THE IMPACT OF THE FILM INDUSTRY ON COLORADO

June 2003

Prepared for the
Colorado Film Commission
Governor's Office of Economic Development and International Trade

Prepared by the
Business Research Division
Leeds School of Business
University of Colorado at Boulder

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EXECUTIVE SUMMARY

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The Business Research Division (BRD) of the University of Colorado at Boulder conducted a baseline analysis of the film industry to determine economic impacts, examine the industry's structure, and understand the intangible benefits. Data were analyzed for Standard Industrial Classification (SIC) Code 7812, motion picture and videotape production and allied services, including teleproduction and postproduction services, and SIC Code 7819, motion picture and videotape distribution and allied services. Freelancers were included in the analysis of nonemployers (or sole proprietors).

In 2001 the Colorado film industry, as defined by companies in SIC Codes 7812 and 7819 and sole proprietors with an emphasis in production, had 1,992 employees. Using an employment multiplier of 3.0, the economic impact of film production, which strictly includes companies in SIC Code 7812, is 3,933 jobs. Of this total, 1,311 are direct jobs in SIC Code 7812 and 2,622 are indirect jobs that include sole proprietors, employees in SIC Code 7819, and workers directly benefiting from the presence of the film industry. Similarly, using a wage multiplier of 3.1, there are $205.5 million in direct and indirect wages for the industry, $66.3 million of which is attributable to companies in SIC Code 7812 and $139.2 million in indirect wages.

In 2001 there were 272 companies in SIC Code 7812 with total estimated receipts of $221.6 million. The number of firms in SIC Code 7819 totaled 75, with 681 employees, wages of $21.1 million, and estimated receipts of $83.4 million. There were 675 sole proprietorships with total estimated receipts of $24 million. These receipts cannot be totaled; doing so would overstate sales for the industry within the state. The impact of the receipts is not mutually exclusive; therefore, any summation results in double counting.

From 1992 to 2001 the Colorado film industry, SIC Codes 7812 and 7819, experienced more rapid growth than the state as a whole. Companies in the film industry showed an 8.1% compound annual growth rate (CAGR) for employment, 13.0% for wages, and 4.5% for average wage per employee. For the state, growth rates were 3.8%, 8.7%, and 4.7%, respectively.

In 2001, approximately 45% of the companies in SIC Code 7812 had 1 employee, compared to 40% of the companies in SIC Code 7819. A total of 23 companies in these two SIC Codes had 20 or more employees. These companies represent 6.6% of the combined total of 347 firms, and they account for 56.3% of total wages.

If the film industry were more broadly defined to include equipment and manufacturers, television stations, cable companies, distribution firms, video rental stores, and theaters, 24,559 employees and $1.4 billion in wages would be added to the Colorado industry in 2001. Of 10 potential sectors, those most likely to have strong ties to the film industry are SIC Code 4833 (television stations), SIC Code 4841 (cable companies), SIC Code 7822 (motion picture distribution), and SIC Code 7829 (distribution services). A compelling case can be made that a majority of the employees working at motion picture distribution and distribution-related companies have significant connections to the film industry. In

2001 there were 72 employees in these categories with combined wages of $3.4 million. While companies in SIC Codes 4833 and 4841 have important ties to the industry, it is felt that only a portion of their combined 15,622 employees and $1.2 billion in wages can be included in the Colorado film industry.

In addition to the economic benefits outlined above, the film industry provides other intangible benefits to the state.

- While most of the impact of the film industry is felt along the Front Range, there is also an impact in rural areas. During 2002, projects were filmed in at least 40 of the state's 64 counties.
- There are more than 100 local film commissions within the state that employ 15 full-time equivalent (FTE) employees.
- Approximately 60 FTE employees and 1,800 volunteers work at the state's film festivals. The festivals generated approximately $4.3 million in revenues and had $4.0 million in expenses in 2001. About 75%—$3.0 million—of their expenses occurred within the state.
- Approximately 87,000 people attended Colorado film festivals in 2001. Attendees at festivals spent approximately $9.6 million. Total festival spending in Colorado was $12.6 million.
- Approximately 2,000 students were enrolled in film programs with a production emphasis during 2001.
- Approximately 350 total employees work in film-related occupations in colleges and universities, ad agencies, hotels with meeting sites, and large companies.
- About 75% of production receipts are derived from out-of-state sources.
- The state's tourism economy is a benefactor of the filming that occurs within the state.
- The diversification of the film industry has increased opportunities for cultural enrichment.

Traditionally, the impact of the film industry would have been measured simply by the contribution of those companies in SIC Codes 7812 and 7819, or the producers and their suppliers. Constantly changing global social and economic conditions, and advances in technology have redefined the structure of the industry. Results from this study suggest that the successful production companies and suppliers currently in business have adapted to these changes.

Today, the structure of the film industry includes production companies, suppliers, film festivals, schools, college and university programs, in-house production companies, and firms that in the past were considered outside the traditional definition of the film industry.

The Colorado Film Commission, along with its network of 100+ local film contacts, is the common element between these segments of the industry, and, as such, has the potential to create synergy between these groups and promote the industry in order to stimulate economic development in the state. The primary and secondary research conducted for this study suggests that the film industry can be strengthened by considering the following:

- Broaden the definition of the industry to include companies that are currently affecting the industry.
- Create awareness about the unique economic benefits of production in the state. This includes emphasizing that much of the revenue is generated from out of state and is reinvested in the local economy, both rural and metro areas benefit from production projects, and production revenue is not necessarily tied to normal economic patterns.
- Generate a critical mass of producers in certain areas, particularly those involved with independent films.
- Provide financial incentives to attract more projects to Colorado.
- Educate financial institutions about the distinguishing factors of the industry, in other words, improve venture capital opportunities.
- Improve the level of awareness of film industry companies with firms that are not involved in the industry. This could include, for example, creating opportunities for ad agencies to strengthen their relationship with Colorado companies that have production facilities, as well as with Colorado crews.
- Strengthen industry ties with school and university programs.

PURPOSE OF THE STUDY

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In response to a request by the Governor's Office of Economic Development and International Trade (OED&IT), the Business Research Division (BRD) of the University of Colorado at Boulder conducted this study to determine the economic impact of the film industry on the state of Colorado. Funding for the study was provided by the Colorado Economic Development Commission and private donors. (For a list of donors, see Appendix.)

This report begins with a section that discusses industry background and trends, followed by an analysis of employment and wage trends based on ES202 data for the period 1993 to 2001. The Colorado Department of Labor and Employment compiles employment and wage data (ES202 data) by industry and county on a quarterly and annual basis. Trends are analyzed for SIC Code 7812, motion picture and videotape production and allied services, including teleproduction and postproduction services, and SIC Code 7819, motion picture and videotape distribution and allied services.

The industry has a number of small companies and sole proprietorships. As a result, trends in the number of nonemployer businesses and total nonemployer business receipts are analyzed for NAICS Code 5121 for the period 1997 to 2000.

In addition to the ES202 data analysis, surveys were conducted to help determine the impact of production companies, in-house production companies, suppliers, local film commissions, film festivals, school districts, and universities and colleges. The survey results are presented following the employment and wages analysis, and estimated industry receipts sections.

FILM INDUSTRY HISTORY, BACKGROUND, AND TRENDS

FILM INDUSTRY HISTORY, BACKGROUND, AND TRENDS

Historically, Colorado has been a leader in the film history as evidenced by the formation of the world's first film commission established by legislative action in 1969. The article below summarizes the development of the film industry in Colorado. A previous version of it appeared in the May 2000 issue of the *Colorado Business Review*. The sections that follow briefly review the key changes taking place in the industry and identify trends.

Film Industry History and Background: A Love Affair with Film

Colorado treasures its long and loving relationship with the film business. Before Hollywood produced little more than farms and fields, Colorado served as a center for motion picture production. Between 1897 and 1923, hundreds of movie shorts were filmed here. In the 1950s and 1960s, the state starred as a popular location site for Westerns and other projects requiring spectacular scenery and locals took note of the benefits.

On July 1, 1969, the Colorado Motion Picture and Television Commission became the first legislated film commission in the world, established to promote the state for location filming and to serve as a liaison during production. Today more than 300 similar offices exist worldwide in every state and many U.S. cities, throughout Canada, the United Kingdom, and Europe, as well as places like New South Wales, Peru, and the Arctic Circle. It is recognized globally that film business is good business.

The Selig Polyscope Company of Chicago pioneered in Colorado, opening a Denver office around the turn of the century. They shot more than 40 films during 1911 and 1912 in the Cañon City area, and stunt rider Tom Mix became a local favorite. Selig soon left for warmer weather in Prescott, Arizona, and eventually, Los Angeles. The Colorado Motion Picture Company moved to Cañon City in January 1914. The company filmed half a dozen movies, but ended after its lead actress and a cameraman drowned in an accident.

In 1947, a Hollywood crew journeyed to the area to shoot a prison story titled, *Cañon City*. They hired local Karol Smith as a still photographer. After the company left town, Mr. Smith discussed the positive economic impact of location filming with his childhood friend, theatre-owner Harold McCormick. They approached the chamber of commerce, and with this support, Mr. Smith trekked to Hollywood in the early 1950s. Tucked under his arm was a book of photos of mountains and prairies and rivers and roads, which he showed to any producer who would listen to his pitch. In 1969, then-Senator McCormick sponsored the bill before the state legislature, and the Colorado Film Commission debuted. It served as the model for subsequent film offices around the country. Mr. Smith directed the program until his retirement in 1989.

During the studio heyday in Hollywood and at the height of popularity of the Western, Warner Brothers, 20th Century Fox, MGM, and United Artists found Colorado a perfect location. Later, other producers chose the state for its scenery, services, crews, equipment, talent, and cooperation. Numerous low-budget independent features shoot here regularly, many by Colorado filmmakers.

But motion pictures are only part of the love affair the state has with filming. Commercials became big business in the 1970s and remain so today. Local production crews earned a solid reputation in the industry when Viacom produced nearly 50 episodes of *Perry Mason*, *Father Dowling*, and *Diagnosis: Murder* in the state during the 1980s. Television projects, documentaries, sports programming, commercials, industrials, catalogues, music videos—all of these shoot here regularly and bring dollars and employment.

A highlight in the state's film history is the special recognition given to Colorado filmmakers Donna Dewey and Carol Pasternak, who were honored with Oscars in 1997 for their documentary short, *A Story of Healing*.

As changes in popular taste, competition, industry structure, and especially technology alter the landscape of filmmaking, every locale struggles to remain in the big picture. One thing is clear in Colorado: Our love is here to stay.

Trends

A literature review revealed the following industry developments.

Overview

During the annual state-of-the-industry speech at ShoWest 2003, Motion Picture Association of America (MPAA) president and CEO Jack Valenti announced record high revenues in the film industry. The theatrical film box office in the United States soared to $9.52 billion last year, continuing an 11-year streak of expansion. Admissions also rose in 2002 by 10%, to 1.64 billion, the highest level since 1957. The bad news is that many film commissions are suffering from the economic downturn and that the cost of making and marketing a movie for a MPAA member company increased nearly 14% in 2002, to $89.4 million, the largest percentage increase since 1997.

The copyright industries (movies, TV programs, home videos, books, music, computer games and software) were responsible in 2001 for some 5% of the gross domestic product (GDP) of the nation. Over the past quarter century, these industries' share of GDP grew more than twice as fast as the remainder of the economy. They earn more international revenues than automobiles and auto parts, more than aircraft, more than agriculture (International Intellectual Property Alliance 2003).

New and Emerging Technology

The film industry is in a period of tremendous change, largely due to new technological advances that are breaking down filmmaking barriers. The transition from film to tape alone is having major repercussions, including a negative impact on employment and budgets and an increase in margins. High-powered computers, high-density digital storage, and specialized software are becoming the new postproduction facilities (Wright 2003). New production markets can now build a technical infrastructure without relying solely on local sources. As Colorado has one of the highest concentrations of computer, communications, and technology companies in the country, it is positioned to jump on the digital bandwagon and climb to the top of the film industry. With technology allowing easier filming and production in one place, local and independent filming is set to emerge. This type of filmmaking and producing creates jobs and money for the Colorado economy. It should be noted, however, that the postproduction/visual effects industry is currently in a state of flux due to high labor costs, low profit margins, and a soft economy. Four established computer graphics firms—Disney's Secret Lab, London's Mill Films, Centropolis in Culver City, and Kodak's visual effects firm Cinesite—have closed or are scheduled to close (Crabtree 2003).

Video entertainment over the Internet is likely to become very popular, especially as more people acquire faster Internet connections. The AOL and Time Warner merger in January 2001 created cable access for both TV and the Internet (broadband) (Jones 2001). Denver-based "City's Edge" is a novel soap opera that is only broadcast on the Web (Ostrow 2002). All scenes are shot in Denver, all production takes place in Denver, and the crew is Denver based. In the future, a possible negative effect of new technology is that software and hardware advances may make it easier for filmmakers to mimic locations on sound stages (Wright 2003). This means that fewer production companies would actually have to film in Colorado since the state's main selling point has been location. However, these advances could have a positive effect on the digital segment of the industry in the state.

Runaway Productions

A current problem in the film industry nationwide is the flight of productions to Canada and other countries. U.S. production companies that choose to film in Canada and other countries are dubbed "runaway productions." The estimated loss to the U.S. economy since the Canadian rebates is $4.1 billion, or about 25,000 jobs, a year (Katz 2001). However, another economic impact study of runaway productions estimates the loss to Hollywood alone at $10 billion annually (McNary 2003). Runaway films to British Columbia alone created $2.82 billion in revenues for fiscal year 2001 (British Columbia 2001). Production companies are drawn by lower costs, better tax incentives, and attractive exchange rates (Wright 2003). The ease of transmitting data over long distances and in short periods, combined with a technical infrastructure and a skilled labor force, has enabled filmmakers to take advantage of lower labor and production costs in other countries.

The significance of this problem is underscored by the pledge by show business executives and union leaders to form industry-union task forces to address runaway production issues (McNary 2003). Furthermore, the nonprofit Creative Coalition created the New York Runaway Production Task Force, which will focus on "combating the negative economic impact that runaway film and television production has on New York" (Mohr 2003).

Film commissions can be found on nearly every continent, and they market aggressively to attract production in their jurisdiction. The number of film commissions currently exceeds 300, according to the Association of Film Commissioners International.

Economic Impacts

Numerous studies have been conducted to determine the economic impact of the film industry. The following list briefly summarizes the results of a few of these reports. Please note that not all states track production in the same way, and therefore these studies cannot be compared. They are listed for discussion purposes only.

- Revenues for the film and video industry on Multnomah County, Oregon, in 2000, totaled $331.8 million in output. Overall, the film industry brought in revenues totaling $565 million and spent $225 million on labor. Taxes and fees collected totaled $2.7 million (ECONorthwest 2001).
- Since 1980, revenues in North Carolina have totaled more than $6 billion, where more than 600 features and nine network series have been produced. In 2001 alone, revenues totaled $250.6 million and 44 major productions were filmed there (North Carolina Film Office 2001). Major sound stages contribute to the film industry's impact in the state.
- The film sector in Florida comprises a $3.9 billion industry, with 3,500 establishments that employ 39,000 full-time workers (MacQueen 2003). Major sound stages contribute to the film industry's impact in the state.
- The economic impact of film and television production in Utah totaled more than $117 million in fiscal year 2000-01 (Salt Lake City Chamber of Commerce 2003).
- Georgia saw its best year ever in 2002, with almost $300 million projected in revenues (Basinger 2002).
- The film and television production industry expenditures totaled $5 billion in New York City in 2001. The industry generated $500 million in tax revenues (Office of the Mayor 2002).
- Texas brought in 44 total projects in 2002, with revenues reaching $134.5 million (Texas Film Commission 2002).

Incentives

States have used various forms of incentives as tools for attracting and retaining filmmakers. Many of these incentive programs focus on tax incentives, but there are other options. Examples of some of the more creative tax incentive programs include:

- The New Mexico legislature passed five bills in the 2003 legislative session in support of the film industry, which were awaiting the signature of the governor at the time this report was written. The New Mexico Film Office also has a film investment program and offers fee-free locations (New Mexico Film Office 2003).

- In May 2003 Belgium announced a new tax-based film finance scheme that will permit reductions in corporate tax bills in return for guarantees on production spending in the country (Frater 2003).
- Florida offers sales and use tax exemptions on motion picture and television production equipment and real property. Florida also offers tax credits of up to $2,000 per employee for companies that create new jobs within 30 designated urban and rural areas (Governor's Office of Film and Entertainment 2003).
- Oklahoma's "Compete with Canada Film Act" was enacted July 1, 2001, and offers a rebate in the amount of 15% of documented expenditures made in the state directly attributable to the production of a long-form narrative film or television production. The rebate is paid to the production company responsible for the production (Oklahoma State Senate 2001).

In addition, many states offer a transient room tax rebate, as well as free filming on state property.

