

FILM COMMISSIONS
REPORT 2020-2021:
AN OVERVIEW &
FILM TOURISM



UNIVERSIDADE FEDERAL DE PERNAMBUCO

FEDERAL UNIVERSITY OF PERNAMBUCO

DEAN

Alfredo Macedo Gomes

VICE DEAN

Moacyr Cunha de Araújo Filho

DEAN OF POST-GRADUATE STUDIES (PROPG)

Carol Virgínia Góis Leandro

COORDINATOR OF THE HOTEL MANAGEMENT AND TOURISM POST-GRADUATION PROGRAM (PPHTur/UFPE)

Sérgio Rodrigues Leal

EXECUTION

Laboratório de Estudos Turísticos (LETs)

PROJECT COORDINATOR

Nathália Körössy

Professor at the Hotel Management and
Tourism Post-Graduation Program
(PPHTur/UFPE)

DATA GATHERING

Evenly Santos

Former scholarship holder of the
introduction to scientific research program
UFPE/CNPq

COMPOSING

Nathália Körössy

Evenly Santos

GRAPHIC PROJECT AND LAYOUT

Leonardo Martins

SUPPORT

Brazilian National Council for Scientific and
Technological Development (CNPq)

Coordination for the Improvement of Higher
Education Personnel (CAPES)

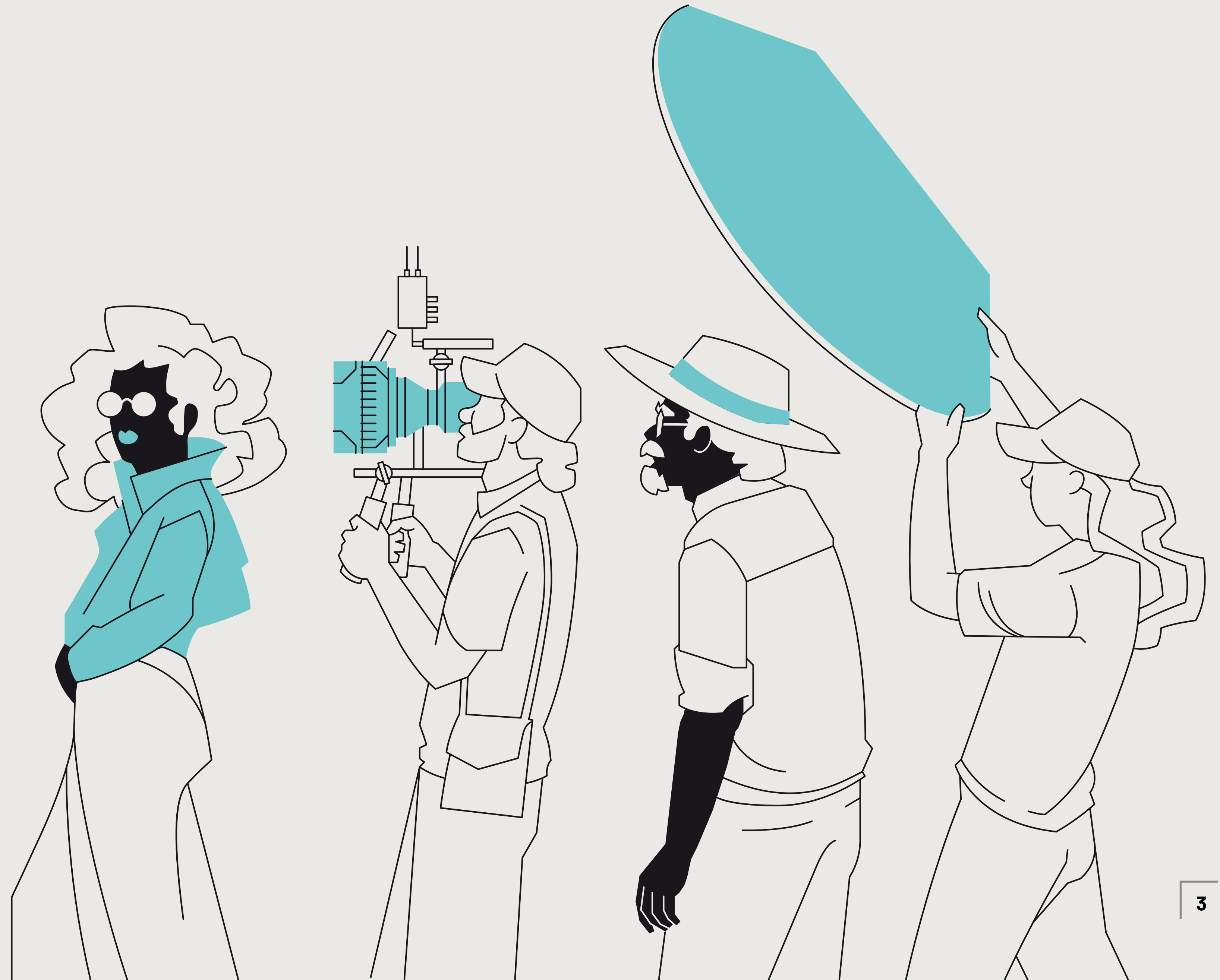
Fundação de Amparo à Ciência e Tecnologia
do Estado de Pernambuco (Facepe)

KÖRÖSSY, Nathália; SANTOS, Evenly.
Film Commissions report 2020-2021:
an overview & film tourism. Recife:
Universidade Federal de Pernambuco,
2022. Relatório técnico.

Rights reserved to Laboratório de Estudos
Turísticos (LETs) from Federal University
of Pernambuco. Charging for the access or
sharing of this work is not allowed. Partial
reproduction allowed provided the source
is cited.

SUMMARY

PRESENTATION	4
RESULTS	5
FINAL REMARKS	15
ACKNOWLEDGEMENT	16
LABORATÓRIO DE ESTUDOS TURÍSTICOS - LETs	17



PRESENTATION

FILM COMMISSIONS ARE NON-PROFIT ORGANIZATIONS WHICH USUALLY PERFORM UNDER THE AUTHORITY OF A GOVERNMENT ENTITY OR OFFICE. THEY ARE BUILT IN ORDER TO BRING ECONOMIC BENEFITS THROUGH THE ATTRACTION OF AUDIOVISUAL PRODUCTIONS AND LOGISTIC AND OPERATIONAL SUPPORT TO PRODUCERS, THEY MAY ALSO CONTRIBUTE TO THE DEVELOPMENT OF TOURIST ACTIVITY BY SUPPORTING FILM TOURISM.

This research considered the performance of film commissions in developing the audiovisual sector as well as film tourism in their own locations as extremely important, so it aimed to understand structural and performing aspects of such organizations, besides the role they play in developing film tourism. In order to do so, an online survey was conducted, between 2020 and 2021, in which 87 film commissions, members of the Association of Film Commissioners International (AFCI) and/or the European Film Commissions Network (EUFCN), were interviewed.

The results of this research are presented in the current report. It was designed for scholars and public managers concerned on local development through the incentive of the audiovisual and tourism sectors. This report's purpose is to contribute to a better understanding of the current situation of film commissions, as well as support the creation of new entities through the

spreading of practical information regarding their operation, performance tactics and strategies toward film tourism. The collected data was processed anonymously and used solely for academic purposes.

This work is a result of a research project developed in Brazil about film tourism, funded by the Brazilian National Council for Scientific and Technological Development (CNPq), by the Coordination for the Improvement of Higher Education Personnel (CAPES) and by the Fundação de Amparo à Ciência e Tecnologia do Estado de Pernambuco (Facepe), under the scope of the Hotel Management and Tourism Post-Graduation Program (PPHTur) of Federal University of Pernambuco (UFPE) and the research group Laboratório de Estudos Turísticos (LETs) ■

