS AND RECOMMENDATIONS

In Chapters 1 through to 4, the importance and theory of destination marketing and film tourism was discussed. One of the most important factors to remember is that promoting a destination as a preferred film location is not the sole responsibility of any one organisation, but should rather be a joint effort between DMOs, film commissions/offices and film production companies (Di Cesare *et al.*, 2012), as together these companies can gather the necessary resources and reach the right target markets. In Chapter 2, the role of the DMO in destination marketing, destination branding, image formation, services marketing and product placements as elements of destination marketing were discussed. In Chapter 3, the effects of film on a destination's image, the advantages and disadvantages of film tourism, the motivation behind tourists' participation in film tourism, the issues of inauthenticity and displacement, film tourism success factors and evidence of successful destination marketing campaigns based on film tourism were analysed. In Chapter 3, the researcher addressed the first two objectives of this study, namely (i) to explore the attractiveness of the film tourism market for destinations and (ii) to identify the unique aspects involved when marketing a destination through film tourism. In Chapter 4, the film production process and the evolution of the South African film industry was discussed. In Chapter 5, the methodology for this study was explained. In Chapter 6, the results were analysed and discussed, according to the third, fourth, fifth and sixth objectives of the study, namely (iii) to explore the marketing strategies used by the local South African DMOs and local and foreign film commissions/offices in attracting international film producers; (iv) to determine what local South African DMOs and local and foreign film commissions/offices perceive as important factors in attracting international film producers; (v) to determine and describe the factors influencing international film producers' selection of a location; and (vi) to determine international film producers' perceptions of South Africa as a film location in terms of these factors.

In this chapter, the study will be concluded, limitations acknowledged and recommendations made. This section contains the final dissertation objective and the main outcome: the model containing guidelines related to the 7 Ps of services marketing, for promoting South Africa as a preferred location to international film producers.

This chapter starts with a discussion on the main findings resulting from the primary data collection, followed by the results gained from the website analyses, the model with guidelines for DMOs, limitations of the study and recommendations for future research.

7.1 MAIN FINDINGS FROM THE INTERVIEWS

7.1.1 MARKETING STRATEGIES USED BY THE LOCAL DMOS AND LOCAL AND FOREIGN FILM COMMISSIONS/OFFICES IN ATTRACTING INTERNATIONAL FILM PRODUCERS

The representatives from the Western Cape and KZN film commissions/offices acknowledge that marketing of South Africa as a film location is not the sole responsibility of any one organisation, but instead a group effort of all the relevant stakeholders. The Western Cape film commission/office has already started taking initiative and approached South African Tourism and urged them to work with the film commissions to encourage film producers to film on location in South Africa. The representative for the KZN DMO acknowledged the need for them as a DMO to work with their regional film commission/office to attract international film producers to South Africa, even though they are not currently doing so. It is valuable that the KZN DMO knows that their most lucrative market is India, as they can start by marketing themselves as a film location to film producers and location scouts in India.

The Western Cape film commission/office is the only South African film commission/office that is a member of the AFCI, although the Gauteng film commission/office and KZN film commission/office advertise with the Western Cape film commission/office at the annual conventions and conferences. Regular publishing in industry magazines seems to be a favourite advertising strategy, used by all the local and foreign film commissions/offices. Attending industry conferences and exhibitions is also a favourite among both local and foreign film commissions/offices.

The representative from the Western Cape film commission/office stated that they are exploring options on how to convince international producers to feature the Western Cape film commission/office in the credits of films that were filmed and/or produced in the Western Cape, as achieved by the Georgia Department of Economic Development.

It appears that South African DMOs are not fully invested in the promotion of the local film industry, with the exception of Western Cape DMO who recently introduced a “film tourism” marketing strategy. The participants agree, however, that film is becoming a very attractive and necessary market to focus on. Furthermore, there appears to be a lack of working relationships between South Africa’s local DMOs and film commissions/office and this needs to be rectified.

7.1.2 WHAT LOCAL DMOS AND LOCAL AND FOREIGN FILM COMMISSIONS/OFFICES PERCEIVE AS IMPORTANT FACTORS IN ATTRACTING INTERNATIONAL FILM PRODUCERS

From the results it is evident that local DMOs, and local and foreign film commissions/offices agree that tax incentives offered by the local government is the most important factor that international film producers consider when selecting a location for shooting a film, as they were mentioned frequently. This is followed by the diversity of the location and its film industry infrastructure, quality and costs. Thereafter they listed service industry infrastructure, cost and quality; accessibility of the location; and the availability of film casts and crews.

The rest of the factors, namely exchange rates and weather were only mentioned by a few respondents, thus it can be concluded that they are not perceived by local DMOs and local and foreign film commissions/offices to be of great importance to international film producers when selecting a destination. This is in contrast with the factors identified as important to international film producers when selecting a location, as indicated in Table 10 (p. 90). Exchange rates were mentioned by the local DMOs and film commissions/offices only; this might be due to the fact that with the current global economy and South Africa’s dismally low exchange rate, the local DMOs and film commissions/offices believe that South Africa might appear more attractive as a film location to international film producers. Similarly, weather was only listed as a factor by local participants. As South Africa has some of the best weather in the world, local stakeholders might believe they can capitalise on this factor and attract international film producers.

Uniqueness was mentioned by some of the local respondents and all of the foreign film commissions/offices. As these foreign respondents represent film commissions/offices from some of the most popular film locations globally, it can be considered an important perceived factor in attracting international film producers.

During the data collection process, trending factors were identified through a frequency analysis; these factors were combined with the factors identified by Honthamer (2001). A new list of factors was created. These factors have been summarised in Table 22 (p. 150).

Table 22: Factors influencing producers' selection of a location

Factors by Honthamer (2001)	Perceived factors identified through data collection
The suitability of the location in relation to the requirements stated in the script.	How diverse the location is.
	How unique the location is.
	Weather.
The ease of accessing the location.	Accessibility.
The quality of local film production services + The ease of acquiring permits and visas for all crew and staff members.	Film cast and crews available at the location.
	Film industry infrastructure, quality and costs (film permit offices, film studios, producers and production facilities, film equipment and pre- and post-production facilities).
The availability of a good customs broker in the desired country.	Service industry infrastructure, cost and quality at the location (hospitality services and facilities, medical services and facilities, emergency services, security services and insurance services).
Insurance coverage.	
The availability of local medical and emergency services.	
The availability of services, supplies and materials.	
	Tax incentives at the location.
	Exchange rates.

The factors in Table 22 (p. 150) correspond with the factors mentioned in theory by Honthamer (2001), but it also brings to light new factors not mentioned in the theory, such as tax incentives, uniqueness, diversity and the availability of local casts and crews. Thus, the factors perceived as most important in attracting international film producers are as follows:

- Diversity of a location
- Unique locations at a destination
- Film industry infrastructure, quality and costs
- Service industry infrastructure, cost and quality

- Tax incentives offered by the local government
- Accessibility of the location
- Film casts and crews available

From the data analysis, it appears that the KZN DMO lacks an understanding of the factors that attract international film producers to a location; the representatives from the Western Cape DMO and the Gauteng film commission/office appear to have a better understanding of what it is international film producers are looking for when selecting a location.