Independent Films

Changing demographics and a more diverse population are creating a market for independent and art films, and evidence suggests they are rising in popularity in the state and in the nation. Indeed, the number of screens in the Denver metro area devoted to art films (which are often independent films) grew from 9 to 26 within the last year (Denerstein 2003). This growth increases the variety of film offerings and creates opportunities for special programming, including sessions with directors and screenings of documentaries, followed by discussions. Working against these films, however, is the "open big policy," whereby films must open in theaters nationwide and perform very strong the first weekend or else die. Many quality movies are not shown in theaters long enough to develop positive word of mouth.

Legislation

Congressmen Dreier and Berman introduced the United States Independent Film and Television Production Incentive Act of 2003 to Congress in February, which would provide for tax credits to anyone producing a movie within the United States. The bill, which is identical to legislation introduced last Congress, is targeted at small independent film and television productions. It provides a wage-based tax credit for television and film projects produced in the United States (United States House of Representatives 2003).

Movie Pirating

The downloading of movies could have a major effect on the film industry. Presently, it takes hours to download a movie using the fastest connections. However, with increases in Internet speeds taking place daily, movie pirating could become a more serious problem. According to a June 2003 report by Deloitte & Touche, the global film industry is currently losing $3 billion to $3.5 billion per year to illegal piracy operations. On the other hand, filmmakers could distribute their films using the same means, thereby completely bypassing distributors and retail chains. In fact, some studios are already taking a proactive role by creating their own subscriber on-line content services (Bellini 2001).

Economic Conditions

The national economic downturn that began in 2001 has negatively affected many state film commissions. Commissions are generally operated and funded by various government agencies. The budget difficulties of these entities have forced the budgets of some state film commissions to be cut and in some cases, the commissions have been disbanded.

Below is a list (compiled in April 2003) of state/regional film commissions that closed or experienced major reorganization or cuts in funding and/or staff in 2002-2003.

- Alaska
- Arizona
- Colorado
- Minnesota
- Massachusetts
- New Jersey
- Ohio
- Washington
- West Virginia
- Boston, MA
- Dallas/Ft. Worth, TX
- Orange County, CA
- St. Louis, MO

Creative Class

Based on the 2000 Census, nuclear families represent less than one-quarter of the population, and the number of singles and never-been-marrieds is rapidly growing. Many of these young workers are part of what researcher Richard Florida calls the creative class, a fast-growing, highly educated, well-paid segment of the workforce that includes artists, entertainers, actors, and designers (Florida 2003). The distinguishing characteristic of this group is that “its members engage in work whose function is to create meaningful new forms” (Florida 2003). The creative class enjoys a mix of influences and activities; they want to hear different music and different opinions, and see different films. They are a new force in the economy because these individuals are attracted to communities that strive to break down barriers and cultivate diversity.

These changes in our culture and the growing importance of creativity and individuality place greater emphasis on film. As creativity becomes more valued, independent films, film festivals, and film as a form of communication will become more vital to our communities.

Occupational Projections for Colorado

As a service to the public, the Colorado Department of Labor and Employment provides occupation projections. It has projected the demand for film editors to increase at a rate of 8.1% from 1998 to 2008, from 181 to 326 editors. It has also forecasted that the demand for actors, directors, and producers will grow from 1,614 jobs to 2,701 jobs during that same period, an increase of 6.7%.

ANALYSIS OF EMPLOYMENT, WAGES, AND NONEMPLOYER DATA

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Background

This section analyzes the number of firms, number of employees, and wages based on ES202 data for the primary film industries, Standard Industrial Classification (SIC) Codes 7812 and 7819. Only companies with direct ties to production are included in this section. A brief analysis is also included for nonemployer data (also known as sole proprietorships). In addition, an analysis is conducted to look at the benefits of ancillary industries, including equipment and supply companies, television broadcasting stations, cable companies, distribution firms, movie theaters, and video rental stores.

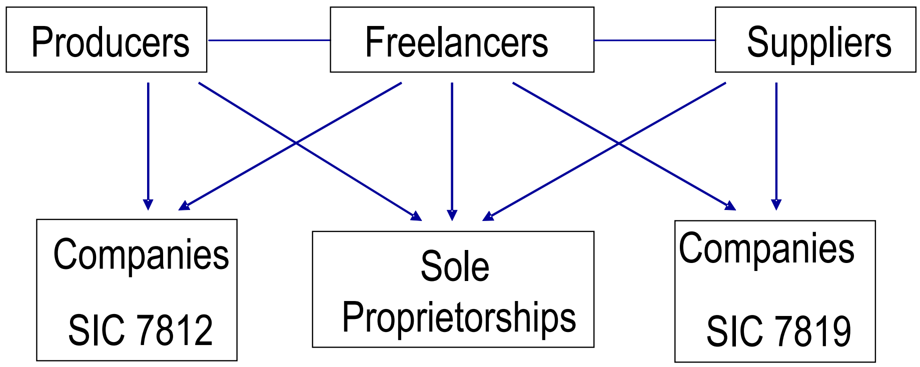
Industry Descriptions for SIC Codes 7812 and 7819

Companies that fall under SIC Code 7812 are described as motion picture and video tape production companies. These are establishments that primarily produce theatrical and nontheatrical motion pictures and video tapes for exhibition or sale. Included in this classification are establishments engaged in both production and distribution. Some examples of SIC 7812 categories are tape or film production of television commercials, educational motion picture production, motion picture production and distribution, and television film production.

Companies that fall under SIC Code 7819 are described as services allied to motion picture production. These are establishments that primarily engage in performing services independent of motion picture production, but are related to motion picture production in some form. Examples include motion picture film processing, editing, and titling; casting bureaus; wardrobe and studio property rental; television tape services; motion picture and video tape reproduction; and stock footage film libraries.

The Colorado Department of Labor and Employment prohibits the release of employment and wage information (ES202 data) about individual companies. When specific company information is mentioned in this section, it is based on secondary research from other data sources or discussions with members of the industry.

CHART I - RELATIONSHIP BETWEEN INDUSTRY SEGMENTS AND FIRMS IN SIC CODES 7812 AND 7819



Wage and Employment Data for SIC Codes 7812 and 7819

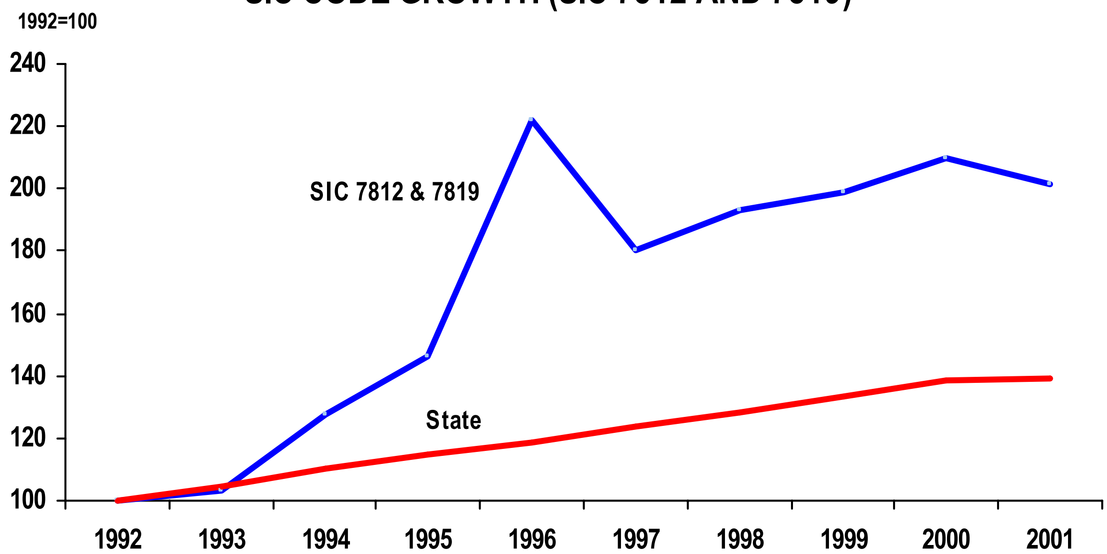
Review of Employment and Wage Data by Quarter

The data for SIC Codes 7812 and 7819 was evaluated on a quarterly basis from Q1 1992 through Q3 2002. Year-end data for 2002 were not available at the time this study was completed. This analysis shows that the employment and wage trends of the film industry do not follow typical state employment trends. Total state employment typically follows a pattern where it reaches its lowest point of the year during the first quarter. Employment typically climbs steadily during the second and third quarters and peaks during the holiday season (fourth quarter). Employment for the film industry appears to be project based, rather than seasonally based.

State Employment vs. Film Industry Employment

The data in Chart II indicate that from 1992 to 2001 state employment grew at a very steady rate and began to taper off in 2002, while the film industry experienced faster growth, but had more drastic upturns and downturns. During this period state employment grew at a compound annual growth rate of 3.8%. The film industry grew at a slightly faster rate, 8.1%.

CHART II - STATE EMPLOYMENT GROWTH VS. SIC CODE GROWTH (SIC 7812 AND 7819)



Source: Colorado Department of Labor and Employment ES202 Data.

SIC Code 7812

Table I presents employment and wage data for companies in SIC Code 7812, which includes motion picture and video tape production companies. The sector grew rapidly in the last decade. Employment increased from 826 in 1992 to 1,311 in 2001, a compound annual growth rate of 5.3%. Estimated wages totaled about $25.2 million in 1992 and $66.3 million in 2001, for an annual growth rate of 11.3%.

The average firm size in sector 7812 remained very constant in the 1992 to 2001 period, with the average number of employees in the 5- to 7-employee range. The largest firms in sector 7812 varied from a low of 70 employees in 1993 to a high of 259 in 2000.

SIC Code 7819

Table I also presents employment and wage data for companies in SIC Code 7819. These firms perform services allied to motion picture production. The sector is substantially smaller than SIC 7812, and slightly more stable. In the period from 1992 to 1996, employment increased by a factor of nearly five. It tapered off in 1997, and did not change significantly in 1998-2001. Wages increased steadily during the early part of the decade before nearly doubling in 1996. They have maintained steady growth since then.

Companies in the 7819 subsector have historically been slightly larger than companies in SIC 7812. In addition, the total number of companies has grown and is expected to increase in the future.

TABLE I
EMPLOYMENT AND WAGE DATA

	1992	1993	1994	1995	1996	1997	1998	1999	2000	2001
SIC CODE 7812										
Total employment	826	803	966	1,096	1,401	1,105	1,191	1,295	1,419	1,311
Estimated wages ($millions)	$25.2	$24.9	$31.7	$38.3	$51.9	$42.6	$48.3	$55.7	$66.5	$66.3
Average quarterly number of firms	162	176	194	228	240	263	280	274	281	280
Largest firm	na	70	103	80	179	157	118	244	259	151
Average size firm	5.1	4.6	5.0	4.8	5.8	4.2	4.3	4.7	5.0	4.7
SIC CODE 7819										
Total employment	162	216	298	352	792	678	717	670	654	681
Estimated Wages ($millions)	$3.9	$4.4	$6.8	$7.3	$12.9	$15.1	$16.9	$18.7	$18.5	$21.1
Average quarterly number of firms	33	38	43	48	50	71	73	73	72	77
Largest firm	na	49	49	76	311	91	83	105	102	141
Average size firm	5.1	5.6	6.9	7.3	15.8	9.7	10.0	9.2	9.1	8.9
TOTAL										
Total employment	988	1,019	1,264	1,448	2,193	1,783	1,908	1,965	2,073	1,992
Wages ($millions)	$29.1	$29.3	$38.5	$45.6	$64.8	$57.7	$65.2	$74.4	$85.05	$87.4
Average quarterly number of firms	195	214	237	276	290	334	353	347	353	357

Source: Colorado Department of Labor and Employment ES202 Data.

Note: Wages are not adjusted for inflation. na=not available.

Nonemployer Data

Number of Nonemployer Establishments

The following analysis is different from the previous data in that it includes all operating establishments that have no paid employees and receipts greater than $1,000 that are subject to federal income tax. Data are only available for years 1997 to 2000 for NAICS 5121 (motion picture and video industry). Data are not available for nonemployer establishments based on SIC Codes; hence, there is no distinction between sole proprietors who are freelancers, producers, and suppliers. Several key points are evident from a review of the data.

- The number of sole proprietorships dropped in 1998, similar to the employment decline seen in 1998 for SIC 7812.
- Likewise, the number of sole proprietorships grew between 1998 and 2000, mirroring the increase in wage and salary employment in SIC 7812 in 1998.
- Between 1997 and 2000, concentrations of companies became evident in the following areas outside the Denver Metro Area: El Paso County, Eagle County, and Summit County.

TABLE II
NUMBER OF ESTABLISHMENTS NONEMPLOYER – NAICS 5121

	1997	1998	1999	2000
Denver Metro Area				
Adams	22	18	20	21
Arapahoe	84	67	79	84
Boulder	82	82	89	92
Denver	156	148	143	137
Douglas	27	31	31	29
Jefferson	104	98	113	111
Total Denver Metro Area	475	444	475	474
Other Metro - El Paso	na	49	57	50
Other areas				
Eagle	na	na	19	17
Summit	na	na	na	10
Total other areas	212	139	125	150
Total all except Denver Metro	212	188	201	217
Total	687	632	676	691

Source: Bureau of the Census.

Note: na = not available

Annual Receipts for Nonemployer Establishments

Between 1997 and 2000 the total receipts for nonemployer establishments increased at a 2.8% annual rate of growth. In 2000, the average annual receipts per nonemployer were $35,304. The highest average annual receipts per proprietorship have historically been in Denver ($53,182 in 2000). Eagle County ($40,529 in 2000) and Arapahoe County ($38,404 in 2000) typically follow.

TABLE III

TOTAL RECEIPTS FOR NONEMPLOYER ESTABLISHMENTS (THOUSANDS)– NAICS 5121

	1997	1998	1999	2000
Denver Metro Area				
Adams	$378	$287	$642	$454
Arapahoe	3,852	3,027	3,300	3,226
Boulder	2,547	2,951	3,423	2,451
Denver	6,164	5,589	6,780	7,286
Douglas	662	877	1,253	952
Jefferson	3,238	3,852	3,616	3,562
Total Denver Metro Area	16,841	16,583	19,014	17,931
Other Metro - El Paso	na	1,308	680	715
Other areas				
Eagle	na	na	1,035	689
Summit	na	na	na	282
Total other areas	5,029	3,657	4,542	5,060
Total all except Denver Metro	5,029	4,965	6,257	6,464
Total	$21,870	$21,548	$25,271	$24,395

Source: Bureau of the Census.

Note: na = not available.

2001 Projections for Nonemployer Establishments

For use later in this report, it is necessary to project nonemployer statistics for 2001. It is assumed that the number of establishments—675—will not increase, in line with the state economy. Additionally, total receipts will remain unchanged, at $24 million.

Ancillary Industries

It is possible to define the impact of the film industry from a much broader perspective than SIC Codes 7812 and 7819. Such a definition may include companies from some or all of the SIC classifications identified below. The descriptions are based on the *Standard Industrial Classification Manual*. Possible ancillary categories are:

- SIC 3861 – Photographic equipment and supplies, including motion picture apparatus and equipment and motion picture film.
- SIC 4833 – Television broadcasting stations.
- SIC 4841 – Cable or other pay television services, including firms engaged primarily in the dissemination of visual and textual television programs on a subscription or fee basis.
- SIC 5043 – Photographic equipment and supplies, such as firms primarily engaged in the wholesale distribution of equipment, including motion picture cameras and supplies.
- SIC 7822 – Motion picture and video tape distribution, such as firms engaged in the distribution of theatrical and nontheatrical motion picture films or in the distribution of video tapes and disks, except to the general public.

- SIC 7829 – Services allied to motion picture distribution, including firms engaged in performing auxiliary services to motion picture distribution, such as film delivery service, film purchasing, booking agencies, and film libraries.
- SIC 7832 – Motion picture theaters, except drive-ins.
- SIC 7833 – Drive-in motion picture theaters.
- SIC 7841 – Video tape rental, such as firms engaged in renting recorded video tapes and disks to the general public.

If all of the companies in the above mentioned SIC Codes were considered part of a broader definition of the film industry, 24,559 employees and $1.4 billion in wages could be added in 2001. The categories most likely to have stronger ties to the film industry are SIC Code 4833 (television stations), SIC Code 4841 (cable companies), SIC Code 7822 (motion picture distribution), and SIC Code 7829 (distribution services). A strong case can be made that a majority of the employees working at motion picture distribution and distribution-related companies have significant connections to the film industry. In 2001 72 workers were employed in these categories with combined wages of $3.4 million.

While companies in SIC Codes 4833 and 4841 have important ties to the film industry, only a portion of their employees work in positions that are directly related to the industry.

TABLE IV

ANCILLARY INDUSTRIES

SIC CODE	Description	2001 Employment	2001 Wages ($ millions)
3861	Equipment and supplies	2,444	$110.7
4833	Television broadcasting stations	1,881	91.0
4841	Cable companies	13,741	1,114.7
5043	Distribution of equipment and supplies	413	21.8
7822	Motion picture distribution	54	2.6
7829	Services allied to distribution	18	.8
7832	Movie theaters	2,893	30.7
7833	Drive-in movie theaters	72	.7
7841	Video rental stores	3,043	41.6
Total		24,559	$1,414.6

Source: Colorado Department of Labor and Employment ES202 Data.

Note: Wages are not adjusted for inflation.