Recife, May 2022

Nathália Körössy

RESULTS

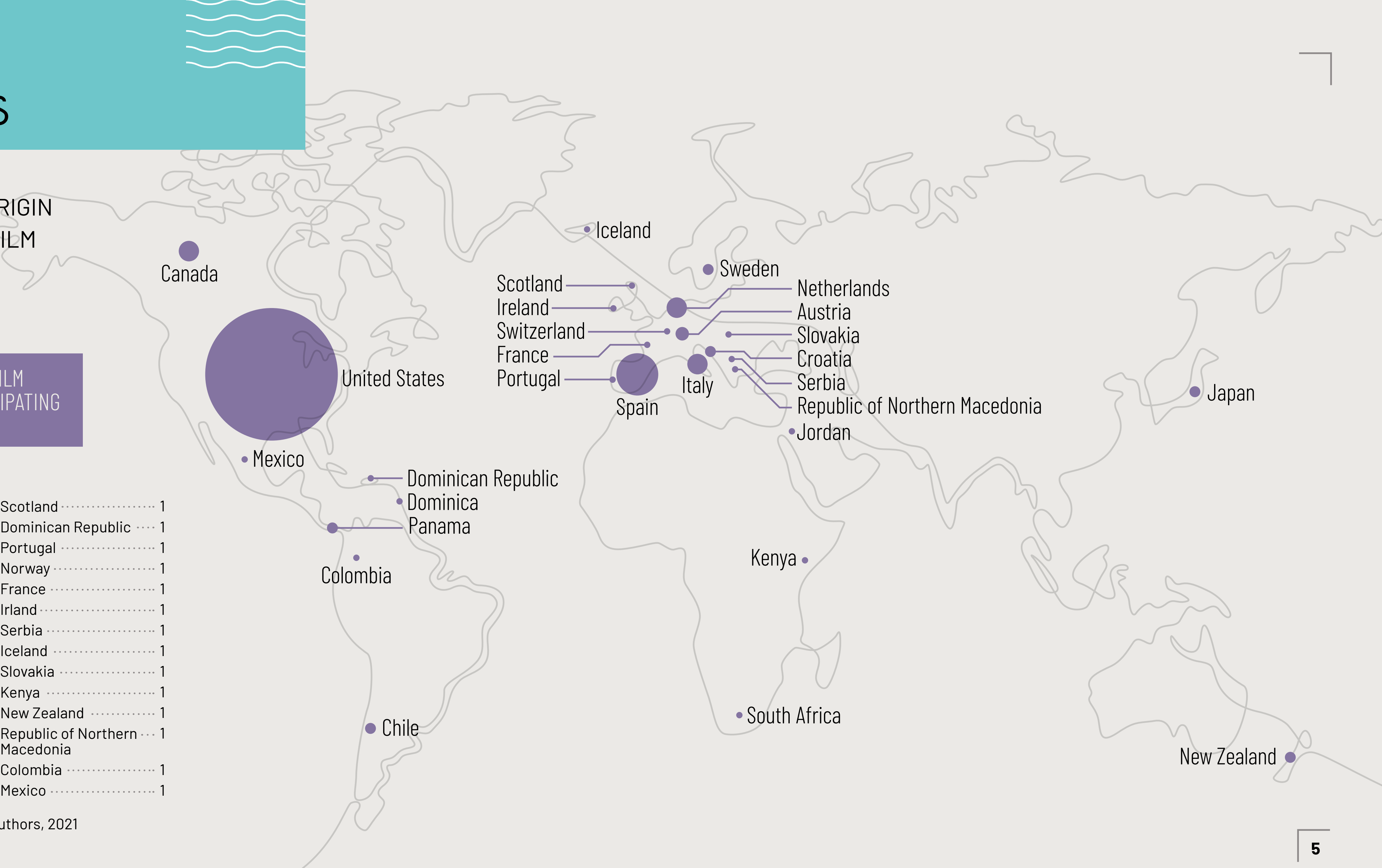
COUNTRY OF ORIGIN
OF ANALISED FILM
COMMISSIONS

NATIONALITIES OF FILM
COMMISSION PARTICIPATING
IN THE RESEARCH

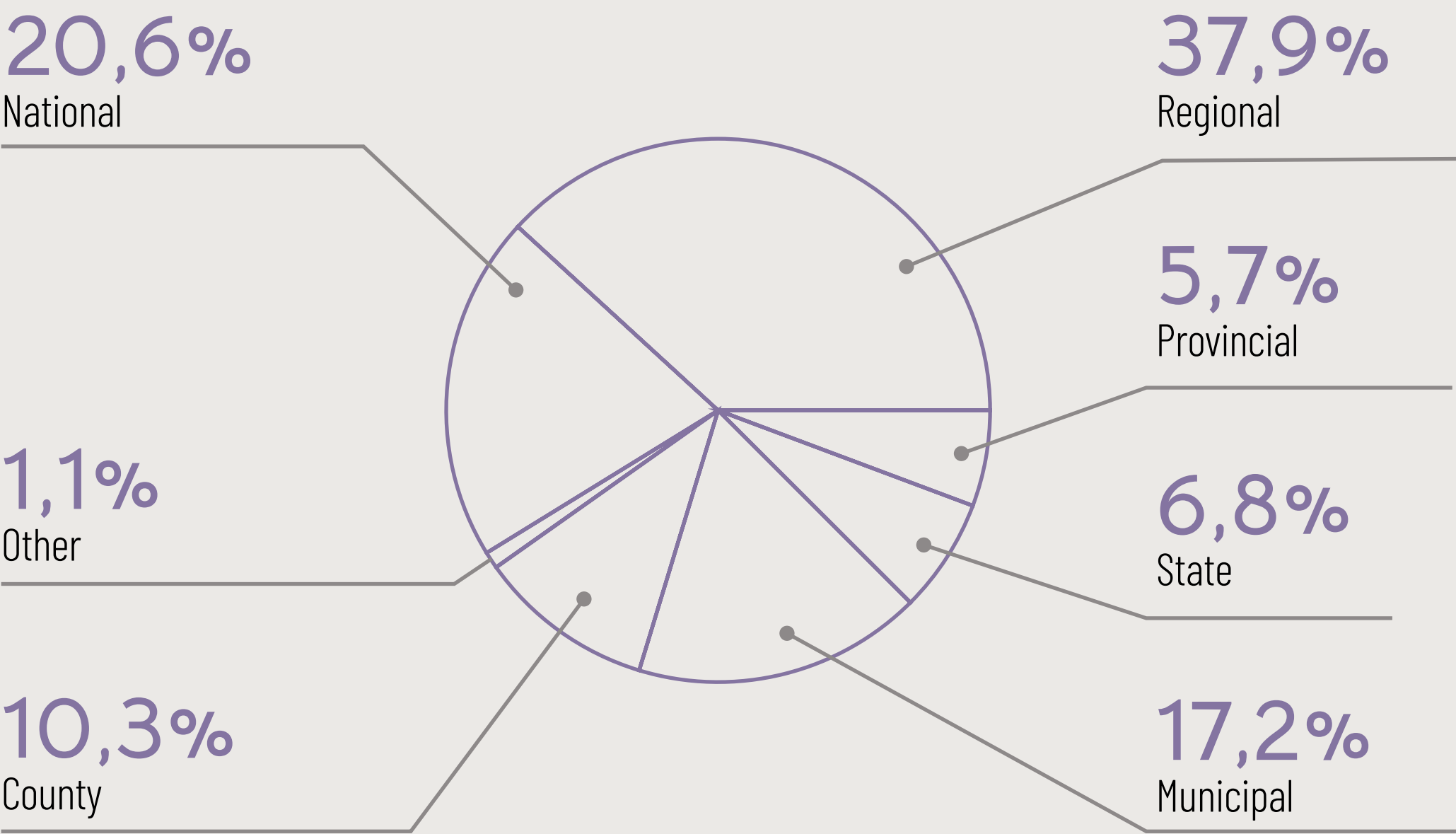
Country - Replies

United States ··· 31	Scotland ······· 1
Spain ······· 10	Dominican Republic ··· 1
Italy ······· 6	Portugal ······· 1
Canada ······· 4	Norway ······· 1
Netherlands ····· 4	France ······· 1
Austria ······· 3	Ireland ······· 1
Sweden ······· 2	Serbia ······· 1
Chile ······· 2	Iceland ······· 1
Croatia ······· 2	Slovakia ······· 1
Japan ······· 2	Kenya ······· 1
Panama ······· 2	New Zealand ······· 1
Jordan ······· 1	Republic of Northern ··· 1
South Africa ····· 1	Macedonia
Dominica ······· 1	Colombia ······· 1
Switzerland ····· 1	Mexico ······· 1