All foreign film commissions/offices interviewed agreed that location diversity and uniqueness, the state of the local film industry and infrastructure, and the availability of tax incentives play a significant role in the final decision when producers select destinations for shooting films. It is interesting to note that none of the foreign film commissions mentioned weather or exchange rates as a factor that influences international film producers' selection of a film location, even though weather can greatly impact the production timeline, as the producer might only be able to shoot for a short period of time during the year at locations where the weather is not ideal and the exchange rate can greatly benefit or negatively impact the bottom-line.

From the results obtained, it is evident that local DMOs and local and foreign film commissions/offices agree that tax incentives offered by the local government is the most important factor that international film producers consider when selecting a location for shooting a film, as they were mentioned frequently. This is followed by the diversity of the location and its film industry infrastructure, quality and costs. Thereafter they listed service industry infrastructure, cost and quality; accessibility of the location; and the availability of film casts and crews.

It appears that, compared with local DMOs, the local film commissions have a better understanding of the factors that influence international film producers' selection of a location. This once again points to the importance of establishing a working relationship between DMOs and film commissions.

In the next section, the factors influencing international film producers' selection of a location, as stated by location scouts, are discussed.

7.1.3 THE FACTORS INFLUENCING INTERNATIONAL FILM PRODUCERS' SELECTION OF A LOCATION

The theoretical factors influencing international film producers' selection of a location and the factors gathered through data collection are summarised and compared in Table 23 (p. 152).

Table 23: A comparison of factors influencing international film producers' selection of a location

Factors by Honthamer (2001)	Perceived factors identified through data collection	Actual factors as provided by location scouts
The suitability of the location in relation to the requirements stated in the script.	How diverse the location is.	Diversity of a location
	How unique the location is.	
	Weather.	
The ease of accessing the location.	Accessibility.	Accessibility of the location
The quality of local film production services + The ease of acquiring permits and visas for all crew and staff members.	Film cast and crews available at the location.	
	Film industry infrastructure, quality and costs (film permit offices, film studios, producers and production facilities, film equipment and pre- and post-production facilities).	Film industry infrastructure, quality and costs
	Service industry infrastructure, cost and quality at the location (hospitality services and facilities, medical services and facilities, emergency services, security services and insurance services).	Service industry infrastructure, cost and quality
	Tax incentives at the location.	Tax incentives offered by the local government
	Exchange rates.	
The availability of local medical and emergency services.		
Insurance coverage.		
The availability of a good customs broker in the desired country.		
The availability of services, supplies and materials.		

From Table 23 (p. 152), it can be concluded that the most important factors influencing international film producers' selection of a location appear to be:

- Diversity of a location
- Accessibility of the location
- Film industry infrastructure, quality and costs
- Service industry infrastructure, cost and quality
- Tax incentives offered by the local government

These factors will be integrated with the guidelines for DMOs in marketing South Africa as a preferred film location to international film producers.

7.1.4 INTERNATIONAL FILM PRODUCERS' PERCEPTIONS OF SOUTH AFRICA AS A FILM LOCATION

As indicated in Table 19 (p. 137), the positive perceptions outweigh the negatives and it can be concluded that interest in and the perception of South Africa as a film location is mostly favourable, both locally and internationally. Foreign location scouts specifically indicated, in general, a very favourable perception of South Africa as a film location, experiences promising interest from international film producers. This corresponds with the information in Table 9 (p. 82) where it is evident, from the increase in the number of films shot in South Africa per year that the interest in South Africa from international film producers is rapidly increasing.

It is crucial for DMOs and film commissions/offices to manage their location's/destination's image and reputation, as perception has a big influence on whether or not international film producers will consider a destination for a film location, no matter what the reality is.

7.2 MAIN FINDINGS FROM THE WEBSITE ANALYSIS

7.2.1 DMO WEBSITES

The analysis suggests that the majority of the DMO websites (local and foreign) analysed are not providing sufficient information to international film producers, or to potential film tourists. Tourism New Zealand and Visit Britain are the only DMO websites found to be taking advantage of the opportunities provided by their film industry and tailoring

advertising campaigns specifically aimed at attracting film tourists. Evidence points to an increase in tourist numbers to these specific film locations, as reported on the websites (Tourism New Zealand, 2013; Visit Britain, 2013).

When comparing the data collected from local DMOs to the data collected from local and foreign DMO websites analyses, it becomes clear that there is a link between the lack of marketing activities performed by local DMOs and the lack of film information to both international film producers and potential film tourists on their various websites. Furthermore, there is no link on the local DMO websites to the websites of the local film commissions, indicating a lack of a working relationship between these two parties; this should be rectified and a working relationship established.

7.2.2 FILM COMMISSIONS'/OFFICES' WEBSITES

Considering the information gathered from the analysed websites in the previous chapter, it is evident that South African film commissions'/offices' websites do not lag behind in terms of the amount and quality of the information offered to international film producers. The most informative websites by far are the Gauteng Film Commission, Film New Zealand and British Film Commission websites, as these websites provide information on all the elements analysed. It is encouraging to notice how well set up the Gauteng Film Commission's website is and that it can compete at an international level.