Comments

Between 1992 and 2001, employment in the state film industry grew faster than total state employment. Because many film projects have a short duration and may require multiple locations for filming, employment growth in the industry has been more volatile than the overall employment growth of the state.

While the film industry is not recession proof, data provided by the Colorado Film Commission suggest that the Colorado film industry grew during some of the state's weak economic times. Because of the volatility of the industry, it is difficult to determine whether the industry will experience growth during the current economic downturn. Preliminary data for the first three quarters of 2002 suggest that the growth patterns of the industry will most likely mirror the patterns of the state economy.

Much of the impact of the film industry is derived from very small companies. Unlike factories or retail stores, the impact of a film project may occur over a matter of days and weeks rather than months or years. Because film projects may require diverse locations, both rural and metro areas of the state can benefit.

Historically, the structure of the film industry has been very simplistic. Companies were classified as either producers or suppliers. A review of the data suggests that within the period of this analysis the film industry has undergone significant changes in terms of technology, definition, products, and structure. These changes are further documented in subsequent sections of this report.

As technology, production companies, and the film industry evolve, it becomes more difficult to determine what constitutes a company in the film industry. A definition of the industry that includes companies in SIC Codes 7822 or 7829, motion picture distribution, minimally increases the size of the industry. Broadening the definition of the industry to include television broadcasting stations would double the number of employees and the amount of wages paid. In addition, the industry would be much larger if it also included cable companies.

PRODUCTION, INDUSTRY ANALYSIS, AND ESTIMATED IMPACT

PRODUCTION, INDUSTRY ANALYSIS, AND ESTIMATED IMPACT

Production

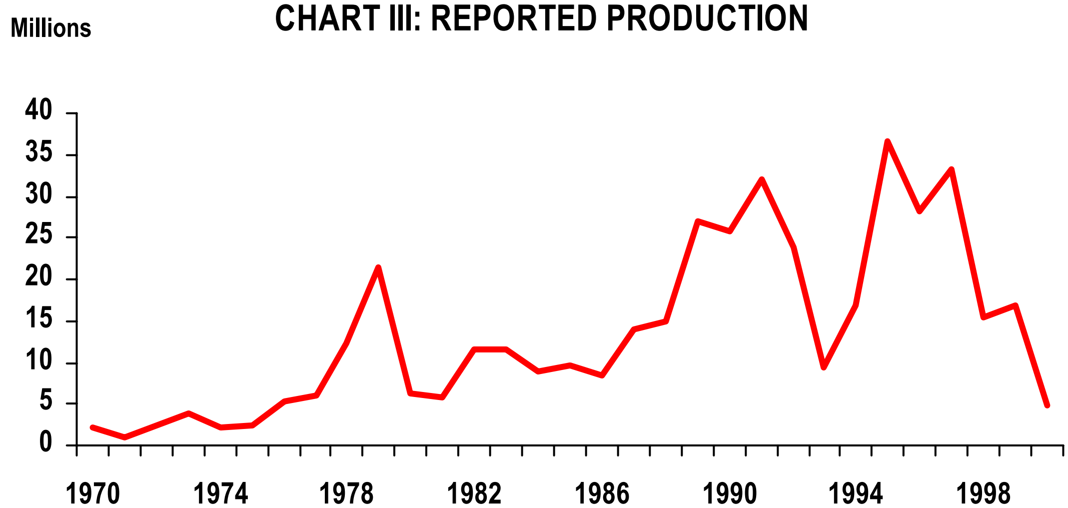
New Production Brought to the State

From 1970 to 2000, the Colorado Film Commission tracked revenue generated from new production projects that it and other local film commissions brought to Colorado from other states and countries. Typically, these projects were feature movies, commercials, or television shows and did not represent all production that took place within the state.

Until recently, it was easy to make the distinction between in-state and out-of-state companies and projects. In the late 1990s the structure of the industry changed to the point where it was no longer possible to classify companies using this criterion. Subsequently, the criteria for tracking revenue changed, resulting in a break in the data starting in 2001. The data set for 2001 and 2002, which was recorded on a calendar year basis, includes the dollars spent in Colorado on out-of-state projects, along with some in-state production revenue. In calendar year 2001 production totaled $31.1 million, and declined to $30.4 million the following year. Since the data for the period 1970 to 2000 are not comparable to the production figures for 2001 and 2002, revenue for the last two years are not shown in Chart III.

The figures represent production reported only by firms that worked with the Colorado Film Commission; the Denver Mayor's Office of Art, Culture and Film; the Colorado Springs Film Commission; and other Colorado communities in calendar year 2002. Nonetheless, some interesting points can still be made. First, the chart shows the volatility of the industry. Second, the growth of the film industry from 1985 to 1990 occurred at a time when the state economy was either declining or stagnant, which illustrates that the film industry can thrive in economies that are growing, declining, or stagnant.

CHART III: REPORTED PRODUCTION

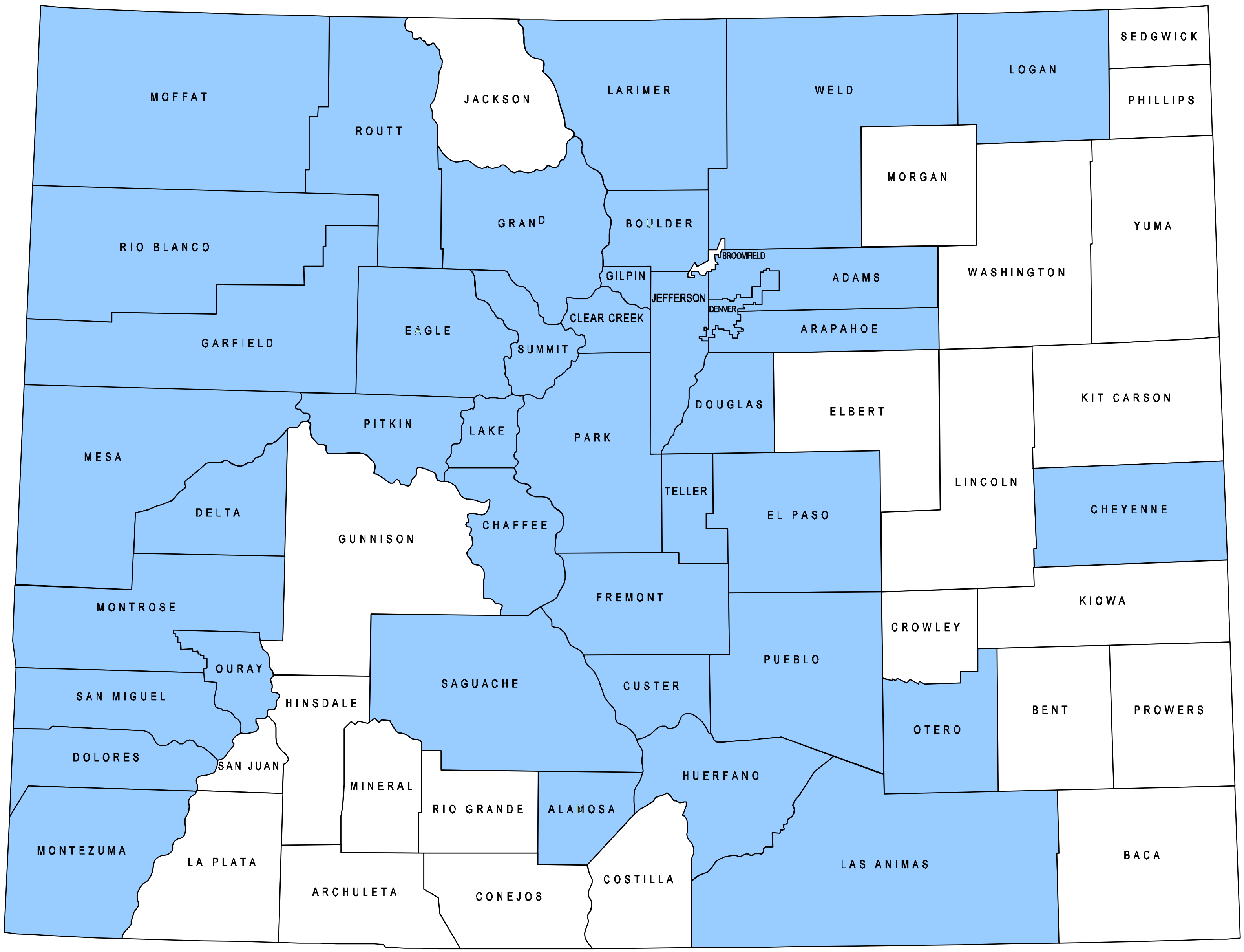


Source: Colorado Film Commission.
Note: Figures are for fiscal year.

Production within the State

The map on the following page illustrates the value of the film industry to the entire state of Colorado. During 2002, the Colorado Film Commission tracked production projects in at least 40 of the state's 64 counties.

PRODUCTION IN COLORADO IN 2002



Source: Colorado Film Commission.

Additional Industry Analysis

Like most sectors of the state's economy, small companies make up a majority of the Colorado film industry, yet a large portion of the total industry wages are paid by fewer than 20 companies. The following section examines in greater detail the employment and wage analysis conducted above to better understand the structure of the industry.

Additional Industry Analysis-7812

Of the total firms in SIC 7812, 256 companies, or 94.1%, have 20 or fewer employees. These companies employ 50.3% of total sector workers and pay 46.1% of total wages. The 2001 average wages per employee for SIC 7812 are $50,564.

TABLE V

2001 WAGES BY COMPANY SIZE FOR SIC 7812

Company Size*	Total Employees	% of Total Employment	Number of Firms**	% of Total Firms	Total Wages (000s)	% of Industry Wages
0	0	0.0%	45	---	$179.9***	0.3%
1	80	6.1	123	45.2%	3,995.4	6.0
2	76	5.8	46	16.9	2,767.0	4.2
3	76	5.8	29	10.7	2,668.0	4.0
4	31	2.3	9	3.3	1,022.3	1.5
5-9	185	14.1	32	11.8	7,379.9	11.1
10-19	212	16.2	17	6.3	12,548.4	18.9
20+	652	49.7	16	5.9	35,739.1	53.9
Total	1,311	100.0%	272	100.0%	$66,300.0	100.0%

Source: Colorado Department of Labor and Employment ES202 Data.

*Note: *Quarterly company averages were rounded up.*
***There were 272 firms with employees during 2001.*
****Deferred wages are paid to companies after a project has been completed, and there are no employees.*

Additional Industry Analysis-7819

In SIC 7819, 90.7% of the firms have 20 or fewer employees. These 68 companies represent 35.7% of total employment, and they pay 36.2% of total wages. The 2001 average wages per employee for SIC 7819 are $30,976.

TABLE VI

2001 WAGES BY COMPANY SIZE FOR SIC 7819

Company Size*	Total Employees	% of Total Employment	Number of Firms**	% of Total Firms	Total Wages (000s)	% of Industry Wages
1	21	3.1%	30	40.0%	$911.0	4.3%
2	22	3.3	13	17.3	788.1	3.7
3-4	24	3.6	8	10.7	420.1	2.0
5-9	42	6.2	7	9.3	865.1	4.1
10-19	133	19.6	10	13.3	4,647.4	22.0
20+	438	64.3	7	9.3	13,462.1	63.8
Total	681	100.0%	75	100.0%	$21,093.8	100.0%

Source: Colorado Department of Labor and Employment ES202 Data.

*Note: *Quarterly company averages were rounded up.*

***There were 75 firms with employees during 2001.*

Estimated Receipts, Wages, Costs, and Multiplier Effect

Calculation of Receipts and Costs

The method of determining estimated wages for SIC Codes 7812 and 7819 was reviewed in the previous sections. In this section estimates of receipts and costs will be shown for SIC Codes 7812 and 7819. Estimates for receipts and other costs for these SIC Codes are based on surveys of industry companies, secondary research, and expert opinion from within the industry.

Wages, Receipts, and Costs

In 2001, estimated total wages for the companies that are directly related to production (SIC Codes 7812 and 7819) are $87.4 million. Estimated receipts for SIC Code 7812 are $221.6 million, of which approximately $166.2 million is from out of state. Other projections for the sector are listed below.

- $66.3 million in wages or 29.9% of total receipts;
- Colorado crew costs of $22.2 million, 10.0% of total receipts;
- Fixed costs are $33.2 million, 15.0% of total receipts; and
- Other costs are $79.6 million, 35.9% of total receipts.

Additional clarification is useful in understanding this data. A review of the ES202 data shows that a majority of the crew costs are being paid to companies in SIC Code 7819. It is estimated that about 90% of total crew costs are paid to in-state workers.

Fixed costs include expenses that are fairly constant in nature and occur on a consistent basis, such as rent, ongoing office expenses, or subscriptions. Other costs include expenses that are more variable in nature, for example, project-based expenses and income taxes. It is estimated that 70% of fixed costs, or $23.2 million, are spent in Colorado and 60% of other costs, or $47.8 million, are spent in Colorado. It is estimated that approximately $10.0 million of this amount is spent with local companies in SIC 7819 category for expenses other than crew.

A similar review of SIC Code 7819 shows that estimated receipts are $83.4 million. As mentioned above, this includes approximately $22.2 million for in-state crew expenses and $10.0 million for additional costs. The companies in SIC Code 7819 receive about 61.4% of their revenue from out-of-state companies. Other projections for the sector include

- $21.1 million in wages, or 25.3% of total receipts;
- Fixed costs are $18.3 million, or 22.0% of total receipts; and
- Other costs are $30.9 million, or 37.0% of total receipts.

TABLE VII

2001 ESTIMATED WAGES AND RECEIPTS

	No. of Firms*	Employees	Est. Receipts ($ mill)**	Est. Wages ($ mill)	Est. Colo Crew Costs ($ mill)**	Est. Fixed Costs ($ mill)**	Est. Other Costs ($ mill)**
Production-Related Wage/Salary							
SIC Code 7812	272	1,311	$221.6	$66.3	$22.2	$33.2	$79.6
SIC Code 7819	75	681	83.4	21.1		18.3	30.9
Total	347	1,992	na	$87.4			
Nonemployers							
Nonemployers	675		$24.0				

Note: *Colorado Department of Labor and Employment ES202 data.
**Estimate based on survey; double counting may occur if sector receipts are added.
na = not applicable.

Determination of Multiplier Effect

One method of determining the impact of an industry is to apply a multiplier effect. A multiplier effect can measure direct and indirect benefits of wages and employment.

The multiplier effect in Colorado for major SIC Code 78, motion pictures, is 2.084 for employment and 2.578 for earnings as defined by the AEDC/Arthur Andersen Economic Impact Analysis. An analysis of other film impact studies shows multiplier effects ranging from 2.5 to 4.6.

After closer review it is felt that an employment multiplier of at least 3.0 is appropriate for Colorado when evaluating industry impact for SIC Code 7812. It can be seen from Table VII that the 1,311 employees in SIC Code 7812 are indirectly responsible for the 681 jobs in SIC 7819 and the 675 nonemployer firms. Likewise, it is felt that the impact on wages is greater than 2.578; however, the increase will not be as great as the increase in the employment multiplier. The estimated wage multiplier will be 3.1.

A multiplier of 3.0 for employment means that for each direct job in the industry 2.0 indirect jobs are created. Similarly, a multiplier of 3.1 for wages means that for every $1.00 of wages created, $2.10 of indirect wages is generated. Induced employment or wages are not considered in this analysis.

Based on these multipliers, it is estimated that in 2001, SIC 7812 supported 1,311 direct jobs and 2,622 indirect jobs. Total employment benefits for the sector are 3,933 jobs.

Furthermore, the production companies created $66.3 million in direct earnings and $139.2 million in indirect earnings. Total wage benefits for the segment were $205.5 million in 2001.

Because companies in the ancillary industries are typically considered part of other industries, the multiplier effect was not been applied to them. It should be noted, however, that if multiplier effects were applied they would most likely differ from those used for SIC Code 7812.

SURVEY RESULTS

Summary of Survey Findings

Survey Results: Summary of Survey Findings

The following table includes a summary of the findings from a series of seven surveys conducted to gather information about the industry. Survey results from the production and supplier companies were used to help determine cost and revenue projections for the industry.

TABLE VIII

SURVEY RESULTS

Production Companies	In-House Production Companies	Industry Supply, Equipment and Service Providers	Film Commissions	Film Festivals	School Districts	Universities and Colleges
► Median number of employees per company: 1	► Total of 350 employees	► Almost 87% of companies have fewer than five employees.	► 100+ local film contacts.	► Total of 60 FTE employees and 1,800 volunteers.	► Primarily located in high schools in both rural and metro areas	► Average program enrollment: 267
► Median gross revenue per company: $194,500	► Median annual in-house production costs: $82,000	► Median gross revenue per company: $77,000	► Estimated total of 15 FTE workers	► Total gross revenue: $4.3 mil		► Total enrollment: More than 2,000 students
► 76.7% of total revenue was derived from out-of-state sources.	► Median annual outsource costs: $124,000	► Approx. 64% of total estimated receipts from out-of-state sources		► Total expenses: $4.0 mil, of which $3.0 mil was spent in Colorado		► Number of faculty teaching classes: About 80
► 69.8% of total expenses was spent in Colorado.				► 87,000 total festival attendees		
				► Total film festival spending in Colorado: $12.6 mil. Of this, about $9.6 mil spent by visitors and $3.0 mil spent by organizers.		

