

FILM TALLAHASSEE
STRATEGIC PLAN AND SALES PLAN

FY 2009/2010

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EXECUTIVE SUMMARY

Tallahassee/Leon County: It's good To Be Small.

With the increasing globalization of motion picture production, Florida's regions face a variety of opportunities and threats. Globalization and available incentives (rebates, tax credit programs, etc.) have opened up new markets to producers where significant cost savings can be obtained. This has put regions in Florida that have traditionally competed on the basis of price at a disadvantage. At the same time the opening of global markets has offered an opportunity for Florida, and Southeast Florida in particular to be a leading center for motion picture distribution, finance and other higher order activities within the industry. Aggressive pursuit of these global market opportunities should be an important part of the State's and regions economic diversification strategy and efforts at growing the regional export base. Also, many of the attributes that make Florida attractive to both visitors and residents alike can form the basis of a competitive industry in smaller markets.

Bottom Line for the Tallahassee/Leon County: The landscapes and cultural environments of the State represent an important source of attractiveness for the industry and as such can serve the continued development of the industry in smaller markets and rural areas.

The marketing objectives outlined here are meant to align with the overall Leon County Tourism Development Council (TDC) Marketing Plan. It is envisioned that the development of the film, television and commercial production industry will support this mission of the TDC via the recruitment of motion picture, television and commercial productions to the area.

Organization

FilmTallahassee was established as a subsidiary of the Tallahassee Area Visitor Convention Bureau/Leon County Development Council in December 2006 (TACVB). FilmTallahassee serves as a resource for film and production crews interested in filming in the Big Bend area. FilmTallahassee is staffed by a contracted, part-time vendor who serves as the County Liaison for film and television marketing, promotional and service activities.

The Film Liaison has three roles: 1) to manage FilmTallahassee as service provider and respond to film and television clients who are interested in producing projects in the area, 2) to provide leadership for the brand management, marketing, public relations, strategy development of the FilmTallahassee brand, 3) to provide TDC leadership with information and expertise regarding budget guidance, policy direction and performance evaluation of the FilmTallahassee program. The Liaison relies on the TDC's core leaders, management team, local partners, resources and infrastructure to achieve success in these roles.

FilmTallahassee must have the continued participation and cooperation of local government and industry partners who support and benefit from entertainment-related tourism. An effective partnership is critical to the success of Tallahassee/Leon County's film and television production efforts.

Film & Television History and Culture

Many films and television shows have been filmed in or around Tallahassee/Leon County including: *Something Wild* (Melanie Griffith), *Airport* (Jack Lemmon), and two *Tarzan* movies, *Creature from the Black Lagoon*, *Trading Spaces* and HBO's *Recount* (Kevin Spacey).

One of the best assets that Tallahassee/Leon County has going for it is the world-class Florida State University College of Motion Picture, Television and Recording Arts (The Film School) which, according to its website is, "One of the top film schools in the nation, Florida State has been recognized by the Directors Guild of America for its 'distinguished contribution to American culture through the world of film and television.'" One way to get the local media and citizenry informed and involved in Tallahassee/Leon County's film culture is to develop, promote and leverage a mutually beneficial partnership with The Film School.

Opportunities to promote the Film School student productions, Film School students who have won Student Oscars and Collegiate Television Academy Awards and the activities of the full-time and notable faculty members, who are professional filmmakers, abound and should generate awareness and interest in Tallahassee/Leon County's film and television industry development efforts.

Tallahassee/Leon County has the makings of an active local film culture with via two major initiatives: the Tallahassee Film Society (TFS) and the Tallahassee Film Festival.

TFS is a 501(c) 3 tax exempt nonprofit organization that was incorporated and formed in 1999 for the purpose of bringing foreign and American independent films to the Tallahassee area. Modeled after other film societies in the southeastern United States, TFS presents films all year around and occasionally promote specialized film events and guests. TFS films are presented in the All Saints Cinema, which is located in the Gaines-street area. TFS has an online presence that allows for social networking and information sharing.

In 2008, Tallahassee/Leon County citizens enjoyed the first Tallahassee Film Festival, presented by Florida Commerce Credit Union. In January 2007, Tallahassee was selected as one of three regions in the nation to participate in the Knight Creative Communities Initiative (KCCI). The KCCI Catalyst Team established four key initiatives to help draw and retain young professionals and sustain the area's high quality of life, and the Festival was a top initiative of KCCI Tallahassee. It attracted more than 1,000 attendees and was recently awarded a grant in the amount of \$60,000 to the Tallahassee Film Festival (TFF) for start-up funding during the first two years by the John S. and James L. Knight Foundation.

Today, these two initiatives are supported by a narrowly defined audience of "film purists;" however, the proper promotion of their existence and success stories to local/regional media and residents can lay the foundation for greater reach among those who enjoy "films," and those who enjoy "the movies."

Locations

FilmTallahassee's core locations are captured in an image library that displays a variety of locales for filmmakers to consider in digital and hardcopy formats. While many of these images are currently available on the Tallahassee Convention & Visitor Bureau website, it is recommended that the TDC invest in the development of a digital location library of images that capture the community, and not only tourist attractions.

A new, more focused online image library and printed promotional location guide will emphasize some of Tallahassee's most visually appealing locations, and its film history. The Liaison will identify and maintain key images for all branding and production materials in order to produce value-added information to meet the needs of FilmTallahassee's clients.

Marketing

FilmTallahassee's proactive marketing efforts have been conducted on a limited basis, and should be substantially extended to ensure that prospective *film and television clients* know the features and benefits that FilmTallahassee has to offer.

