



Lessons from the Field:

National Insights to Inform Bay Area
Film Production Growth

Research Team:

Paula Smith Arrigoni, BAVC Media

Kailen Sallander, BAVC Media

with support from

John Carnwath, WolfBrown

Advisory Committee:

Lex Sloan, The Roxie

Anne Lai, SFFILM

Masashi Niwano, SFFILM

Rivkah Beth Meadow, Kenneth Rainin Foundation
& Frankly Speaking Films

Erica Milsom, Ryzo Studio

Sam Bempong, East Bay Film Collective
& Mindful Media

Funding Partner:

Ted Russell, Kenneth Rainin Foundation

- Introduction

This project was conceived to learn more about strategies to boost film production in the Bay Area, and associated economic and social benefits. The study consists of a field scan of other film and media markets outside of California and a Film & Media Maker Survey of over 300 Bay Area artists. Our project was developed in collaboration with WolfBrown, with guidance from an advisory committee, support from Film SF and the Bay Area Media Maker Summit (BAMMS), and essential funding from the Kenneth Rainin Foundation.

BAVC Media (Bay Area Video Coalition) is a nonprofit organization that has operated film and media programs in the region for nearly 50 years, since the early days of portable video cameras. Our mission centers on supporting media makers from diverse backgrounds to make and preserve media, through art, technology, and education. We engage in field-building and research activities to advance our programs for media makers, often in collaboration with peers. This project is heavily influenced by our organization's on-the-ground experiences providing training, workforce development, and artist development, for youth and adults in film and media.

WolfBrown collaborates with industry leaders to build a more equitable, pluralistic, and sustainable future for artists, organizations, and whole ecosystems. We are grateful to WolfBrown for providing us with guidance and support to conduct field interviews.

- Abstract

Since the 1990's, significant investment has been made in film production - locally, across the United States, and internationally. The nature of these initiatives has varied significantly, as have the strategies that they have pursued. While film tax credits receive most of the headlines, several initiatives have also invested in networking, infrastructure, communications, workforce development, and advocacy. This study takes a qualitative approach to understand what elements of other locations' film and media industries might be transferable to the Bay Area's creative economy. Through interviews with stakeholders in seven states, it's clear that the key to a successful industry is a 'three-legged stool with incentives, workforce, and infrastructure'. In addition, we learned that achieving those three key components can be attributed to a collaborative community made up of government, community organizations, individual artists, and industry partners.

- Methodology

We deployed qualitative research methods to conduct informal interviews with stakeholders in a variety of other film and media markets. Eligible participants were film commissioners and staff, nonprofit leaders, researchers, and media artists. Note that film offices (commissions) have a variety of organizational structures. They can be housed within economic development, commerce, arts and culture, tourism government agencies, or, on rare occasions, independent organizations.

In order to contact a wide variety of potential participants, BAVC Media leveraged contacts from Film SF (the City of San Francisco's film commission), online research on other film industries, and snowball sampling as participants introduced us to potential interviewees over the course of the study. During the six-month research period, we collected data from seventeen people across seven states. We also reviewed data from a public panel discussion at the Independent Media Arts Group, co-facilitated by the National Endowment for the Arts and BAVC Media, and interview transcripts from the East Bay Film Collective for a related research project. The geographic spread of participants spanned cities including: Seattle, Washington; Oklahoma City, Oklahoma; Cherokee Nation; Denver, Colorado; Chicago, Illinois; Austin, Texas; New Orleans, Louisiana; and San Francisco, California (Appendix A). We took an exploratory approach to select the cities and states where we concentrated our interviews - generally seeking insight from those that have similar qualities (such as strong tourism and iconic locations, and the presence of universities and other educational feeder programs), and markets that have grown significantly over the last twenty years. We intentionally excluded Los Angeles, New York, and Atlanta, to focus on markets that are more relatable to the Bay Area.

Our team conducted interviews collectively, utilizing a semi-structured interview guide (Appendix B). Questions covered topics such as the participants' role in the film and media sector, their personal perception of the sector, factors contributing to local/regional growth, and the documentation of the sector's trajectory. We took a flexible approach to the interview style and asked substantial follow up questions, following the lead of the participant. The interviews were transcribed and coded to identify key themes.

- Findings

Incentives

Tax Incentives were a major focus for all respondents. That's especially true for those who work at film offices, but even independent artists and community organization leaders cited them as absolutely critical to local industries.



I don't think it can be denied that in New Orleans, it has created a space and an opportunity for independent film to also thrive.

New Orleans Interviewee



The tax credit is a big [incentive]... the Illinois Film Office and the Chicago Film Office have been pushing that so hard, and that has been really successful in bringing more investments to Chicago.