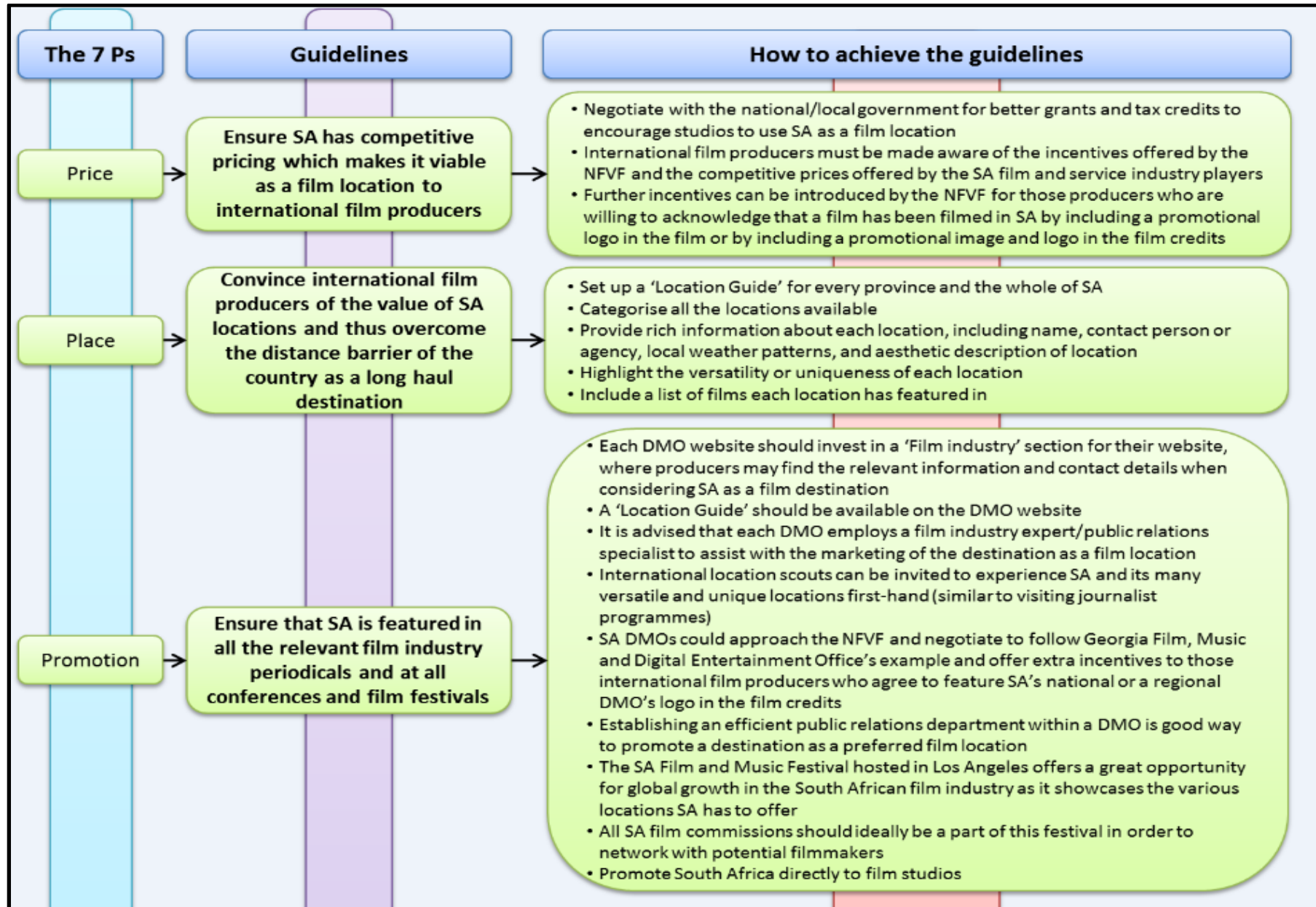
7.3 A MODEL FOR DMOS TO MARKET SOUTH AFRICA AS A PREFERRED FILM LOCATION

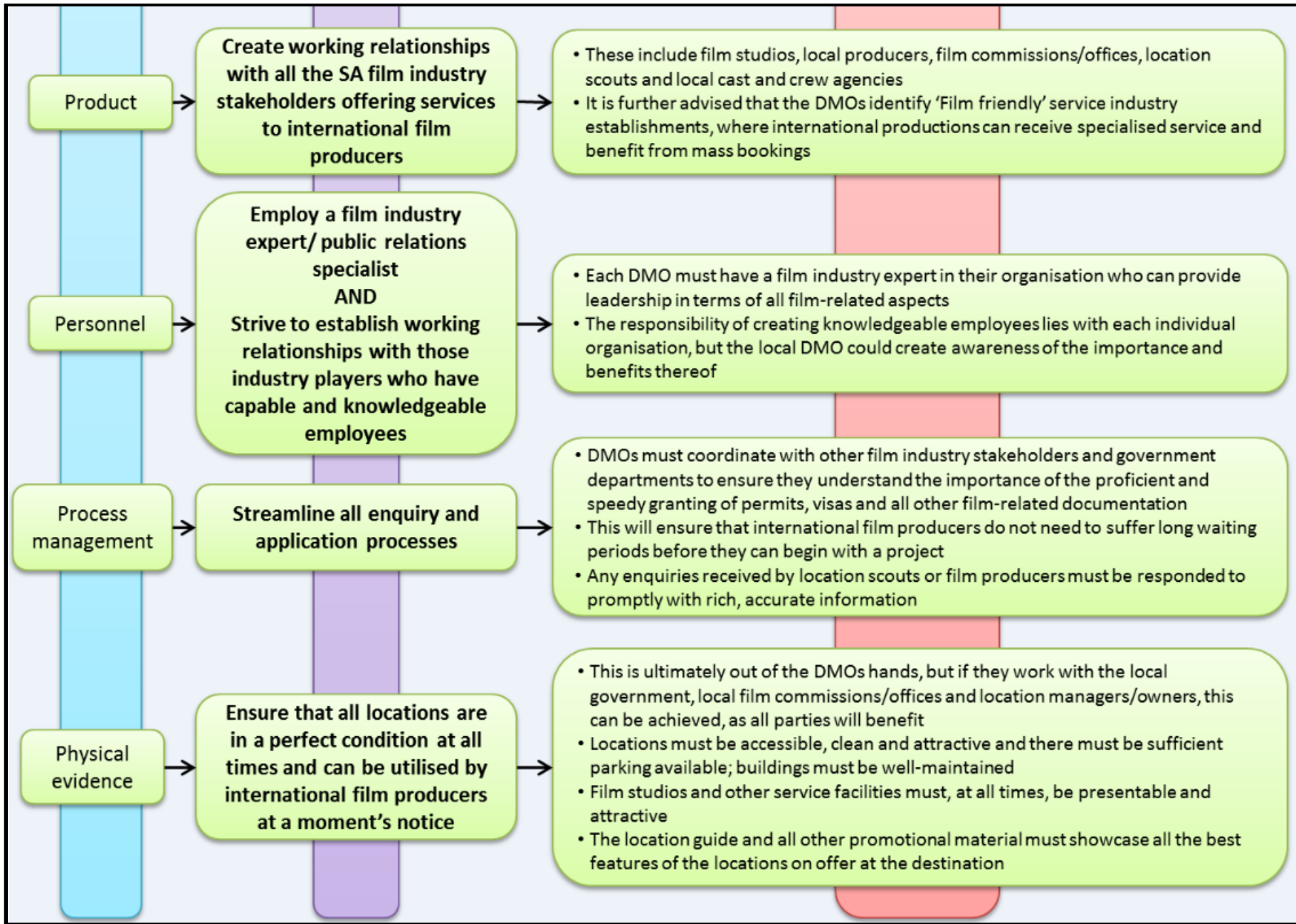
Many studies have stressed the important role of DMOs in marketing a destination as a film location to film producers, yet insufficient guidelines exist on how to achieve this (Bolan, 2010; Campo *et al.*, 2011; Dore & Crouch, 2003; Hahm & Wang, 2011; Hudson & Ritchie, 2006; Kim, 2010; Kim & Richardson, 2003; Riley *et al.*, 1998; Saltik *et al.*, 2011; Young & Young, 2008). The main purpose of this study was to prepare a model for South African DMOs, based on the best-practice promotional activities identified in Table 6 (p. 68) and the selection criteria of international film producers when choosing a destination as a film location, as identified in Table 23 (p. 152). This model with its guidelines can be

used by South African DMOs to effectively market South Africa, with its versatile landscapes and cities, as an ideal film location. As tourism is considered a service, it is imperative for DMOs to fully understand how to market a destination at the hand of the 7 Ps of service marketing (Schofield, 1996). Bolan and Williams' (2008) study evidenced that many service marketing challenges can be overcome through the use of films.

