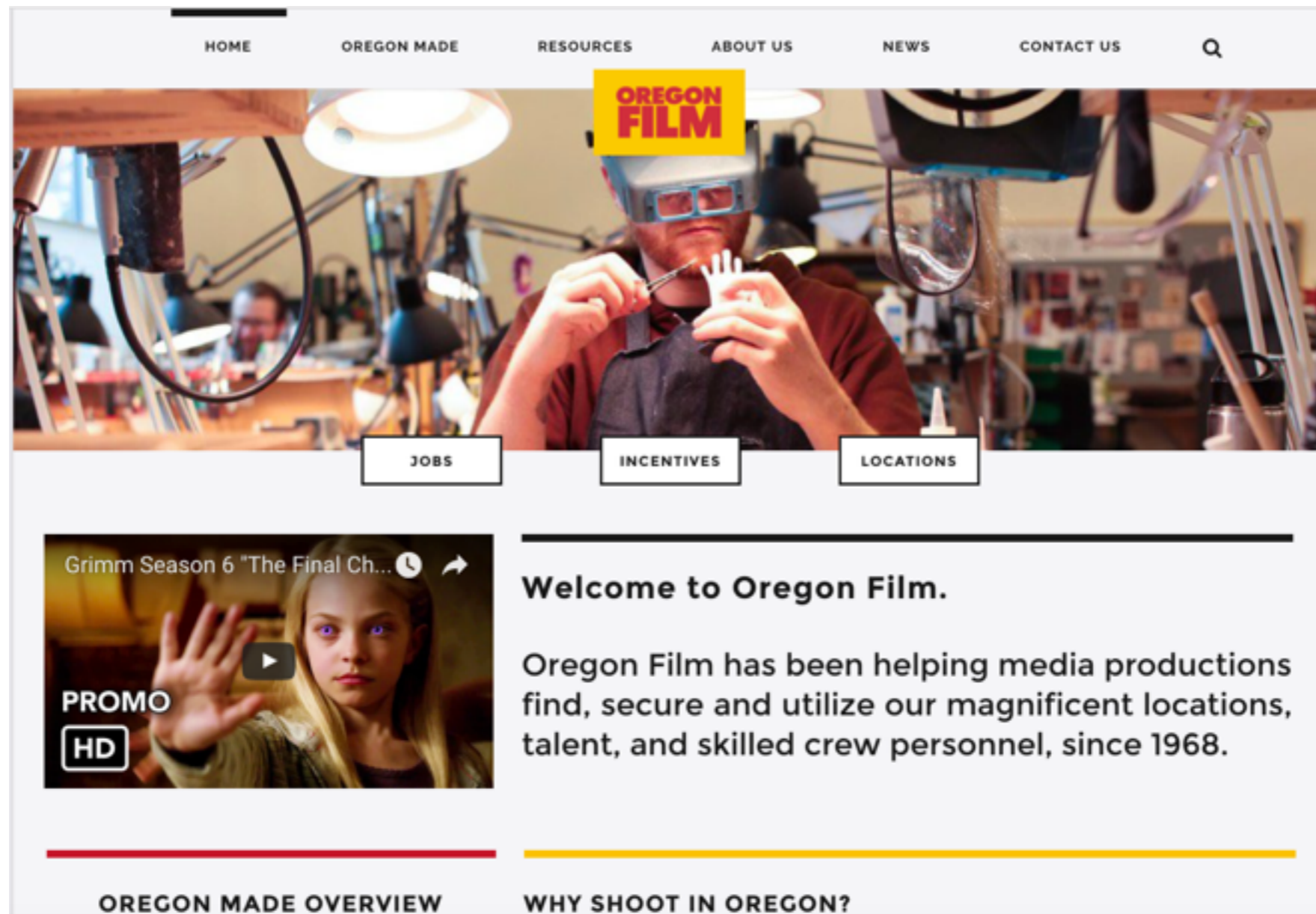


Economic Development & Trade Committee Presentation 2017



Oregon Film & Video Office



The screenshot shows the homepage of the Oregon Film & Video Office website. At the top is a navigation menu with links for HOME, OREGON MADE, RESOURCES, ABOUT US, NEWS, CONTACT US, and a search icon. Below the menu is a large hero image of a man wearing a blue mask and a brown shirt, working in a workshop. A yellow 'OREGON FILM' logo is overlaid on the top right of the image. Below the hero image are three buttons: JOBS, INCENTIVES, and LOCATIONS. To the left of the main content area is a video player for 'Grimm Season 6 "The Final Ch..."' with a play button, 'PROMO', and 'HD' labels. To the right of the video player is a welcome message: 'Welcome to Oregon Film. Oregon Film has been helping media productions find, secure and utilize our magnificent locations, talent, and skilled crew personnel, since 1968.' At the bottom of the page are two horizontal bars: a red one labeled 'OREGON MADE OVERVIEW' and a yellow one labeled 'WHY SHOOT IN OREGON?'.



Programs Administered by OFVO

- Oregon Production Investment Fund (OPIF) and the Indigenous Oregon Production Investment Fund (iOPIF)
- Greenlight Oregon Labor Rebate (GOLR)
- These programs combine to offer:
 - *20% rebate of verified Oregon-based goods and services,*
 - *and up to a 16.2% rebate of verified wages & benefits paid to production personnel.*

**OREGON
FILM**



Incentives: Greenlight Oregon

- A rebate of up to 6.2% of payrolled labor for film or TV productions or combined commercial production spending of more than \$1M in Oregon.
- Aids in in-state commercial production:
