

Animation@DFM

A review of progress

Artists are almost seen as the kids at the back of the class – those who are not going anywhere. In contrast, artists are absolutely professionals. Artists are our visionaries, our storytellers. They play a vital role in society, and we have a responsibility to develop them
Nosipho Maketo-van den Bragt, Judge.

“Being in this room today, and seeing so many people here, it is so inspiring and gives me so much hope for our animation industry in the country and the continent as a whole.”

Audience member, Animation@DFM: The Correct Picture - The Dynamics of Characterisation in Animation

Most of what your kids are watching is Western content, and content can define the perception of how you view the world. And if our stories are not equally shared in that space where there is global content, then the negative image of Africa remains.

Mohamed Said-Ourma, Executive Director, DocA-Documentary Africa

“We have so many stories to tell, so many authentic voices, our tribes, our culture, so much for us in history, in present and even in the future”.

Audience member, Animation@DFM: The Correct Picture - The Dynamics of Characterisation in Animation

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Commitment to independence: this independent monitoring and evaluation review has been completed in accordance with the South African Monitoring and Evaluation Association (SAMEA) principles and practices.

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The report's intent

The world is in the grip of an animation boom, and hungry for African stories, but African animation sector is not currently able to capitalise of this situation¹. Unless African talent is given a space to shine, these stories will be told by foreign voices.

The Durban Film Mart institute (DFMI) aims to forge connections between competent storytellers and global buyers, strengthening investment into local markets and building the creative economy.

To develop and support African animators, DFMI conceptualised and implemented a four-prong programme, which includes:

- Pitch and Finance Forum 2022 and 2023 animation stream (Animation Pitch and Finance Forum)
- Animation@DFM industry programming at DFM 2022 and 2023 (Animation@DFM Industry Programming)
- Participation in MIP Africa and Cape Town International Animation Festival (CTIAF)
- Collaborations with CTIAF and Digital Lab Africa

DFMI is committed to gender transformation in the audio-visual sector through encouraging women from the African Continent to find the confidence, skills, and access to capital to conceptualise, produce and market content to local and global audiences. This is vital, not only to develop a new generation of talent, but also to tell African stories from multiple perspectives, and meet the needs of many audiences.

In the last two years, DFMI has included a focus on animation through a separate stream of the existing Pitch and Finance Forum and in The Durban Film Mart (DFM) programming. This has been made possible through support from the Federal Ministry of Economic Cooperation (BMZ), implemented by the Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) as part of the Global Project Cultural and Creative Industries (GP CCI). Implementation partners include Animation SA, University of the Witwatersrand (for both Tshimologong, Fak'ugesi) and Women in Animation SA.

This report reflects on the progress that has been made, and highlights areas for improvement. The multi-modal evaluation uses ethnographic observation, quantitative analysis of the Animation Pitch and Finance Forum participant statistics and audience perceptions, together with 25 in depth one-on-one interviews with stakeholders.

The results are both analytical and interpretive and look at financial and non-financial benefits of the investment.

The analysis is presented in five parts:

1. Making space for women in the animation sector
2. Developing African Voices through the Animation Pitch and Finance Forum
3. Efficiencies through sharing the platform with South African players
4. A hub for African animation
5. New market segments for DFM

¹ South African Cultural Observatory, South Africa's Animation Industry: Ecosystem Analysis, 2022

Summary of findings

DFM is helping to create a more inclusive space by including diverse speakers in their panels and talks around opportunities and achievements of women in the animation space. Representation on stage is very important.

Kaydee de Villiers, Women in Animation - SA

20 years ago, the animation industry was almost exclusively the domain of white men, now there is a refreshing mix of voices in the room as women and black animators are taking centre stage.

With new voices come new perspectives and new stories - from children's series that celebrate and encourage difference... to playful depictions that celebrate the joy of an African childhood. Collectively, these stories are changing ideas of what it means to be female and African, and in doing so, encourage pride, increase self-worth and make space for difference.

Collectively these stories and perspectives can help to challenge unconscious bias and prejudice that lead to overt racism and sexism, not only in the animation sector, but for all society.

This did not happen automatically, it was a result of a series of deliberate, intentional interventions to open the industry to black and women voices. One of these is DFMI.

Most of what your kids are watching is Western content, and content can define the perception of how you view the world. And if our stories are not equally shared in that space where there is global content, then the negative image of Africa remains.

Mohamed Said-Ourma, Executive Director, DocA·Documentary Africa

Through the Animation Pitch and Finance Form, Animation@DFM Industry Programming, networking events and workshops, DFMI have used their position as the premier film mart on the continent to open opportunities to African animators and intermediaries².

While it is too soon to tell if the investment will yield financial benefits, the intangible benefits are obvious through Pitch and Finance mentees personal growth, rich networks between mentees across the continent and collaborations in existing and new productions.

In the Animation Pitch and Finance Form programme, of the 18 productions under development, 14 were able to quantify their capital needs. The estimated collective capital requirement is \$35 898 278, of which \$1 738 084 has been pledged before DFM mentorship – so the potential investment income, in production fees alone, is \$34 160 194 Of course, it is highly improbable that all these productions will be financed.

However, from the 2022 cohort, there are already signs of success stemming from connections made at DFM:

- Clare Louis, South Africa, has signed a distribution deal for her 3D animated series, Knittyville, with Mounia Aram company, with a firm commitment from SABC pre-sales. She also has interest from Dube Tradeport in investing in her company, Katanimate.
- Esther Kemi, Nigeria, was mentored online by Olivier Catherin. They later met in person at the Meknes International Animated Film Festival in Morocco. From there sprang a

² We define intermediaries as those that help animators profit from their productions, and include producers, distributors, marketers and lawyers.

partnership to develop a studio in Nigeria – and fund animation training through the French Embassy. She participated in Berlinale Talents 2023 and attended Annecy 2023. Her short, *PTD (Prepared To Die)*, was nominated for the best animation in the 2022 African Movie Academy Awards – and shown at the Africa International Film Festival.

- Adja Mariam Soro, Côte d'Ivoire, was selected to participate in the Centre National du Cinéma et de l'image Animée (CNC) DEENTAL-ACP programme, which provides both grant funding and capacity development. She also pitched per project, *Kinafo*, at MIP Africa 2023.
- Brian O Wilson, Nigeria, won a Ciclic Animation Residency for 2022 where he continued to work on *Aminah's Journey*. Sony have expressed interest in developing it as a feature.