Based on these factors, a model, containing guidelines was developed to assist South African DMOs in marketing South Africa as a preferred film destination. This model is presented in Figure 18 (p. 156-157).

Figure 18: A model for promoting South Africa as a preferred film location





The guidelines contained in the above model (Figure 18, p. 156-157) could be used by the provincial, regional and national DMOs of South Africa to attract the attention of international film producers and to establish South Africa as a preferred film location, based on the factors influencing international film producers' selection of a location, as identified in Table 23 (p. 152). Some of these guidelines can be achieved through the best-practice marketing activities identified in Chapter 3, Table 6 (p. 68).

As suggested by Magrath (1986), a company should identify one key services marketing element that presents the most compelling argument from a marketing point of view and which is most likely to convince potential target market members to respond to the marketing effort. Furthermore, it is important to present a unified message among all marketing platforms (Karim and Strzelecki, 2012), even though this is very difficult to achieve, as a destination comprises of various stand-alone businesses that together create the service experience, with the DMO having little control over the individual marketing efforts and service quality of these businesses (Hankinson, 2007).

In a study done by Soliman (2011), it was suggested that tourism authorities should prepare a location list and the local government should offer additional incentives for the use of specific iconic locations; this guide is then to be distributed to film producers internationally to make them aware of the benefits of filming at a certain destination. This links with the guidelines provided in the model above. Vagionis and Loumioti (2011) stress the importance of public relations in promoting a destination as a preferred film destination. In order to effectively attract film producers and tourists, DMOs need to work proactively to promote their destination and resources; they must further continuously monitor the image being presented to possible film producers and tourists (Di Cesare *et al.*, 2012). These recommendations have been incorporated in the guidelines in the above model.

It is evident that South Africa is already considered one of the best film destinations in terms of variability and affordability, albeit underutilised. This is evident, as the South African Film and Music Festival was launched in Los Angeles in October 2013 (Lillie, 2013a). This offers a great opportunity for global growth in the South African film industry as it showcases the various locations South Africa has to offer. All the South African film commissions should ideally be a part of this festival in order to network with potential

filmmakers. Anant Singh, a well-known film producer, has recently purchased land in KZN, where he will be building KZN's first film studio; this studio will be named Durban Film City (Rorich, 2013). The building of this studio has the potential to further encourage international productions to film in South Africa and is expected enhance South Africa's image as a film destination, although the Cape Town Film Studios has already done a lot for South Africa's popularity as a film location.

7.4 LIMITATIONS OF THE STUDY

This study is not without limitations; the location scout sample size was small and therefore the results cannot be generalised. Had other participants been asked, the resulting factors affecting international film producers' selection of a location may have differed from those identified. A further delimitation could be that South Africa was not specifically compared to a country of similar scenic and economic background. Neither local nor international film producers' were contacted to participate. The counties approached are based on statistics gathered from 2010 and 2011, not the most recent 'popular film locations' statistics; the counties differ slightly.

7.5 RECOMMENDATIONS FOR FUTURE RESEARCH

Further research can be done on the subject of effective ways to attract international film producers to a destination, both on a national level within South Africa and also on an international level, where a researcher can look at film destinations in general, not only South Africa. Furthermore, a similar study can be conducted where South Africa is compared to a similar country in terms of film production (both locally and internationally). Another suggestion would be to take the developed model and guidelines to local and international film producers to evaluate the accuracy of the model.

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APPENDIX A

- Data collection instrument for location scouts -

PROMOTING SOUTH AFRICA AS A FILM TOURISM DESTINATION

(Email interview schedule for location scouts)

DETAILS OF THE PARTICIPANT

Name _____

Job title _____

Organisation _____

Number of years at organisation _____

Age _____

Highest qualification _____

Contact telephone number _____

Email address _____

Date _____

Approved consent to participate

OPENING STATEMENT TO PARTICIPANTS

Thank you for agreeing to partake in this study.

The focus of this document will be on the ***selection criteria influencing location decisions*** of international film producers. Many destinations have the potential to host a range of films and portray different sceneries accurately; this document aims to establish how a destination may be selected by international film producers based on their selection criteria. Furthermore, it aims to establish film producers' ***current views on South Africa as a film location***.

Please take the time to read through the three questions and please **provide a list of** all the factors (criteria) that you feel are relevant. Please elaborate on each factor listed and explain why it is relevant.

The discussion will be guided along the following three themes:

- The **factors influencing** the selection of a film location.
- **How** South Africa is currently perceived as a film location.
- What South Africa **can do** to become a more popular film location.

APPENDIX B

- Informed consent form for location scouts -



**Informed consent for participation in an academic
research study**

Dept. of Tourism Management

PROMOTING SOUTH AFRICA AS A FILM TOURISM DESTINATION

Research conducted by:
Ms. C. Loedolff (27091831)
Cell: 072 283 0207

Dear Participant

You are invited to participate in an academic research study conducted by Carmen Loedolff, a Masters student from the Department of Tourism Management at the University of Pretoria.

The objectives of this study are to determine and describe the factors influencing international film producers' selection of a location, as well as to determine international film producers' perceptions of South Africa as a film location in terms of these factors.

Please note the following:

- This study consists of a descriptive interview schedule. Your name will appear on the schedule, but the company name will be used in the report in order to compare marketing strategies.
- Your participation in this study is very important to us. You may, however, choose not to participate and you may stop participating at any time without any negative consequences.
- Please answer the questions in the attached schedule as completely and honestly as possible. This should not take more than 30 minutes of your time.
- The results of the study will be used for academic purposes only and may be published in an academic journal. We will provide you with a summary of our findings on request.
- Please contact my supervisor, Mrs. E. Kruger (elizabeth.kruger@up.ac.za) if you have any questions or comments regarding the study.

Please sign the form to indicate that:

- You have read and understand the information provided above.
- You give your consent to participate in the study on a voluntary basis.

Participant's signature

Date

APPENDIX C

- Data collection instrument for local DMOs -

PROMOTING SOUTH AFRICA AS A FILM TOURISM DESTINATION (Interview schedule for local DMOs)

DETAILS OF THE PARTICIPANT

Name _____
Job title _____
Organisation _____
Number of years at organisation _____
Age _____
Highest qualification _____
Contact telephone number _____
Email address _____
Date _____

Approved consent to participate

OPENING STATEMENT TO PARTICIPANTS

Thank you for agreeing to partake in this discussion.