Chicago Interviewee



BAVC MediaMaker Fellows at the New Orleans Film Festival

Government support and production tax incentives are not only beneficial to commercial production, they are key for small-budget independent productions as well. In addition, incentives are integral to the promotion of local hires. Interviewees in New Orleans were skeptical that non-local film productions would go through the effort of hiring locally if the Louisiana state tax incentive didn't require it. The Cherokee Nation Film Office mentioned that their increasing involvement in workforce development initiatives was an effort to train up their own people and send them out to productions, with the goal of creating an environment where they can stay and film there.



BAVC MediaMaker Fellows at the New Orleans Film Festival

Many of the incentives discussed in the interviews are at the state-level programs, designed to drive economic development. However, some locations also have local incentives that can be layered with the state incentives. Participants in both Austin and Oklahoma City described their local incentives as *"deal sweeteners."* Although everyone was supportive of incentives that support productions in their state and region, they also noted the benefit of having incentives specifically for productions filmed in their city. For example, in Austin, one interviewee said,



...it's just really nice... it helps us keep production[s] in Austin that might look at other cities in the Texas region.

Other individuals spoke to the regional benefit of productions. In Illinois, one interviewee spoke about the revenue generation and job creation in the State and region, as a result of ample film production activities occurring in Chicago. When local cities are coordinated, there may be a “spillover effect” from a film production for local workers accessing jobs, out-of-area workers finding temporary housing and other accommodations, vendors, and actual days of production moving next door for a specific shoot. A robust region benefits all of the individual cities. A great example is New Orleans where we heard, “**...if a film goes from New Orleans to Baton Rouge or to Shreveport, that’s great because they see the economic benefit and that’s going to help the whole community.**” We suspect the difference in perspectives might be influenced by the geographic size of a state.

The leadership and engagement of local film offices are also critical for developing and growing film and media ecosystems. Many of the stakeholders we interviewed are film commissioners, who spoke to us about the additional leg work they provide and their hands-on approach to investment and growth. For example, the Cherokee Nation Film Office hosts a database of native talent and crew. Similarly, in Austin and New Orleans, the film office leaders are actively involved in connecting productions to local talent and crew. In addition to connecting crew, the Austin film commissioner hosts a database of locations for productions and encourages hiring local production scouts. Leaders across several other cities are directly involved in workforce development initiatives, which is discussed further below.

Despite the clear benefits of government support and tax incentives, maintaining and increasing support for funding is often a contentious political issue. Almost all of the interviewees mentioned the need for ongoing advocacy to local politicians in the effort to approve, expand, and/or continue incentive programs. Most interviewees described this as a challenge, notably at the state level in Colorado, Oklahoma, and Louisiana. In New Orleans, one participant explained,



Every time there’s a vote, there’s this rallying to get all film organizations, and anyone who cares about film, and anyone impacted by film, to show up at the Capitol to make sure that voices are heard... it’s always like an important deal when that gets voted on because there is such fear of, you know, that money [is] being taken away.

Another New Orleans interviewee said, *“There’s always a really scary moment when the tax incentives are up for debate because people have made huge investments in this.”*



Despite the ongoing challenge, leadership in the Cherokee Nation and Washington State surfaced positive strategies to help educate local politicians about the underlying economic importance of the film and media sector. Both film offices found that bringing political leaders to production sets, and directly involving them garnered their support moving forward. In Oklahoma, the Cherokee Nation Film Office pivoted to going to communities and hosting meetings with local state legislators as a strategic move to speak with legislators about being film-friendly year-round. They saw legislators who were originally against tax incentives change their vote after hearing from constituents about how they sustain themselves via the industry. Similarly, in Washington, an interviewee told us:



One of the things that has been really effective is getting folks out on set, bringing the political leaders in, the decision makers out to see because a lot of people, as lots of you know, have a mistaken impression of what the film industry is...Because folks have this sometimes glamorous impression of the film industry when really it’s a workers’ issue. It is a workers’ industry and creative workers need to be supported. And so getting our political leaders to understand that is essential and a firsthand view can be really helpful.

This interviewee described additional community-based methods to get political leaders on board when she said, ***“We spent a lot of time in the community...listening to people from underrepresented communities about what they need to succeed and how we get there. And so working with the information that we gathered, we have implemented several things within the equity space in the law.”*** The impact of these efforts in Washington was public support to build a [soundstage](#) under the guidance of a fifteen-person industry advisory team.



Workforce Development and Retention

Even in locations with ample production activities, workforce development programs are needed to ensure that the productions hire local talent, further generating positive economic impact.