Note: All data for 2001 unless otherwise indicated
All figures based on survey respondents.

Production Companies

Survey Results: Production Companies

Survey Process

An e-mail survey was distributed to 164 Colorado production companies. Freelancers whose main focus is production were also sent a survey. A follow-up survey was sent to nonrespondents, with additional e-mail surveys sent to targeted companies. A total of 36 surveys were received for a response rate of 22.0%.

Survey Results

Year Established

The year of establishment for the responding production companies ranged from 1948 to as recent as 2001. About 11.4% of the companies began operating before 1980, with an additional 42.9% between 1980 and 1989. About 17.1% of the companies started business between 1990 and 1995, while 28.6% of the companies were formed after 1995.

Company Size

The median number of employees per company is 1, and more than three-quarters, 77.8%, of the responding production companies reported that their staff ranges from 1 to 4 full-time employees. An additional 13.9% of the companies have between 5 and 24 employees. The remaining 8.3% employ 25 or more people. The overall average number of full-time employees for the responding 36 companies is just over 6.

Projects

The data in Table VII reveal that production companies work on a number of different types of projects. Seventy-five percent of the responding companies are involved with corporate films, about half with commercials, 41.7% with documentaries, and 30.6% with episodic television projects.

From a revenue standpoint, almost 88% of the total revenue comes from three areas. Episodic television projects provide the greatest amount of revenue, 52%. Just under 16% is derived from commercials, 11.4% originates from industrial or corporate films, and 8.6% is from feature films.

It should be noted in Table VII that the average revenue per company is nearly $1 million. However, this figure is misleading as the revenue of the majority of the companies (83%) is less than $1 million. In fact, the median revenue per company is $194,500. Again, the presence of a few large firms has a major effect on the data. These results appear to be a good representation of the entire population.

TABLE IX

PRODUCTION COMPANIES: TYPES OF PRODUCTIONS, NUMBER OF COMPANIES AND PROJECTS, AND REVENUE

	Number of Companies	Number of Projects	Gross Revenue (Millions)	Average Revenue Project	Average Revenue Company
Television episodic	11	75	$18.2	$242,265	$1,651,806
Commercials	18	775	5.5	7,099	305,642
Industrials/corporate films	27	516	4.0	7,723	147,588
Feature films	6	6	3.0	503,500	503,500
Documentaries	15	72	1.1	14,892	71,483
Television single/special	7	53	1.0	19,491	147,575
Stock footage	3	42	0.4	10,488	146,833
Internet	7	21	0.4	20,905	62,716
Television movie of the week	1	1	0.3	270,000	270,000
Stills	5	21	0.3	13,702	57,550
Sports programming	6	40	0.0	1,020	6,800
Short films	2	2	0.0	2,500	2,500
Music video	4	4	0.0	500	500
Other	6	76	0.7	9,214	116,710
Total	na	1,704	$35.0	$20,521	$999,554

Notes: na = not applicable. Companies may work on any of the above types of projects. Total number of companies is 35.

Revenues and Expenses

Production companies were asked to provide information about the amount of their total revenue that was derived from out-of-state sources and freelance costs, fixed expenses, and total expenses for their projects. Key findings from the responding producers are that

- 76.7% of total revenue was derived from out-of-state sources.
- 12.2% of total revenue is spent on freelance crews. Approximately 10.9% of total revenue is for in-state crews, with the remaining 1.3% spent on out-of-state crews.
- Fixed expenses represent 21.7% of total revenue.
- Other expenses account for 33.9% of total revenue.
- Wages are estimated to be 30% of total revenue.
- Total expenses are 96.5% of total revenue.
- 69.8% of total expenses (excluding wages), or 46.4% of total revenue, was spent in Colorado.

Sources of Suppliers and Employers

The production companies were asked to identify their sources for finding suppliers and employees. A ranking of responses, based on frequency of response, appears below.

- word of mouth, 72.2%
- internship programs, 30.6%
- professional associations, 22.2%
- apprenticeships, 13.9%
- college/university career centers, 13.9%
- advertisements, 13.9%
- trade publications, 13.9%
- Internet, 13.9%

In addition, the respondents indicated that they recruit from television, job agencies, and technical schools.

Promotion of Production Companies

The respondents were asked for their thoughts on how the capabilities of the production companies could be better marketed. A variety of ideas were suggested as the comments listed below indicate.

- Market the economic impact of the industry on the state of Colorado.
- Film production companies provide an untapped revenue source for state and local companies.
- Funds should be allocated for marketing Colorado as a year-round filming location.
- "Denver continues to be perceived as a cow town. Tell the complete story that talks about the great work and great talent located in Colorado."
- Marketing efforts should focus on Colorado's ability to change with the changing industry.
- Additional marketing efforts should include in-state ad agencies, corporations, and production companies, which will help keep the business in-state.
- Develop local venture capital groups to help fund local projects. A concentrated promotional program should be aimed at Colorado investors to educate them about the feature film industry. Such an effort would explain how entertainment industry works, the feature film financing model works, and the value of the industry to Colorado.
- Funds should be allocated to provide incentives to bring producers to Colorado.
- Emphasis should be placed on developing, supporting, and promoting independent feature film producers. It is necessary to create a critical mass where a number of Colorado-based independent producers begin producing two to three films per year.

Comments

The film industry is valuable to the Colorado economy because it generates revenue from out-of-state companies and in turn spends a majority of that revenue in Colorado. Approximately 77% of the revenue generated by Colorado production companies comes from out of state. Nearly 70% of total expenses (excluding wages) is spent in Colorado.

In terms of total revenue, the largest contributor was television episodic productions, followed by commercials, industrials/corporate films, and feature films. Colorado producers have shown their diverse talents and ability to adapt to change by also filming documentaries, television single/specials, stock footage, Internet clips, and television movies of the week.

Colorado industry professionals feel there is unlimited potential for growth of the film industry in the state given proper promotion.

In-House Production Companies

Survey Results: In-House Production Companies

Survey Process

Companies and organizations outside the film industry are considered to be indirectly involved in the film industry if they have media or production centers. It is difficult to identify companies that are involved in in-house production, because unlike the companies in SIC Codes 7812 and 7819 their primary function is not with the film industry.

Several paths were followed in an effort to identify companies with in-house productions. A database search was conducted in "Reference USA" to identify companies with more than 1,000 employees. The 227 companies identified in this process were called and asked whether they had in-house production capabilities. At least three efforts were made to contact each company. After the results from a third set of telephone calls were reviewed, hotels and universities were pulled out for analysis in a separate section. There were 10 incorrect telephone numbers.

In addition, 106 advertising agencies and various other organizations were identified that were thought to have in-house production capabilities. Surveys were sent by e-mail to 11 of the companies, and by mail to the remaining 95 because e-mail addresses were not available. In addition, 30 companies from the initial list of large companies were sent surveys. A second copy of the survey was sent out two weeks after the initial survey to those companies that had not responded. A total of 22 surveys were returned for a response rate of 16.2%.

Survey Results

Large Companies

Of the 203 large companies, telephone calls were made to 138 firms; however, contact could not be made with the remaining 65 companies. Of the 138 companies that were contacted, 35.5% said they had in-house capabilities, 8.0% reported they outsourced these services, and 56.5% indicated that they did not have a need for production services or that they could not answer the question.

Employment Estimates

Based on a review of companies that did not respond to the telephone calls, it is estimated that a total of 75 of the companies with more than 1,000 employees have at least 2 full-time employees, or 150 full-time employees total, whose primary function is film related.

As part of the study on university film education programs, 48 colleges, universities, and community colleges were identified as potential sites for film programs. Not all of these sites had programs, but based on the calls made for this segment of the industry, it is felt that each of these institutions has an average of about 1 full-time employee, or 50 full-time employees total, whose primary function is related to the film industry.

Finally, hotels and lodging facilities were considered to be a source of workers whose primary job functions are film related. The Colorado Hotel and Lodging Association (CHLA) estimates there are 84 hotels in the state with meeting facilities. Many of these hotels outsource their audio visual needs. Based on discussions with CHLA and the feedback from the informal telephone survey conducted by the BRD, it is felt that there are 100 employees who work at meeting facilities at hotels or conference centers whose primary function is film related.

Ad Agencies and Other Companies

Companies with in-house production capabilities were asked to provide information about the types of production and filming they were involved with in 2001. See the list that follows.

- Commercials or promos 81.8%
- Industrial/corporate films 27.3%
- Stills 27.3%
- Television or cable 22.7%
- Internet 22.7%
- Documentaries 13.6%
- Stock footage 13.6%
- Infomercials 13.6%
- Training 9.1%

Cost of In-House Production

Next, companies were asked to estimate the total cost of in-house production (including payroll) for 2001 and the total cost of outsourced production for 2001. The total cost of in-house production for the 22 companies is $3.1 million, although $1.5 million of this total belongs to a single firm. The total cost of outsourced production for the 22 companies is $19.0 million. Again, it should be noted that there are two companies with costs much larger than the average, one with $15.0 million and the other with $1.5 million.

Outsourcing is more prevalent than in-house production as 68.2% of the respondents indicated that they incurred in-house production costs in 2001 and 86.4% indicated they outsourced their video needs. Based on this information, it is not surprising that annual outsourcing costs are higher than in-house production costs.

Annual in-house production costs range from $10,000 to $1.5 million. All of the companies, except one, indicated that their in-house production costs are between $10,000 and $600,000. Excluding the one outlier, $1.5 million, average annual in-house costs are $163,800. The median annual in-house production costs are $82,000.

The costs associated with outsourced projects tend to be higher. The annual costs of outsourced projects range from $12,000 to $15 million. Two companies provided responses that could be considered outliers; one company indicated their annual outsourced costs are $1.5 million and another $15.0 million. Excluding the outliers, average annual costs for outsourcing are $181,070, and median annual costs are $124,000.

The two previously mentioned outliers totaling $16.5 million were outsourced to out-of-state companies. Of the remaining outsourced costs, 68.3% were outsourced to Colorado production companies.

Company Facilities/Size

The respondents were asked to identify the physical size of their companies and the number of employees. One facility indicated that they have 20,000 square feet, while the remaining facilities indicated occupy between 1,000 and 5,115 square feet. The median facility size is 2,100 square feet.

Based on the physical size of companies' facilities, it stands to reason that firms also have a small number of employees. Total full-time employment ranged from 2 to 10 employees, with a mean of 3.5 full-time employees and a median of 3 full-time employees.

Based on information provided by respondents to this phase of the survey, the BRD staff estimates that about 50 full-time equivalent employees work for ad agencies in film-related positions.

Production Revenue from Other Companies

Although many of the companies have the ability to perform in-house production, only 18.2% of them indicated they provide production assistance to other companies. Two firms reported they generate about $15,000 in production revenue and one company generates $500,000.

Major Issues

The respondents were asked to discuss any major issues that affect their ability to generate productions in Colorado. Comments made by the respondents covered a variety of topics and are as follows:

- "Could use more and better camera talent, otherwise there seems to be adequate crew facilities, locations, and equipment to get the job done."
- "Lack of large companies who want to do their production here."
- "A severe lack of qualified free-lance talent in the post-production community – overflow work goes to LA where we are more familiar with the talent pool and get much more consistent results."

- "Sometimes not enough people on staff to get all the jobs done."
- "Working with national Big 10 agencies and the perception that LA/NYC/Miami are the only quality production zones."

Suggestions for Better Promotion of Film/Video/Digital Production Industry

The companies were asked to provide suggestions on how the Colorado film industry could be better marketed. Suggestions given by the respondents were:

- "Put more articles in periodicals and newspapers regarding production."
- "You can't pay for good hardware or attract great talent without the work to bill against it…but who wants to work in a market that has, for example only one 8 year old telecine in the Denver area…or where the good compositing gear is in in-house facilities like StarzEncore."
- You need to educate studios and filmmakers regarding the opportunities in Colorado (i.e., affordability, the availability of talent and crew).
- "We are not aware of what is already being done. There needs to be good relationships with major producers and independent filmmakers and you need to offer incentives for productions to come here; use the tourism fund to promote film locations."

Comments

Just as it is possible for accounting, finance, human resource, and marketing professionals to work for a variety of companies, people with film production skills can work for companies in various industries. This section of the research estimates there are 350 total employees in film-related occupations in colleges and universities, ad agencies, hotels with meeting sites, and large companies.

The data suggest that even though the companies considered in this portion of the study have in-house production capabilities, they tend to outsource more than they produce in-house, and they seldom look for outside customers. While there will undoubtedly be occasional situations where companies with in-house capabilities will seek outside business, there is no evidence to suggest that they compete against film producers or suppliers in SIC 7812 or SIC 7819 for film production business on a regular basis.

Because the companies mentioned in this segment of the report are most likely not directly tied to the film industry, they have a slightly different perception of the industry. Based on their responses to the open-ended questions, they have less knowledge of the film industry in Colorado, and they are more likely to look outside the state for help when outsourcing.

Industry Supply, Equipment, and Service Providers

Survey Results: Industry Supply, Equipment, and Service Providers

Survey Process

In cooperation with the Colorado Film Commission 340 suppliers to the film industry were identified. An e-mail survey was sent to each of these companies, and a second e-mail survey was forwarded to those who did not respond. The list of nonrespondents was reviewed by the Colorado Film Commission, and additional follow-up was conducted on a case by case basis. Freelancers who are primarily suppliers were also sent a survey. A total of 98 surveys was received for a response rate of 29%.

Survey Results

The suppliers were asked to identify how long their companies had been in business, the types of services provided by their company, and the segments of the industry for which their company provided services. In addition, they were asked to identify the number of employees and estimate revenue and expenses for their company during 2001. Finally, they were asked to provide suggestions about how the film/digital/video industry could be better promoted in Colorado.

Year Established

The year of establishment for the responding companies ranged from 1946 to 2002. A breakdown follows for those respondents who answered the question.

- Prior to 1980 10.9%
- 1980 to 1984 15.2%
- 1985 to 1989 10.9%
- 1990 to 1994 27.1%
- 1995 to 1999 19.6%
- 2000 to present 16.3%

This information shows that the largest five-year periods of growth in the industry occurred during 1990 to 1994 and 1995 to 1999.

Services Provided by Company

The industry suppliers were asked to identify the general services provided by their company. See the list that follows for a breakdown of these services.

• Equipment, camera, or lighting/grip	22.4%
• Production support	19.4%
• Staffing	18.4%
• Sound stage/studio	14.3%
• Film/tape post-production	12.2%
• Trucks/mobile equipment	8.2%
• Film/tape editing	7.1%
• Location	6.1%
• Make-up	5.1%

Industry Segments Served

The industry suppliers were asked to identify the segments of the film/video industry for which they provided services. The breakdown by market segment follows.

• Commercials	77.6%
• Industrials/corporate films	69.4%
• Documentaries	62.2%
• Feature films	60.2%
• Television/cable: single special	54.1%
• Short films	49.0%
• Music videos	46.9%
• Internet	41.8%
• Sports programming	40.8%
• Television/cable: episodic	38.8%
• Stills	36.7%
• Television/cable: movie of the week	31.6%

These results show how the video and film industry has evolved, particularly in the areas of music videos and the Internet. These industry segments did not exist 20 years ago. Similarly, as Denver has developed into a city with five professional sports teams, the need for sports programming has increased.

Staff Size

The suppliers who responded to the survey indicated that they are very small companies. The breakdown of company size follows.

- One or fewer employees 65.9%
- 2 to 4 employees 20.9%
- 5 to 9 employees 7.7%
- 10 or more employees 5.5%

Revenue/Expenses

Total revenues of the responding companies are also very small. The median gross revenue for each company during 2001 was $77,000. Total annual gross revenues for the companies are categorized below.

- Less than $50,000 37.6%
- $50,000 to $99,999 21.2%
- $100,000 to $249,999 15.3%
- $250,000 to $499,999 10.6%
- $500,000 to $999,999 4.7%
- $1 million to $10 million 8.2%
- More than $10 million 2.4%

The suppliers are very dependent on out-of-state sources. Approximately 64% of total estimated receipts are from out-of-state sources, while about 46% of the companies derive more than half of their sales from out-of-state sources. The breakdown of sales from out-of-state sources is listed below. Of the responding companies,

- 29.9% had between 0 and 10.0% sales from out of state,
- 10.3% had between 11.0 and 24.9% sales from out of state,
- 13.8% had between 25.0 and 49.9% sales from out of state,
- 28.8% had between 50.0 and 74.9% sales from out of state, and
- 17.2% had 75% or more of their sales from out of state.