The focus of this discussion will be on **film tourism** and your **current marketing activities** used to **attract international film producers**. Many destinations have the potential to host a range of films and portray different sceneries accurately; this discussion will aim to establish how a destination can effectively promote itself to international film producers in order to appear in international films and thus have a chance of generating film tourism. Furthermore, it will aim to determine what South African DMOs perceive to be **important factors** for international film producers when **selecting a film location**. Please provide detailed answers and be as comprehensive as possible.

The discussion will be guided along the following four themes:

- **Film tourism.**
- **Current marketing activities.**
- The **factors influencing** international film producers' **selection of a film location.**
- Film producers' interest in **South Africa as a film location.**

APPENDIX D

- Informed consent form for local DMOs -



**Informed consent for participation in an academic
research study**

Dept. of Tourism Management

PROMOTING SOUTH AFRICA AS A FILM TOURISM DESTINATION

Research conducted by:
Ms. C. Loedolff (27091831)
Cell: 072 283 0207

Dear Participant

You are invited to participate in an academic research study conducted by Carmen Loedolff, a Masters student from the Department of Tourism Management at the University of Pretoria.

The objectives of this study is to explore the elements/aspects involved when aiming to market a destination though film tourism; explore DMO stakeholders' understanding of film tourism; and to determine what DMOs perceive as important factors in attracting international film producers.

Please note the following:

- This study consists of a descriptive interview schedule. Your name will appear on the schedule, but the company name will be used in the report in order to compare marketing strategies.
- Your participation in this study is very important to us. You may, however, choose not to participate and you may also stop participating at any time without any negative consequences.
- Please answer the questions in the attached schedule as completely and honestly as possible. This should not take more than 1 hour of your time.
- The results of the study will be used for academic purposes only and may be published in an academic journal. We will provide you with a summary of our findings on request.
- Please contact my supervisor, Mrs. E. Kruger (elizabeth.kruger@up.ac.za) if you have any questions or comments regarding the study.

Please sign the form to indicate that:

- You have read and understand the information provided above.
- You give your consent to participate in the study on a voluntary basis.

Participant's signature

Date

APPENDIX E

- Data collection instrument for film commissions -

PROMOTING SOUTH AFRICA AS A FILM TOURISM DESTINATION (Interview schedule for film commissions)

DETAILS OF THE PARTICIPANT

Name _____
Job title _____
Organisation _____
Number of years at organisation _____
Age _____
Highest qualification _____
Contact telephone number _____
Email address _____
Date _____

Approved consent to participate

OPENING STATEMENT TO RESPONDENTS

Thank you for agreeing to partake in this study.

The focus of this discussion will be on your **current marketing activities** used to attract **international film producers**. Many destinations have the potential to host a range of films and portray different sceneries accurately; this discussion will aim to establish how a destination can effectively promote itself to international film producers in order to appear in international films and thus have a chance of generating film tourism. Furthermore, it aims to determine what national film commissions perceive to be **important factors** for international film producers when **selecting a film location**.

Please provide extensive, detailed answers and be as comprehensive as possible.

The discussion will be guided along the following two themes:

- Current **marketing activities**.
- The **factors** influencing international film producers' **selection of a film location**.

APPENDIX F

- Informed consent form for film commissions -



UNIVERSITEIT VAN PRETORIA
UNIVERSITY OF PRETORIA
YUNIBESITHI YA PRETORIA

Faculty of Economic and
Management Sciences

**Informed consent for participation in an academic
research study**

Dept. of Tourism Management

PROMOTING SOUTH AFRICA AS A FILM TOURISM DESTINATION

Research conducted by:
Ms. C. Loedolff (27091831)
Cell: 072 283 0207

Dear Participant

You are invited to participate in an academic research study conducted by Carmen Loedolff, a Masters student from the Department of Tourism Management at the University of Pretoria.

The objectives of this study is to identify the elements/aspects involved when aiming to market a destination though film tourism and to determine and describe the factors influencing international film producers' selection of a location.

Please note the following:

- This study consists of a descriptive interview schedule. Your name will appear on the schedule, but the company name will be used in the report in order to compare marketing strategies.
- Your participation in this study is very important to us. You may, however, choose not to participate and you may also stop participating at any time without any negative consequences.
- Please answer the questions in the attached schedule as completely and honestly as possible. This should not take more than 30 minutes of your time.
- The results of the study will be used for academic purposes only and may be published in an academic journal. We will provide you with a summary of our findings on request.
- Please contact my supervisor, Mrs. E. Kruger (elizabeth.kruger@up.ac.za) if you have any questions or comments regarding the study.

Please sign the form to indicate that:

- You have read and understand the information provided above.
- You give your consent to participate in the study on a voluntary basis.

Participant's signature

Date

APPENDIX G

- Email introduction to location scouts -

Good day (name)

I trust this email finds you well. I am a masters student from the University of Pretoria and I am currently conducting a study on film tourism. I realize you are very busy, but I would like to invite your company to participate in my study as I believe your feedback would be extremely valuable. If you do not have the time to do this, could you please refer me to an experienced colleague within your company who might be able to assist me?

The interview will be purely written, with no personal interaction (please see the attached informed consent form and interview schedule). If you would prefer it, a Skype interview can be arranged with pleasure. There are three questions regarding film producers and locations. The objectives of this study are to determine and describe the factors influencing international film producers' selection of a location, as well as to determine international film producers' perceptions of South Africa as a film location in terms of these factors. I am approaching you as a location scout as you work closely with film producers and I believe you could offer valuable insight into the subject.

I eagerly await your reply.

Kind regards,

Carmen Loedolff

APPENDIX H

- Selection of films shot in South Africa (1916-2013) -

Table 24: Selection of films shot in South Africa (1916-2013)

Release year	Film name
2013	Fanie Fourie's Lobola
	Bakgat! 3
	Khumba
	Spud 2
	To the Power of Anne
2012	Mad Buddies
	Agter die ligte
	Semi-Soet
	Pretville
	Wolwedans in die skemer
	Stilte
2011	Hoofmeisie
	Platteland
	Getroud met Rugby
	Saak van Geloof
	Roepman
	Superhelde
	Skoonheid
	Ek joke net
	Ek lief jou
	Bloedsuiers
2010	Die Ongelooflike Avonture van Hanna Hoekom
	Spud
	Liefling
	Bakgat! 2
	Egoli: Afrikaners is Plesierig
	Stoute Boudjies
2009	District 9
	Karate Kallie
	Hond se dinges
2008	Bakgat!
	Skin
	Vaatjie sien sy gat
2007	Poena is Koning
	Ouma se slim kind
	Meisie
2006	Number 10
2005	The Flyer
2005	Tsotsi
2004	Yesterday
2003	Stander
2001	Lyklollery
1998	Paljas
	Ouma se slim kind
1997	Kaalgat tussen die Daisies
1994	Lipstiek Dipstiek
1993	Orkney Snork Nie 2
	Die Prince van Pretoria
1992	Nag van die 19de
	Die Storie van Klara Viljee
	Orkney Snork Nie (Die Moewie)