Looking at the potential for Animation@DFM Industry Programming and networking sessions to raise awareness around gender equality, present alternative paths and inspire behaviour change, the results are promising. Results from a dipstick, quantitative survey of 49 attendees, show that:

- 60% believe that there is work to be done to ensure that there are equal opportunities across genders, and 83% believe that DFM is a suitable space to create these.
- 74% met people who inspired them to find out more about creating gender-inclusive workspaces, and 62% attended sessions which added new perspectives on gender equality.

When it comes to DFM as a platform for pan-African connections and developing pan-African solutions, it is clearly that this is a vital platform to contribute to the movement. There are 54 countries in Africa, and participants of the 2022 and 2023 Animation Pitch and Finance Forum were sourced from seven of them. Strong partnerships with key players in these countries have been established. While this presents a start, there is much work to be done to ensure a comprehensive Pan-African animation movement.

South African partnerships and connections have developed well – and DFMI has strong working relationships with the key national and regional players. These close collaborations ensure that activities are not duplicated, and opportunities are cross promoted, ensuring that the overall sector is developed, and opportunities are not cannibalised.

These collaborations need to be further entrenched, and learnings from different animation and digital arts incubation programmes need to be shared. We make suggestions about how this can happen in *overlaps and integrations into other animation incubation programmes* on page 15.

In summary, while at the very start of its entry into working to promote and support the animation sector, DFMI is doing vital work that is already yielding significant benefits. As this work builds on the well-established, globally respected, premier African Film Mart, this is just additional marginal costs on an existing – and a cost-effective approach.

These achievements should be celebrated, and both the Animation@DFM Industry Programming and Animation Pitch and Finance Forum need to be supported through additional partnerships, sponsorship, grant funding or investment.

Our recommendations on minor adjustments to the programme are listed in *conclusions and recommendations* on page 21.

Part one: Making space for women in the animation industry

There is a major need for transformation at lead, management, directors, and high-level management level. We need to see more women in supervisory roles, leading teams that are gender and racially diverse.

Kaydee de Villiers, Women in Animation - SA

This section answers the question if panel discussions and networking events at DFM can be used to raise awareness, educate, and inspire actions to encourage transformation towards gender equality in the industry. The results come from two sources: a delegate survey, and one-on-one interviews.

Delegate survey: To understand if DFM programming is helping to make an impact on gender equality, we included these four questions in the post-evaluation survey run by DFMI.

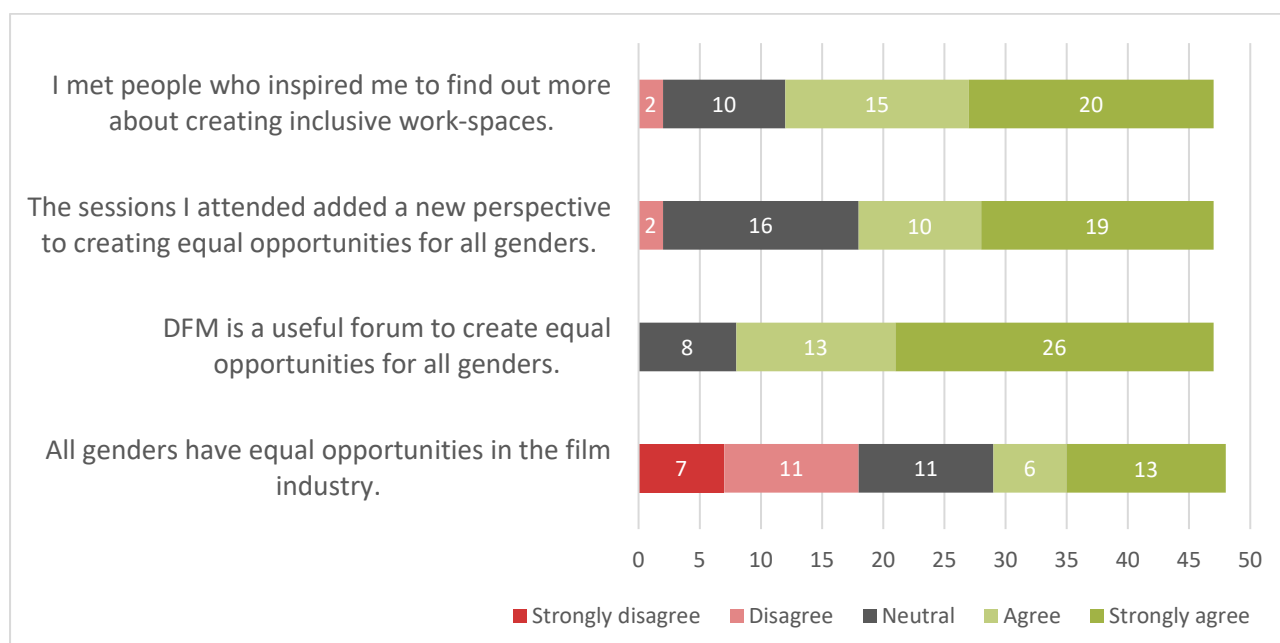


Figure 1 Audience response to questions on gender programming

While the sample is small (49 respondents), a clear trend emerges:

- 18 respondents (60%) believe that there is work to be done to ensure that there are equal opportunities across genders, and 39 (83%) believe that DFM is a suitable space to create these.
- 35 respondents (74%) met people who inspired them to find out more about creating gender-inclusive workspaces, and 29 (62%) attended sessions which added new perspectives on gender equality.

From this, we can see that respondents feel that DFM panel discussions are effective tools to ensure that issues of gender equality are not forgotten, or sidelined. The challenge will be in finding ways to keep the topic interesting to a jaded audience. Our interviews with DFM staff showed that the DFM programming team are well up to the challenge – drawing on their international network of festival and mart curators, to ensure that each event on the global circuit uses different panellists and topics to focus on different aspects of gender equality.

We also explored gender equality through the interviews we ran during and after DFM. The following themes emerged:

A space more suitable to collaborative, non-hierarchical ways of working: female working styles are characterised as empathic, democratic or team-styled work environment ³. The animation sector is particularly well suited to working in distributed, collaborative teams over lapsed time frames. In contrast, shooting live film happens in a short time, and there is one chance to get it right – and a military style, command-and-control culture is best suited to get the shot right, the first time. Animation, on the other hand, emerges over a longer time frame, where different set ups can be explored at little additional marginal cost. This allows for deeper, more collaborative, discursive ways of working.