The FilmTallahassee branding (logo, tag line, key imagery) has been developed, but not yet produced. It is envisioned that these marketing and communications tools be completed during the 2009-10 year and fully utilized to promote awareness, forge relationships and recruit production activity to Leon County.

Competition

Commercial production and location companies and other North Florida cities and counties are in fact competing with FilmTallahassee by providing filmmakers with access to filming locations and production services. Rather than being viewed as a threat, this should be viewed as an opportunity. Through carefully selected partnerships, FilmTallahassee can better provide filmmakers with a portfolio of services that may not be available locally, such as full service grip and electrical equipment, R/V and production trailers and experienced crew.

Geography

FilmTallahassee's is located in the Tallahassee/Leon County in the heart of Florida's "Big Bend." This unique positioning allows FilmTallahassee to market traditional Florida locations, such as beaches, waterways and coastlines, as well as images and locations which could easily replicate locations in Georgia, North Carolina, South Carolina, Louisiana and other southeastern destinations.

ECONOMIC IMPACT ANALYSIS

The data below was collected from the University of West Florida Haas Center for Business Research on contract with the Governor's Office of Film and Entertainment Contact person: Rick Harper, Ph.D., Director.

- In 2007, film and entertainment-related spending accounted for:
 - ✓ \$17.9 billion in GSP (Florida's Gross State Product)
 - ✓ \$8.5 billion in personal income
 - ✓ \$498 million in tax revenue to Florida
 - ✓ 207,800 jobs (direct and indirect)
- GSP impact of the film and entertainment industry increased by 13% from 2003 – 2007.
- For every \$1 spent on a production within Florida, the state sees an additional 95 cents in impact.
- In 2008, every dollar of film incentives provided by the state is associated with \$22 in additional gross state product and \$1.44 in additional tax revenue.
- In 2007, an estimated 101,897 individuals were directly employed within this industry at an average annual wage of \$57,700.
- The Florida Film and Entertainment Industry is forecasted to grow faster than other targeted industry clusters within the state of Florida. With a projected employment growth rate of 20 percent, it is expected to grow faster than the Biomedical/Biotech cluster (19%) and the Defense and Security cluster (18%).
- The study shows that over 68,000 jobs were created in 2007 directly in arts, entertainment and recreation services. Additionally, due to spending in the industry supply chain and industry payrolls, jobs were created in other parts of the Florida economy. These spinoff jobs included:
 - ✓ 28,620 jobs in professional and technical services
 - ✓ 26,520 jobs in information services
 - ✓ 11,870 jobs in construction
 - ✓ 10,810 jobs in retail trade
- In 2002, Florida firms within the overall film and entertainment industry generated over \$4.7 billion in revenue and paid over \$1.2 billion in wages. By 2007, the major component industries of motion pictures, television, commercials and music videos, and digital media saw revenues exceeding \$8.5 billion, or 5.2 percent of US industry wide revenues.
- The Gross State Product (GSP) generated by the industry in 2007 represents 2.4 percent of the total state GSP. A complete report may be viewed at www.FilmInFlorida.com.

PLAN FOR 2009-10

Goal			
Establish Tallahassee/Leon County as a film and television production location, creating a new economic engine and aligning the industry with the emerging digital production, distribution, and niche marketing business model.			
Objectives	Strategies	Tactics	Measure
Establish perception and awareness of Tallahassee/Leon County primarily as a television production and independent film (small, low budget) location within local and global markets.	Complete production on FilmTallahassee marketing, promotional and communications tools and deploy	Web Site Redesign and Re-launch, Location Image/Info Kit, Print Advertisement.	By January 2010
		Host an "Emerging Florida Filmmaker Event" (honoring current and post-graduate FSU Film School students) during the Third Annual Tallahassee Film Festival.	May-June 2010
	Secure listings on multiple industry websites and in publications perused by motion picture/TV professionals searching for film office assistance and on-location shooting.	Create and launch a local promotions campaign to inform and encourage residents and media to support FilmTallahassee.	Launch three weeks prior to TFF and sustain another three weeks after. (May-June 2010)
		Targets: Hollywood Creative Directory, Film Commission Headquarters, Markee Magazine, ProductionHub.com, ShootingOnLocation.com, TheLocationAgent.com, and others.	
Participate in relevant trade shows and in-state meetings/events in partnership with the Film Florida Association.		Locations USA, Los Angeles, CA	Fall 2010
		South By Southwest Independent Film Market, Austin, TX	Spring 2010
		Film Florida Annual Meeting, Miami, F	Summer 2010

Objectives	Strategies	Tactics	Measure
Increase economic activity via the recruitment of entertainment and sports-related conventions, and meetings.	<p>Leverage Tallahassee's education partners (TCC, FAMU and FSU schools of arts, music, film and culture) to develop a database of entertainment and sports-related conventions and meetings that each could co-sponsor/co-host with the TDC.</p> <p>Include FilmTallahassee marketing and promotional materials in the TDC's conventions and meetings, and sports portfolio.</p>	<p>Targets:</p> <ul style="list-style-type: none"> ✓ Events and Conferences ✓ Sports/Entertainment Workshops ✓ Signature Nature-Based Events ✓ Film Festivals ✓ World-Class Live Music 	Recruitment Goal: 2 events.

Objectives	Strategies	Tactics	Measure
Formalize the current Film Permit process and document.	Partner with TDC leaders and decision-makers to develop, introduce and seek passage of a new county ordinance regarding film permitting.	<p>Partner with County stakeholders and department heads to review the current process and document and revise where necessary.</p> <p>Meet with County Commissioners and staff to seek support and eventual approval of the new ordinance.</p>	By September 30, 2010.