Release year	Film name
1990	Tolla is Tops
	Agter Elke Man
1988	Fiela se Kind
1986	Liewe Hemel, Genis!
	Dada en die Flower
1985	Bosveldhotel, die moevie
	Vyfster: Die Slot
	Wie Laaste Lag
	Nag van Vrees
1984	Broer Matie
	Boetie gaan border toe
	Die Groen Faktor
	Skollie
	Tawwe Tienies
1983	Geel Trui vir 'n Wenner
	Wolhaarstories
1982	Verkeerde Nommer
1981	Blink Stefaans
	Nommer asseblief
	Beloftes van Môre
1980	Kiepie en Kandas
	Rienie
	Sing vir die harlekyn
1979	Plekkie in die Son
	Pretoria O Pretoria!
	Wat Jy Saai
	Weerskant die Nag
	Elsa se Geheim
	Grensbasis 13
	Die Eensame Vlug
1978	Witblits en Peach Brandy
	Die Spaanse Vlieg
	Dit was Aand en dit was Môre
	'n Seder Val in Waterkloof
	Dr Marius Hugo
1977	Netnou hoor die kinders
	Kootjie Emmer
	Dingetjie en Idi
	Kom tot Rus
	Die Winter van 14 Julie
1976	Daar kom tant Alie
	Liefste Madelein
	Vlindervanger
	'n Beeld vir Jeannie
	Die Ridder van die Grootpad
	Die Rebel
	'n Sondag in September
	Haak Vrystaat
	Springbok
1975	Eendag op 'n Reëndag
	Die Square
	Ter wille van Christine
	Somer

Release year	Film name
	Troudag van Tant Ralie
	My Liedjie van Verlange
	Vergeet My Nie
	Jakkalsdraai se Mense
	Trompie
	Liefste Veertjie
	Ma skryf matriek
	Soekie
1974	Die Sersant en die Tiger Moth
	Ongewenste Vreemdeling
	Babbelkous en Bruidegom
	'n Sonneblom uit Parys
	Geluksdal
	Tant Ralie se Losieshuis
	Met Liefde van Adele
	Pens en Pootjies
	Skadu's van Gister
	Dans van die Flamink
	Boland!
	Suster Teresa
	Kwikstertjie
1973	Siener in die suburbs
	Môre, Môre
	Snip en Rissiepit
	Die Bankrower
	Die Voortrekkers
	Insident op Paradysstrand
	Die Wit Sluier
	Afspraak in die Kalahari
	Met Moed, Durf en Bloed
	Groetnis vir die Eerste Minister
	Aanslag op Kariba
	Seun van die Wildtemmer
	Die Spook van Donkergat
1972	Lokval in Venesië
	Vlug van die Seemeeu
	Pikkie
	My Broer se Brill
	Die Marmerpoel
	Die Wildtemmer
	Liefde vir Lelik
	Kaptein Caprivi
	Salomien
K9 Baaspatrolliehond	
1971	Pappalap
	Die Erfgenaam
	Die Banneling
	Breekpunt
	Lindie
1970	Jannie totsiens
	Vicki
	Lied in My Hart
	Onwettige Huwelik

Release year	Film name
	Hulda Versteegh MD
	Sien jou môre
	Die drie Van der Merwes
1969	Katrina
	Stadig oor die Klippe,
	Die Geheim van Nantes
	Die Vervlakste Tweeling
	Majuba
	Vrolike Vrydag die 13de
	Dirkie
1968	Jy is my Liefing
	Die Kandidaat
	Majuba: Heuwel van Duiwe
	Oupa for Sale
	Dr Kalie
1967	Kruger Miljoene
	Hoor my Lied
	Die Professor en die Prikkelpop
1966	Kavaliers
1965	Debbie
	Die Wonderwêreld van Kammie Kamfer
	Voortreflike Familie Smit
1964	Piet my Niggie
1963	Huis op Horings
	Gee my jou hand
	Die Reën Kom Weer
1962	Lord Oom Piet
	Voor sononder
	Tom, Dirk en Herrie
	As Ons Twee Eers Getroud is!
	Die Tweede Slaapkamer
	Stropers van die Laeveld
	Jy's Lieflik Vanaand
	Die Skelm van die Limpopo
Gevaarlike Spel	
1961	En die Vonke Spat
	Die Bubbles Schroeder Storie
	Boerboel de Wet
	Doodkry is min
	Die Hele Dorp Weet
	Moord in Kompartement 1001E
	Basie
1960	Oupa en die plaasnooientjie
	Die Jagters
	Die Vlughteling
	Hou die Blinkkant Bo
1959	Die Wildeboere
	Nooi van my Hart
	Piet se tante
1958	Rip van Wyk
	Fratse in die vloot
	Die Bosvelder
	Die Goddelose Stad

Release year	Film name
1957	Dis Lekker om te Lewe
	Donker Afrika
1954	Vadertjie
	Matieland
	Geld Soos Bossies, komedie
1953	Inspan
1951	Altyd in my drome
	Hans-die-Skipper
	Vyftig-vyftig
	Die Leeu van Punda Maria
1950	Hier's ons weer
1949	Sarie Marais
	Kom saam, vanaand
1948	Die Kaskenades van Dr. Kwak
1947	Pantoffelregering
	Simon Beyers
1946	Geboortegrond
	Die wildsboudjie
	Die Skerpioen
	Pikkie se Erfenis
1944	Donker Spore
1931	Moedertjie
	Sarie Marais
1916	Die Voortrekkers

APPENDIX I

- Example of an interview transcript -

Interview Transcript

Interviewer: Carmen Loedolff
Interviewee: [REDACTED]
Job Title: [REDACTED]
Organisation: [REDACTED]
Years at organisation: [REDACTED]
Age: [REDACTED]
Highest Qualification: [REDACTED]
Contact number: [REDACTED]
Email address: [REDACTED]
Date: 14 December 2012

Carmen: Ok, so here is an informed consent form that I need you to sign for me please. You can read through it. It just basically says what the study is about and then you give consent to participate. And the rest is the interview schedule. If you could just fill in the top part please. And then the rest I will go through with you.

[REDACTED]: Alright.

Carmen: Yes, those are just some questions I will ask you as we go. Do you have any questions about the study before we continue?

[REDACTED]: Uh, could you just give me a brief two minute overview of your study.

