

A film crew is filming in a forest of tall, thin trees. A man in a green jacket stands on the left, looking towards the camera. A camera operator in a black jacket and red beanie is in the center, holding a camera on a shoulder rig. Another person in a blue jacket is on the right, also looking towards the camera. The forest floor is covered in dry leaves and grass.

FILM & TV DEVELOPMENT // ROTORUA MARKET OPPORTUNITY

ROTORUA
Economic Development
te Whanaketanga Ohanga o Rotorua

EXECUTIVE SUMMARY

New Zealand is a significant player in the film production industry, both as a location for shooting and thanks to its world class post-production services. Our country's reputation far exceeds our size, and has become synonymous with films such as the Lord of the Rings and Hobbit Trilogies.

However, the growing future of the industry is in streaming services, with online giants competing for increasingly diverse and unique stories to set them apart and attract subscribers. Gone is the need for set formats to meet broadcast schedules, with increased flexibility and international audiences seeking a wide range of voices. The door is open for our filmmakers to share their stories on the world stage.

Rotorua is the home to a range of film makers, and as New Zealand's hub of Māori culture it is unsurprising that some of New Zealand's most well-known and successful indigenous productions have come from Rotorua. From the production of short films, to animation series, and as a filming location for Hollywood films to foreign reality TV shows, Rotorua offers a strong location for many filming services. Its strength lies in its people and their stories they are bringing to the world.





THE GLOBAL INDUSTRY

The global entertainment and media industry is valued at US\$2 trillion (2017 – PwC estimate). The industry is still growing with huge increases in the audience and volume of content available online. The online streaming services industry is valued at US\$30.29 Billion (2016 – Research & Markets) with a forecast CAGR of 18.3%, to reach market value of US\$70 Billion by 2021.

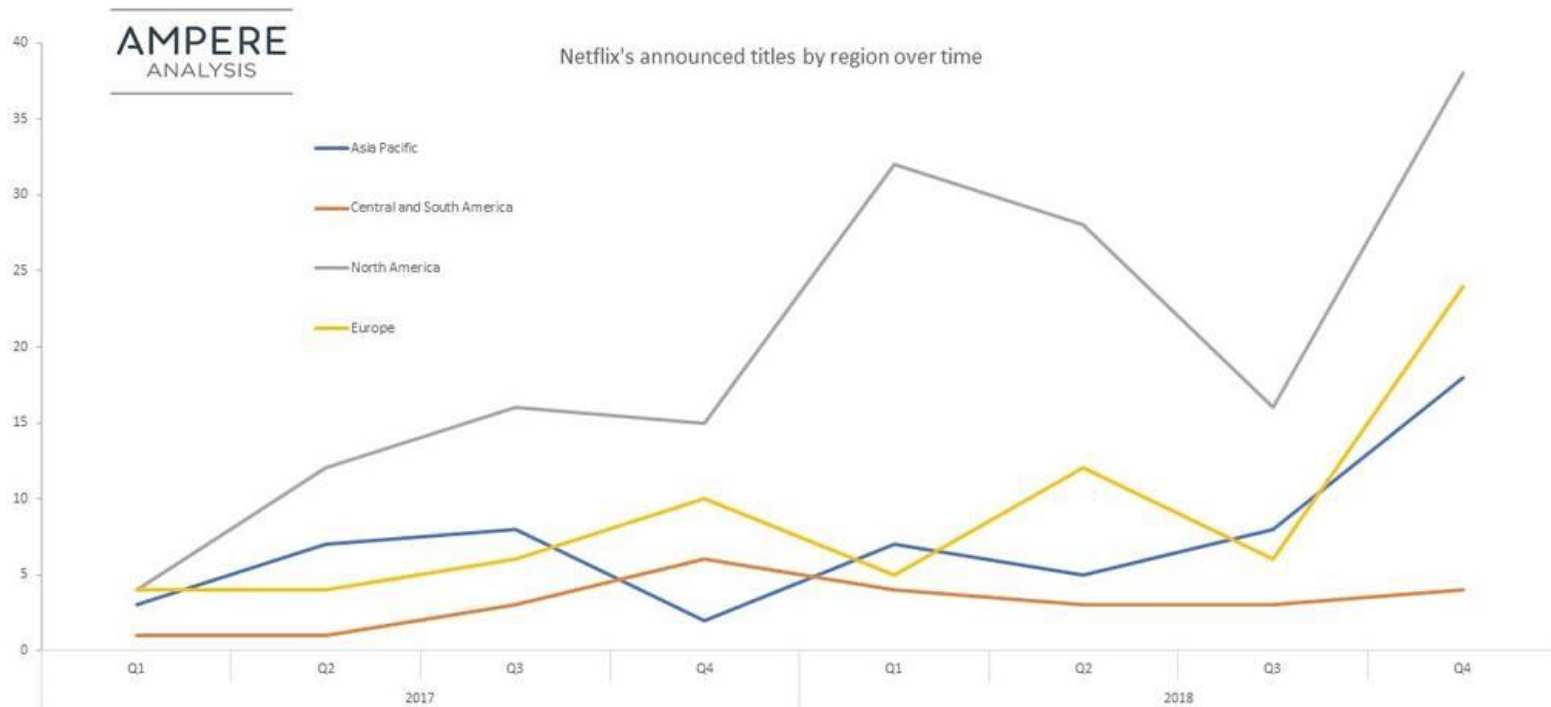
A recent Harvard Business School study showed that the biggest driver of signing up to a streaming service is the amount of original content that is not available elsewhere. This has driven a proliferation of new content - not restrained by broadcast schedules, episode length, series length or format.