Promotion of the Industry

The suppliers were asked to offer suggestions about how the film/digital/video market could be better marketed in Colorado. Just over half of the respondents offered suggestions, which were classified into four categories:

- Tax incentives 56.4% of comments
- General marketing ideas 30.1% of comments
- Specific ideas related to the film commission 14.5% of comments
- Labor related 10.9% of comments

Tax incentives. Of the 55 suggestions that were offered by supply/service respondents, 56.4%—31 responses—were related to government or tax incentives. The comments can be summarized as follows:

- Twenty-three of the 31 comments—about 74%—were directly related to some kind of tax incentive, but more specifically, 14 of these 23 referred to tax incentives in the form of rebates or discounts for producers.
- Other incentive suggestions were to eliminate sales tax on purchases associated with film and photography; offer government incentives at local, state, and federal levels; and offer other incentives, such as free housing, for production companies traveling to Colorado.
- Many respondents thought that Canada, Florida, Utah, and New Mexico have better film industries because of incentives offered to producers shooting in these areas.
- Similarly, almost 10% would like to see better laws to make shooting in Colorado easier.

General marketing ideas. Another category of comments was suggestions dealing with marketing and promotions. A sample of these responses follow.

- Better distribution of information to in-state and out-of-state people to inform them of the high quality production equipment, crews, locations, etc. that Colorado has to offer.
- Not only promote the Denver area, but rural and mountain areas outside the metro area.
- Host a tradeshow in Colorado.
- Promote industry on radio and cable outlets in the Denver area.
- Support an "Always Buy Colorado campaign to keep shoots in-state and hire locally."
- "Let Hollywood know that it's beautiful, less expensive, and easier to work in Colorado."

Specific ideas related to the film commission. Almost 15% of the respondents offered suggestions related to the services provided by the film commission.

- Just over 37% of these respondents wanted to see the funding and resources available to the film commission increased so that marketing and promotions aimed at out of state producers could be more wide spread.
- A total of 25% suggested getting all levels of the state government, including the governor, more involved to realize the impact the film industry could have on the state's economy.
- One suggestion was to staff the film commission with volunteers, such as production assistants and film students, to assist the paid staff.
- "It's time for (Colorado) to 'rewrite the script' not by groveling to the 'big money' but by catering to the low-budget, independent films."
- Better hotel accommodation packages are needed.

Labor related. A number of comments focused on the labor-related issues in Colorado. Some direct responses follow.

- Colorado should clearly become a right-to-work state.
- Be open to new people and new ideas. Observe professional crews in other markets and train Colorado crews to be more professional and conscientious. There is a lot to learn out there. I've observed lots of attitude and "this is a party" mentality here. Denver still has a "cow town" reputation in the industry–why do you think that is?
- I know that rental house equipment prices and crew rates in many states have dropped to accommodate the limited amount of business.
- I have had to nearly shut my business down because my out-of-town clients don't recognize this area as being very "production friendly." This is due in part to some of the "below the line" craft people expecting and demanding the same day rates they get from the "movie" people for one or two day corporate shoots. . . . [W]e have a very talented pool of people here. . . . I can do a production in Chicago, Indianapolis, St. Louis, and even Salt Lake City for less than some productions here. Are you people sure the "community" wants to promote Colorado?
- Films don't come out here enough to sustain the film people. So they have to move. That leaves inexperienced crew left. Crews that work in commercials wouldn't take a film for fear of losing their daily local clients.

Comments

As with the producers, the suppliers generate a majority of their revenue—about 64%—from out-of-state sources. Almost 87% of the supplier companies have fewer than five employees and approximately 85% generate less than $500,000 per year in revenue. Suppliers typically work on commercials, industrials/corporate films, documentaries, or feature films. Changes in the industry are reflected by the number of people who supply products or services for such projects as music videos, Internet clips, or sports programming.

Suppliers feel there are labor issues that need to be addressed to help increase the amount of production in the state. More importantly, they indicated that some form of tax incentive or tax relief is needed to help bolster the Colorado film industry. This includes increased financial support for the Colorado Film Commission, and improved marketing of local companies and Colorado as a place to produce any type of film or video.

Film Commissions

Survey Results: Film Commissions

Process

Local film commissions are the organizations within a town or area designated to serve as the primary contact for any project or individual looking for assistance in filming in the area. They provide a variety of services, such as location information, contacts, lodging, and so forth. An e-mail survey was sent to 95 film commissions throughout the state for which complete addresses were available. A follow-up survey was sent to the respondents who did not respond to the initial survey. A total of 30 surveys were received for a response rate of 31.6%. The 30 responding film commissions are listed below.

Alamosa Visitor Center
Aspen, City of
Aurora, City of
Bent's Fort/ SE Colorado Film Commission
Boulder County Film Commission
Breckenridge Resort Chamber
Buena Vista Chamber of Commerce
Burlington, Town of
Cañon City Chamber of Commerce
Carbondale Chamber of Commerce
Clear Creek County Tourism/Film Board
Colorado Springs Film Commission
Cripple Creek City Hall
Denver Mayor's Office of Art, Culture & Film
Estes Park Chamber Resort Association
Firestone, Town of
Fort Collins Convention and Visitors Bureau
Fort Morgan Area Chamber
Glenwood Springs Chamber Resort Association
Golden, City of
Grand Junction, City of
Leadville/Lake County
Northwest Colorado Film Commission
Park County Tourism Development
Prairie Development Corporation
Telluride Visitors Bureau
Trinidad/Las Animas County Film Commission
Victor, City of
Wild Horse Community Club
Yampa Valley Film Board

Survey Results

Film commissions were asked to provide the initial year in which their organization was established, funding sources, and the average number of hours per week that staff members work on projects. In addition, they were asked to describe the value of their organization and the film industry to their area. Finally, they were given the opportunity to provide suggestions about how to better promote and market the film/video/digital industry in Colorado.

Year Established

For those film commissions that responded, the Cañon City Chamber of Commerce was the commission that had been established the longest, since 1969. Six commissions could not or did not identify when they were established. A majority of film commissions, 18 out of the 24 that identified a year of establishment, reported that they were established during the 1990s and 6 indicated that they began operating in 2000 or later.

Funding Sources

Film commissions receive funding from a variety of sources. From a list of eight potential funding sources, respondents were asked to identify which sources were most applicable. A majority of the organizations, 73.3%, had one funding source, 20% identified multiple funding sources, and 6.7% did not identify a funding source. The breakdown of funding sources follows.

- City 36.7%
- Chamber of commerce 30.0%
- Economic development 13.3%
- Tourism board 13.3%
- County funding 6.7%
- Private sector 6.7%
- Local fund raising 6.7%

Staff Members and Hours

The local film commissions are typically very small in size, ranging from one to four employees. Seventy percent of the film commissions reported only one staff member, and an additional 20% indicated that they have two staff members.

Two of the responding film commissions reported they have full-time employees, and two commissions responded they have a total of three half-time workers. The remainder of the film commissions have employees who were .2 FTE or less. Because they are funded from sources not related to the film industry, these employees indicated that they spend slightly less than 6 hours per week, or about 14.1% of their time, working on film projects.

Data from the 30 survey respondents were extrapolated to the entire population to understand how many workers were employed in positions that included film commission responsibilities. It is estimated that 108 people work in capacities that include film commission responsibilities. These employees spend about 3.5 hours per week, or 8.8% of their time, working on film projects. Because these responsibilities vary by project, rather than by seasonal trends, it is estimated that they equate to 12 FTE workers. It should also be noted that in 2001 three employees worked for the Colorado Film Commission, bringing the total to 15 FTE.

Value of Film Industry and Local Film Commissions

Local film commissions were asked to describe the value of their operations to their communities. The overwhelming majority of responses were very positive, stressing the important role they play in creating contacts and generating awareness of their communities.

- Most stated that they made a very positive financial impact, indicating that the contacts being made are truly creating value.
- Respondents also explained that the benefits of having a local film commission are not limited to simply creating leads. They include help in permitting, scouting for usable land, and hiring local production companies.
- Several respondents indicated that they felt the film industry in their area had growth potential, but that the commission's effectiveness and ability to promote the industry was limited by financial constraints.

Respondents also answered a question regarding the value of the film/video/digital industry to their local area. Again, most of the responses were very positive, although several respondents from small rural counties indicated that very few jobs are created by the industry because there is little production in their area.

Apart from the direct economic impact of job creation, respondents noted the vast residual impacts of production and filming in their communities. Comments from the respondents describe the value of the industry to their local area as follows:

- "The trickle down to hotels, restaurants, food service, retail, etc., is amazing, as is the national exposure for our tourist resort."
- The industry is valuable because it is a clean industry.
- The film industry "promotes tourism, return guests, and business revenue."
- "The visitor dollar passes through many hands in our community. . . . Not only would the actual stay of a film crew positively impact the area, the residual effect of exposure in a film project could potentially generate visitors."

Many other responses mirrored the opinion that the impacts of the film/video/digital industry are far-reaching.

Suggestions for Promoting the Film/Video/Digital Industry in Colorado

Despite the overwhelmingly positive comments, respondents still believe a number of things could be improved and changed to better promote the film/video/digital industry in Colorado. Their suggestions follow.

- 37.5% of the respondents wanted to see the funding and resources available to the Colorado Film Commission increased so that marketing and promotions aimed at out-of-state producers could be more widespread.
- 25% suggested getting all levels of the state government, including the governor, more involved in order to realize the impact the film industry could have on the state's economy.
- One suggestion was to staff the film commission with volunteers, such as production assistants and film students, to assist the paid staff.

- Several respondents felt it was necessary for the state legislature to recognize the importance of the industry and to provide the necessary funding needed to keep up with the potential of the Colorado Film Commission to bring dollars into the state.
- As mentioned by respondents to surveys conducted of other segments of the industry, film commission respondents felt that it is essential to establish tax incentives for film production in the state.
- Finally, respondents advocated increased advertising to the (out-of-state) film industry to try to bring in more business.

Overall, respondents acknowledged the efforts of the Colorado Film Commission in supporting growth of the film industry on a local level.

Comments

In 2001, more than 100 people worked in jobs with responsibilities for the promotion or coordination of the film industry on a local or state level. Because these individuals are funded from a variety of sources, they typically work on film projects on a part-time basis. It is estimated that the workload of these people equates to 15 FTE employees. A common theme that has evolved while preparing this report is that this small group of people can potentially have a significant impact on their local economy.

The respondents have a positive perception of the film industry and the way it is promoted in Colorado. They indicated that it is an important part of the state's economy because it is a clean industry that also benefits tourism. Movies, videos, advertisements, and other products generated in Colorado often have a secondary value in that they create awareness and attract visitors to the state. At the same time, respondents felt that additional funding, resources, and support for the industry will help it reach its potential.

Film Festivals

Survey Results: Film Festivals

Survey Process

An e-mail survey was sent to contacts from 25 festivals through out the state. Those who did not respond were sent another survey by mail. From these two methods, a total of 15 surveys was received for a response rate of 60%. The survey respondents are listed below.

Aspen Shortsfest
AspenFilmfest
Aurora Asian Film Festival
Breckenridge Festival of Film
Denver International Film Festival
Denver Jewish Film Festival
Denver Pan African Film Festival
Denver School of the Arts
Denver's Jazz on Film Fest
Film on the Rocks
Moondance International Film Festival
Rocky Mountain Women's Film Festival
Telluride Film Festival
U.S. Comedy Arts Festival
Xicanindie Film Festival

Survey Results

Festival directors were asked to provide information about their festival for the first year it was held and for 2001, including the length of the festival, event attendance, number of films shown, and number of volunteers. In addition, the respondents provided a variety of financial information to help determine some broad economic indicators of this segment of the industry. Finally, the festival directors were asked to discuss the extent to which they promote Colorado films and what the Colorado Film Commission could do to better promote and market film festivals in Colorado. (It should be noted that the results for the Breckenridge Film Festival are presented as an average for 2000 and 2002. The 2001 festival occurred shortly after September 11, 2001, and was drastically affected by those tragic events. Hence, we thought it was appropriate to adjust the data accordingly.)

Three of the film festivals were started during the 1970s, two during the 1980s, and seven in the 1990s. Three festivals have been launched since 2000.

Number of Employees and Volunteers

The festivals are run with a small number of employees. Seven of the festival directors indicated that they started the festival with no employees. Today, four of those festivals continue to have no employees. In their first year, the 15 festivals had a total of 23 full-time equivalent (FTE) employees. In 2001 the total was 60 FTE employees.

The festivals rely heavily on volunteers to make the events successful. In their first year, the responding festivals were supported by approximately 450 volunteers; in 2001 the total had swelled to more than 1,800.

Festival Length and Number of Films

During the first year of operation, the film festivals were held over a period of 53 days throughout the year compared to 72 days in 2001. Nine of the festivals extended the total number of days of their event, and the length of six festivals remained the same as the year they were established.

By increasing the length of the events, festivals were able to show more films. In the first year the events were held 338 films were shown. This number had grown to 700 films in 2001.

Attendance

As expected, total festival attendance grew along with the increase in the number of films shown. In the first year the events were held, festival directors estimated that total attendance was approximately 42,000 people. By 2001 total attendance more than doubled, with 87,000 people attending the 15 festivals.

Festival directors were asked to estimate the percentage of attendees, including festival participants and guests, who spend room nights in local hotels. Based on that estimate, approximately 64,000 room nights are booked per year in association with these 15 festivals. Using the assumption that each person incurs expenses of $150 per day for hotel, food, and incidentals, spending by film festival attendees totaled approximately $9.6 million in the Colorado economy in 2001.

Films Produced/Shot in Colorado

Seven of the fifteen festivals indicated that they showed films either produced by Colorado directors or shot partially or entirely in Colorado. In 2001, the Aspen FilmFest reported that all 30 of their films were produced or shot in Colorado.

The respondents indicated that a total of 43 films, or 6.3%, of the 700 films shown at festivals were shot partially or entirely in Colorado. Festival directors reported that a total of 49 films, or 7.0%, of the films shown at their festival were produced by Colorado directors. Direct comments from festival directors included the following:

- We are CFVA members and solicit Colorado made films. . . . We screen 10% Colorado films.
- The festival began as a showcase for local independent Chicano filmmakers. The filmmaking of these individuals is still the centerpiece for the event.
- We highlight and celebrate through special receptions and/or panels local filmmakers, producers, actors, etc.
- The movies are made by students.
- Trailers used for broadcast ads and opening of each screening are locally produced.

- Any new Colorado-produced films are eligible for submission to any of the Film Society's festivals, including the 10-day Starz Denver International Film Festival in October. (All film entries are reviewed by a program committee for consideration for inclusion.) In addition, the Film Society has created a monthly Colorado Filmmakers Showcase at the Starz FilmCenter, which will begin in April 2003.

Revenue/Expenses

The respondents reported a total of $4.3 million in gross revenues and $4.0 million in expenses in 2001. The festival directors indicated that $3.0 million, or 75% of total expenses, were spent in Colorado.

Comments

According to the information provided by the respondents, in 2001 approximately 60 FTE employees worked for the film festivals throughout the state. This analysis estimates that a total of approximately $12.6 million was spent in Colorado during 2001 as a result of the film festivals that responded to this survey. About $9.6 million of this amount was spent by visitors attending the events who stayed in local hotels and spent money on food and incidentals. Additionally, it is estimated that festival organizers spent approximately $3.0 million in the state economy for expenses related to the festivals.

All of the responding film festivals indicated that they had experienced growth since their inception. This increase in popularity has occurred in part because of the evolution of the creative class. Many of these festivals provide a venue for films or videos that would normally not be shown, or would be shown only in limited areas at micro cinemas. The festivals also provide an opportunity for filmmakers who are new to the industry.

Although the film festival segment of the industry overall has grown in popularity and in the number of attendees and films shown, the current sluggish economy has affected the amount of giving to these events by corporations, foundations, and individuals. Funding levels have been lower, which may slow the pace of growth (Stiny 2003).

School Districts

Survey Results: School Districts

Survey Process

There are 207 school districts within Colorado, which include various elementary, middle, and high schools. Surveys were mailed to all 207 districts, although correct contact information was not available for five districts. Of the remaining 202 school districts, 48 replied for a response rate of 23.8%. The 48 responding districts are listed below.

Adams County 14	Fowler R-4J	Plainview RE-2
Aspen 1	Granada RE-1	Plateau RE-5
Bayfield 10 JT-R	Harrison 2	Prairie RE-11
Bethune R-5	Holyoke RE-1J	Pritchett RE-3
Big Sandy 100J	Julesburg RE-1	Pueblo City 60
Brighton 27J	Keenesburg RE-3(J)	Rangely RE-4
Buena Vista R-31	Lake County R-1	Ridgway R-2
Cheyenne County RE-5	Lamar RE-2	Sargent RE-33J
Cheyenne Mountain 12	Las Animas RE-1	Sheridan 2
Crowley County RE-1-J	Limon RE-4J	Silverton 1
Dolores County RE NO.2	Littleton 6	Springfield RE-4
Durango 9-R	Manzanola 3J	Telluride R-1
East Grand 2	Meeker RE1	Thompson R-2J
Edison 54 JT	Montezuma-Cortez RE-1	Walsh RE-1
Ellicott 22	Ouray R-1	Weldon Valley RE-20(J)
Florence RE-2	Peyton 23 JT	Wray RD-2

Survey Results

School district leaders were asked to provide information about the number and type of schools in their district and the number of schools with film programs. In addition, they were asked to identify the subjects where film and video were integrated into the teaching process and the weaknesses of the film studies programs in their district. Finally, they were asked to provide information about the types of equipment they used in their program, briefly describe the film or video programs offered in their district, and discuss the role film education will have in education in the next five years.