Carmen: Well basically I'm a masters student from the University of Pretoria, doing my masters in Tourism Management and in film tourism specifically. So what I basically want to do...the end product of my study will be a set of guidelines based on the seven Ps of marketing. Uhm, you know just guiding local DMOs on how to market South Africa, or their specific regions within South Africa as a desired film location for international film producers specifically. And what I want to...the information I would like to gather is what do South African DMOs and film commissions perceive as important film-specific factors that encourage film

producers to come to a location and then what are they currently doing to promote South Africa or their specific region to international film producers.

█: And what are you hoping to do when you finish?

Carmen: Uhm, to create the set of guidelines on...

█: I mean as a job when you leave.

Carmen: Oh, as a job. Well I'm very interested in destination marketing and film tourism falls under destination marketing, uhm, so ja I would like to, I don't know, go into...maybe work for a local DMO, uhm, regional, national, depends, uhm, ja. I'm quite interested in destination marketing, getting people here, and various ways of getting them here and film tourism I think is a very important factor in getting them here. Ok, I will read this through to you quickly, just so you can get an understanding of what we will be doing. The focus of this discussion will be on your current marketing activities used to attract international film producers. Many destinations have the potential to host a range of films and portray different sceneries accurately. This discussion will aim to establish how a destination can effectively market itself to international film producers in order to appear in international films and thus have a chance of generating film tourism. Furthermore, it aims to determine what national film commissions perceive to be important factors for international film producers when selecting a location. When you answer the questions would you just please provide detailed answers as this is a qualitative study and I need...they call it "fat" information.

█: Ja.

Carmen: The discussion will be guided along the following two themes: current marketing activities and then the factors influencing international film producers' selection of a location. I think I have about five questions so it won't take long. Ok, as a representative of a national film commission, please explain the marketing activities or campaigns your film commission currently has in place to promote

South Africa or your destination specifically as a desirable film location to international film producers.

Ok, uhm, we have...well I'm a member of the Association of Film Commissions International, which is a global body which is run out of the USA. There are about 350 commissions on that list. We meet twice a year, once in Los Angeles, once in Europe, uhm, where we go through various different scenarios to talk about how people are currently marketing their destinations. We use international best practice here in terms of how we manage the whole process. And then the AFCI has an annual conference in Los Angeles in June every year where most of the commissions around the world take a stand, so they sell and promote destinations for filmmaking and the partners with the National Film Video Foundation, Gauteng Film Commission and KZN Film Commission and the offices prepare a stand. That whole week is surrounded by various interactions and forums, master classes with predominantly the US film industry. We also host a forum in partnership with the South African Consulate in Los Angeles, where we host a breakfast. Probably about 150 representatives of the Los Angeles film community attend that. We get the opportunity to market our destination, so we take turns on the presentation, so there's a few slides on Cape Town, a few on Durban, a few on Johannesburg. Then we partner with the CEO of Cape Town Film Studios who gives a presentation on what the studios do. That's one aspect of it. I'm also a member of the International Academy of Television Arts and Sciences which is essentially the international Emmys for the past couple of years we've been hosting and judging for the semi-finals of the Emmys, you know to help choose semi finals you know. And this year we hosted the English Language Kids Animation and English Language Documentary, the consequence of that is that our judges that we had 12 to 15 for each session, judges of South African film makers. We then get invited to the World Television Forum and the international Emmy awards which we attended in New York last month, November. And that attracts in the region of 250 to 300 representatives of the international film and television industry. We were given the opportunity there to showcase what we do, specifically in Cape Town, because we were the host of it, and interact with

the marketplace there. We also interacted with South African Tourism and open their eyes a little bit to what can actually be done in terms of Destination Marketing with regards to the film industry. But we also do a lot of press, I mean we put a lot out there in Variety Magazine, and the Hollywood Reporter, a lot of newsletters that we put out are international. We have a membership...uhm...when I joined the organisation two years ago our membership was running at about three, no...550. Our membership now stands at 3000 and a lot of that membership is now made up of international partners so we got BBC, Japanese Broadcasting Corporation, The Seattle Film Festival and the Sundance Film Festival. All of those are members, so they get copies of the newsletters that I send out every week and updates on what's going on in Cape Town and Western Cape. So they're all up to speed with what we've got to offer. There are some TV shows being made here, so yeah...So that, I mean, that's pretty much what we do in terms of marketing. I mean there's a lot of base marketing, uhm, we take out advertisements in various industry magazines and supplements hosted throughout the world. Yeah we try and get as much press as we can.

Carmen: Ok, thank you.

█ I don't know if that answers that question.

Carmen: It does, it does. Ok what is your role in the film making process exactly?

█: We don't really have a role in the film making process other than what we do is enable the environment, so if for example when an international production wants to come shoot here, for example I just got an enquiry last night from Harvey Weinstein's company in Los Angeles who wants to come shoot a film here. They'll talk to us about the availability of particular locations, whether studio space is available, what are the best locations. We get a lot of enquiries asking if we got anything within an hour's drive from Cape Town that looks like the Rocky Mountains. You know, so we assist them with that, we give them guidance in terms of access to locations, and film permits. We've got a very

good working relationship with guys in London so we offer very competitive insurance policies because filmmakers need to take out liability insurance. We offer that and we also have a very good working relationship with the Department of Home Affairs because a lot of the inbound productions need work visas for...for example we recently assisted a production company getting the work permit visa sorted out for Orlando Bloom who has been filming here for the past six months. So it's, it's on every level, I mean Mad Max, I don't know if you heard about Max's filming currently in Cape Town, it's the biggest production ever to come to Cape Town, it's employing about 1000 people. They were shooting part of the film in Namibia, and they needed to get work permits for 350 crew to come from Namibia to here, which we organised in 2 days for that production.

Carmen: Sjoë, that's impressive!

█: Yeah I mean, that's the stakes, we really get involved with the filmmaking process. But then if you look at the independent filmmakers that are working here, telling our own stories, we work very closely with them in terms of getting finance, or in terms of how to run their business, and come and use me as a sounding board, so they are allowed to come in and look around here, that sort of thing.

Carmen: Ja, ok. And then what support services do you offer both national and international production companies? We pretty much covered it. Ok, then as the representative of a national film commission, what do you think are important location specific factors for international film producers when considering a location for a film?