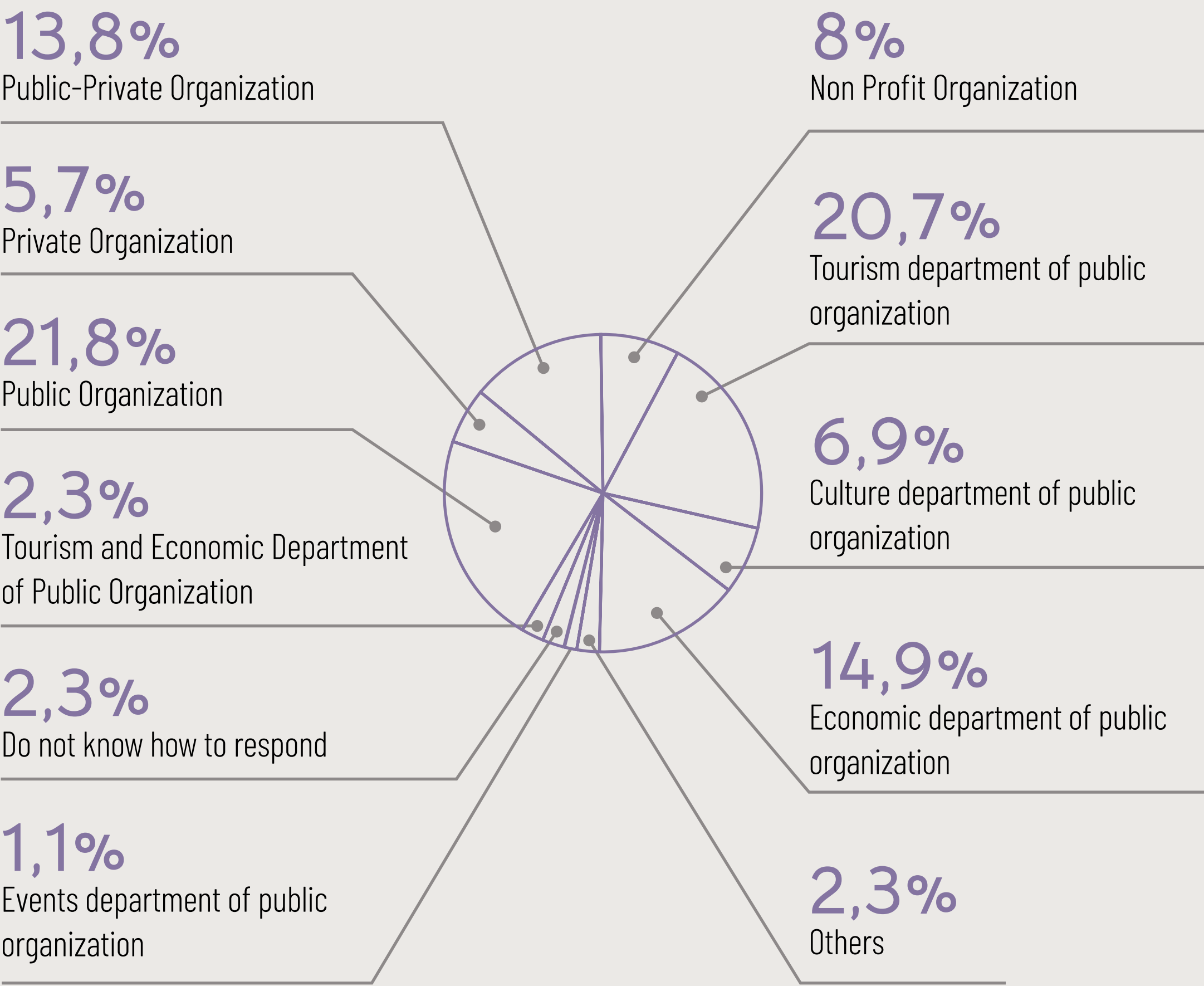
Source: Elaborated by authors, 2021



GEOGRAPHIC COVERAGE OF FILM COMMISSIONS

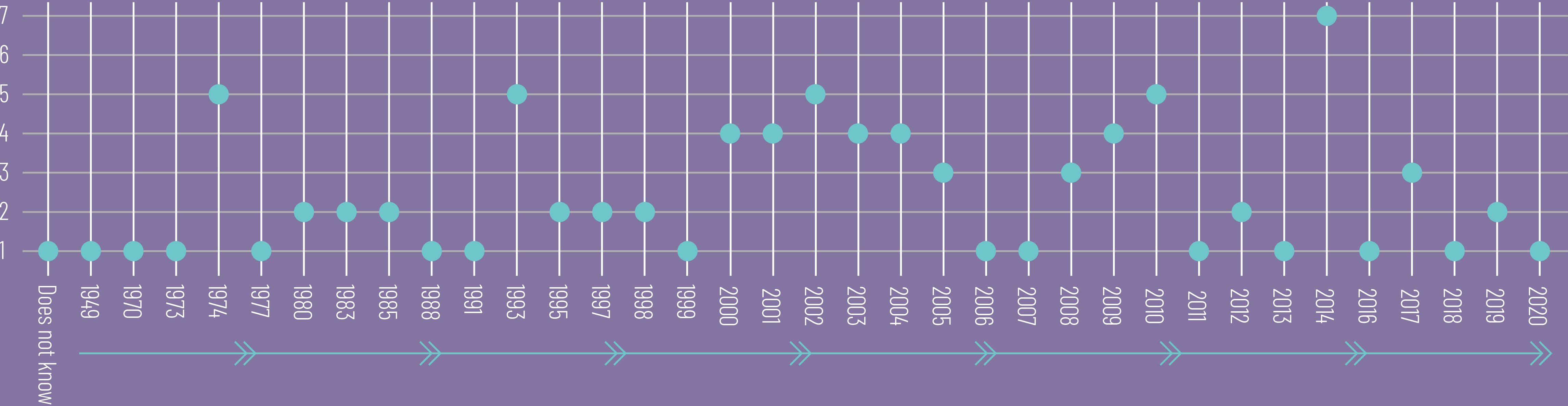


LEGAL COMPANY STRUCTURE



ESTABLISHMENT YEAR