It has also driven growth in non-national centric content. New generations are interested in stories from other cultures and places, not just American stories for Americans.

NETFLIX

Netflix are currently producing 30 - 35 non-English language originals a year, but as at October 2018 were aiming to raise that figure to 100 within two year's time.

36% of Netflix's upcoming originals will be non-English, and 46% will originate from outside the US and Canada

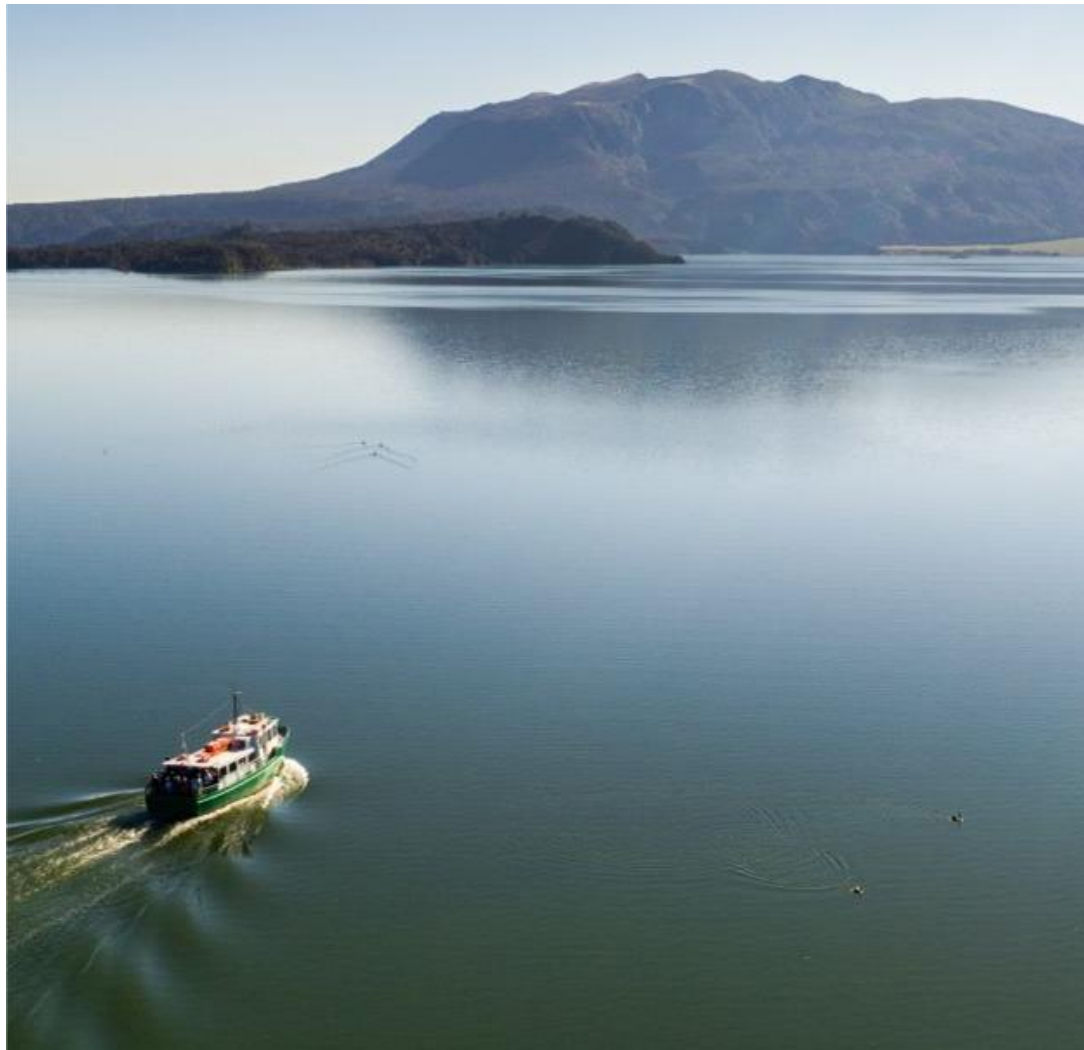


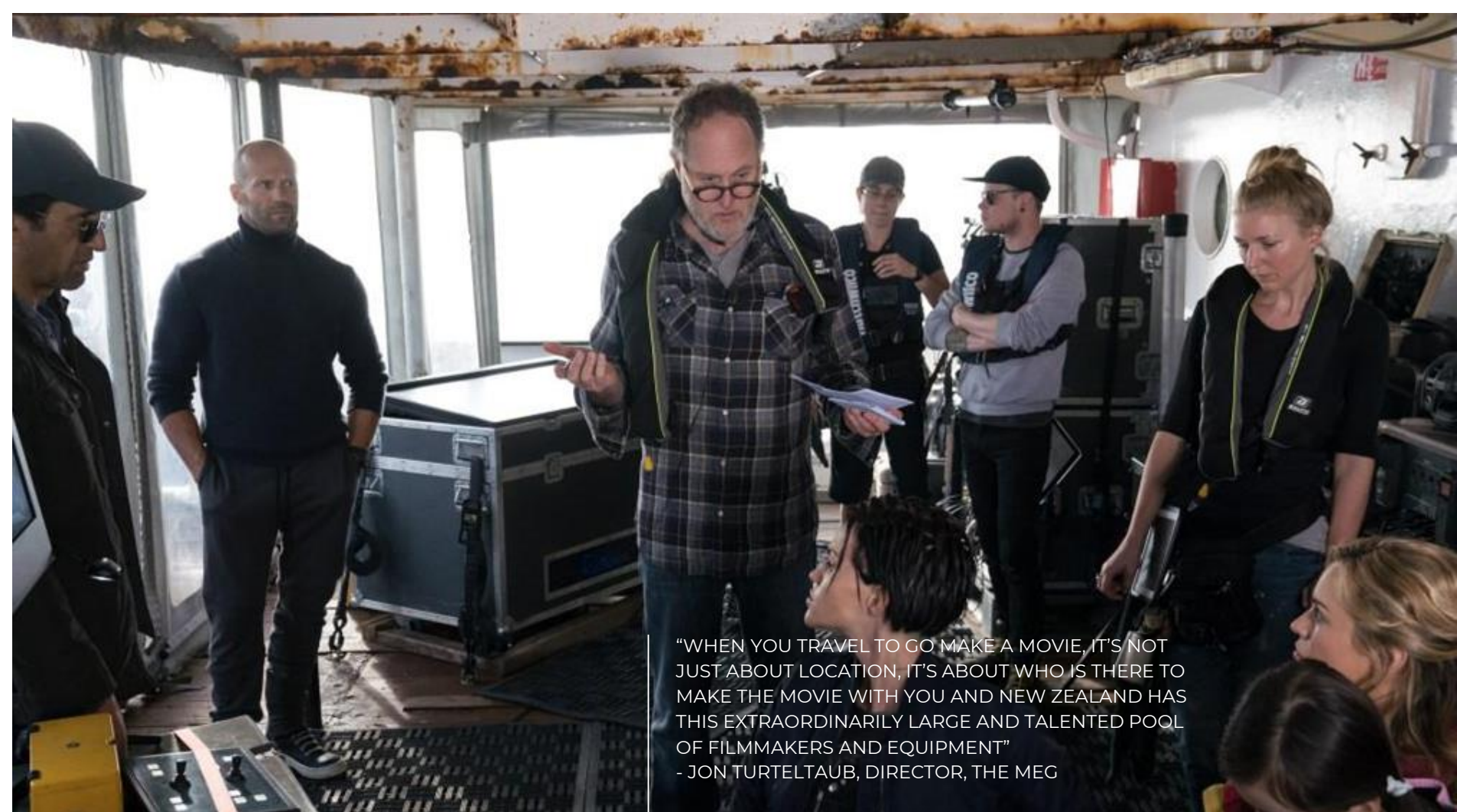
NEW ZEALAND FILM INDUSTRY

Nationally, revenue from the screen industry topped NZ\$3.55 billion (2017), with an 8% growth in revenue over the previous year (Statistics NZ). In 2017 online-only programmes were measured for the first time, with 105 businesses generating gross revenue of \$26 million. This made up only 1% of industry revenue, showing plenty of room for expansion.

The New Zealand film community is made up of 14,000 skilled individuals, all in hot demand as cast and crew pay rates are very internationally competitive.

New Zealand is also in demand for its varied filming locations with many studios in the main centres booked up until the end of 2020. This is supported by internationally recognised post-production services.





"WHEN YOU TRAVEL TO GO MAKE A MOVIE, IT'S NOT JUST ABOUT LOCATION, IT'S ABOUT WHO IS THERE TO MAKE THE MOVIE WITH YOU AND NEW ZEALAND HAS THIS EXTRAORDINARILY LARGE AND TALENTED POOL OF FILMMAKERS AND EQUIPMENT"