█ Well, it's interesting because they're all looking for the same thing and they are all looking for something different as well. The bottom line is the most important thing in making the decision is to where you want to film. We're in competition with for example Bolton, or some of the Eastern bloc countries. We are also in competition with London for certain films as well. You know there are a lot of

variables. I think the...one of the biggest benefit we've got through the DTI and through SARS, is that we offer incentives so that if you come here with your international production and you partner with a local production company, there is a rebate on tax which is equivalent to about 20% of the production if the production takes place here. And if you stay and do post-production in South Africa, there is a further 25%. It's not the best in the world, but it's one of the best in the world. We also got to take into account the exchange rate, and currently the exchange rate to the pound for example is running at around ??????????. That adds another 10% to the bottom line you know, because of the weakness of the rand, that's quite an important factor. But the key issue is if you take away financial interest, then the key issues are, it's the value for money proposition, so, you look at the quality of the hotels. Here the accommodation is probably better than most places in the world. The food is better, obviously, the wine, the people, so the whole experience of coming here to make a move, is nicer, if you like, than going to any other country because of the quality of service you get. We find a lot of film makers come over here, especially from Los Angeles, uhm, who've never been here before, and they find it a bit difficult to believe, they say 'Why has nobody told me about this place before? It's just like California, nobody knew'...all sorts of stuff. Look I think the key issue is, within an hour's drive of Cape Town you can be pretty much filming anywhere in the world. You know, I mean the scenery is so flexible and generic throughout parts of the country, you know, on one hand you've got the beaches and the ocean and within an hour's drive you've got desert and you've got mountains in the middle. Yeah, so if you look at what the History Channel were actually after, it was to film the history of the USA with a drama documentary series. It was entirely shot here, none of it was shot in the USA and they've just finished a drama documentary on the story of Great Britain was filmed entirely in Cape Town and Gettysburg was all filmed in Cape Town. You know, all these great British and American stories are being filmed here. So it's...it's very rare unfortunately that we get a film that is in Cape Town about Cape Town. You know Safe House is obviously an example, but then if you look at Chronicle, uhm, which, interestingly, the guy, uhm, the guy from New York who runs the Emmys' judging, came here in June. At the time we had the poster

in the lobby there for Chronicle and he said, “just out of interest, why have you got a poster of Chronicle?”. So I said “Because it was filmed here.”. And he said “But it’s set in Seattle”. And that is my case in point, he had no idea it was filmed here, he said “I’ll have to watch it again so I can see”. So I saw him last month, I said: “Did you have another look?”, he said “Yeah, once you know, you can pick up bits of scenery.”

Carmen: But it’s actually a pity that they don’t...that no one knows that it was filmed in Cape Town.

█: Well it’s something we need to look at, uhm, because we’ve started, uhm, because we’re getting more involved in more feature films, we’ve started looking at how we can get credited as the Cape Film Commission at the end credits. And it’s very difficult because if that film wants to portray itself as being shot in Seattle, and then the █ comes up at the end, it’s going to create converse you know, and I think there’s an issue with marketing as well. I think what we intended to do with Chronicle, and also Labyrinth, the Ridley Scott series, which was shot here recently. I mean, Ridley Scott is in TV series, uhm, I mean he’s produced The Good Wife, so it’s that sort of quality TV show. It was supposed to be set in medieval France, yet it was filmed here in the studios and the surrounding areas. When we hear about that, we start linking that to the rest. We’re not supposed to, but we tend to just start picking up what has been made here.

Carmen: But that brings in the issue of displacement and inauthenticity, but many times you will find that if a tourist really, you know, is interested in the film location, you often find that they either go visit the film location where it was really shot, or they will visit the place it portrays. Sometimes they will also visit both, you know, just to get the feel of both, but it’s very difficult....

█: Yes, that’s what we’ve been battling with as well because if you look at what I’ve just been talking about, but also other films that have been made, for example, I don’t know if you know David Lean, who’s a very famous British film

director. He passed away years ago. He was responsible for Doctor Zhivago and, I can't remember the name of the films, I'm sorry, but it was a classic film, it did extremely well in the box office, and one of the major scenes in it is a beach in Ireland and for all of my life I've been watching this film, and just though what an amazing scene this is on the beach and then one day I just drove over the mountain and saw Kommetjie beach from a different angle and I thought 'this looks familiar'. And then I asked someone and they said no it was all shot around Cape Town and I was like nobody tells us.

Carmen: Oh ok (laughs).

█: And then a couple of weeks ago I was watching Generation Kill, which is a very good HBO series about US marines taken down in Baghdad. Tremendous. And I spoke to somebody about it, asked "have you seen it", and he said, 'Yeah, I'm in it". I was like "What do you mean you're in it?". He's like "well it was all filmed here, I'm one of the extras in it.". So I said "why don't you tell us so we can talk about it?". It's interesting because we've been looking at film tourism, both in terms of how the film industry can promote business tourism through bringing a company's film, but also how can you track people who are actually watching the film in the cinemas who think "I want to go there". Now it's worked for Safe House as Safe House is clearly in Cape Town. We were trying to get the Bond producers to say Skyfall was filmed here, but they didn't bite. But you know the Bond fans are quite fanatic and they will track it down to the original place where it's filmed. So if we could get them here that would mean we get through to them as well. I mean we're hopeful because we believe once they're here they will experience the rest of Cape Town as well. We want to start doing the, we want to go to Deon Meyer, you know Deon Meyer, the crime writer from Cape Town. All of his novels are set, I mean great books, very similar to the Bond books, they're going to start filming those around here.

Carmen: Oh ok, that will be very nice. How does the business look for 2013 and beyond?

█: It's looking pretty good, I mean we're having the busiest season so far. There's

been a bit of a fall in commercials, and commercials are quite interesting, because they bring in somewhere in the region of a million rand, but nobody knows they're film in Cape Town. I get phone calls and emails from friends who are South African, in London for example, saying "I've just seen Camps Bay in this commercial". On average in the UK, there's at least two or three commercials showing in the evening which are filmed in Cape Town and it's not credited, they recognise it. Last year we processed about a thousand film permits here and we reckon the footprint was in the region of R 2 billion on feature films. We did not take into account the documentary industry or the RTTV industry. What you get in the RTTV industry is quite interesting. Well over at the Emmy's in New York, I met the guy who produces the Amazing Race, I don't know if you know that show?

Carmen: I've heard of it.

█: It's being franchised internationally. We've already had two versions of it in Cape Town the past six weeks. A guy in Australia said he's going to bring six versions quite soon, 2013. Which is great. So it's looking good.

Carmen: Ja, but I think if, you know if a film is shot here and it portrays a different location, I think it would actually be great if you could arrange with the producers to just acknowledge that they filmed it in Cape Town. Often you find on the movie sites, especially IMDb, they often say there where the film was shot and that's quite interesting, but you should actually be able to get it out there, you know, working with Cape Town Tourism.

█: Yeah, there's a magazine called Call Shoot, I don't know if you've seen it, but we had the editor in here the other day and we had a very similar discussion because I got a very threatening letter from Cape Town Film Studios when I leaked information about Labyrinth being shot there. I had taken a photograph and I did not take the photograph from inside the studios, but the back lot of the buildings, which is the same that I could have gotten from the street. But they got very angry that I had blown the cover on this particular shooting at the

studios and I understand why because they had signed an agreement of confidentiality, but I haven't. And everybody knew that that was being filmed here anyway. Most productions don't want you to talk about it for whatever reason, but we just decided in Call Shoot that we were going to start publishing it as of next year.

Carmen: That's good. Well thank you for your time, it was very enlightening.