We heard that often the local talent pool was not able to meet the need for the largest productions that come to town. In order to fill this gap many film offices told us they were directly involved in funding and administering training programs. Partnerships were leveraged with myriad organizational partners including local nonprofits, unions, community colleges, and universities. Film New Orleans shared that their office is, ***“...also a large funder and supporter of workforce training programs and filmmaker development programs in the city of New Orleans, and we have our partner organizations, among them, NOVAC and the Film Society.”*** Similarly, an independent filmmaker in Chicago reflected on the accessibility of professional development in Chicago for individuals who are typically marginalized from higher education when she said, ***“There’s definitely tons of educational workshops [for] people who maybe have not had the opportunity to go to film school... [They] can take cinematography classes, they can learn about fundraising, distribution... like all of our [community-based] orgs have this kind of supplementary programming.”*** The Austin Film Commission also noted a successful partnership between the Austin Film Society and a union to run a training and apprenticeship program.



In Denver and New Orleans, the film offices are focused on working with youth to generate a robust career pipeline for emerging media makers to skill up and find jobs locally over their careers. It seems that centralized coordination is a helpful factor when creating training programs that meet local industry needs, access substantial funding, and are able to serve historically under-resourced community members. In order to reach geographically dispersed communities in media deserts across Colorado, an interviewee from the State Film Commission said their student programs encompass, ***“narrative summer workshops [and] career connection panels, where we bring professionals virtually into a university, college, or trade school classroom where they get a chance to interface with students and talk about their career pathways [in order to] bridge those initial networking opportunities.”*** We noticed that a big need in different locations was to have a coordinated workforce development effort. The New Orleans film office mentioned needing to ***“get everyone on the same page.”*** We heard a similar sentiment from Film SF about the Bay Area’s workforce development organizations when they said they wanted to host listening sessions with all the relevant stakeholders. Overall, it seems that responsive, coordinated, and specific training can bolster industry partnerships.



Further driving the motivation to build up a skilled workforce was the threat of talent drain. The huge film industry hubs in Los Angeles and New York loom large for other cities as a constant draw for talented filmmakers and creatives. In Denver, an interviewee told us that ***“brain drain and talent drain are the two obstacles that we face,”*** and that, ***“The extreme part-time nature [of media work in Colorado] is a challenge.”*** A Chicago interviewee reflected on the reason why people tend to leave when she mentioned, ***“We also do see that there is a ceiling that one can reach in Chicago... Once you’re starting to get more accolades... it becomes harder to be connected to greater industry because it’s just not present in Chicago... at that point, people start to leave for New York and LA for industry support.”*** An interviewee reflected on the New Orleans Film Society’s goals to keep locals in the area when he said, ***“I can name 5 or 6 people off the top of my head who’ve been drawn in other directions because of work and because of the need to fully sustain themselves. So we understand that completely, but also want to make sure that we’re doing what we can to continue to support those folks who are wanting to stay in the region and tell [local] stories.”*** We face similar challenges in the Bay Area. Offering opportunities for growth into leadership positions on media productions is difficult. We often see many of our artists and culture bearers leave for other places in order to find the next level of work or to film their projects about the Bay Area in other cities and states.

Infrastructure

Physical infrastructure was cited as paramount to securing large-scale production in a variety of cities. Several people we interviewed lauded the success of their physical space. For example, an interviewee in Chicago said, ***“We’ve had this very large facility, Cinespace, I think now for ten years... and that definitely started the momentum.”*** In Austin, an interviewee said, ***“The real game changer was starting Austin Studios.”***

Washington is following the examples set in Chicago and Austin. One interviewee explained, ***“For a long time in Washington, we haven’t had an accessible, large-scale, soundstage. So, we have public investment in a soundstage now known as Harbor Island Studios, and that is one of the initiatives we’re moving forward with to really help grow the film economy and culture here.”***

On the flip side, participants from areas currently lacking physical infrastructure described it as a clear disadvantage that they’re working on addressing. The Cherokee Nation Film Office told us a story about a significant television series that wanted to film in the state of Oklahoma but lost most of the project’s filming days to another state that had larger incentives and a sound stage. At home in the Bay Area, Film SF and East Bay Film Collective shared that securing a dedicated sound stage is a top priority to secure the future success of the Bay Area’s film ecosystem.