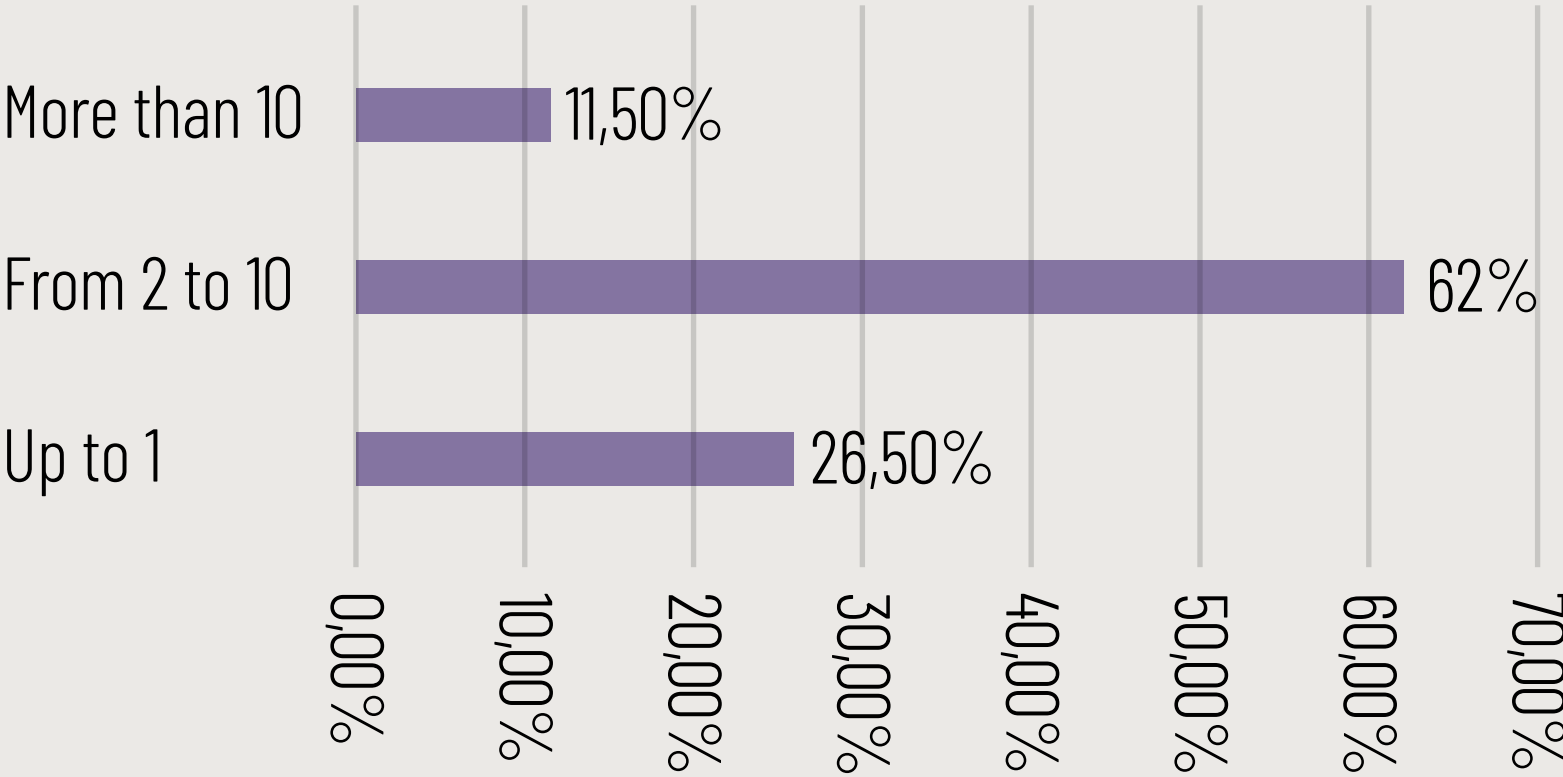
NUMBER OF FILM COMMISSIONS



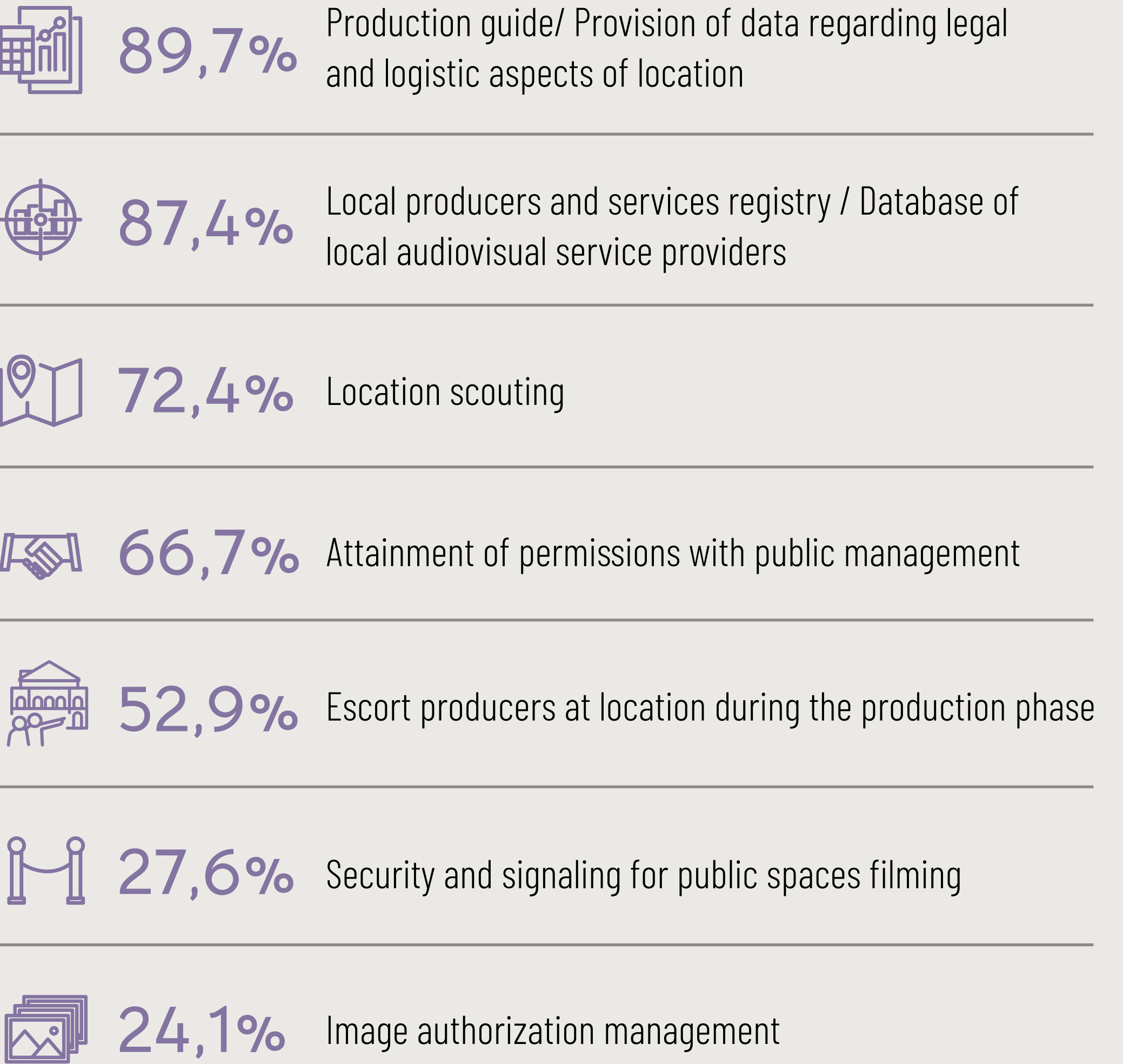
AVERAGE WORKERS IN FILM COMMISSION



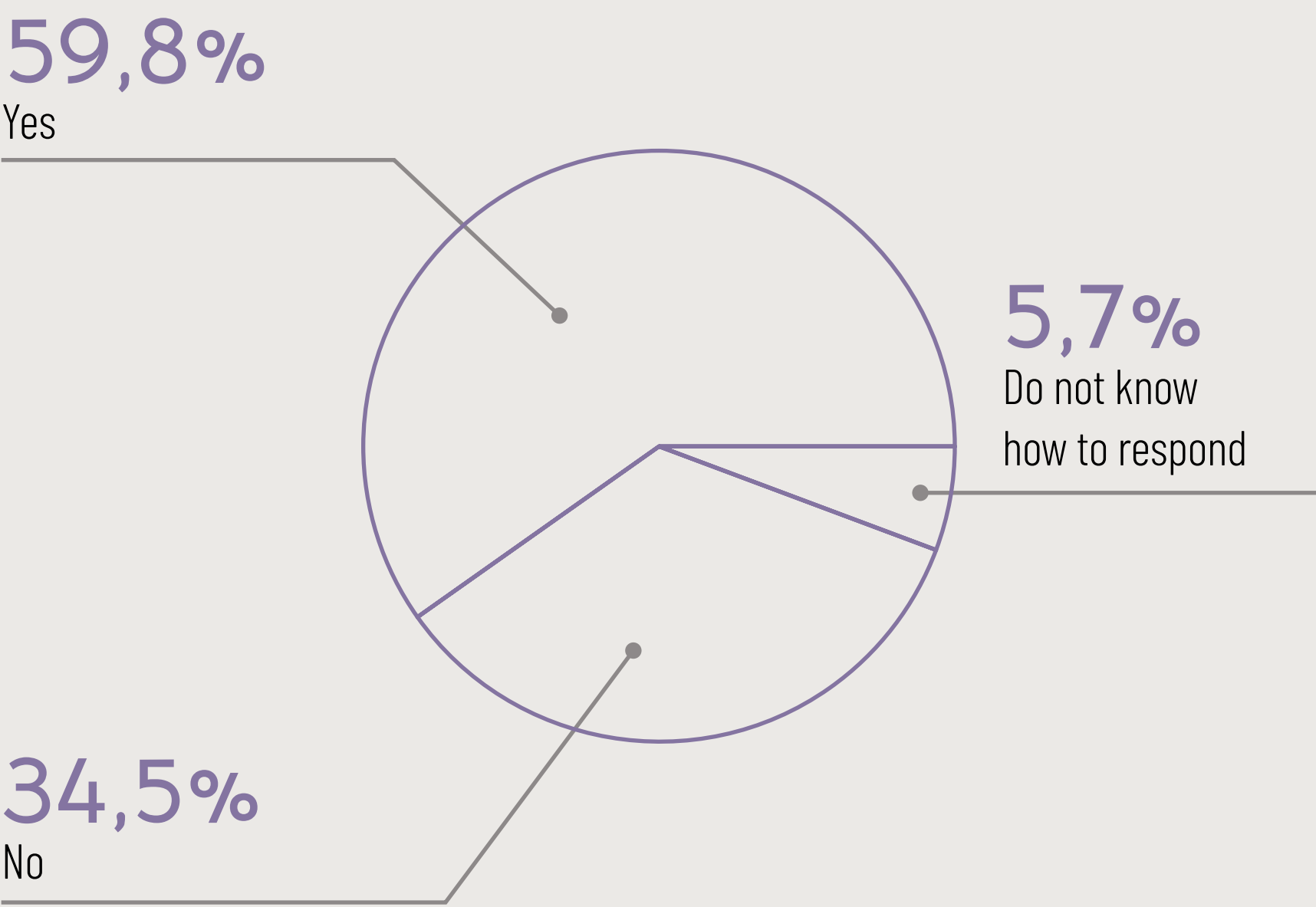
NUMBER OF PEOPLE WHICH
CONSTITUTE FILM COMMISSION