A different kind of man, and a different culture: men that gravitate towards animation can be seen as different to men who gravitate towards live action. In simplistic terms, animation is the realm of geeks while live action is the realm of jocks.

DFM is championing the cause and playing a part: through representation on panels, and specific gender focused panels – together with the Women in Animation SA Connect Event, DFM is playing a part in making sure that gender equality remains on the agenda.

DFM is helping to create a more inclusive space by including diverse speakers in their panels and talks around opportunities and achievements of women in the animation space. Representation on stage is very important.

Kaydee de Villiers, Women in Animation - SA

DFM cannot do it alone: While progress is being made, it is not enough to stop here, Nosipho Maketo-van den Bragt highlights some of the structural issues that need to be addressed. Here are her comments:

Funding: when you put your money where your mouth is, you are solving some of the problem

Stereotypes: women are flakers, when the going gets tough, we go away and have babies. We need to create spaces where women feel validated and part of the process.

Psychological the more of us that they are, the more people see it as a norm and standard. We should not be seen as a separate sector. We are part and parcel of this conversation in this creative space.

Nosipho Maketo-van den Bragt, Judge

The talent exists, it just needs to be included: we leave the final word on gender inclusivity to Lola Aitkens, a pitch participant:

We do need to have programmes where we actively involve women. I was very intentional that I wanted my art director to be a woman. There are people there, and we have to be intentional to find them, and get them on the project.

³ https://en.wikipedia.org/wiki/Feminine_style_of_management

Part two: Developing African voices through the Animation Pitch and Finance Forum

This part of the report looks at the benefits of the Animation Pitch and Finance Forum – both tangible (deal value, job creation and small business development) and intangible (through personal development and growth).

The tangible value is derived from success stories from the 2022 participants – while the intangible value is drawn from one-on-one interviews with 2023 participants during DFM 2023.

The intent

The DFM Pitch and Finance Forum format has been running since 2010 and has become the gold standard of pitch incubation programmes. Each year, through an open application process and two independent selection panels, the Durban FilmMart Institute selects 20-30 official African fiction and documentary projects in development to present to a panel of potential co-producers, sales agents, broadcasters and film funds. The Pitch and Finance Forum consists of public pitching, one on one meetings with decision makers and individual mentorship leading up to the market⁴. It provides a unique way for content producers from the continent to develop and present pitches that meet the needs of international decision makers.

The Animation Pitch and Finance Forum follows this format and takes emerging African animation directors and producers through the process of creating a compelling pitch – and gives them access to decision makers to pitch it to.

The roll out

The *Animation Pitch and Finance Forum* includes one-on-one mentoring, group masterclasses, pitch rehearsals and feedback, and culminates to a pitch session to industry representatives at the DFM. These pitch sessions are recorded and archived on the DFM website.

The forum has run for two years – here is a tabulation of the demographics of the participants.

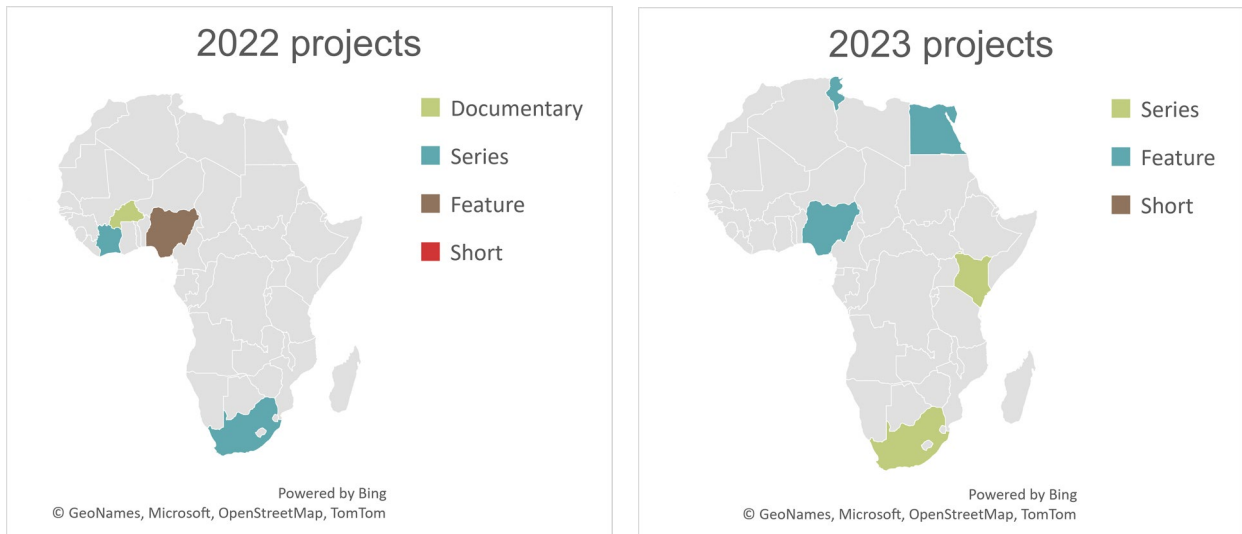
	2022	2023
Projects	10	8
Source countries	Burkina Faso, Côte d'Ivoire, Nigeria, South Africa	Egypt, Kenya, Nigeria, Qatar, Saudi Arabia, South Africa, Tunisia
Collaborators*	France	France, Qatar, Saudi Arabia, South Korea
Female directors	4 (40%)	5 (62%)
Female producers	4 (40%)	4 (50%)
Total potential value	\$ 8 348 573	\$ 27 549 705
Total pledged	\$ 1 258 826	\$ 479 258