 - 355 Commercial shoots in 2015
 - 494 Commercial permanent & freelance jobs
- Sunset date: 12/31/17 (extension sought as part of HB2244)

**OREGON
FILM**



The Returns

- Combined, FY 2015-2016 saw \$170M of confirmed in-state spend with a combined \$15.5M paid out in rebates.
- This work directly impacted more than 2100 jobs, and tracked spending to hundreds of in-state vendors.
- 20 Oregon based media companies took direct advantage of the program as a tool to help attract business and expand their employees and infrastructure.



The Economic Impact

Northwest Economic Research Center Report

- From 2012 to 2015 Incentivized projects...
 - Provided an annual average of 1,543 jobs
 - Indirect and induced impact of another 1,652 jobs elsewhere in the Oregon economy.
 - Average income paid to Oregon workers was \$149 million per year.
- Total value added within the Oregon economy averaged \$193 million per year.
- 83% of payroll expenditures across all project types accrue to Oregon residents.
- Total estimated economic output for the media industry rose from just over \$480M in 2012 to close to \$550M in 2015 - impacting over 3100 jobs for residents of the state.

**OREGON
FILM**



A Small Business Economy

University of Oregon Survey

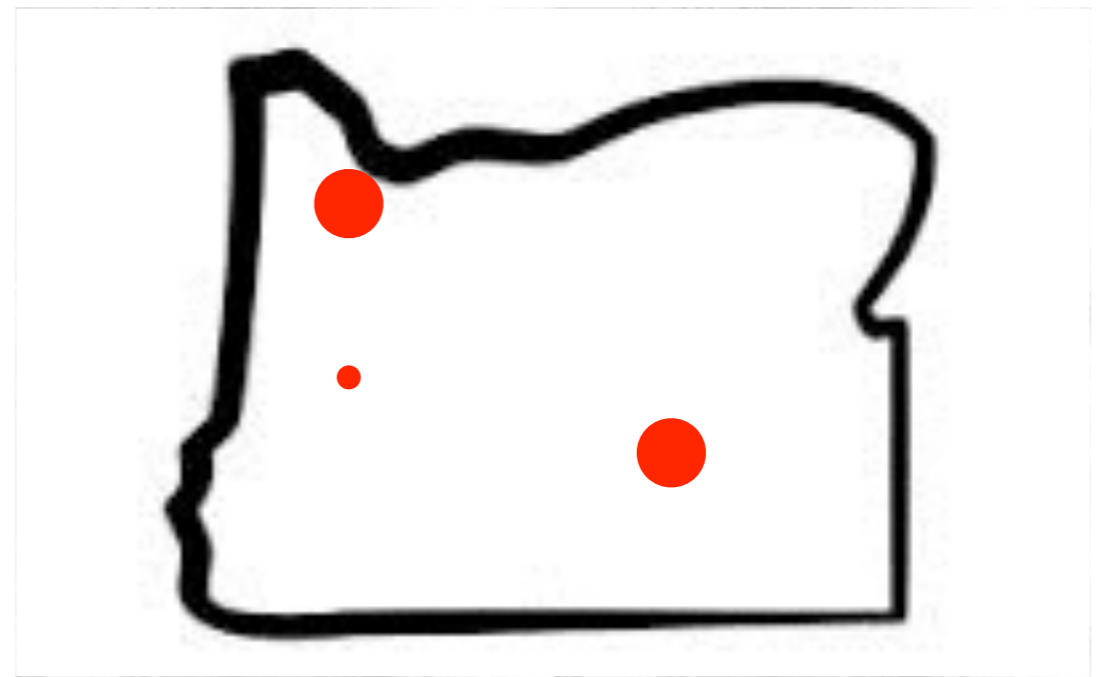
- The media sector in Oregon is largely composed of freelancers and smaller businesses.
- Annual gross revenue from media-related activities as reported by their respondents varied from \$400 to \$25 million.
- Two-thirds of survey respondents reported revenue of less than \$100,000, while 16% reported revenues of over \$1 million.
- The industry is made up of a vast amount of sole proprietors and freelance workers.