- JON TURTELTAUB, DIRECTOR, THE MEG



WHAKAREWAREWA
REDWOOD FOREST, ROTORUA

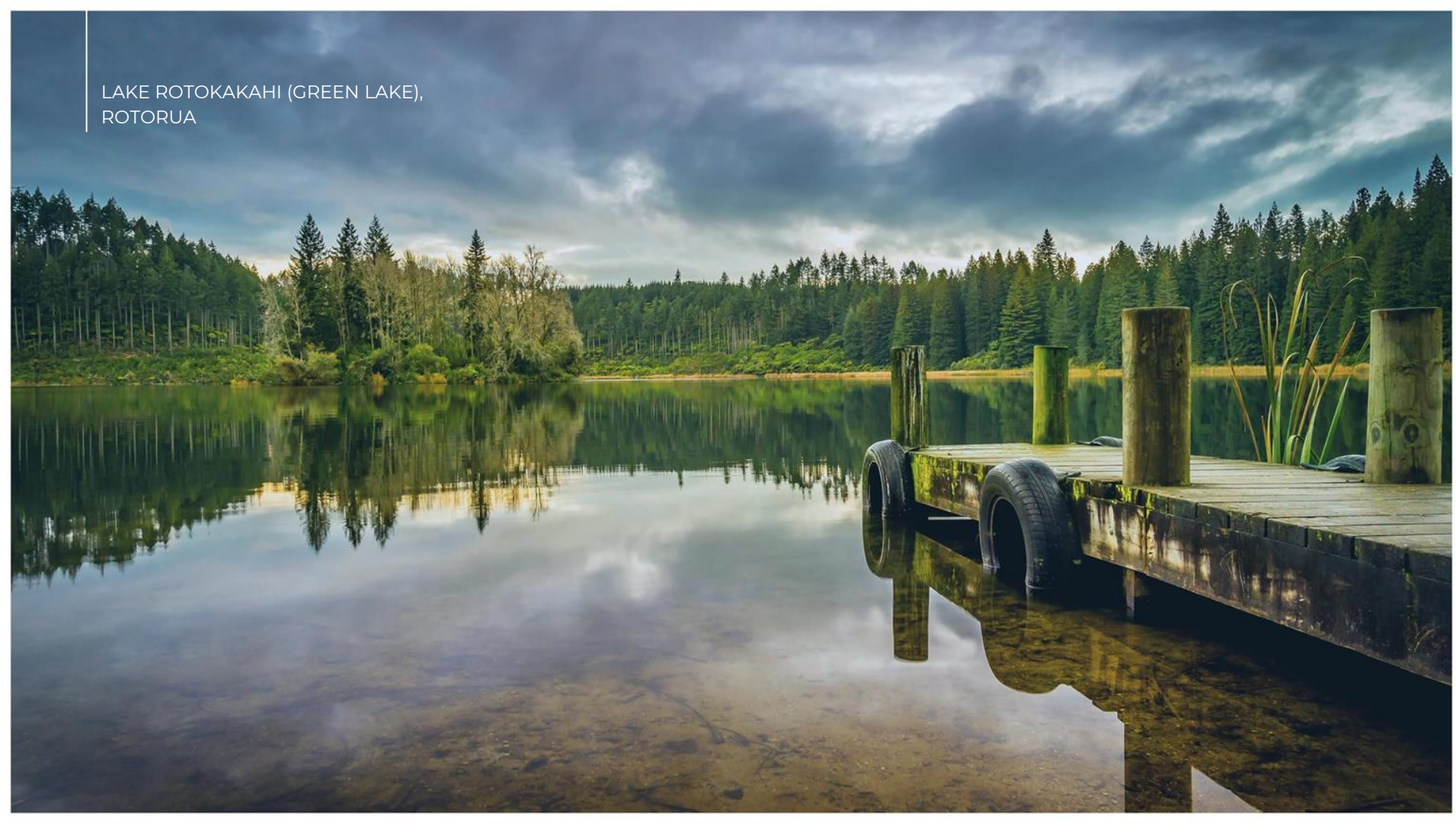
ROTORUA'S PLACE IN FILM

Of the NZ\$3.55 billion generated in the Film industry in New Zealand in 2017, only 3% was from North Island locations outside of Auckland and Wellington (Statistics NZ). This shows there is huge room for growth.

Rotorua has been used as a location for filming for years, most notably for *Pete's Dragon* and *Without a Paddle*. It is world renowned for its geothermal activity, as well as also being surrounded by forests, lakes, manicured gardens, small towns, a variety of unique tourist locations as well as an urban centre, all in a small geographic area.

Rotorua is conveniently located close to major cities, beaches and mountains, making it useful as a central base.

LAKE ROTOKAKAHI (GREEN LAKE),
ROTORUA



Proximity to Auckland's sound stages and production studios also make Rotorua a great secondary filming location.

Rotorua is supported by Film Bay of Plenty who can assist with location scouting and facilitation, permitting, crew & service provision, advocacy and liaison with local government.

Film Bay of Plenty has commissioned a study to investigate a studio in the region, which would further support Rotorua as a filming location.



TE PUIA, ROTORUA



PETE'S DRAGON PRODUCTION USED SEVERAL LOCATIONS FOR FOREST SCENES, INCLUDING THE ROTORUA REDWOOD FOREST.