⁴ <https://durbanfilmmart.co.za/pitch-and-finance-forum/>

Funding gap

\$ 7 089 747

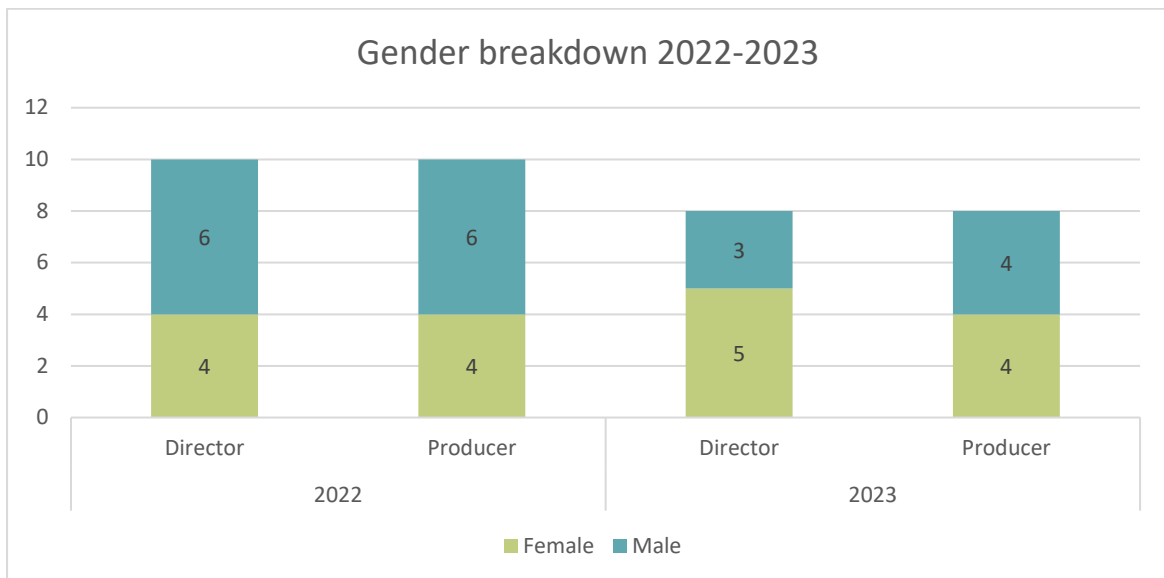
\$ 13 921 441



It is said to be rare to find female directors in the animation sector. However, through the deliberate efforts of the DFMI team, there is no shortage of them at the DFM Animation Pitch and Finance Forum.

In 2022, 40% of the selected directors were female – by 2023, this figure had risen to 60%. For producers, the figure moved from 40% in 2022 to 50% in 2023.

By 2023, DFM Animation Pitch and Finance reached gender parity across both disciplines.



The mentors and judges we spoke to all feel that these women were selected on the strength of their talents and not as token gender appointments.

It is quite tough being a women CEO, you are often second guessed for your abilities, and you start second guessing yourself. So, it was really, really fantastic to have at least six women. Very confident, very articulate, very ready for the next level. They are breaking

those barriers, and we need to make sure that we mentor that confidence.

Nosipho Maketo-van den Bragt

Financial benefits

Programme participants enter the programme at very different stages of project development – some projects are just an idea, while others have a well-executed concept and trailer, already neatly packaged for funding.

Clearly, the time to convert the project into a fundable project will differ, and a range of factors will influence this. These could include:

- **The stage in development:** it will take longer to turn a concept into a fundable project, than to fine tune an existing pitch
- **The depth of the skills in the project team:** multi-dimensional project teams should be able to develop well rounded pitches that take into account all commercial aspects of their project
- **The available time to work on the project:** these projects may be unfunded passion projects run by studios in parallel to their commercial work. This will take longer to finalise a pitch than if development funding is secured
- **The x-factor:** some projects just work better than others.

By allowing projects at all stages of developing into the programme, and encouraging both small and large studios to participate, DFMI have created a funding pipeline where projects will mature at different rates, creating a staggered funding pipeline. This is a good thing as it allows for the smooth flow of funding into the African animation ecosystem.

Following up on the progress with participants is difficult as chasing participants for feedback can place a psychological burden on mentees to report progress when progress is slow. Eight out of ten of the 2022 mentees (80%) reported on progress. DFMI should be congratulated as this is above the industry average for longitudinal tracking studies of incubation programmes.

Here are the key results from the 2022 cohort:

- Clare Louis, South Africa, has signed a distribution deal for her 3D animated series, Knittyville, with Mounia Aram company, with a firm commitment from SABC pre-sales. She also has interest from Dube Tradeport in investing in her company, Kantanimate.
- Esther Kemi, Nigeria, met her mentor Olivier Catherin at the Meknes International Animated Film Festival in Morocco. From there sprang a partnership to develop a studio in Nigeria – and fund animation training through the French Embassy. She participated in Berlinale Talents 2023, and attended Annecy 2023. Her short, PTD (Prepared To Die), was nominated for the best animation in the 2022 African Movie Academy Awards – and shown at the Africa International Film Festival.
- Adja Mariam Soro, Côte d'Ivoire, was selected to participate in the Centre National du Cinéma et de l'image Animée (CNC) DEENTAL-ACP programme, which provides both grant funding and capacity development. She also pitched per project, *Kinafo*, at MIP Africa 2023.
- Brian O Wilson, Nigeria, won a Ciclic Animation Residency for 2022 where he continued to work on *Aminah's Journey*. Sony have expressed interest in developing it as a feature.

- Deidre Jantjies, South Africa, has pitched *The Memory Keepers* to Canal Plus, and will apply for funding through International Organisation of La Francophonie, through a meeting set up by DFMI.
- Bokang Koatjia, South Africa, is in talks with both Sony and Warner EMEA around his series *Hovers*.
- Selaelo Maabela, South Africa, has applied for development funding to the KZN Film Commission and South African National Film & Video Foundation.
- Ajibola Adewole-Oyebokun, Nigeria, has been contacted and encouraged to apply to the KZN Film Commission for development funding for his series, *Grit*.

Non-financial benefits

This section discusses the non-financial and non-tangible benefits of the programme.

We include these as high-quality projects and pitches, cross-country collaboration between participants, development in participant self-belief and confidence, ongoing support from their mentors, and access to difficult to access buyer networks.

High quality outcomes

An important outcome is the quality of projects that are pitched, and the way that they are pitched. Unanimously, the judges we spoke to, all felt that the work, and the pitches, was impressive.

Phenomenal. Exceptional. Brilliant. Thought provoking. Eight really fantastic pitches., Definitely can see that they have put a lot of thought into it and the level that we are seeing is really superb.
Nosipho Maketo-van den Bragt, Judge

There was great preparation, you could see it in the way that they answered the questions and feedback.
Nosipho Maketo-van den Bragt, Judge

This DFM one was good because we did quite a few sessions with them, over a sustained period of time...there is time for them to go away and work on some of the stuff that you discussed, then come back and present it. You can see the project evolve in front of you. And I can see at the presentation some of those projects, they really have levelled up so much, from when the mentorship programme started.
Isaac Mogajane, Judge and mentor

Someone might only have two minutes to sell their idea to someone who is then going to give them millions of dollars. These pitches were well on their way to being able to do that.
Anthony Silverstone, Judge

Fostering cross-country collaboration between participants

Programme participants spoke of the connections they made with their fellow participants. Already this has led to shared work opportunities as parcels of work are shared across the networks:

I met seven other people and their projects – it is really cool as I'm now working with some other people and their projects. We are developing a community of animators around the continent. Animation is a collaborative effort at heart. We are all trying to help each other grow our projects.