**OREGON
FILM**



Project Spotlight: LEAN ON PETE

- Based on the book by Oregon author Willy Vlautin, LEAN ON PETE shot in North Portland, Mollala and Harney County.
- More than 125 vendors in multiple transactions in 30 house districts and 20 state senate districts were engaged.
- Employed 220 local crew & cast members, and 415 local background actors.
- The production spent more than \$100,000 in accommodations in Harney County alone.



**OREGON
FILM**



Is It Finally Time To Give Laika an Oscar?



The Animation Economy

Oregon is a World Class Animation Capital



Company Spotlight: GOLR & ShadowMachine

- Relocated to Oregon during 2015 citing talent pool and the Greenlight Labor Rebate program.
- Now 50 full time employees in a 20,000 sq foot permanent animation studio.
- Comedy Central's "Jeff & Some Aliens" is being completely produced here in Oregon with a local workforce.

Drawn to Portland's animation talent, maker of 'BoJack Horseman' finds a home

Jan 25, 2017, 12:06pm PST Updated Jan 25, 2017, 1:02pm PST

INDUSTRIES & TAGS Technology



When **ShadowMachine** co-founders **Alexander Bulkley** and **Corey Campodonico** were looking to expand their animation studio, they saw an opportunity to grow beyond the bright lights, traffic and intense competition of Los Angeles.

Just more than a year ago, Bulkley moved to Portland, along with about a dozen team members, to open a satellite operation in the quickly changing Slabtown neighborhood.



Alex Bulkley, co-owner of ShadowMachine, opened the Los Angeles-based animation... [more](#)
CATHY CHENEY

OREGON
FILM



Grimm Concludes

Final 'Grimm Gala' raises record-breaking \$804,000 for Doernbecher Children's Hospital

- 6 Seasons, 123 Episodes, nearly 300 jobs per season and \$300M of in-state spending.
- The Grimmster Endowment: \$1.5M in charity funds raised for Doernbecher Children's Hospital.



**OREGON
FILM**



GOLR Renewal

- The Greenlight Oregon Labor Rebate (GOLR) program was utilized in 2016 to build small businesses, attract out of state companies to relocate their productions to Oregon and increasing well paying, full time jobs.
- Lack of renewal would mean an immediate and significant drop-off of commercial production and possible loss of TV series & feature films.
- Metrics of Success Going Forward:
 - *After an initial dip of production spending due to the wrap-up of Grimm we should expect to see...*
 - 1. Job Growth -
 - +10-12% annual job growth for Oregonians.
 - 2. Small Business Expansion -
 - +10-20% annual in-state HQ'd production company spending increase.
 - 3. Out-of-State Recruitment & Retention -
 - +10-15% new projects or new work from repeating out-of-state companies, specifically focusing on commercial production.

**OREGON
FILM**



GOVERNOR'S OFFICE OF FILM & TELEVISION

**OREGON
FILM**

Tim Williams
Executive Director
tim@oregonfilm.org
(917) 254 4021