ACTIVITIES AND SERVICES PROVIDED BY THE FILM COMMISSION



FILM COMMISSION OFFERS TAX/ FINANTIAL INCENTIVES TO AUDIOVISUAL PRODUCTIONS




TYPES OF TAX/FINANTIAL INCENTIVES OFFERED

 34,6%
Tax credits

 32,7%
Goods and services offered at no cost

 21,2%
Cash rebate

 21,2%
Film fund

 17,3%
Exemptions

 5,7%
Tax rebate

MAIN PRIORITY MARKETS FOR
ATTRACTING NEW AUDIOVISUAL
PRODUCTIONS

66,7%
Hollywood

55,1%
National

25,3%
Bollywood

20,7%
France

14,9%
China

10,34%
Europe

MAIN AUDIOVISUAL PRODUCTIONS OF INTEREST

94,2%
Movies

90,8%
TV Shows

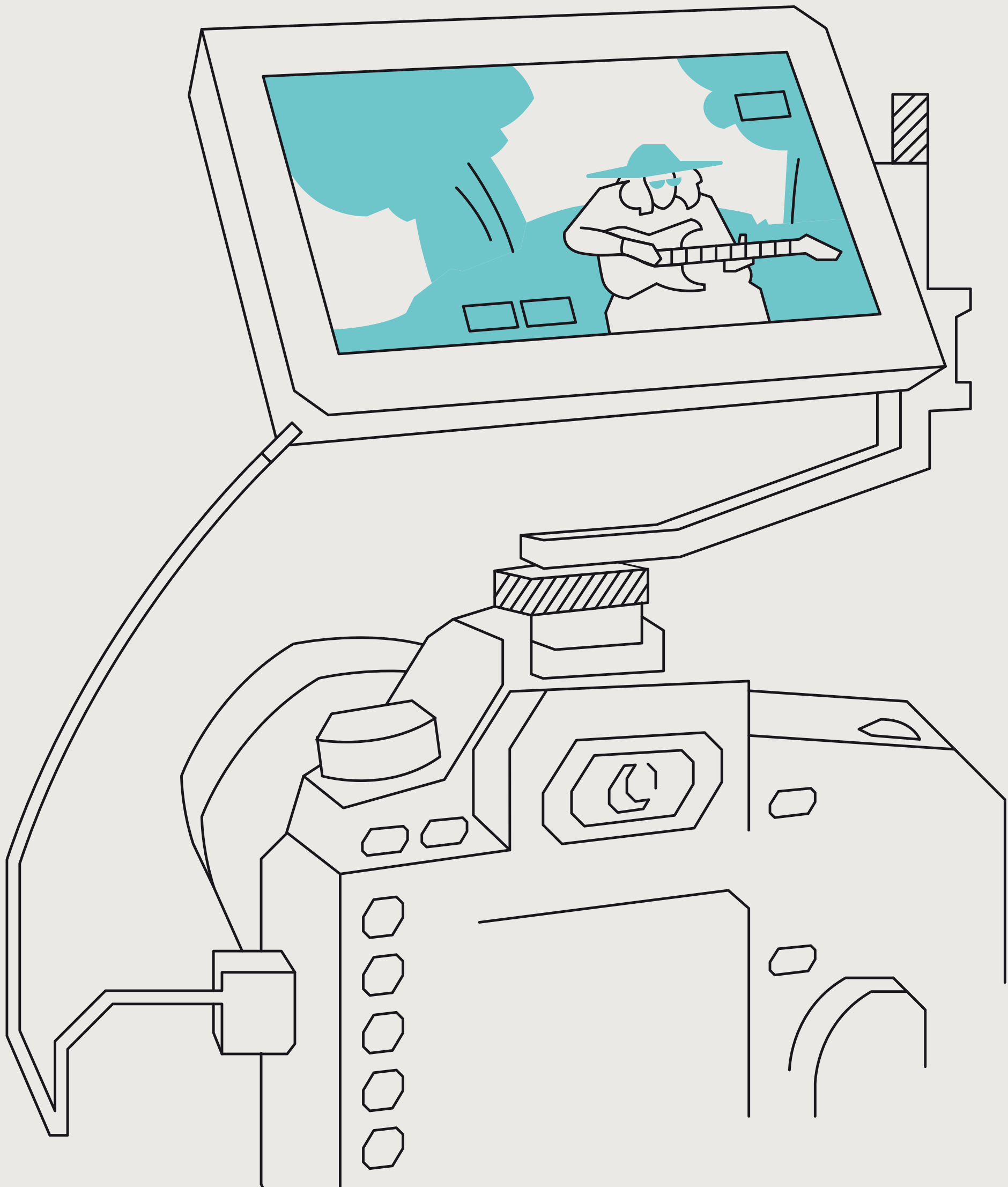
83,9%
Documentaries

65,5%
Travel shows

58,6%
Advertisement videos

16%
TV Commercials

6,9%
Video clips



MAIN MARKETING STRATEGIES USED TO ATTRACT AUDIOVISUAL PRODUCTIONS

 **86,2%**
Participating in events and fairs

 **71,3%**
Digital marketing

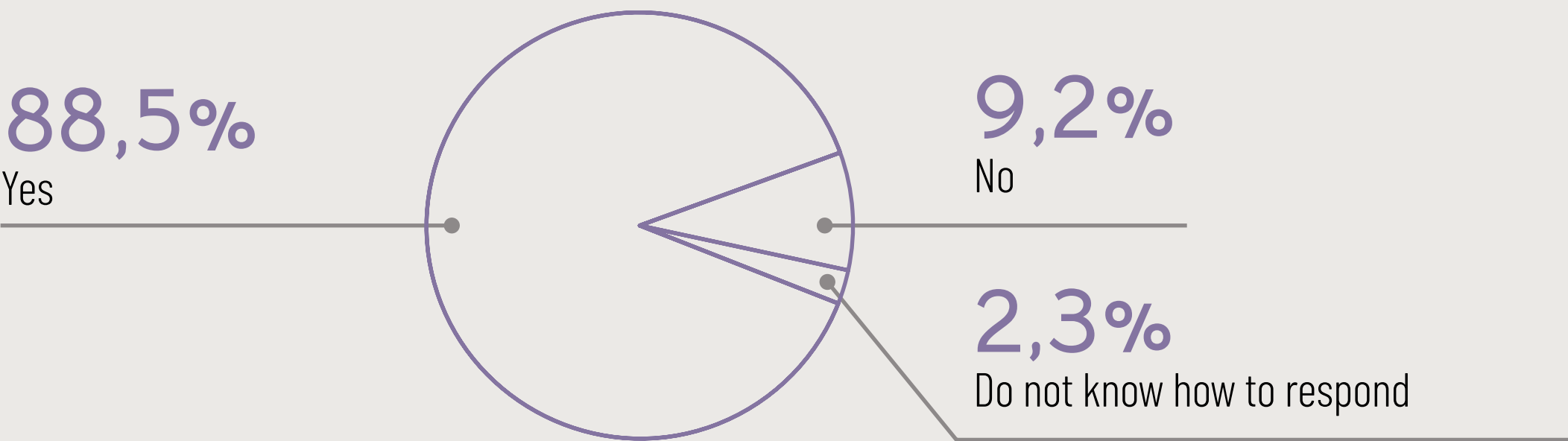
 **70,1%**
Public relations

 **60,9%**
Publicity

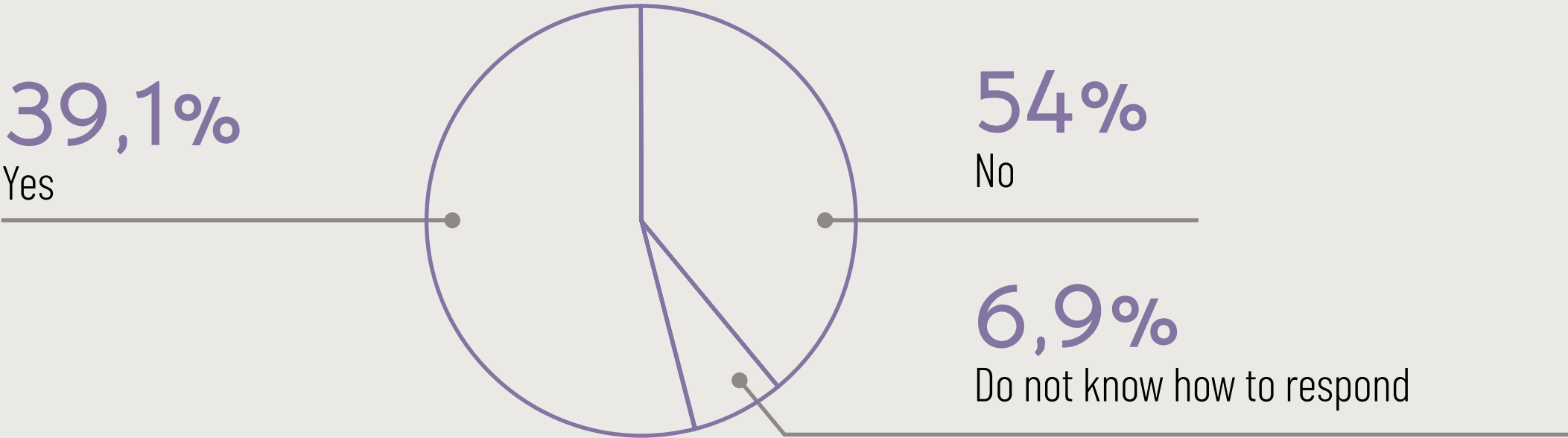
 **19,5%**
Sales promotion

 **4,6%**
Fam tours

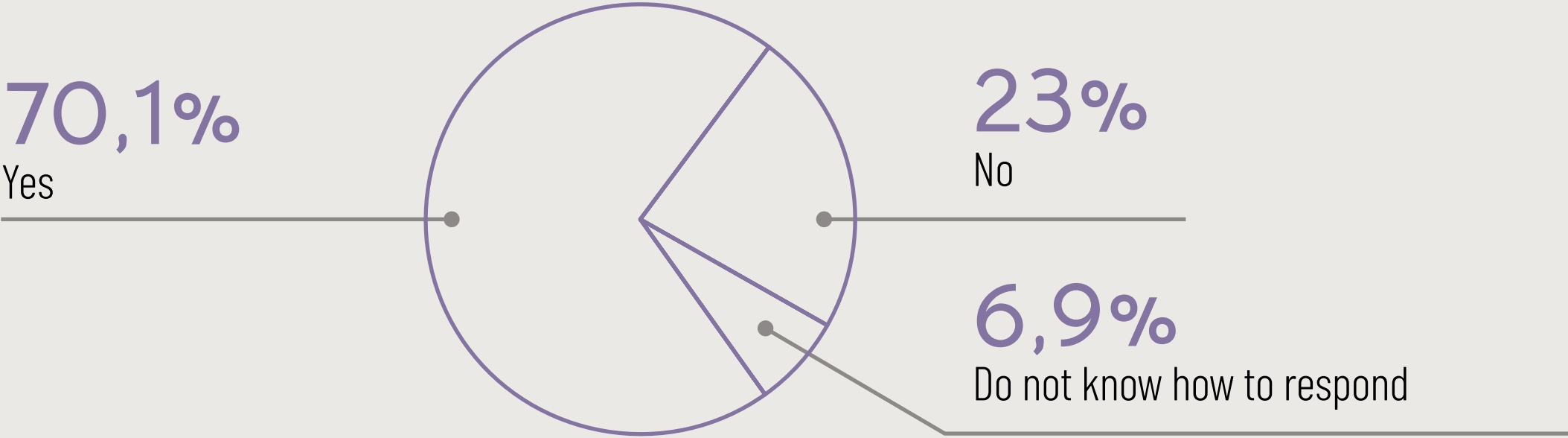
FILM COMMISSION IS A MEMBER OF NETWORKS OR ASSOCIATIONS