Lola Aitkens, pitch participant

This collaboration will stretch across Africa, and paves the way for cross-country collaboration, skills and knowledge transfer and trade. This will help to develop a pan-African talent pool, and support South-South trade.

The colleagues from different countries are all amazing. We can work together and collaborate on different projects. Every time I meet someone, they have something to share – it is really impressive, and inspiring.

Nermeen Salem, pitch participant

Fostering self-belief and confidence

Programme participants reported a new sense of self-belief and development. This is important, as increased self-belief often leads to improved output.⁵

Entering DFM was such an amazing experience. I felt seen, I felt heard.

Thandiwe Mlauli, pitch participant

Participants were particularly grateful for the way that they were mentored and coached as they worked to improve weak points in their presentations.

It is done in a very decent way, that even if your pitch is very bad, they tell you how to fix it - but they don't push you into a direction you don't want... The mentors were very generous with their time, we worked on it until it was my best.

Nermeen Salem, pitch participant

I want to thank you – I am really excited about everything here. I met a lot of amazing people, the way they help you, it is brilliant. I really hope it keeps going, something great is going to happen.

Nermeen Salem, pitch participant

⁵ <https://www.verywellmind.com/what-is-self-efficacy-2795954>

A perspective from the mentors

There have been three mentors used by DFM since the Animation Pitch and Finance Forum started. We spoke to all three of them. They were all complementary of the way that the programme was conceptualised and executed. These themes emerged:

Not to be taken lightly

Being a mentor is a deep responsibility and an investment into the future of the sector.

For the mentee it is such an important thing - they have so much riding on it. So, you have to meet the commitment there to be there to be present and focus on what they what they ask you otherwise it is just not fair.

Isaac Mogajane, Mentor

Being a mentor can both lead to emotional bonds, and commercial opportunities.

But there were some very interesting people in it and I'm still in touch with most of them in fact. It's much more interesting if they really have someone to defend, to say and find the right way to see it...

That's why sometimes I'm doing it for free.

Olivier Catherin

Well conceptualised and rooted in the needs of the animation sector

Unlike other projects that have emerged from a live-action base, the Animation Pitch and Finance Forum considers the technical, and commercial realities of animation. The DFM team invested significant time to understand these dynamics of the industry and have crafted a programme that will bring change and support talent.

It has been a really fantastic experience, driven by a thoughtful and inclusive process that looks at the unique needs of animation.

Vanessa Ann Sinden, Mentor

Freedom to focus on exactly what each mentee needs

Mentees were given the freedom to use their one-on-one sessions focusing on what each participant needed:

I assumed going in that you're going to be talking about the same stuff with different projects, but some of them focused on broader career development and approach to the industry and the work life balance – while some were hyper specific on creative aspects of a project – and some needed help with pitching and business side and core productions and understanding how things come together.

Isaac Mogajane, Mentor

This freedom was appreciated by the mentees:

Having access to industry professionals, and not just talking about the project, but you – and your ambitions, and the industry. The broad range of masterclasses was great.

Lola Aitkens, pitch participant

However, like in most programmes of this nature, some participants put more in than others:

The vast majority do the work, and I could see the passion and progress. Most really worked hard at it - there were just one or two where I felt they did not.

Isaac Mogajane, Mentor

Mentors offer suggestions to take the Animation Pitch and Finance Forum further

We asked the mentors how the programme could evolve, or what gaps are missing. There are their suggestions:

Isaac Mogajane proposed an integrated programme where global film markets work together to develop graduates, where one programme becomes a pipeline sourcing talent for the next. This will provide many different types of mentoring and more than one opportunity to present a project.

I think that if they could coordinate with a couple of other markets around the world and build a joint programme that can have some Africans traveling through all those markets...I think they'll see more projects going into production out of all of this.

Isaac Mogajane, Mentor

To support under-resourced studios or individuals who are developing their concepts on small budgets, Vanessa Ann Sinden suggested that DFMI hire professional artists and creative directors to support these teams in the pitch refinement process.

Development is iterative. Animation is iterative. And it is not enough to take your first draft and put it into your deck and say off you go.... What we need is for DFM to be able to pay professional artists, and art directors, to work on character design and environmental design and push the visual development with the creators.

Vanessa Ann Sinden, Mentor

Olivier Catherin suggests that if mentors are involved in project selection, they may have a closer affinity to the individuals they mentor.

So maybe the possible way to improve is also to let the opportunity for the coach to choose or not some project, because if you are really not connected to this project, it is very difficult to help.

Olivier Catherin

Overlaps and integrations into other animation incubation programmes

DFMI is not the only organisation supporting African animators, and we believe that they should not be. However, we also believe to make the most benefits, and spread the investment of development funds across talent appropriately, organisations that offer developmental assistance to animators need to share information and progress about their graduates.

The need for co-ordinated information sharing stems from observation in the general entrepreneurial development sector that a group of individuals have emerged who move from developmental programme to programme, without any sign of progress towards either self-sufficiency or becoming investment ready.

The premise in the entrepreneurial development sector is that if information exists on what courses individuals have completed, and how they have progressed through them, efforts can be spread more effectively. This is because in this sector there is a huge overlap between what each development organisation offers, all gravitating towards teaching the same content in classrooms as they are measured on throughput - rather than being able to develop learner-centric approaches that meet participants where they are and focus on each participant's unique needs.

This is one of the core strengths of Animation Pitch and Finance Forum. With a manageable cohort and intense one-on-one mentoring from industry experts who can engage on many types of advice, matched with intimate technical masterclasses, each participant gets just what they need: focused, customised attention that meets each participant where they are. This would not be possible if the ratio of mentee to mentor increased.

Additionally, the road from concept to a signed merchandising and distribution deal, has many aspects – both creative and commercial. While there is an inevitable overlap between the creative execution and commercial packaging, DFMI has conceptualised this programme to focus on the commercial side – and not on creative craft. There are other programmes that do that – and DFMI have strong, informal relationships with organisations like Tshimologong's Digital Lab Africa, and Ciclic's Animation Residency and individuals who either graduate from, or migrate to, these programmes are tracked.