PREVIOUS FILM PRODUCTIONS IN ROTORUA

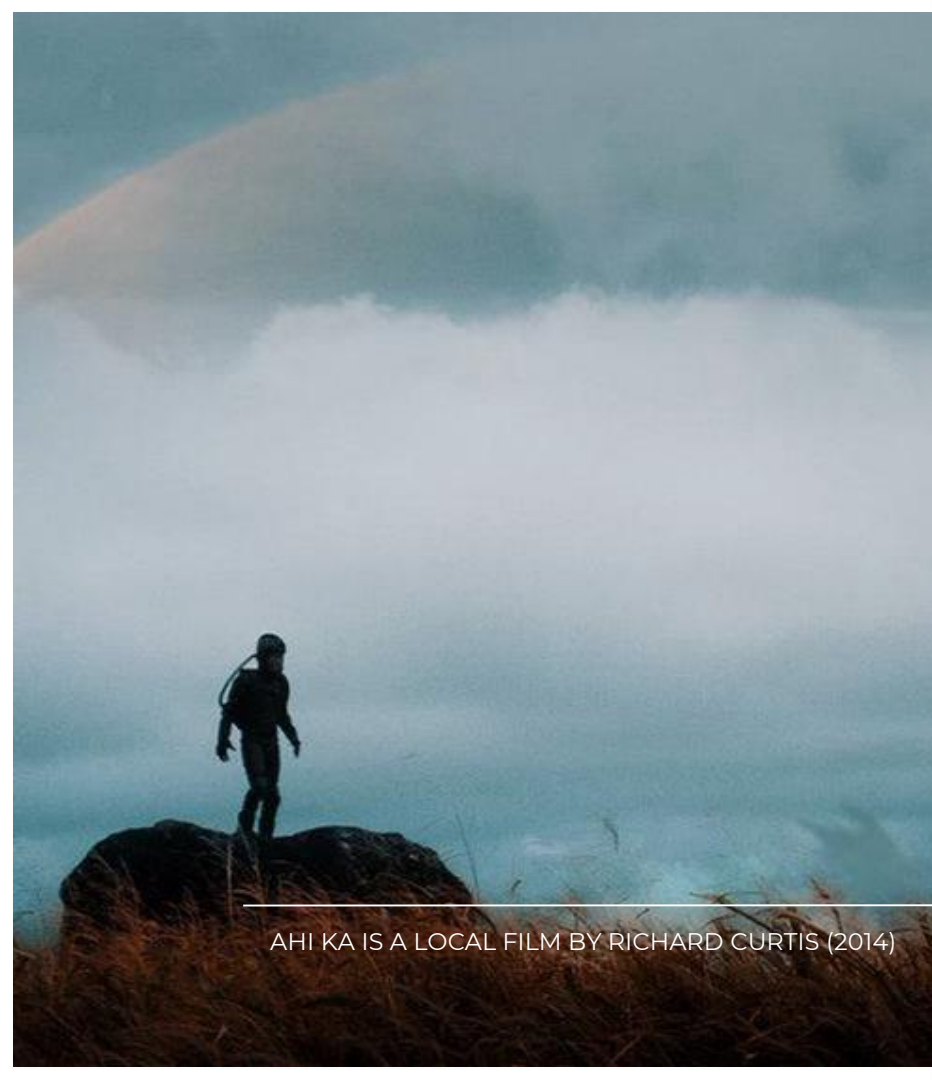
- Hollywood Films:
 - Pete's Dragon (2016, grossed in excess of \$143 million)
 - Yogi Bear (2010, grossed over \$200 million).
 - Without a Paddle, USA (2004)
- Short Films:
 - Tits on a Bull, by local filmmaker Tim Worrall (2014)
 - All Children Have The Right To Art by Alaskan filmmaker Fred Potts (2019)
 - Meke by Tim Worrall (2017)
 - Ow What! By Mike Johnathon (2015)
 - Elevation by Tihini Grant (2015)
 - Ahi Ka by Richard Curtis (2014)
- Other Films:
 - Life of Josutty, Malayalam (2015)



THE CAMP AND PICNIC AREA IN YOGI BEAR WAS
FILMED IN THE ROTORUA LAKES DISTRICT.

PREVIOUS TV PRODUCTIONS IN ROTORUA

- Reality TV Shows:
 - Dad, Where are we going?, China (2014)
 - Dad, Where are we going?, Korea (2013, 2016)
 - RV Rampage, USA (2014)
 - The Bachelorette Australia - 2015
 - VOL920, Canada (2015)
 - Flight 616, Italy (2016)
 - Married at First Sight, New Zealand (2017)
 - The Bachelor, USA – (2013)
- Travel Shows:
 - Our NZ Escape (2016)
- Other Shows:
 - The Almighty Johnsons, New Zealand (2012)



AHI KA IS A LOCAL FILM BY RICHARD CURTIS (2014)

ROTORUA TALENT

Although outside of the main centres, there are many involved in the film industry who have chosen to make Rotorua home. A different lifestyle, and lower overheads is attractive for many. After relocating from Auckland, Nige Ward a cartoon animator and anime fan, found life in Rotorua still has many of the advantages of city-living, with cheaper cost of living, and everything being close by. One of the stand out parts of Rotorua for Nige has been the amount of culture, which is part of everything. "You can just accomplish so much more in Rotorua! You're not lost in the mix and the noise."