Within the 48 responding school districts, there were a total of 148 elementary schools, 70 middle schools, and 61 high schools.

Existence of Elementary, Middle School, and High School Programs

Film studies classes or film production programs are more likely to exist in high schools than in middle schools or elementary schools. The data suggest that programs exist both in the state's Metropolitan Statistical Areas and rural areas, and that programs in all areas have similar problems in obtaining sufficient funding, finding qualified personnel to teach the courses, and providing adequate equipment. There was not enough information available to determine whether differences exist between rural and metro programs.

Of the 148 elementary schools:
- none offered film studies classes,
- 4 schools, 2.7%, offered film production programs.

Of the 70 middle schools:
- 3 schools, 4.3%, offered film studies classes,
- 4 schools, 5.7%, offered film production programs.

Of the 61 high schools:
- 14 schools, 23%, offered film studies classes,
- 10 schools, 16.4%, offered film production programs.

Integration of Film Studies or Production Programs

While many schools may not have film studies or production programs, film has been integrated into the standard curriculum at all three levels. Film and video have been integrated into:

- 60.4% of history classes,
- 56.3% of literature and English classes,
- 45.8% of drama classes,
- 43.8% of vo-tech classes,
- 39.6% of science classes,
- 33.3% of geography classes,
- 18.8% of business classes, and
- 10.4% of math classes.

Areas for Program Improvements

School district leaders indicated they would like to make improvements to their film studies program in the following areas: financial support for the programs, instructor knowledge and skills, and hardware/equipment. A closer look at each of these items shows that:

- 21 districts, or 43.8% of total districts, felt that financial support was a weakness.
- 21 districts, or 43.8% of total districts, felt that instructor knowledge and skills were a problem.
- 20 districts, or 41.7% of total districts, felt that hardware and equipment were a problem.

Other areas of concern were weaknesses in curriculum, film-making skills, technical support, and software weaknesses. The breakdown of these factors indicates that:

- 15 districts, or 31.3% of total districts, felt that there were weaknesses in the curriculum.
- 14 districts, or 29.2% of total districts, felt that there were weaknesses in film-making skills.
- 12 districts, or 25.0% of total districts, felt that there were weaknesses in technical support.
- 10 districts, or 20.8% of total districts, felt that there were weaknesses in software.

Equipment and Classes

The districts were asked to provide a list of basic equipment and software used in their programs. The equipment was typically basic in nature and included video and digital camcorders or cameras, iMovie software, computers, and VCRs.

Also, the districts were asked to describe what is taught in some of the film programs offered at their schools. One of the more complete descriptions indicated that the student production program provides instruction on the basics of studio video production, including cameras, lighting, audio, studio, directing, and production planning, as well as the use of nonlinear editing systems. The program descriptions included a variety of projects, such as:

- Basic broadcast journalism newscasts
- DVD production
- Film making and editing
- Interviewing skills and techniques
- Integration of film into PowerPoint productions and Web sites
- Local public access station is housed in the school, which provides students with mentorship experience
- Report preparation for history classes
- Stage productions have been replaced with DVD movies
- Video productions
- Video yearbooks

Role of Film Education in School Districts

Finally, the school districts were asked to provide their thoughts on the role of film education in the next five years. The overriding theme of the open-ended comments is that film programs are viewed as potentially having a great impact in the future; however, there is concern about how they will be funded and about the amount of time that can be dedicated to programs. The magnitude of funding will most likely determine the impact of the programs. A representative sampling of responses from the school districts are listed below.

- Film education programs will help “keep students involved and active in the school process.”
- “Film education will foster creativity, influence social norms, and politics.
- “Kids love videos and what better way to reach/teach them than to use something they are already interested in. They will be able to watch, listen and also learn in the process.”
- “The high cost of equipment limits the number of schools capable of offering a program.”
- “It should feed lots of new people into the industry with better entry level skills and more interest.”
- It will foster “major changes in alternative education.”
- “The schools are focusing on the basics. With all the requirements of the state, little support is going to the film courses.”
- The impact will “probably not be major because most schools do not have programs or the production capability.”
- Film education programs will not have much of an impact in small, rural school districts with declining enrollments.
- “Would like to see it expand to reach the community through [the] local cable company. Students could create documentaries, dramatic, or informational products for our educational and geographic community.”

Additional Schools

The Denver Academy Film Festival for Youth, or DAFFY, held its fourth annual festival in April 2003. Two hundred fifty students from 23 middle and high schools in the following districts participated in this unique program:

- Academy 20
- Boulder Valley RE 2
- Cherry Creek 5
- Colorado Springs 11
- Denver County 1
- Douglas County RE 1
- Englewood 1
- Jefferson County R-1
- Summit RE-1

In addition, there were submissions from students in Nebraska. Interest has continually grown since year one, and DAFFY plans to expand further to outlying communities throughout Colorado and neighboring states this year.

The “Casablanca” video editing system, which is made by Boulder based MacroSystem US, is available in every Boulder Valley school. It is used mostly at the middle and high schools for projects in classes such as science, foreign language, and government, and for producing student news broadcasts (Bounds 2002). This information combined with the above survey results suggests that at least 25 of the state's school districts have film programs.

Comments

Film programs are primarily located in high schools and to a lesser extent, in middle schools and elementary schools. They exist in both rural and metro settings. Film education programs for K-12 students are justified because they serve as a foundation for preparing people to work in the industry, and they provide a different medium by which students can learn and communicate. Much of the success of film programs lies with obtaining adequate funding from the school district.

While school districts recognize the importance of school programs, discussions with members of the local industry indicate an opportunity to strengthen the tie between the K-12 programs and the industry. In other words, while students are being trained to work in the industry, the industry is largely unaware of these efforts.

Universities and Colleges

Survey Results: Universities and Colleges

Survey Process

There are 48 private and public colleges, universities, and community colleges in Colorado. All institutions were contacted to determine whether they had film programs. Web sites were reviewed, and follow-up calls were made to nonrespondents.

From this effort it was determined that 23 institutions might have film programs or classes offered in a related area. These schools were sent an e-mail survey. Multiple attempts were made to contact the nonrespondents by both telephone and e-mail. Surveys were received from eight schools throughout Colorado, resulting in a 34.8% response rate from the remaining 23 schools.

The responding institutions are listed below:

- Aims Community College
- Pikes Peak Community College
- Rocky Mountain College of Art and Design
- University of Colorado at Boulder
- University of Colorado at Colorado Springs
- University of Colorado at Denver
- University of Denver
- University of Northern Colorado

Survey Results

Institution leaders were asked to provide information about the size of their program, degrees offered, and student support programs, and give a brief history and general description of their facilities and outlook for the future. Abbreviated profiles of the responding institutions are provided near the end of this section.

Because of turnover in program leadership, it was difficult to obtain complete historical program information about all programs. Based on the information that was received, the oldest film program began in 1963 at the Rocky Mountain College of Art and Design. The most recent programs started in the mid to late 1990s.

All programs have experienced strong growth rates, and four institutions indicated that they have 400 or more students. These programs had an average enrollment of 71 the first year and 267 in 2001. It is estimated that total enrollment at the eight institutions in 2001 exceeded 2,000 students.

The number of full-time faculty and staff has also increased over the same time period to the point where about 80 faculty are teaching classes. Three institutions have 1 person teaching courses, and three institutions have 20 or more faculty members teaching classes.

While the number of film courses taught per year has not increased significantly (6.5 courses taught in the first year to 7.2 taught in 2001), programs are growing in terms of the number of faculty and staff and enrollment. Most programs have minimal support staff. Only two of the programs have more than two staff members assisting with programs, while the other have two or fewer staff members. Because each institution has a different emphasis, different types of courses are offered. Also, the focus of the program may determine how many courses are taught each year.

Based on information provided by the institutions, the program with the largest class offering is the communications technology program at Aims Community College, where 28 classes are offered each year. It should be noted that the number of classes is just one measure of evaluating a program.

General Program Offerings

The institutions offer a variety of programs ranging from the study of film and video as a form of communication to film production degrees that will train people to work in the industry. The institution leaders were asked to identify which general types of class offerings were part of their programs. These general offerings were in the areas of:

- Film/TV studies 100%
- Communications 63%
- Media 63%
- Journalism 50%
- Telecommunications 50%
- Theatre 50%
- Drama 38%

One institution indicated that it offered programs in digital design.

The institution leaders were also asked in which of these areas they planned to add classes during the next five years. The responses were:

- Media 50%
- Film/TV studies 38%
- Journalism 25%
- Telecommunications 25%
- Theatre 25%

One institution indicated that it would add a program in new media photography.

Student Experience Offered

The institution leaders were asked to provide information about student opportunities that they created for their students. Half of the institutions recruit outside work for funding or student experience. The respondents indicated that they typically received little, if any, revenue for these projects. The institution leaders were given a list of nine job-related opportunities they offered their students. The responses include the following:

• Volunteer internships	75%
• Paid internships	50%
• Career counseling	38%
• Student film festivals	38%
• Mentorship programs	13%
• On-campus recruiters	13%

None of the institutions offered job databanks, job fairs, or job shadowing opportunities.

External Funding

Only three of the institutions indicated that they had received external funding from grants, financial donations, in-kind donations, or other sources. Two of the three institutions had received financial donations, two had received in-kind donations, two had received donations from other sources and one had received a grant. The in-kind donations were for less than $5,000, the grant was for less than $50,000, and funding from other sources was for amounts less than $25,000. Financial donations were greater than other external funding sources.

Facilities

Six of the eight institutions have production facilities. They range in size from 1,100 square feet to 17,000 square feet. All of the institutions own video and digital equipment, and three of the institutions own film equipment.

Role of Higher Education and Technical Training in the Film/Video/Digital Industry

The institution leaders were asked what role they thought higher education and technical training will have in the film/video/digital industry in the next five years. Generally, they were optimistic about the impact they could have on the industry. See the comments below.

- "In this region not much [impact], although the larger media markets outside Colorado continue to grow."
- "Higher ed and technical training will have a contentious role with the industry over the next five years since both GE-25 and CCHE are reducing the number of courses that colleges can offer in order to standardize instruction and prevent initiation of new courses which those bodies view as threats to efficiency."
- The impact will be in the "production for venues outside traditional film/video formats; the critical studies of new media and film."
- "It will grow. As access to digital formats grows, more and more 'home' filmmakers will discover the need for a strong foundation in media history, theory, and practice."

- It will have a major role because most fields already look favorably on some form of media training.
- "Significant. As technology reduces the cost of entry for entertainment industry productions, it is only the training in storytelling skills and technical quality that will launch new careers and production entities."
- "Teachers need to understand that learning to read and write video is as important as learning to read and write English. Kids today get, and will increasingly get, information from a video screen. Learning the grammar of video production is the next basic skill after learning to read and write. Television production is much more than giving kids a camera and shooting pictures. Done correctly, students involved in video production become involved in cooperative grouping, teamwork, planning, research, writing, visual literacy activities, and many higher order thinking activities. In fact, it is a basic information skill students must understand if they are going to deal effectively with information in the future" (John See, Minnesota Department of Education).

School Profiles

This section includes program profiles based on information provided by the institutions.

Aims Community College

Program Overview:	The program is a hands-on oriented audio, video, and multimedia production program. It is objective and competency based with an emphasis on marketability and employability. Portfolios are required in most programs.
Contact:	Ken Sauer, Asst. Dept. Chair, Communication Technology kfsauer@aims.edu
Web Site:	http://www.aims.edu/academics/communication_technology/index.htm
Degrees and Concentration:	AAS Communications Media AA Communications Media with emphasis on audio, radio, and TV/digital video AGS Communications Media Broadband Communications Certificates in Audio; Video/TV Production; Digital Imaging and Publishing; Radio Production; Media Writing; and Integrated Media Production. Certificate in Educational Technology

Pikes Peak Community College

Program Overview:	One Film Studies Course (history, stylistic, and narrative strategies) Visual Communication Program (graphic design, digital animation, digital design) Multimedia (video production and editing, web design, and interactive design)
Contact:	Dean of Communications, Humanities and Technical Studies
Web Site:	http://www.ppcc.cccoes.edu/
Degrees and Concentration:	Associate's Degrees and Certificates in Digital Media

Rocky Mountain College of Art and Design

Program Overview:	Animation, art education, graphic design, interactive media, and illustration
Contact:	Martin Mendelsberg, Chair, Graphic Design
Web Site:	http://www.rmcad.edu/
Degrees and Concentration:	BFA Animation

University of Colorado at Boulder

Program Overview:	Educates students in the history and development of film as an art form and a contemporary medium. The curriculum instills an informed analytic awareness of the ways in which film has been used and provides the resources for significant creative exploration of the medium. The undergraduate degrees in film studies emphasize knowledge and awareness of the major artistic contributions to the evolution of film, from the advent of the moving image to the present; the general outlines of world film from the silent period to the present, with emphasis on the historical contributions of major national cinemas; and methodological variations in film criticism and film theory, including at least one recent methodological development. Students completing either the B.A. or the B.F.A. degree in film studies are expected to acquire the ability and skills to analyze and interpret films critically; communicate such interpretations competently in essay form; and make a short 16-mm sound film (B.F.A. majors only).
Contact:	Suranjan Ganguly, Director
Web Site:	http://www.colorado.edu/FilmStudies/
Degrees and Concentration:	BA and BFA Narrative Film, Documentary, Experimental Cinema, and Animation Film

University of Colorado at Colorado Springs

Program Overview:	The purpose of Film Studies is to develop in its students a scholarly and creative approach to the cinematic arts and to provide the theoretical and historical component to the practical media programs offered by the Dept. of Communication. The program offers a critical methodology and an exploration of ideas and expression which enriches many academic subjects and majors.
Contact:	Dr. Robert von Dassanowsky, Associate Prof. and Director, Film Studies rvondass@uccs.edu
Web Site:	http://web.uccs.edu/vapa/film/film.htm
Degrees and Concentration:	Currently a minor program; forthcoming as "major" focus within the Visual and Performing Arts major (2004)

University of Colorado at Denver

Program Overview:	The Film/Video program is intended for students seeking professional preparation for careers in Film, Video, and related industries. Program delivery is realized in a unique "2 + 2" offering with the Community College of Aurora through the Colorado Film Video Instructional Studios (CFVI), sited at the former Lowry Air Force base.
Contact:	Frederic Lahey, Film/Video Program Head www.cfvistudios.com
Web Site:	http://www.cudenver.edu/cam/tfvp/tfvpmain.html
Degrees and Concentration:	BFA, AGS, AAS, and Certificates in Film/Video Production, Writing/Directing, Videography/Cinematography, Post Production

University of Denver

Program Overview:	Through a highly flexible, customizable curriculum, communication majors have the opportunity to explore areas such as communication theory, communication in personal relationships, computer-mediated communication, conflict and negotiation, corporate communication/public relations, criticism and rhetoric, debate and forensics, digital media production, group and team communication, intercultural/international communication, broadcast and print journalism, leadership, organizational communication, persuasion, public speaking, telecommunications, and video and film writing and production.
Contact:	Mike Wirth, Director and Chair
Web Site:	http://soc.du.edu/index.asp
Degrees and Concentration:	BA Communications and Digital Media Studies MA and MS Digital Media Studies, Management and Communications, Management and Telecommunications, Mass Communication

University of Northern Colorado

Program Overview:	The minor in film studies is designed to provide students with an understanding of film as a distinct art form with its own unique history, language, mechanics, and principles of production and reception. The emphasis in this minor is on film reception, as opposed to training in film production. This area of inquiry includes film analysis, film criticism, consideration of the social implications of film, with some attention also to various theories of film reception.
Contact:	Mark Berrettini and David Caldwell, Co-Directors
Web Site:	http://asweb.unco.edu/depts/film_studies/default.htm
Degrees and Concentration:	Minor in Film Studies

Comments

Although several film studies programs have existed for 30 to 40 years, programs are not a major part of curriculums at most institutions. This is most likely because film studies in the past have focused primarily on the study of film as an art form. As the price of production equipment has fallen and the quality improved, the barriers to entry have also dropped, enabling more colleges and universities to afford the purchase of certain types of production equipment for use in programs.

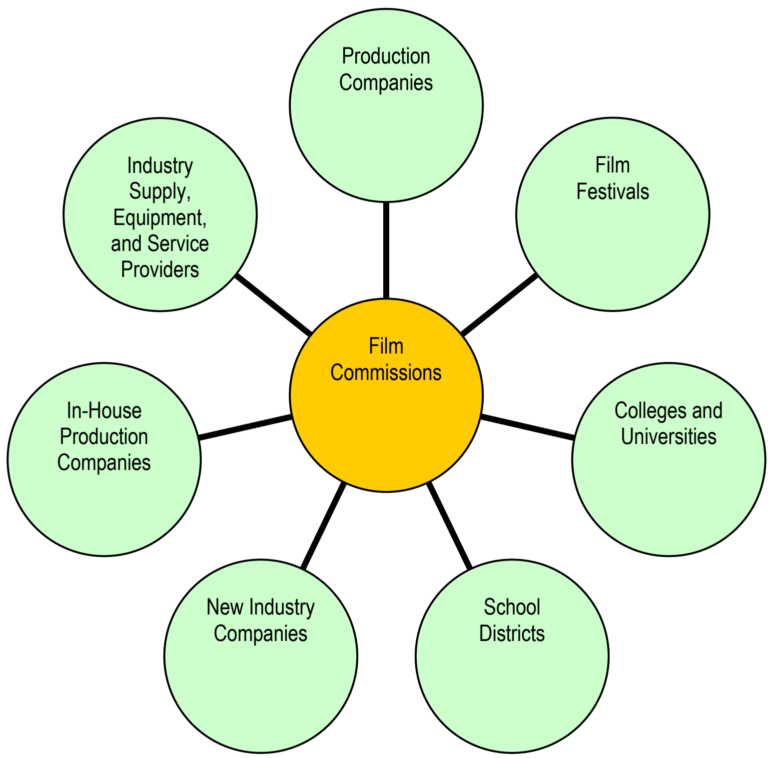
In addition, a dramatic change has taken place in the perception of how films or videos can be used in the education process. For the MTV generation, videos are a form of communication, which means that film and videos are as important to them as books and tablets were to previous generations.