Another example of industry collaboration is the Road to Annecy Animation Pitching Competition⁶ which picks up where Animation Pitch and Finance Forum leaves off. Run by Tshimologong, in partnership with many players, including DFMI, this six-month incubation programme prepares participants to pitch their project to investors – with the goal to have projects worthy of being shows at the Annecy Film Festival (one of the four international film festivals sponsored by International Animated Film Association).

Three of the five winners of the 2023 Road to Annecy competition were graduates of the Pitch and Finance Forum (My Big World by Amonge Sinxoto, Naledi by Lola Aikins and Azania Rises by Farayi Chinyanga)

Gaps and further developments

Until every graduate of every programme has taken part in a successful production, the need for incubation, mentoring and support will exist. However, public funding for creative and cultural industries is finite. Organisations that offer donor-funded incubation programmes will need to work together to make the most of these limited funds.

⁶ <https://www.bizcommunity.com/Article/196/13/237618.html>

There will be overlaps and differences between programme design and execution as programmes develop at different rates, and in different ways, to close these gaps. This is not a bad thing, as different organisations and individuals will approach the challenge using divergent approaches. There is benefit in distributed experimentation, it fosters innovation.

However, it is vital that existing and emerging, publicly and privately funded, coaching, mentoring and support programmes collaborate and pool their efforts so that the collective benefits can be pooled of these approaches can be pooled.

Here are some ways this can be done:

- **Shared progress tracking across incubators:** One of the most difficult aspects of running an incubation programme is tracking graduates to be able to report to donors on the programme's success. There is more than one animation incubation programme in South Africa, and it makes sense for them to pool forces and run a single tracking study across graduates from all programmes. This can be used as a space to use the collective power and insights of the graduates, who are the people these programmes are supposed to serve, to conceptualise additional developments for the programmes. It will also be interesting to track the relative progress of graduates who have been to more than one programme, against those who have only been to one.
- **An annual incubators conference:** Hosted as an additional day at one of the events on the local animation circuit, or as a separate online event, animation incubation practitioners share learnings to collectively develop the industry. This could evolve into a peer-reviewed journal capturing learnings locally so they can be shared globally.
- **Shared input into, and benefits from, research studies:** different aspects of incubation are of interest to different researchers, donors and research institutions. This multi-dimensional exploration should be encouraged – but the results should be shared.

The question here is who should drive this collaboration. It is obvious that DFMI should be a key collaborator and founding partner to an initiative like this, but they may not be best placed to house it.

We propose that a meeting with existing incubators and their funders to explore who should participate, what the benefits are, what the costs are, and who should drive it.

Part three: Efficiencies through sharing the platform with key players

This section of this report focuses on the sector efficiencies from having industry players being present at the DFM. Efficiencies through collaboration with other incubation programmes are discussed in the previous part of this report, *overlaps and integrations into other animation incubation programmes* on page 13 which forms part of the analysis of the Animation Pitch and Finance Forum section of this report.

South African animation industry partners were well represented at the DFM, and used the platform to run networking events, conferences, present research findings and host panels. These are highlighted below:

Industry World Cafe

The South African animation sector is undeveloped and needs to be fully developed and capacitated. This which will take an investment in both talent and infrastructure – and needs to be driven by supportive government policies, and a mature ecosystem. The World Cafe, facilitated by Tshimologong, driven by DSAC, DSAC, DCDT, DTI and DSBD, and housed at the DFM, used new formats for public private engagement to integrate feedback from the small business sector into the Creative Industries Master Plan.

The World Cafe led to:

1. Awareness and understanding of the South African Creative Industries Master Plan
2. Empathy between government and private sector
3. Deeper levels of debate and problem solving to input into a policy statement
4. Reaffirmation of connections and plans for collaboration outside the room

Fak'ugesi networking event and intermediary research report

On the first day of DFM, Fak'ugesi held a networking lunch to promote the *Trust in the Value Chain research project*⁷. These findings were discussed and debated on the last day of the DFM, at the *Intermediaries in Africa; Now and Beyond* panel discussion. Even though this was held on the last day of the DFM, the room was packed, with intermediaries from animation and film.

Animation SA and KZN Animation Growth Strategy

The KZN animation growth strategy is a pivotal moment – creating additional investment into production, education and audience development in the local animation sector. This was the first time that the strategy was presented, and the audience response was positive.

Animation SA facilitated panel discussions

Animation SA facilitated two additional panels, *The Correct Picture - The Dynamics of Characterisation in Animation* and *Animation@DFM: Creative Currency: Professional Opportunities for Women in the Animation Industry*. These panels were well attended, and the level of questions from the floor and quality of debate is testimony to the relevance of the topic, quality of the panellists that were selected, and the strength of the moderator.

Women in Animation SA Connect Event

Women in Animation is a global non-profit advocacy group that works towards gender equality in Animation, Gaming and Visual Effects with no chapters on the African continent. This event aimed to find out if there are enough interested people to set up the first African chapter. The session was well attended, and names of interested individuals were collected.

⁷ <https://fakugesi.co.za/intermediaries-dfm-july/>

Part four: A hub for African animation

Animation provides the opportunity to imagine. It seems limitless. Animation allows our people to dream of a vision of what we could be. To imagine an Africa we want.

Raymond Malinga, Judge

We need to know each other better and understand that we are all victims of colonialism. We all have those misperceptions; we have to go beyond the colonial and post-colonial barriers and the film industry is lagging behind.

Mohamed Said-Ourma, Executive Director, DocA·Documentary Africa

The importance of a vibrant African animation sector

Developing a vibrant African animation sector is important for three main reasons:

1. **Developing self-respect and agency:** If Africans can influence how the world sees Africa, and how Africans see themselves, Africans can re-write the dominant negative dominant narrative of Africa as a continent of poverty, disease, conflict, poor leadership and corruption⁸. Changing this perspective will help Africans develop self-respect and agency, which will contribute towards a more equal power relations between Africa and the rest of the world.
2. **It is a source of economic development:** the global animation market was estimated to be about \$395 billion in 2022, and to reach \$587 billion dollars by 2030⁹. There is clearly money to be made in animation, and animation skills are in short demand around the world. As Africans generate income, either in their own country, or abroad, the continent benefits. Research shows that one of the largest sources of money into Africa comes from members of the diaspora who send money to their relatives they have left behind¹⁰.
3. **Fostering pan-African approaches to a post-colonial agenda:** this acknowledges the power of cross-country collaboration to find shared ways of addressing a shared challenge.

It will take ongoing investment into skills and infrastructure development for African animators to realise this potential. DFM has a vital role to play in this. As the central (if not only) film market on the continent, the DFM is the place where African film makers connect with themselves, and with global markets.