Another benefit of infrastructure was its natural reciprocal benefit to independent artists. In New Orleans, an interviewee told us about equipment rental businesses, ***“The folks who run those businesses love our little independent scene...[and] supporting local filmmakers...so I always get good deals at the camera houses.”***

Community Collaboration

In describing community development initiatives, many individuals mentioned artist support opportunities as a means to fill various needs in their local communities. For example, in Chicago, one interviewee founded Mezcla Media to **“elevate over 700 women and non-binary filmmakers of color in Chicago, both in the documentary and narrative space,”** while another launched the **Chicago Alliance of Film Festivals** program at FACETS to centralize key resources and build a coalition. During her tenure at NOVAC in New Orleans, one interviewee launched the third Thursday networking nights for filmmakers, while another described the New Orleans Film Festival’s growth, **“I think also the film festival has grown a lot in the past ten years or so, and it has allowed us to become a beacon for artists in the region.... It helps to forge connections. It helps to really provide a sense of community.”** In addition, in Austin, an interviewee works on a mentorship program while another in Austin supports local festival happy hours through sponsorship. In the Bay Area, Film SF and many San Francisco and East Bay-based organizations have rallied to co-create social, professional development, and advocacy-related activities. These opportunities help filmmakers and media makers feel connected and informed rather than isolated.



BAVC MediaMaker Fellows at the First Look & Celebration

We repeatedly heard the idea of the ***“right people coming together at the right time.”*** Increased momentum in the industry or a galvanizing effort around community-building projects seems to take shape best when a group of passionate individuals comes together and builds bridges across different community groups. One interviewee said, ***“We have collective momentum going on that has some real gravity around it right now with a whole lot of people pulling in the same direction. And it feels like our film sector in Washington is more hopeful now than it has been for a long time.”*** When reflecting on Austin’s history, an interviewee said that Austin’s Film culture ***“started with people just getting together!:*** Another described the contemporary New Orleans community, ***“[we are] just really lucky to have some very talented people - who are either from here or have moved here in the past decade or so - who have been really influential in doing some of the work: creating community, inviting other folks in, and mentoring and helping to nurture other artists.”***

Succession planning was also raised as an important issue to consider in small film and media markets. One interviewee said, ***“It’s always going to be a challenge to have talent in the positions. [People] who are both talented and understand the complexity and the specificity of the work...”*** Looking toward the future, one interviewee predicted, ***“I suspect that insofar as there will be change to Colorado’s film and media industry going forward, it’ll be a combination of grassroots organizing, people coming together in numbers, and being able to speak with one voice as to what the needs are.”*** These responses relate to the importance of investing in leadership and sustainability.



BAVC MediaMaker Fellows at the First Look & Celebration

All the people we spoke to relayed the importance of being passionate about the local media industry and supporting local artists. An interviewee in Oklahoma City made it clear that bringing artists, and opportunities back home was her central motivation. An interviewee reflected on her experience in New Orleans when she said, ***“I felt strongly that a community media center that’s rooted in social justice is actually a thing that needs to exist in itself.”*** Similarly, an interviewee said this about his motivation to generate growth in Colorado: ***“For me, artists being able to live and work in the places they know and love, benefits the artists, the work, the place, and the community.”*** This is a sentiment we see reflected back in the Bay Area, especially in cities like Oakland that are in the early stages of investing in local media arts and culture in an increasingly formalized way, motivated by passionate artists’ desire to work at home and tell local stories.

In addition to the individuals that make up fruitful communities, interviewees also lauded their cities as unique filming locations. Many respondents highlighted their cities’ cultural elements as a draw for talented individuals, big productions, and independent work. In some places, we heard about an organically collaborative environment where people are able to pitch their work to each other, share job opportunities and resources openly, and find interpersonal connectivity and mentorship. An interviewee from the New Orleans film office shared, ***“Our city is an easy sell because of who we are. The deep cultural roots that we have in terms of music, and the arts, and the diversity of our city on so many levels, but primarily [it’s] the architecture of the city, the design of the city, and the livability of our city.”*** This is also something we see in the Bay Area. Film SF shared that their pitches to potential productions often highlight San Francisco as a cinematic and culturally dynamic city with easy access to a variety of landscapes.

– Conclusion

We learned a great deal from the seventeen people who generously shared their time and expertise on growing a thriving film and media sector in the Bay Area. The “three-legged stool” of incentives, workforce, and infrastructure is essential to creating a fruitful production economy for commercial and independent storytelling. To sustain large productions and a healthy independent media landscape attractive incentives, a skilled and readily available workforce, and physical/technical space for production are needed. We know that bolstering any of these three factors requires community buy-in from local and state legislators. In addition, we shouldn’t underestimate the desirability of shooting a production in a location like New Orleans or the Bay Area for aesthetic and cultural reasons.