The colleges and universities mentioned in this section of the study focus their programs more on production than K-12 programs. Based on feedback from respondents, there seems to be a lack of job-related opportunities for students who want to work in the film or video industry. In an effort to increase local student participation in Colorado film and video productions, Evergreen-based film and video payroll service, PayReel, Inc., has started "SOS (Students on Shoots) Colorado." The program will establish a clearinghouse for film students eager to gain valuable work experience and make industry contacts, and for independent filmmakers to find entry-level production crew close to filming locations. Students can enroll online, and will be placed on actual film shoots in the state (PayReel 2002).

CONCLUSION

Conclusion

In the past, the film industry was comprised of companies in SIC Codes 7812 and 7819, or basically film producers and their suppliers. Continually changing global social and economic conditions, and advances in technology have redefined the structure of the industry. Today, the structure includes production companies, suppliers, film festivals, school programs, college and university programs, and in-house production firms. The Colorado Film Commission, along with its network of 100+ local film contacts, is the common element between these segments of the industry, and, as such, has the potential to create synergy between these groups and promote the industry. Moreover, it is important for the Colorado Film Commission to continue to be a clearinghouse for other government agencies and the private sector.



Production Companies

Based on the types of projects on which production companies work, it is clear that the successful producers understand the need to adapt to social, economic, and technological changes. Production in Colorado can be strengthened by considering the following:

- Create awareness of the unique economic benefits of production in the state (for example, more than three-fourths of revenue is generated from out of state and much of that money is invested in the local economy; rural and metro areas

benefit from production projects; production revenue is not necessarily tied to normal economic patterns),
- Generate a critical mass of producers in certain areas,
- Provide incentives to attract more projects to Colorado,
- Educate financial institutions about the distinguishing factors of the industry,
- Strengthen relationships with ad agencies and Colorado companies that have in-house production facilities and outsourcing needs, and
- Strengthen ties with schools and university programs.

In-House Production Companies

It is estimated that 350 total employees in film-related occupations work for colleges and universities, ad agencies, hotels with meeting sites, and large companies. This total does not include teachers or instructors in college, university, or K-12 programs. The companies considered in this portion of the study tend to outsource more than they produce in-house, which provides revenue for the production companies and suppliers in the state.

Industry Supply, Equipment, and Service Providers

This segment of the industry has also been adept at making changes as evidenced by the number of people who supply products or services for such projects as music videos, Internet clips, or sports programming. Because most of them rely on the work of producers, they strongly support increased financial support for the Colorado Film Commission and improved marketing of Colorado companies and the state as a place to produce any type of film or video. Moreover, they support some type of incentives to attract business to the state.

Film Commissions

The Colorado Film Commission and the 100+ local film contacts are important in attracting production projects and supporting the state’s film industry. In addition to the Colorado Film Commission’s three staff members, survey results reveal that an estimated 12 FTE employees worked on film-related projects in 2001. Production, which totaled $30.4 million in 2002, took place in nearly 63% of the state’s 64 counties.

Film Festivals

All of the current film festivals in existence today have grown since their inception. This increase in popularity has occurred in part because many of these festivals provide a venue for films or videos that would normally not be shown, or would be shown only in limited areas at micro cinemas. These festivals provide an opportunity for independent filmmakers and filmmakers who are new to the industry.

School Districts

This study found evidence that film programs exist both in rural and metro schools throughout Colorado. They are primarily in high schools and to a lesser extent in middle schools and elementary schools. Even in schools where there are no film studies or production programs, film has been integrated into other classes to provide a different medium through which students can learn and communicate. At the K-12 level, film is studied as an art form, provides training for a career in the industry, and acts as an alternate medium for communication. Currently, the Denver Academy Film Festival for Youth (DAFFY) is directed at high school age students. Similar efforts that tie filmmaking to the education system would benefit the industry.

Universities and Colleges

Film studies programs are not a major part of curriculums at most institutions, most likely because such programs in the past focused primarily on the study of film as an art form. It seems logical to think that the industry would benefit from working closely with university film programs.

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APPENDICES

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♦ ♦ ♦

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CFC Board Member Joel Ehrlich and New Deal Pictures, Inc., Denver

♦ ♦ ♦

SELECTED COLORADO FILMOGRAPHY
1897-2003

Title	Production Company	Year
Festival of Mountain and Plain	Edison Film Co.	1897
Runaway Stage Coach	Selig Polyscope Co.	1902
Films of the Ute Tribe		1902-07
Girls in Overalls	Buck Buckwalter	1904
Robbery of the Leadville Stage	Selig Polyscope Co.	1904
Tracked by Bloodhounds, or Lynching at Cripple Creek	Selig Polyscope Co.	1904
Denver in Winter	Buck Buckwalter	1905
Roosevelt's Hunt	Buck Buckwalter	1905
The Bandit King	Selig Polyscope Co.	1907
The Girl from Montana	Selig Polyscope Co.	1907
Western Justice	Selig Polyscope Co.	1907
The Great Bear Hunt		1908
The Cattle Rustlers	Selig Polyscope Co.	1908
The Telltale Knife	Selig Polyscope Co	1911
The Bully of Bingo Gulch	Selig Polyscope Co.	1911
A Cowboy's Mother	Selig Polyscope Co	1912
Buck's Romance	Selig Polyscope Co	1912
Roderick's Ride	Selig Polyscope Co	1912
The Diamond 'S' Robbery	Selig Polyscope Co.	1912
The Little Hero	Selig Polyscope Co.	1912
The Dynamiters	Selig Polyscope Co.	1912
A Matrimonial Deluge	Selig Polyscope Co.	1913
Judge Ben Lindsey's Juvenile Court	Columbine Film Co.	1913
The Faker and the Bootlegger	Columbine Film Co.	1913
The Way of the Transgressor	Columbine Film Co.	1913
Traffic in Souls		1913
The Hand of the Law	Colorado Motion Picture Co./ Warner	1913
In Perilous Paths	Colorado Motion Picture Co.	1914
A Cycle of Destiny	Colorado Motion Picture Co.	1914
Across the Border	Colorado Motion Picture Co.	1914
Pirates of the Plains	Colorado Motion Picture Co./ Warner	1914
The Range War	Colorado Motion Picture Co./ Warner	1914
Small Town Vamp	Durango Film Co.	1917
Snow Wonderland	Durango Film Co.	1918
Mesa Verde	Durango Film Co.	1919
Burlesque Bull Fight	Durango Film Co.	1920
Love of a Navajo	Durango Film Co.	1920
Scarlett West (Custer's Last Stand)	First National	1925
The Great K & A Train Robbery	The Fox Co.	1926
The Phantom Raiders		1927
The Outcast	Republic	1952
Canon City	Pathe/Eagle-Lion Films	1947
Colorado Territory	Warner Brothers	1949
Sand	20th Century Fox	1949
A Ticket to Tomahawk	20th Century Fox	1950
Across the Wide Missouri	MGM	1951
Secret of Convict Lake	20th Century Fox	1951
Vengeance Valley	MGM	1951
Lone Star	MGM	1952
The Naked Spur	MGM	1952
One Minute to Zero	RKO	1952
Outcasts of Poker Flats	20th Century Fox	1952
Denver and the Rio Grande	Pine-Thomas	1952
Viva Zapata!	20th Century Fox	1952
The Glenn Miller Story	Universal-International	1953
The Lone Hand	Universal	1953
The Siege at Red River	20th Century Fox	1954
Three Young Texans	20th Century Fox	1954
Run for Cover	Paramount	1955
Around the World in Eighty Days	United Artists	1956
The Searchers	Warner Brothers	1956
The Maverick Queen	Republic	1956
Tribute to a Bad Man	MGM	1956
Night Passage	Universal	1957
Saddle the Wind	MGM	1958
These Thousand Hills	20th Century Fox	1959
How the West Was Won	MGM	1962
Cheyenne Autumn	Warner Brothers	1964
The Unsinkable Molly Brown	MGM	1964
Cat Ballou	Columbia	1965
Stagecoach	20th Century Fox	1965
The Sons of Katie Elder	Paramount	1965
Gunpoint	Universal	1965
In Cold Blood	Columbia	1967
Barquero	United Artists	1969
Butch Cassidy and the Sundance Kid	20th Century Fox	1969
The Happy Ending	Pax Prods./UA	1969
True Grit	Paramount	1969
Downhill Racer	Wildwood Int'l.	1970
Good-by Fat Larry	Mushroom Prods.	1970
Vanishing Point	20th Century Fox	1970
Lassie Come Home	Wrather Prods.	1971
Support Your Local Gunfighter	United Artists	1971
The Cowboys	Warner Brothers	1971
Stand Up and Be Counted	Columbia	1971
When the Legends Die	Stuart Miller Prods.	1971
Badlands	Pressman-Williams	1972
Brothers O'Toole	CVD Studios	1972
Scarecrow	Warner Brothers	1972
Showdown	Universal	1972
Snowball Express	Disney	1972
Mr. Majestyk	Mirisch-Fleischer	1973
Running Wild	CVI, Ltd./Gold Circle	1973
Sleeper	Rollins-Joffe	1973
Doc Savage	Warner Brothers	1974
Winterhawk	Howco Int'l.	1974
Bite the Bullet	Columbia	1975
The Duchess & the Dirtwater Fox	20th Century Fox	1976
The White Buffalo	Dino DeLaurentiis	1976
One on One	Warner Brothers	1977
How the West Was Won	MGM-TV	1977
Snowbeast	Douglas S. Cramer	1977

Title	Production Company	Year
The Shining	Warner Brothers	1978
Avalanche	New World	1978
Butch and Sundance: The Early Days	20th Century Fox	1978
Comes A Horseman	Chartoff-Winkler	1978
Every Which Way But Loose	Malpaso	1978
Ice Castles	Columbia	1978
Champions: A Love Story	Warner Brothers	1978
Over the Edge	Benedict Prods.	1978
The Further Adventures of the Wilderness Family	Pacific Int'l.	1978
The Frisco Kid	Warner Brothers	1978
Centennial	Universal TV	1978
Mork and Mindy	Paramount TV	1978-80
Charlie's Angels	Spelling-Goldberg	1978
A Change of Seasons	Aspen Prods./20th Century Fox	1980
Continental Divide	Universal	1980
Dynasty	Spelling-20th Century	1980-83
Endangered Species	Alive Ent./MGM	1981
The Avenging	Movie Making Co.	1981
National Lampoon's Vacation	Warner Brothers	1982
PK and the Kid	Sunn Classics/Hanna Barbera	1982
Hush Little Baby, Don't You Cry	Filmworks/Frameline	1983
American Flyer	Ladd Co.	1983
When She Says No	Decade Prods.	1983
Max Boyce Goes West	Opix Films/BBC	1983
Fire and Ice	Bogner Films	1984
Starman	Columbia	1984
The Legend of Billie Jean	Tri-Star	1984
A Prison for Children	Viacom/CBS	1986
Dream West	Sunn Classics/CBS	1985
The Christmas Gift	Rosemont Prods./CBS	1986
Over the Top	Cannon Films	1986
The Return of Perry Mason (22 MOWs)	Viacom	1986-92
Manhunt for Claude Dallas	Purple Sage Prods.	1986
Shadow of Death	Wind River	1987
Messenger of Death	Cannon Films	1987
Land of Little Rain	Mayport for PBS	1987
Lone Wolf and Dream Vision	First Films	1987
The Women's Club	Fred Weintraub Prods.	1986
Where the Hell's That Gold?	CBS Prods.	1988
Big Bad John	Red River Films	1988
Indiana Jones and the Last Crusade	Lucasfilm	1988
Flashback	60/80 Prods.	1989
Ford Fairlane	20th Century Fox	1989
Incident at Lincoln Bluff	Qintex Ltd.	1989
Rescue 911 (several episodes)	Katy Film Prods.	1989-95
National Lampoon's Christmas Vacation	Warner Brothers	1989
City Slickers	Castle Rock	1990
Die Hard 2: Die Harder	20th Century Fox	1990
Father Dowling Mysteries (17 episodes)	Viacom	1990
Archie's Wife	Interscope	1990
Fast Getaway	Cinetel	1990
Thelma & Louise	Ridley Scott	1990

Title	Production Company	Year
Almost Blue	First Films	1991
Arizona Dreamin'	Arrow Tooth Prods.	1991
Dead Right	Dead Right Prods.	1991
Ladybugs	Ruddy Morgan	1991
Mirror Image	Wind River	1991
My Samurai	Starmax	1991
Aspen Extreme	Fall Line	1992
Cliffhanger	Tri-Star	1992
Ironsides	Windy City Prods.	1992
Top of the World	Denver Center Media	1992
Alferd Packer, The Musical	Trey Parker & Matt Stone	1993
Dumb and Dumber	MPCA for New Line	1993
Lightning Jack	Lightning Ridge Films	1993
North	Castle Rock	1993
Tall Tale	Tall Tale Prods. for Disney	1993
White Fang II	Disney	1993
Wyatt Earp	Earp Prods.	1993
Dark Territory	Dark Territory Prods. for Warner Brothers	1994
Things To Do In Denver When You're Dead	Boat Drinks, Inc.	1994
Diagnosis: Murder (8 MOWs)	Viacom	1994-95
Christmas Vacation '95	Film Auro	1994
A Child's Cry for Help	Sane & Longbow Prods./NBC	1994
Large As Life	MGM-UA	1995
Walker, Texas Ranger	Amadea Films/CBS	1995
Unsolved Mysteries (several episodes)	Cosgrove-Meurer	1993-95
Stormchasers	IMAX	1995
Phantoms	Snowfield, Inc.	1996
Asteroid	Dutch Prods./NBC	1996
Scrapple	Sweetwater Prods.	1996
The Shining	Lakeside Ent./ABC	1996
SwitchBack	Going West Prods.	1996
Three Ninjas: High Noon at Mega Mountain	Tri-Star	1996
Emergency Vets series	Rocket Pictures for Animal Planet	1998-2002
StrangeLand	Shooting Gallery	1998
The Hungry Bachelor's Club	Unity Entertainment	1998
For Love of the Game	Universal	1998
The Hi-Lo Country	Working Title Films	1998
Body Slam: Ready to Rumble	Body Slam Prods for Warner Brothers	1999
Nurse Betty	DDF Films	1999
Dragon and the Hawk	Inferno Films	1999
Mountain Magic	Bogner Films for IMAX	2000
The Laramie Project	Good Machine for HBO	2001
About Schmidt	Avery Pictures	2001
West of Here	West of Here Prods.	2001
Dancing Bear	Red Bear Prods.	2002
Searching for Haizmann	Centre Prods.	2002
Below the Belt	New Deal Pictures	2002
Unwrapped series	High Noon Productions for Food Network	2001-04
Busted series	Rocket Pictures for Animal Planet	2002-03
Several Things Not Intended to Hurt You	Conundrum	2002
Trivia Unwrapped (52 episodes)	Rocket Pictures	2003

SIGNIFICANT COMPANIES

SIGNIFICANT COMPANIES IN SIC 7812 and 7819

Company	Employees	Receipts	Comments
Base 2 Studios	20 to 49	$5 to $10 M	A spin-off from Colorado Production Group that handles postproduction services, such as editing, graphics, animation, and duplication.
Channels 5 and 30 Production	20 to 49	$5 to $10 M	
Colorado Production Group	20 to 49	$5 to $10 M	CPG works with companies around the state to primarily produce corporate videos. They also produce broadcast promos, commercials, and original programs for The Learning Channel, ABC, ESPN, and the Discovery Channel, among others.
Colorado Studios (Norac)	100 to 249	$20 to $50 M	Colorado Studios, formerly Norac Production, is involved in more than 1,000 productions a year, mostly in sports, news, documentaries, and industrial films. Additionally, it has been involved with several TV films and programs, and is currently working on the production of a sit-com.
Crosspoint	20 to 49	$10 to $20 M	Crosspoint is a post production facility located in Denver, Colorado. They have over 17 years of experience editing independent films for video and television. They do mostly commercial advertising.
The Denver Studio Complex	5 to 9	$500,000 to $1 M	Sound stage complex of 17 industry-related businesses.
Film/Video Equipment Service Co.	10 to 19	$2.5 to $5 M	Film/Video Equipment Service Co. (F/VESCO) is the largest rental/sales/service facility between the two coasts.
High Noon Productions	50 to 99	$5 to $10 M	A leading provider of nonfiction programming for cable networks. Affiliated with Rocket Pictures and Great Divide Pictures.
Rocket Pictures	20 to 49	$5 to $10 M	Develops and produces television programming. Affiliated with High Noon Productions and Great Divide Pictures.
Thunder Productions	20 to 49	$5 to $10 M	Film production company.
Video Professor Industries	101 to 200	$40 to $50 M	VPI provides video, CD-ROM, and online lessons on how to use PC software covering more than a dozen commonly used software applications, such as Microsoft Outlook, PowerPoint, WordPerfect, and how to use the Internet.
Visual Aids Electronics Corporation	10 to 19	$5 to $10 M	
Warren Miller Entertainment	50 to 99	$10 to $20 M	Producer of sports and industrial videos, commercials and contract films, and stock footage vendors.
Windstar Studios Inc	10 to 19	$5 to $10 M	Video production company dealing mostly with TV and radio commercials, corporate presentations, and interactive CD-ROMs.