The role of Animation@DFM

Mohamed Said-Ourma, Executive Director, DocA·Documentary Africa, presents four reasons why it is important that the market is in Africa, and why international buyers come to Africa, rather than African's going to Europe of The States:

⁸ <https://africanofilter.org/home>

⁹ <https://www.statista.com/statistics/817601/worldwide-animation-market-size/>

¹⁰

https://www.afdb.org/fileadmin/uploads/afdb/Documents/Publications/WPS_No_308_The_Diaspora_and_Economic_Development_in_Africa.pdf

The first is that being in Africa will lead to a more nuanced view of Africa:

We want to change perspectives of Africa. The best way to do that is to have a market in Africa so that people can come in. And then, just by being here physically, by talking to us on a daily basis, there is a shift in the paradigm.

Mohamed Said-Ourma, Executive Director, DocA-Documentary Africa

The second is that traveling internationally is expensive, and this limits the number of Africans who can afford to attend markets:

If you are a young, emerging filmmaker on the continent, and learn how to navigate a landscape that is very complicated and itemised. They are almost unreachable spaces that are for the happy few, that become gatekeepers.

Mohamed Said-Ourma, Executive Director, DocA-Documentary Africa

It is also logistically challenging:

For us, African film professionals, if we do not have a market in on the content, we always have to go up North, there is always a practical challenge – visas, travel.

Mohamed Said-Ourma, Executive Director, DocA-Documentary Africa

Finally, by being seen in the African context, the project will be appreciated for what it is, not seen as a token foreign film:

This is a space, the Durban Film Market where we as African film professionals, can bring people here to hear our vision of the world. We are not going to the North, to be the token African project that is going to be in a masses of Western projects.

Mohamed Said-Ourma, Executive Director, DocA-Documentary Africa

DFM already plays this role in the live film space, it is up to DFM and its partners to ensure that this role continues to expand into the pan-African animation space.

DFMI is clearly intentional about making sure that animation at DFM is pan-African in spirit. Panellists in the Animation@DFM Industry Programming and Participants in the Animation Pitch and Finance Forum are sourced from only seven African countries: Burkina Faso, Côte d'Ivoire, Nigeria, South Africa, Egypt, Kenya, Tunisia.

Inevitably, these are the countries with the most well developed, and organised, animation sectors – where industry associations make it easy to share information and promote opportunities. Developing these structures in other African countries is well beyond the scope of DFMI, but it can continue to draw on partners, donors and other people in the network, to make connections to bodies as they emerge.

Any sector will develop if you have the talent. You have to nurture talent, you almost have to babysit talent. You have to create pools of talent all over the continent. Without talent, you can put as much money as you want, it is not going to go anywhere.

Mohamed Said-Ourma, Executive Director, DocA-Documentary Africa

Part five: New market segments for DFM

The benefits to DFM

Adding animation to DFM increases the potential audiences, with a new set of students, producers, and buyers. This means more revenue at the door – and an increase in total deal value stemming from the market. In 2022, 38% of the total DFM delegates (1293) were from the animation sector.

However, it is difficult to please everyone. As animation buyers are far more specific and segmented than those in live action, it becomes difficult to cover all market segments:

The only negative I find with that is animation is very much driven by audience age category. So if you look at a company like Apple, Apple TV, their commissioning editors are separated by those age categories. It would be a different person dealing with preschool, a different person dealing with young adults, a different person dealing with tween, and we can't have three guests from Apple TV – we have to choose one. And I'm sure you noticed that our animation slate was very diverse in terms of audience that they were hoping to reach. *Faiza Williams (Durban FilmMart SA)*

Promoting Animation@DFM

The animation stream at DFM was well promoted through partner social media, however this was not carried through to the structure of the DFM's own website.

The tag Animation@ was not consistently used, and there was no clear section telling animators what was in store for them. While this is intentional, and DFMI do not want animation to appear to be a separate stream, the unintended consequence is that animators may not know where to go, and what is relevant to them.

In one instance, this may have been a blessing in disguise. The very well attended panel discussion on the role of the intermediary *Intermediaries in Africa; Now and Beyond* attracted audience members from both live action and animation.

For many live action intermediaries, this raised awareness of opportunities that they had not previously considered – creating the possibility of skilled live action Intermediaries transitioning into animation and closing the glaring skills gap in the animation sector.

Next year, it would be interesting to see DFMI using icons and colours to present both and integrated and animation only way of navigating the website and event.



Conclusions and recommendations

A summary of our conclusions and recommendations are laid out in the section, *Summary and recommendations*, on page 4 of this report.

This research proves that the five objectives of the animation stream, funded by the BMZ through GIZ, have yielded impressive results, and should continue. Here is a summary of our key findings and the recommendations that emerge.

1

Making space for women in the animation sector.

What was done: There were two mechanisms for driving gender equality, the first through gender sensitive activities at the DFM (enabled thorough partnerships with Animation SA and Women in Animation SA), and the second by ensuring that at least 40% of the Animation Pitch and Finance Forum were female.

Key findings: For Animation@DFM Industry Programming, delegate feedback shows that 60% believe that there is work to be done to ensure that there are equal opportunities across genders, and 83% believe that DFM is a suitable platform to surface this work.

For the forum, female participants at Animation Pitch and Finance Forum were equally competent as their male peers. In fact, and the two most significant success stories from 2022 stemmed from female participants.

Recommendations: for the programming, keep doing what you are doing – and ensure that gender remains on the agenda at discussions and events at DFM 2024.

For the forum, include a masterclass within the 2024 Animation Pitch and Finance Forum on why gender matters and ensure that both women and men (who will be future allies) attend this course. Share an edited version of this masterclass on the Animation SA public resource.

2

Developing African Voices through the Animation Pitch and Finance Forum

What was done: one-on-one mentorship, combined with group masterclass, prepared a cohort of participants to pitch their concept to a panel of potential investors.

Key findings: the financial and non-financial benefits are clearly significant. While it is too soon to see a host of deals signed, an impressive 80% of 2022's cohort are showing clear progress towards this goal. The non-financial benefits are equally impressive. Participants feel seen, heard and valued. Increased self-belief can lead to improved output. Participants are working together across borders, and these bonds bode well for pan-African partnerships.

Recommendations: keep building on what you are doing. The forum is yielding impressive results and needs to continue, in collaboration with other players. Here are some refinements to consider:

Develop a sector-wide animation incubation forum: The industry needs a forum for animation incubators to share approaches, research and convene. DFM may not best placed to establish this but should be a founding partner and key collaborator.