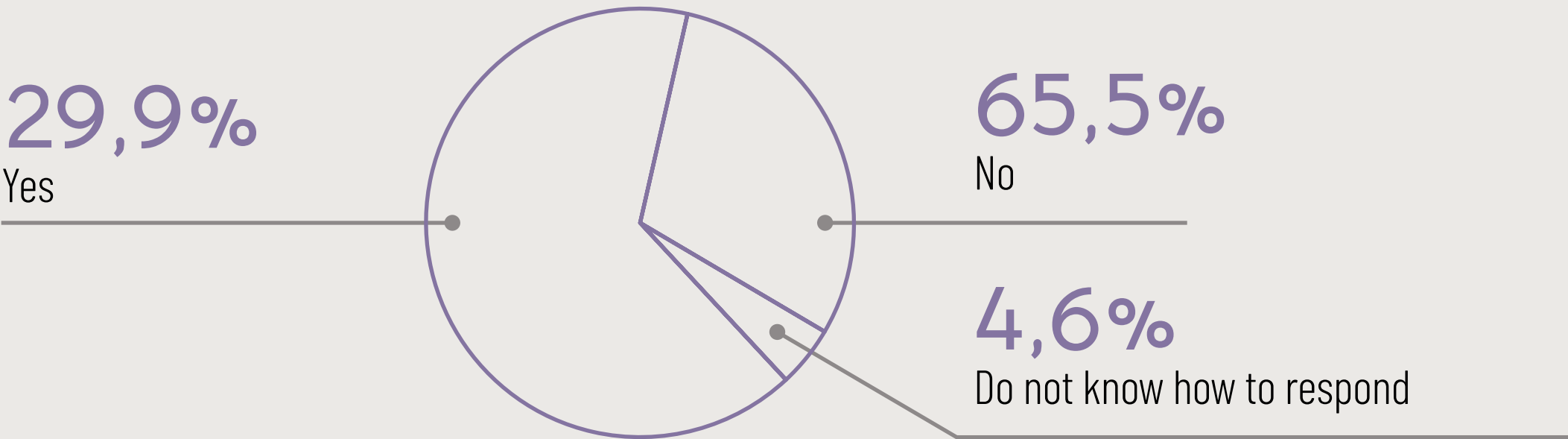
FILM COMMISSION PERFORMS SATISFACTION
SURVEYS WITH ATTENDED PRODUCERS



FILM COMMISSION PERFORMS RESEARCH ON THE LOCAL
ECONOMIC IMPACTS OF ATTENDED PRODUCERS

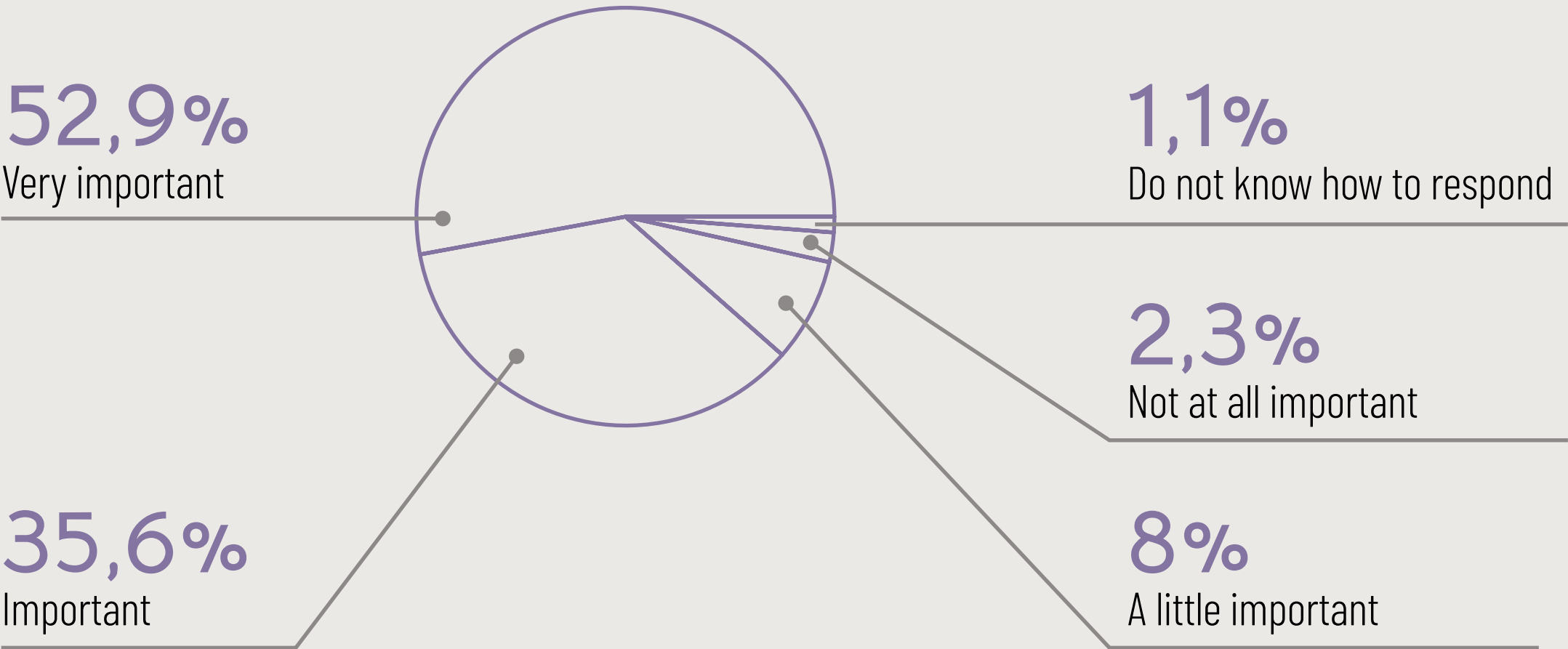


FILM COMMISSION PERFORMS MARKETING PROSPECTION
RESEARCH TO ATTRACT AUDIOVISUAL PRODUCTIONS

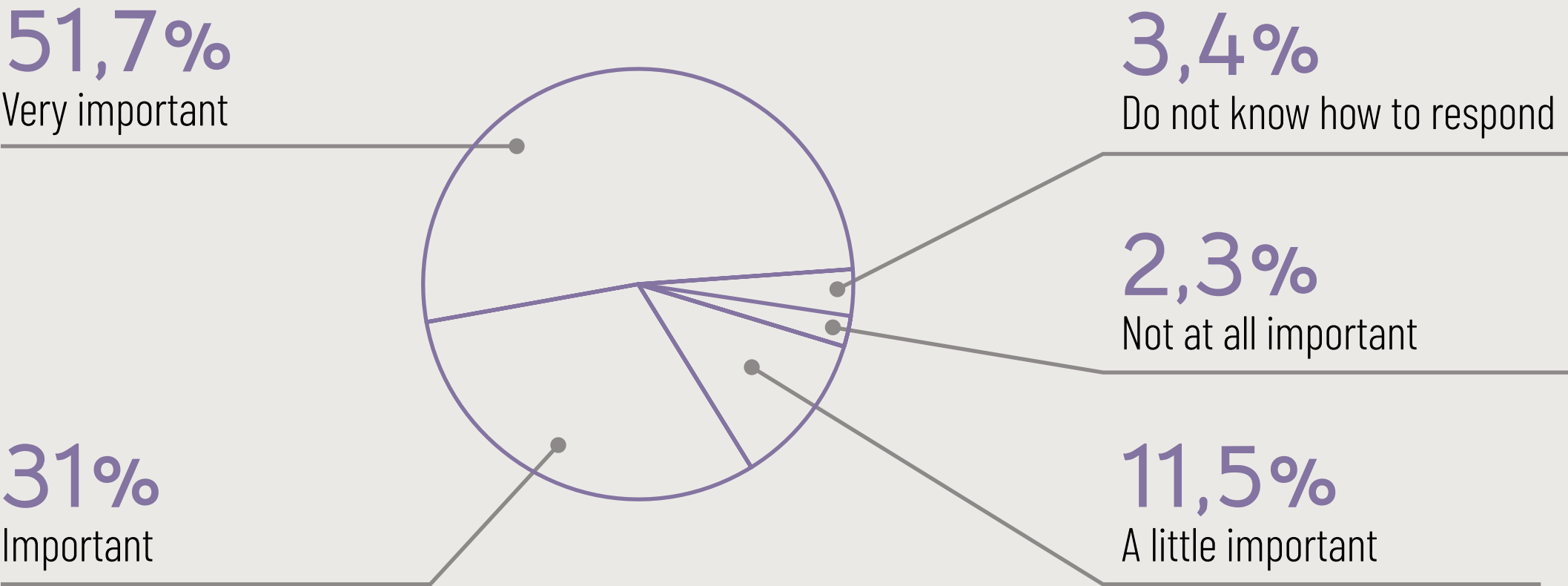


FILM TOURISM

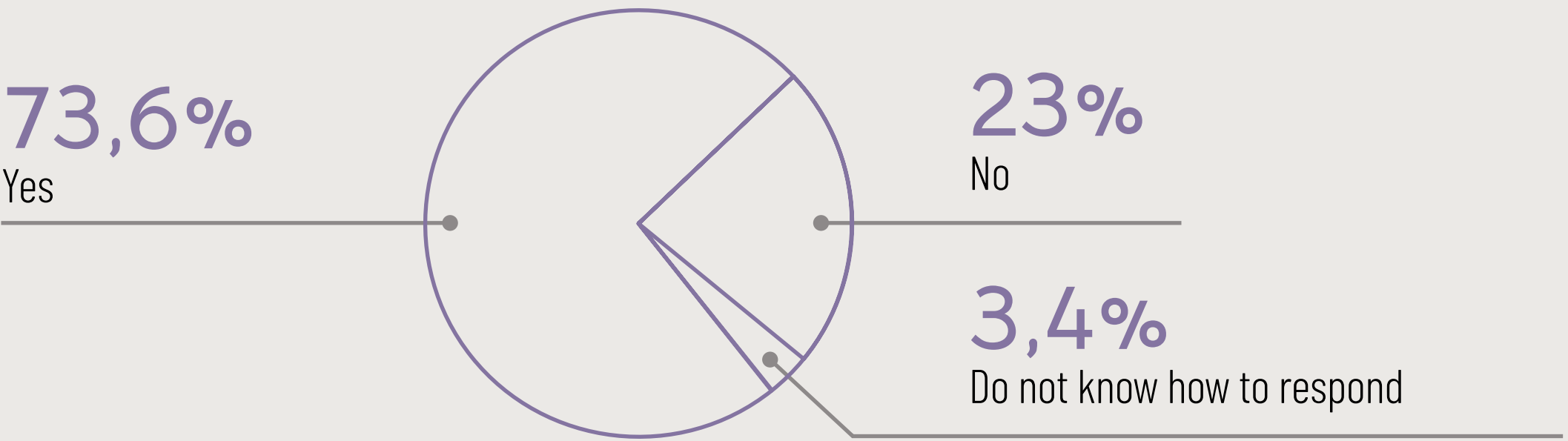
FILM COMMISSION CONSIDERS THAT FILM TOURISM DEVELOPMENT COULD BE IMPORTANT FOR THEIR LOCATION



