



Colorado Film Study

EXECUTIVE SUMMARY | OCTOBER 2022



COLORADO

Overview

A four-year study of Denver and Colorado's film industry found it growing rapidly and delivering significant economic benefits to the city and state, but a lack of investment in infrastructure, support programs, and incentives has made it difficult for members of the industry to grow their projects, companies, and careers. The COVID-19 pandemic exacerbated these challenges and made the need to address them even more urgent.

The study was commissioned in 2019 by Colorado Creative Industries and Denver Arts & Venues to better understand the needs and opportunities of Colorado's and Denver's filmmakers. Researchers conducted more than 150 interviews with Coloradans working across ten subsectors of the industry, as well as with leaders in film communities around the country for comparative lessons and ideas, and analyzed jobs and revenue data for the film, television, and media industries in Denver, Colorado and other states.

The sectors included in the study were:

-  **Television production¹**
-  **Commercial video production**
-  **Ad agencies (for commercial video production)**
-  **Documentary filmmaking**
-  **Scripted (fiction/narrative) filmmaking**
-  **Experimental, animated and short-form filmmaking**
-  **Exhibition (movie theaters and film festivals)**
-  **City and state agencies (relevant to film and media)**
-  **Education in film and media (high school and college)**
-  **Video game production**

¹ In this report the sector of "television production" refers to companies that produce content and shows intended for sale to television networks and streaming platforms. The study did not include in its research Colorado's television broadcast companies or its news media outlets, as both are distinct in many ways from the creative industry sectors that were the focus of the study.

The study found that although there are challenges, Denver and Colorado's film, television, and media industry is one of large and growing potential, waiting to be unlocked.



PHOTO
courtesy Colorado
Film School ▶

Highlights of the Study's Findings

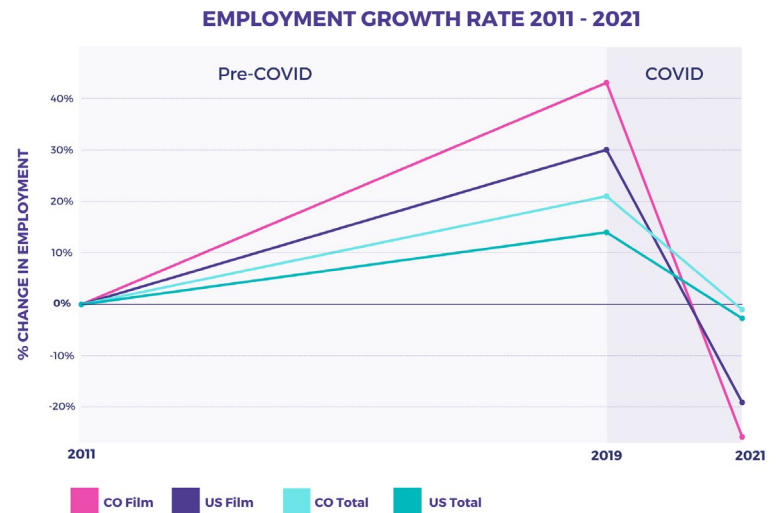
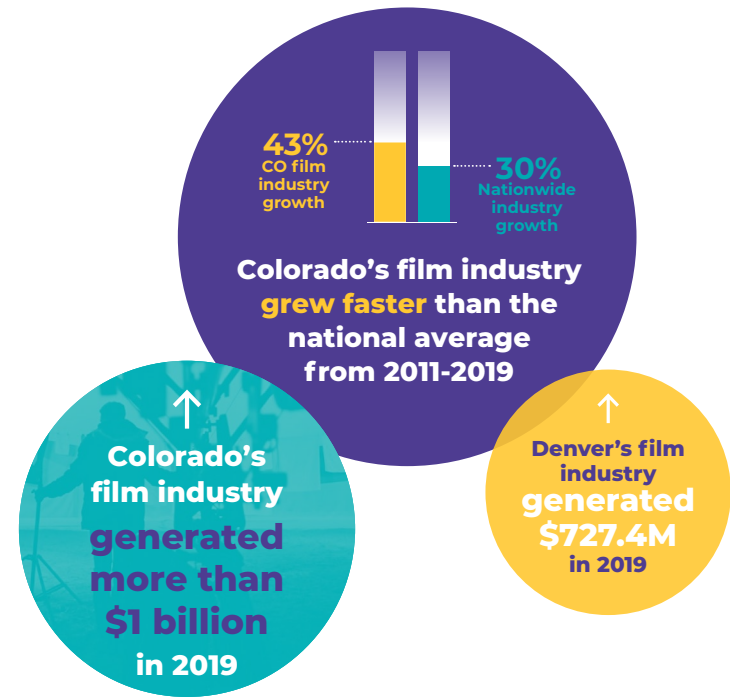
Colorado's and Denver's film and media industry is large, economically robust, and growing rapidly. This growth appears to be occurring primarily in commercial video production.²

- + In 2019, Colorado's film industry **generated more than \$1 billion** in sales of goods and services. Denver's film industry **generated \$727.4M** in 2019 (69%).
- + As of 2019, more than **15,000** Coloradans worked in the film industry. Of those, more than **8,700 (55%)** worked in the Denver metropolitan area.
- + Between 2011 and 2019, employment in Colorado's film industry **grew 43%**, faster than employment growth in the nation's film industry (**30%**), and faster than Colorado's total employment growth (**21%**).