Collaboration with, and exchanges between, international film marts: graduates are sent to major film marts, like Annecy and Cannes, and graduates from their incubation programmes join the Animation Pitch and Finance Forum. The groundwork has been set through collaboration with both Wits and CTIAF.

Sponsor professional artists for projects in development: some participants lack the resources to pay professional artists to progress their visual development. Providing professional artists to projects that need it will accelerate development.

Mix and remix: sponsor a project where graduates from DFM collaborate on a new project. A closed session where mentees pitch new ideas to the room and see if they would like to collaborate. This could pave the way to formal studio collaborations as mentees' studios mature and access funding.

3

Efficiencies through sharing the platform with key players

What was done: DFMI shared the DFM platform with key players in the South African animation sector. A similar approach was not found across other parts of the continent.

Key findings: this worked well in the South African context - however, it needs to be taken further up the continent as there were no African associations or networks as panel co-hosts, or event partners.

Recommendations: identify and work with emerging or established continental players, like Association of Animation Artistes Kenya, African Animation Network, AIFA, CCFM, and encourage them to conceptualise and chair a panel discussion.

4

A hub for African animation

What was done: DFM is the premier film mart for the African continent and already attracts a pan-African audience. This brings marginalised communities to the international film table, surfacing interesting stories and story tellers. DFMI is following a similar trajectory for animation.

Key findings: while the Animation Pitch and Finance Forum had representation from across Africa, it is still dominated by South African projects. Continental partners were missing from the line up in the Animation@DFM Industry Programming.

Recommendations: there is a lot of work to be done in ensuring that the animation stream does not become seen to be dominated by collaborations with South African associations and organisations.

Identify and include African partners: It will take a concerted effort to identify and include potential partners from across the continent. Draw on existing relationships with partners, donors and government agencies to facilitate.

Use digital assets to start the conversation: recordings of the panel discussions are available online. Share these with partner networks to help to spread the word.

Grow the continental pipeline: not every applicant makes it to the Animation Pitch and Finance Forum. Sponsor high-potential rejected applicants from underrepresented African countries to attend the DFM.

5

New market segments for DFM

What was done: DFMI used relationships with industry players to promote the animation stream at DFM.

Key findings: including animation is working. 38% of the 2022 DFM delegates were interested in animation. This uses the sunk costs in the existing infrastructure to create new opportunities at comparatively little additional cost. There was a significant increase in potential deal flow, with \$35 898 278 in new projects pitched. It was not clear from the DFM website that animation is a focus, and the @animation tag was not used consistently.

Recommendations: continue to use the relationships with key players to promote DFM – and widen the net to include educational institutions.

Include visual effects: visual effects and animation are closely linked. Extending the focus to include visual effects will increase the potential for revenue that can be generated through event exhibitors and increase cross over opportunities between life action and animation.

Make it clear that animators are welcome: Better signposting with a separate communications campaign and website section for animators will increase awareness and conversion. Use private animation colleges as a springboard to attract final year students and alumni.

We are not lacking for innovation, invention or imagination in Africa. What we need, especially for the animation industry, is a way to package it, a way to position it, for other sectors in our economy to understand why it is useful.

Raymond Malinga, Judge

Methodology

This analysis follows a classic multi-modal design, and has yielded both rich thematic qualitative data, and quantitative data to support it.

Here are the forms of analysis used.

1. **Ethnographic observation:** we attended the DFM and observed panel discussions, workshops and networking events. We engaged informally with audience members to hear their perceptions of the events, panels and overall experience. Fieldwork took place during 21-24th July 2024.
2. **Quantitative analysis of the Animation Pitch and Finance Forum participant statistics:** statistics run over two years. We normalised and standardised the data before running frequency analysis across the dataset.
3. **Quantitative analysis of audience feedback:** DFMI sent out a survey to attendees after the event, and we included a series of questions about the Animation@DFM Industry Programming. We ran frequency, cross-tabulations and content analysis across this limited dataset.
4. **One-on-one interviews:** we ran 25 depth semi-structured interview with stakeholders, both at DFM and later online. These were run between the 21st July and 30 August 2024.

The interviews were recorded, and content analysis was used to extract the key themes which were included in this report.

The sample breakdown is below:

Group	Count	Method
DFM key staff	3	Online
Judges	4	Face-to-face
Mentors	3	Online
Mentees	6	Face-to-face
Partners	9	Face-to-face

Annexure

Annexure A: 2023 programming linked to animation

2023

Date	Time	Title	Type	Speakers	Linked to
Friday 21st	10:00- 13:30	Durban FilmMart Pitch and Finance Forum	Pitch forum	Isaac Mogajane (Diprente)	DFI
<i>Friday 21st</i>	<i>13:30- 14:30</i>	<i>Fak'ugesi Intermediaries Networking Event</i>	<i>Networking</i>		<i>Fak'ugesi</i>
Saturday 22nd July	12:30- 13:30	Animation@DFM: The Correct Picture - The Dynamics of Characterisation in Animation	Panel	Raymond Malinga, Yolanda Mogatusi, Lesego Vorster Moderator: Isabelle Rorke	Animation SA
<i>Saturday 22nd July</i>	<i>14:00- 18:00</i>	<i>Fak'ugesi Unconference (by invitaiton only)</i>	<i>Worksession</i>		<i>Fak'ugesi</i>
Sunday 23rd July	10:45- 12:15	KZN Film: Animation Growth Strategy	Panel	Clare Louis, Justin Yarrow, Nompivi Vilakazi Moderator: Isabelle Rork	Animation SA
Sunday 23rd July	12:30- 13:30	Unpacking the IDC's strategy for the media and AV sector	Panel	Tutu Bongani Miya	IDC
Monday 24th July	10:45 - 11:45	Intermediaries in Africa; Now and Beyond	Panel	Eduardo Cachucho, Sakhile Mogale, Moderator: Lesley Donna Williams	Fak'ugesi
Monday 24th July	14:00 - 15:00	Animation@DFM: Creative Currency: Professional Opportunities for Women in the Animation Industry	Panel	Ebele Okoye, Nosipho Maketo-van den Bragt, Mounia Aram Moderator: Isabelle Rork	Animation SA
Monday 24th July	15:00 - 16:00	Women in Animation SA Networking tea	Networking	Kaydee de Villiers	Women in Animation SA

Annexure B: 2022 programming linked to animation