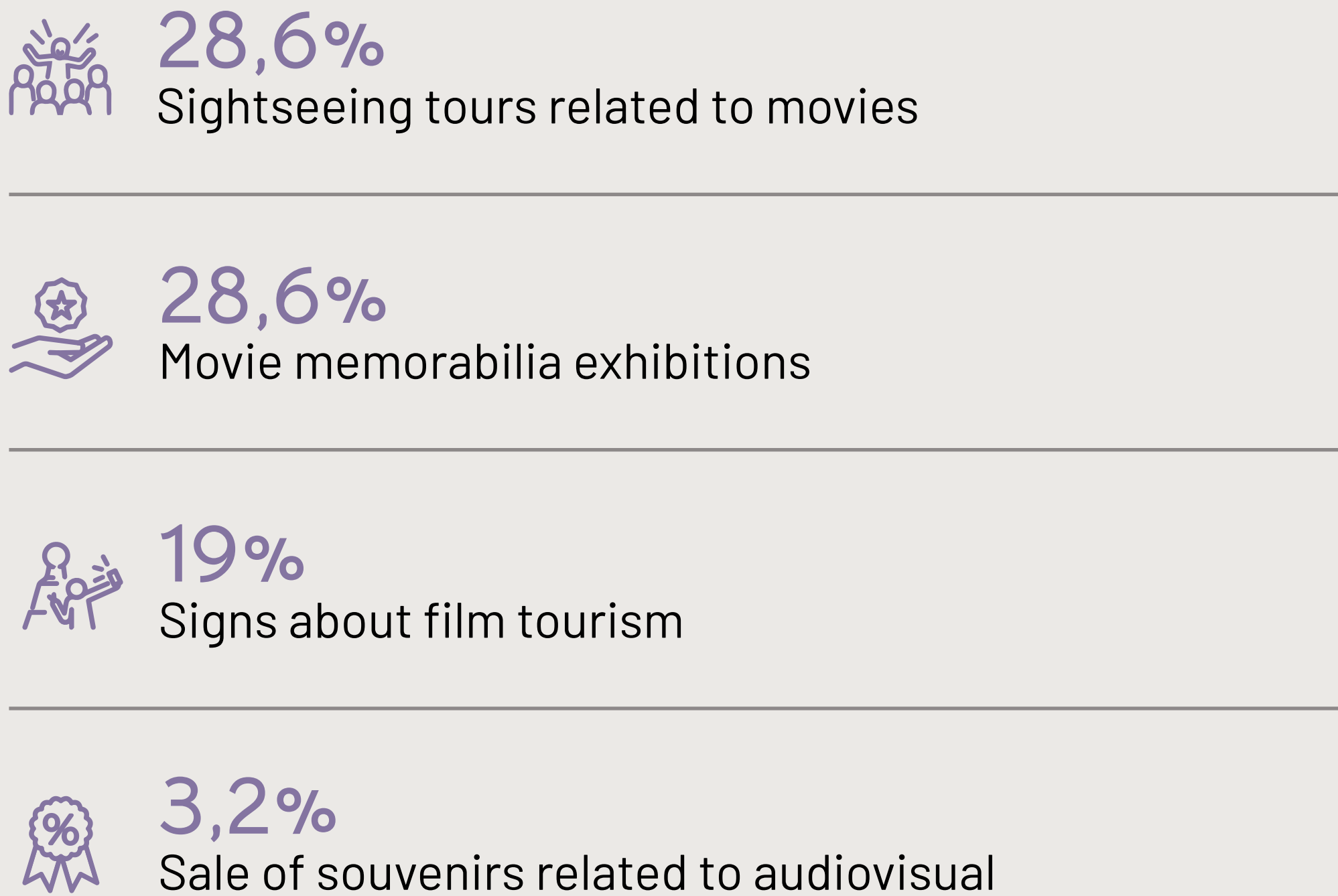
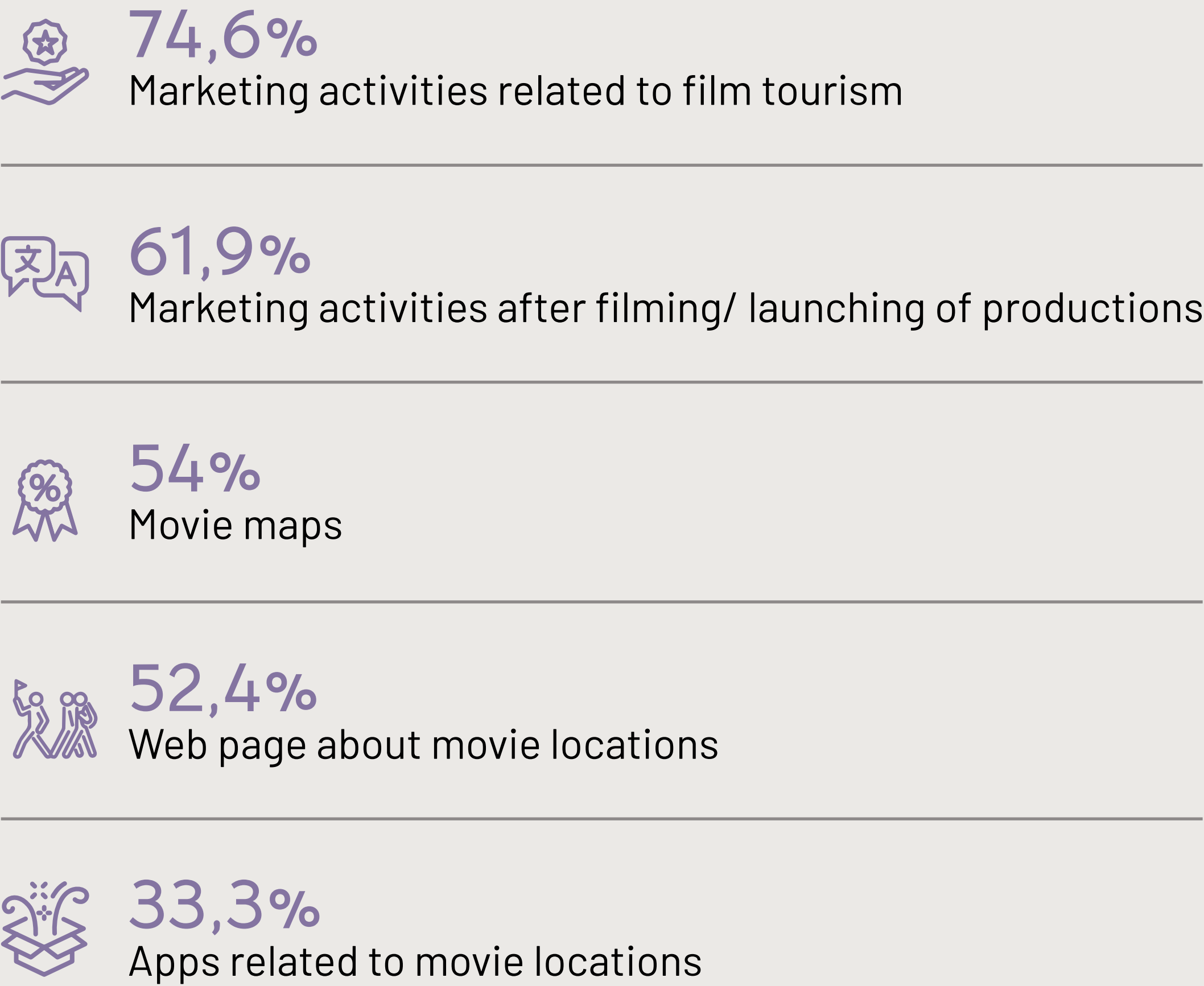
FILM COMMISSION BELIEVES IT IS IMPORTANT TO WORK IN ASSOCIATION WITH THE LOCAL TOURISM OFFICIAL AGENCY IN ORDER TO DEVELOP FILM TOURISM



FILM COMMISSION PERFORMS STRATEGIC ACTIONS IN ORDER TO DEVELOP FILM TOURISM



MAIN ACTIONS PERFORMED BY FILM COMMISSION IN ORDER TO DEVELOP FILM TOURISM



FINAL REMARKS

This research aimed at characterizing the organization and performance of film commissions from all the world, as well as their involvement in developing film tourism. Most of the analyzed agencies are from the United States and Spain, which are important audiovisual markets.

The current findings indicate that regarding their legal structure, the analyzed film commissions are mostly formed by public organizations or public managed departments, while only a few are of private structure. This highlights the indispensable role of the government in encouraging film tourism. It was also noticeable that a high percentage of film commission operates at a regional level, benefitting the cooperation among different actors and local competitiveness.

It is also interesting to notice that even though these institutions have such diverse activities, they are, in their majority, formed by small teams or individual professionals. Another noteworthy aspect of the analyzed institutions is the presence of networking, involvement in associations, and attendance in fairs and events as relevant strategies, as these actions further the creation of

network and knowledge exchange among institutions.

The findings of this research also show that film commissions still need to consider performing satisfaction surveys with producers, as a way of improving services provided. Besides that, they should also hold studies for strategies and prospections of new markets, so the commissions may better define their own market niche, allowing for the creation of attraction techniques more appropriate to their target markets.

Regarding film tourism, it is clear that the analyzed film commissions possess knowledge about their own relevance for the development of the tourism sector. Many of them have already actively worked to attract, not only audiovisual productions, but also tourists who are interested in the productions filmed at the location. The research verified that most of them implements some action toward film tourism, with tourism marketing being the main activity. However, efforts from most institutions regarding Tourism usually happen right after the launch of movies, so they do not take full advantage of the long-term potential of these productions. And only a small part of the respondents invests

ACKNOWLEDGEMENT

We would like to specially acknowledge all film commissions which kindly accepted to participate in this research.

in creating attractions and tourist experiences which relate the location to productions in which they were portrayed.

This research aimed at understanding, on an exploratory manner, a general outlook of film commissions associated to AFCL or EUFCN and their relation to tourism. Even though a restrict sample was successfully reached (around 25% of film commissions universe), a first approach to the topic was possible. As a way to widen the current knowledge, it is recommended that wider and deeper studies be performed, with a mixed method being used, in an attempt to strengthen the relations between audiovisual and tourism ■



LABORATÓRIO DE ESTUDOS TURÍSTICOS LETs

The Laboratório de Estudos Turísticos (LETs) is a collective of researchers interested in building a space for discussion, experimentation and research about tourism. We understand that participative and collaborative work in an academic environment enables a distinguished scientific production, capable of including diverse perspectives and necessary approaches in order to understand tourism as a social practice. Tourism, Hotel Management, Anthropology, History, Geography, Urbanism and Management researchers are currently members at LETs ■

SUPPORT



EXECUTION



UNIVERSIDADE
FEDERAL
DE PERNAMBUCO



PRÓ-REITORIA DE
PÓS-GRADUAÇÃO



Programa de Pós-Graduação
em Hotelaria e Turismo



LABORATÓRIO
DE ESTUDOS
TURÍSTICOS

This research was financed in part by the National Council for Scientific and Technological Development – Brazil (CNPq), the Coordination for the Improvement of Higher Education Personnel – Brazil (CAPES, Finance Code 001) and the Fundação de Amparo à Ciência e Tecnologia do Estado de Pernambuco (FACEPE).