The COVID-19 pandemic led to severe job and revenue losses in Colorado's film industry at a greater percentage than both the national film industry and the state's total job market.³

- Between 2019 and 2021, Colorado's film industry **lost 4,092 jobs (-25.7%)**, compared to the national film industry (**-19%**) and the state's total job market (**-1%**). Denver's film industry **lost 2,200 jobs (-25.1%)**.
- Between 2019 and 2021, Colorado film industry's sales of goods and services **fell 8.4%** from **\$1.04 billion** to **\$959.9M**. Denver's film industry sales **fell 10.1%** from **\$727.4M** to **\$653.7M**.

Colorado's low incentive levels may explain why its film industry lost a greater percentage of jobs than the industry nationally.



² CVSuite, United States Bureau of Labor Statistics

³ CVSuite, United States Bureau of Labor Statistics

Key Findings

Interviewees across Colorado's film and media industry described persistent challenges arising from a few key pain points:



Silos

The most common description of Colorado filmmaking by interviewees was "extremely siloed." Artists and professionals alike expressed widespread desire to be more connected to their peers.



Representation

The study found gender, and racial and ethnic disparities in the makeup of Denver's and Colorado's film industries relative to the overall populations of the city and the state. These disparities appear to be more pronounced among higher paying jobs such as directors, producers, and editors.



Talent Retention

Although the total number of Coloradans in the industry is growing, many are choosing to leave for states with more opportunities. Talent loss appears to be most common among recent college graduates, those seeking entry level positions, and those pursuing careers in specialized jobs (e.g. cinematographers, actors, editors).



Physical Infrastructure

The most frequently cited need across all sectors of interviewees was physical infrastructure. Artists and professionals alike desired affordable, accessible, and conveniently located production studio space for film shoots. Some also cited the need for easier access to and more competitive prices for equipment rentals.



Online Infrastructure

Interviewees reported a lack of online infrastructure. This infrastructure would streamline production, facilitate client and filmmaker connections, and potentially advance crewing and hiring practices beyond the standard word-of-mouth recommendations, which currently limit opportunities to those the filmmakers already know.



Support Systems

Programs that connect filmmakers to financial or creative support for their projects are the most common and successful ways for states that do not offer competitive film and media incentives to foster and sustain independent filmmaking. Programs for financial support include: project markets, pitch forums, and investor programs that recruit and educate potential film investors and connect them directly with projects and filmmaking teams. Programs for creative support include: fellowships, artist-in-residency programs, and masterclass programs.



Incentives

Incentives play a determinative role in whether a state attracts large-scale film, television, and video game production. Wherever those productions go, so goes talent (skilled crew, actors), facilities (studios, rental houses), and companies that hire that talent and run those facilities. Even sectors that aren't directly dependent on incentives are significantly impacted by whether their state offers them competitively.⁵

⁵ More information about incentives is available in the full report.

Recommendations Overview

Based on the study's findings, the authors of this report recommend the creation of a steering committee to guide a long-term strategy informed by industry members and supported by state and local officials, with the following suggested points of focus:

- A Launch a collective strategy** that provides a vehicle for these efforts, facilitates collaboration across sectors, and gives filmmakers the opportunity to advocate for themselves and be represented in policymaking.
- B Prioritize equitable representation** in leadership, program design, and efforts to grow the filmmaking community.
- C Leverage strength in existing sectors** by focusing on what types of filmmaking are currently here and working, and using the immediate community to build on that growth.
- D Secure shared physical infrastructure** that individuals, companies, and organizations can use to meet, work and collaborate.
- E Create funding opportunities and creative support programs** for filmmakers and film projects.
- F Retain Denver and Colorado's talent** by making it easier for filmmaking artists and professionals to find the opportunities they need to stay and build their careers in the state.
- G Increase film's visibility and cultural footprint in Denver and Colorado**, so Coloradans are more aware of the talent that exists in the state, and the economic and cultural opportunity that can be unlocked by supporting it.
- H Take a "yes-and" approach to incentives** that treats all efforts to support Colorado filmmakers as necessary and complementary.

PHOTO
Director Jeff Orlovski and
custom-built drone. Photo by
Catherine Yrisarri © Chasing
Coral courtesy Exposure Labs



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PHOTO
Self-portrait by artist and
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