We recognize **NOW** as the moment when ***“the right people are coming together”*** in the Bay Area. We have increasing support and engagement from government agencies, community-based organizations, independent artists, and local studios. Now is the time for strategic planning, educating elected officials, increased coordination, and securing capital investment. Growing the Bay Area film and media sector requires sustained collective effort.

– Appendix A

Interview Participants

We are so grateful to all the individuals who contributed their time, expertise, and insights, which made this study possible.

California:

Manijeh Fata, Film SF

Sofia Alicastro, Film SF

Colorado:

Arielle Brachfeld, Colorado Office of Film, TV and Media Brian R. Lewandowski, Leeds School of Business.

John Van Wyck, Cine Fe

Illinois:

Colette Ghunim, Mezcla Media Collective Karen Cardarelli, FACETS

Louisiana:

Carroll Morton, Film New Orleans

Clint Bowie, New Orleans Film Society Darcy McKinnon, Gusto & Formerly NOVAC

Oklahoma:

Jill Simpson, OKC Film & Creative

Tava Sofsky, Cherokee Film Commission

Texas:

Brian Gannon, Austin Film Commission Rebecca Campbell, Austin Film Society

Washington:

Amy Lillard, Washington Filmworks & Whip-smart Kate Becker, Creative Economy Director

King County Vee Hua, Arts Administrator & Journalist

- Appendix B

Interview Protocol

Introductions from Everyone

Set context for the study: Over the past few decades, focused initiatives in several cities across the US have sought to strengthen local film production. The nature of these initiatives has varied significantly, as have the strategies that they have pursued. In order to inform the Bay Area's film ecosystem as well as other sector-wide initiatives in the region, we aim to gain a better understanding of the initiatives that have been launched elsewhere, the strategies that have proven most effective, and how their impact on local filmmakers have been assessed. To accomplish this, we are speaking with local leaders in various cities across the US. We plan to publish a report that includes case studies of 5-7 cities. We are thrilled to be talking to you today and look forward to hearing more about your experience in the [city] media sector.

If there's anything you'd like to share confidentially just let me know and I'll take your comment off the record.

Does that all sound okay to you? Do you have any other questions about the project? If so, are you okay with us recording the call for reference later?

Core Questions:

1. Can you tell us about yourself and the work you do in the media-making field?
2. How would you describe the landscape of your local industry?
 - a. What's the balance between independent mediamaking and commercial work?
3. In your opinion, what's the biggest contributing factor to your region's growth in the media sector?
 - a. What prompted this growth?
 - b. Is there a person or specific group that's behind this force?
 - c. Are there any specific productions that were catalysts for your local industry?
 - d. Is the catalyst for growth an ongoing project? Or did it happen only once?
 - i. If it happened in the past: did something previous happen that was helpful? Are there efforts to iterate on it in the future?

Secondary Questions:

4. What kind of data is available on your creative industry?
 - a. Are there any data collection efforts going on?
5. What's the biggest challenge for media makers in your city?
6. What kind of workforce development interventions does your city deploy?
 - a. What prompted the,?
 - b. Are they effective? How do you know that?
 - c. Are there any barriers?
 - d. What are the outcomes?
7. What kind of community development activities happen in your city?
 - a. What prompted them?
 - b. Are they effective? How do you know that?
 - c. Are there any barriers?
 - d. What are the outcomes?

Additional questions based on location:

8. What support does the local govt provide?
 - a. Are there tax incentives?
 - b. Any other benefits like city-funded security for production spaces?
9. What support does the state govt provide?
 - a. Are there tax incentives?
 - b. Any other benefits like city-funded security for production spaces?
10. What support do local nonprofits provide to the community?
 - a. Do these organizations work independently or as a coalition of resources?
 - b. What else do you need from them?
11. How do all of these factors intersect?
12. What's the biggest need for you right now? What could be done/is being done to improve this workforce sector in your area?

- Appendix C

Considerations for Future Research

Potential questions for a future iteration of the survey that could provide more insight into the digital media/animation segment of the Bay Area film and media industry, provided by one of our advisory committee members:

1. What has changed in your sense of work stability over the last few years? What are the factors that impact that change?
2. What kinds of projects/training will help you adapt your skill set to industry changes?
3. What kind of support would be helpful on a studio level to create a vibrant and resilient work environment in a changing technical landscape?
4. What could facilitate the development of new films/games at your studio? Among your community?
5. Do you see a potential for tax credits to help foster new game / animation studios that will employ people?
6. How are you seeking to adapt to the transforming creative/technical landscape in the face of AI integration across the media production landscape?

● BAVC
● MEDIA