The film industry is growing in Rotorua, with companies for casting, production, catering, communications and other supporting industries, popping up in response to the growing need of local and international productions in the area.

Rotorua also has a deep pool of talented award-winning writers with amazing stories to tell. Stories with a unique viewpoint, a connection to the land, and particularly strong Māori voices in film makes Rotorua stand out amongst story tellers.

Rotorua's Steambox Films collective is a group of these film makers, who between them have won a considerable number of both national and international awards. They were also responsible for organising the first Rotorua Indigenous Film Festival in November 2018, sharing uniquely Māori films as well as stories from other indigenous filmmakers around the world.



ROTORUA TALENT FOR ACTORS

Rotorua is the birthplace of a range of actors who have played significant roles on both a domestic and global stage.

- Notably Cliff Curtis (pictured, right) has starred in *Fear of the Walking Dead*, *The Meg*, *The Dark Horse* and will play a lead role in James Cameron's upcoming *Avatar* sequels.
- Temuera Morrison has featured in roles in *Star Wars*, *Moana*, and *Speed 2* among others.
- Miriama Smith has been involved in *Power Rangers*, *Xena Warrior Princess* & *Spartacus*
- Likewise, Manu Bennett has featured in *The Hobbit*, *Xena Warrior Princess* & *Spartacus*





ROTORUA'S DIGITAL SPACE

Rotorua is training the next generation of filmmakers and animators, with a local campus of the Animation College, with Diplomas in animation and digital design available. The campus has proved popular and was expanded in 2017.

Many students remain in the local area, and are able to build off the strong local networks and digital community in place via such initiatives as Digital Basecamp.

Digital Basecamp has been set up as a collaborative coworking space for digital content creators and tech developers. Digital Basecamp brings together those involved in the digital space to work together, be inspired by one another and showcase the talent that exists in Rotorua. Opened in 2017, the space has proven popular and there are currently only limited memberships remaining.

One of the most recent success stories from Rotorua is the Pipi Mā series “Te Pakiwaituhi”. The series was born after the success of the namesake toy, Pipi Mā with the Rotorua based creators winning the 2017 People's Choice Award at the New Zealand Innovation Awards. The cartoon series was made by Punarau Media Ltd, a Rotorua production company specialising in high quality Māori web series, digital TV, apps and other platforms. Now with a second series in creation, the first is available online, but has also been picked up by Air New Zealand’s inflight entertainment package, and broadcast TV.

Another upcoming Māori animation series made in Rotorua includes Upoko Kōhua, which will be aimed at an older audience than Pipi Mā, and is a collection of stories in Te Reo on a range of subjects from Taniwha to bullrush, to life at the Pa and cooking.



OPPORTUNITIES

Rotorua not only has great talented filmmakers, it is also New Zealand's hub of Māori culture. It is home to the New Zealand Māori Arts and Culture Institute, which is dedicated to maintaining, preserving and perpetuating Māori art forms for future generations. The Institute also acts in an advisory capacity on supporting the representation of indigenous culture with pride and empowerment.

Rotorua also has opportunities to grow within the 3D animation space. There is an emerging pool of talented individuals which creates the opportunities for larger scale work.

Aside from offering a great shooting location, investment in these film makers and their unique voice offers an opportunity to take these stories to bigger markets on the world stage and also local broadcast operations. Whether it is the streaming giants like Netflix, or Māori TV, everyone is seeking a product that is exclusive, distinctive, and utterly unique to attract viewers.



NEW ZEALAND
MĀORI ARTS & CRAFTS INSTITUTE
— NGĀ KETE TUKU IHO —

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