Sources: Reference USA, Hoover's Online, Gale – Business and Company Resource Center,
Colorado Film and Video Association- 2003 Colorado Production Resource Guide, Colorado Entertainment Industry Development Corporation Business Plan.

SIGNIFICANT COMPANIES IN SIC 4833			
Company	**Employees**	**Receipts**	**Comments**
Fox Sports Net Rocky Mountain	50 to 99	$10 to $20 M	Television station located in Denver, Colorado.
KBDI Public TV 12	20 to 49	$10 to $20 M	PBS affiliate in Denver, Colorado.
KCEC	20 to 49	$10 to $20 M	Univision affiliate in Denver, Colorado.
KCNC	100 to 249	$50 to $100 M	CBS affiliate in Denver, Colorado.
KFQX	20 to 49	$10 to $20 M	Fox affiliate in Grand Junction, Colorado.
KJCT	50 to 99	$10 to $20 M	ABC affiliate in Grand Junction, Colorado.
KKCO	20 to 49	$10 to $20 M	NBC affiliate in Grand Junction, Colorado.
KKTV	100 to 249	$20 to 50 M	CBS affiliate in Colorado Springs, Colorado.
KMGH	100 to 249	$50 to $100 M	ABC affiliate in Denver, Colorado.
KOAA	100 to 249	$20 to $50 M	NBC affiliate in Colorado Springs, Colorado.
KRDO	50 to 99	$10 to $20 M	ABC affiliate in Colorado Springs, Colorado.
KREX	20 to 49	$10 to $20 M	CBS affiliate in Grand Junction, Colorado.
KSHP	20 to 49	$10 to $20 M	Television station in Denver, Colorado.
KTSC	20 to 49	$5 to $10 M	PBS affiliate in Pueblo, Colorado.
KTVD	50 to 99	$10 to $20 M	UPN affiliate in Denver, Colorado.
KUSA Productions	100 to 250	$50 to $100 M	NBC affiliate in Denver, Colorado.
KWGN	100 to 249	$20 to $50 M	WB affiliate in Denver, Colorado.
KXRM	20 to 49	$10 to $20 M	Fox affiliate in Colorado Springs, Colorado.
KXTU	20 to 49	$10 to $20 M	UPN affiliate in Colorado Springs, Colorado.
PBS	100 to 249	$20 to $50 M	Television station in Denver, Colorado.

Sources: Reference USA, Hoover's Online, Gale – Business and Company Resource Center,
Colorado Film and Video Association- 2003 Colorado Production Resource Guide, Colorado Entertainment Industry Development Corporation Business Plan.

OTHER SIGNIFICANT COMPANIES			
Company	**Employees**	**Receipts**	**Comments**
Anschutz Corporation	10,000+ corporate; 100 to 249 local	na	Parent company of Regal Entertainment Group, the largest operator of screens in the United States. Other companies include Crusader Films and Walden Media.
AT&T Digital Media Center	1,000 to 4,999	$500 M to $1 B	Offers a full range of digital television production and distribution services.
Comcast Cable	5 to 9	$1 to $2.5 M	Provides cable and other subscription programming.
Concept Systems	20 to 49	$5 to $10 M	Publishes educational material on open-water diving.
*Echo Star Communications	11,000 corporate; 1,500 local	$4 B	Parent company of Dish Network, the fastest growing pay television provider in the United States.
Focus on the Family	1,000 to 5,000	$100 to $500 M	A Christian organization offering individual/family support services. Publishes numerous periodicals and books. Also produces films, videos, and radio and television programs.
*Gaiam	253 corporate; 150 local	$98 M	Produces health-related videos.
*Liberty Media	7,455 corporate; 23 local	$2.0 B	Parent company of Starz Encore Group, the largest provider of premium movie services in the United States (approximately 134 million pay units). The firm holds interests in numerous globally branded entertainment networks, such as Discovery Channel, USA Interactive, and QVC.
*New Frontier Media	137 corporate; 11 local	$52,435,000	Adult entertainment provider based in Boulder, Colorado.
Network Affiliates	20 to 49	$5 to $10 M	Network Affiliates is a medical marketing firm of physician and orthodontic practices that employs their own producers and directors, and has a post-production facility.
*Starz Encore	na	$580 M	A subsidiary of Liberty Media, the company operates pay movie channels, including STARZ!, MOVIEplex, and Encore. The company owns 13 domestic channels and has more than 6,500 movies in its library. Starz Encore Group has exclusive rights to the first run of theatrical movies from a number of studios, including Universal Pictures and Miramax.
TimeWarner Cable	5 to 9	$1 to 2.5 M	Provides cable and other subscription programming.
United Global Com Inc.	12,500 corporate; 100 local	$1.6 B	An international broadband communications company providing a full range of video, voice, high-speed Internet, and programming services, to residential consumers and business customers throughout the world.

Sources: Reference USA, Hoover's Online, Gale – Business and Company Resource Center,
Colorado Film and Video Association- 2003 Colorado Production Resource Guide, Colorado Entertainment Industry Development Corporation Business Plan.

*Note: *Indicates publicly traded companies. na = not available.*

SURVEY INSTRUMENTS

STUDY OF COLORADO FILM/VIDEO/DIGITAL INDUSTRY PRODUCTION COMPANIES

Your participation in this survey is critical in helping the Colorado Film Commission better understand and promote the impact of the film/video/digital industry in Colorado. Please provide answers to the following questions about your production company to the best of your ability. If you need clarifications, please contact Gary Horvath of the CU Business Research Division at 303-492-8395, or Stephanie Two Eagles of the Colorado Film Commission at 303-892-3825.

1. In what year was your company formed?

2. How many full-time equivalent (FTE) staff members did your company employ in 2001?
   **FTE = one full-time employee (e.g., 1 person working 40 hrs/wk = 1 FTE; 2 people working 20 hrs/wk each = 1 FTE).*
   Note: 1 person salaried to work 40 hrs/wk who works greater than 40 hrs/wk = 1 FTE.

3. Please estimate (I) the number of projects that your company produced and (II) the total gross revenue for each of the following categories in 2001.

	I **Number of Projects**	II **Gross Revenue**
a. Commercials		$
b. Industrials/Corporate Films		$
c. Documentaries		$
d. Feature Films		$
e. Short Films		$
f. Television and Cable:		
i. Episodic		$
ii. Single/Special		$
iii. Movie of the Week		$
g. Stills		$
h. Sports Programming		$
i. Music Video		$
j. Stock Footage		$
k. Internet		$
l. Other		$
m. **TOTAL**		$

4. Of your 2001 total revenue, what percentage was derived from out-of-state sources? %

5. What was your estimated cost for freelance crews in 2001? $

6. Of your total estimated cost for freelancers, what percentage was spent on Colorado crews? $

7. How much did your company spend on fixed expenses in 2001? $

8. What were your total job/project expenses in 2001? $

9. Of your total job cost expenses in 2001, what percentage was spent in Colorado? $

10. From what sources do you recruit your suppliers/employees?

College/University Career Centers		Job Agencies		Technical Schools	
Internship Programs		Apprenticeships		Word-of-Mouth	
Other Training Schools		Advertisements		Community Bulletin	
Professional Associations		Trade publications		TV	
Internet		Radio		Other	

11. Please discuss any major issues affecting your ability to conduct business in Colorado.

12. Please list the major suppliers that you used for the above projects.

Supplier's Name	Supplier's City	Supplier's State
a.		
b.		
c.		
d.		
e.		
f.		
g.		
h.		
i.		
j.		

13. Do you have any suggestions about how to better promote and market the capabilities of film/video/digital production companies in Colorado?

STUDY OF COLORADO FILM/VIDEO/IMAGING INDUSTRY SUPPLY, EQUIPMENT, AND SERVICE PROVIDERS

Your participation in this survey is critical in helping the Colorado Film Commission better understand and promote the impact of the film/video/digital industry in Colorado. Please provide answers to the following questions about your company to the best of your ability. If you need clarifications, please contact Gary Horvath of the CU Business Research Division at 303-492-8395, or Stephanie Two Eagles of the Colorado Film Commission at 303-892-3825.

1. In what year was your company formed?

2. Which category best describes the services your company provides?

Film Processing		Equipment, Camera, or Lighting/Grip		Film/Tape Editing	
Sound Stage/Studio		Film/Tape Post-Production		Trucks/Mobile Equipment	
Other (please explain)					

3. To which of the following segments of the film/video/imaging industry do you provide services?

Commercials		Stock Footage		TV/Cable: Single/Special	
Feature Films		Short Films		TV/Cable: Episodic	
Documentaries		Stills		TV/Cable: Movie of the Week	
Sports Programming		Music Videos		Industrials/Corporate Films	
Internet		Other			

4. How many full-time equivalent (FTE) staff members did your company employ in 2001?
   **FTE = one full-time employee (e.g., 1 person working 40 hrs/wk = 1 FTE; 2 people working 20 hrs/wk each = 1 FTE).*
   Note: 1 person salaried to work 40 hrs/wk who works greater than 40 hrs/wk = 1 FTE.

5. What is the estimated 2001 gross revenue for your company? $

6. Of your company's 2001 total revenue, what percentage was derived from out-of-state sources? %

7. What were the estimated 2001 expenses for your company? $

8. How much did your company spend on other operating expenses in 2001? $

9. Do you have any suggestions about how to better promote and market the film/video/digital industry in Colorado?

STUDY OF COLORADO FILM/VIDEO/DIGITAL INDUSTRY
FILM COMMISSIONS/CONTACTS

Your participation in this survey is critical in helping the Colorado Film Commission better understand and promote the impact of the film/video/digital industry in Colorado. Please provide answers to the following questions about your film commission or film contact to the best of your ability. If you need clarifications, please contact Gary Horvath of the CU Business Research Division at 303-492-8395 or Stephanie Two Eagles of the Colorado Film Commission at 303-892-3825.

1. What year did your community establish a local film commission/contact?

2. Which of the following entities provide funding for your film commission/contact?

Tourism Board		Economic Development		Chamber of Commerce	
City Funding		County Funding		Private Sector	
Grants		Local Fund Raising		Other	

3. How many staff members work on film projects?

4. Realizing that film projects may be very sporadic, what is the average number of hours per week that staff members work on projects?

hrs/wk

5. a. Please provide the following information about **local film festivals** held in your area in **2001**:

Name of Film Festival	Director Contact Info (Name and Phone)
a.	
b.	
c.	
d.	

b. **Local film festivals** held or expected to be held in your area in **2002**:

Name of Film Festival	Director Contact Info (Name and Phone)
a.	
b.	
c.	
d.	

6. a. Please provide the following information about **projects with a budget greater than $1,000** produced in your area in **2001**:

Name of Project	Producer Contact Info (Name and Phone)
a.	
b.	
c.	
d.	

6. b. Please provide **projects with a budget greater than $1,000** produced in your area in **2002** to date:

Name of Project	**Producer Contact Info (Name and Phone)**
a.	
b.	
c.	
d.	

7. What industry-related activities did your commission/contact support during the past year?

8. Please describe the value of the **local film commission/contact** to your local area.

9. Please describe the value of the **film/video/digital industry** to your local area.

10. Do you have any suggestions about how to better promote and market the film/video/digital industry in Colorado?

STUDY OF COLORADO FILM/VIDEO/DIGITAL INDUSTRY – FILM FESTIVALS

Your participation in this survey is critical in helping the Colorado Film Commission better understand and promote the impact of the film/video/digital industry in Colorado. Please provide answers to the following questions about the festival to the best of your ability. If you need clarifications, please contact Gary Horvath of the CU Business Research Division at 303-492-8395, or Stephanie Two Eagles of the Colorado Film Commission at 303-892-3825.

1. What was the first year that the festival was held? [ ]

2. Please provide the following information for the first year of the festival and for 2001.

	First Year	2001
a. Full-Time Equivalent (FTE) Employees		
b. Number of Volunteers		
c. Number of Days in Festival		
d. Number of Films Shown		
e. Total Attendance (including film festival participants & guests)		

**FTE = one full-time employee (e.g., 1 person working 40 hrs/wk = 1 FTE; 2 people working 20 hrs/wk each = 1 FTE.) Note: 1 person salaried to work 40 hrs/wk who works greater than 40 hrs/wk = 1 FTE.*

3. What is your best estimate of the percentage of those attending the festival (including film festival participants and guests) who spend at least one night in hotels or motels in Colorado? %

4. What is the average length of stay for the above mentioned out-of-town participants and guests? nights

5. Of the films shown at the 2001 festival, what percentage was shot either partially or entirely in Colorado? %

6. Of the films shown at the 2001 festival, what percentage was produced by Colorado producers? %

7. a. Does your festival dedicate a portion of its activities to showcase the Colorado film/video/digital industry?

   Yes [ ] No [ ]

   b. If **YES**, please describe:

8. What is the estimated 2001 total gross revenue for the festival? $

9. What are the estimated 2001 total expenses for the festival? $

10. Of the estimated 2001 total expenses, what percentage is spent in Colorado? %

11. Do you have any suggestions about how to better promote and market film festivals in Colorado?

STUDY OF COLORADO FILM/VIDEO/DIGITAL INDUSTRY
UNIVERSITIES AND COLLEGES

Your participation in this survey is critical in helping the Colorado Film Commission better understand and promote the impact of the film/video/digital industry in Colorado. Please have the person who is most familiar with the film studies program at your institution provide answers to the following questions. If you need clarifications, please contact Gary Horvath of the CU Business Research Division at 303-492-8395, or Stephanie Two Eagles of the Colorado Film Commission at 303-892-3825.

1. What year did your program start?

2. Please provide the following information for the **first year** of your program and for **2001**?

	First Year	2001
Students Enrolled		
Full-Time Equivalent (FTE) Faculty		
Full-Time Equivalent (FTE) Staff		
Courses/Year		

**FTE = one full-time employee (e.g., 1 person working 40 hrs/wk = 1 FTE; 2 people working 20 hrs/wk each = 1 FTE).*
Note: 1 person salaried to work 40 hrs/wk who works greater than 40 hrs/wk = 1 FTE.

3. Please give a brief overview of your film/video/digital program at your institution.

4. Please provide up-to-date contact information for your program:

5. a. What degrees relating to the film/video/digital industry does your institution offer?

   b. What concentrations relating to the film/video/digital industry does your institution offer?

6. a. In which of the following subject areas do you offer classes?

Film/TV Studies		Journalism		Theatre		Telecommunications	
Media		Communications		Drama		Other	

b. In which of the following subject areas will you add classes in the next five years?

Film/TV Studies		Journalism		Theatre		Telecommunications	
Media		Communications		Drama		Other	

7. Which of the following do you offer relating to the film/video/digital industry?

Mentorship Program		Paid Internships		Volunteer Internships	
Career Counseling		Job Databank		Student Film Festivals	
On-Campus Recruiters		Job Fairs		Job Shadowing	
Student Film Festivals				Other	

8. Please select the category that best describes the amount received in (I) grants, (II) financial donations, (III) in-kind donations, and (IV) other types of funding in 2001 to support your program.

Category	**I Grants**	**II Financial Donations**	**III In-Kind Donations**	**IV Other**
None				
$1 - $499				
$500 - $999				
$1,000 - $4,999				
$5,000 - $9,999				
$10,000 - $24,999				
$25,000 - $49,999				
$50,000 - $99,999				
$100,000 or more				

9. Does your program recruit outside work for funding or student experience? Yes ☐ No ☐

10. How much revenue did your program receive from these productions? $

11. Does your institution have a production facility? Yes ☐ No ☐

12. What is the size of your production facility in square feet? sq. ft.

13. In which of the following areas do you own equipment? Film ☐ Video ☐ Digital ☐

14. Please list the primary equipment used for your program.

15. What role do you think higher education and technical training will have in the film/video/digital industry in the next five years?

STUDY OF COLORADO FILM/VIDEO/DIGITAL INDUSTRY
SCHOOL DISTRICTS

Your participation in this survey is critical in helping the Colorado Film Commission better understand and promote the impact of the film/video/digital industry in Colorado. Please have the person who is most familiar with the film programs in your district provide answers to the following questions. If you need clarifications, please contact Gary Horvath of the CU Business Research Division at 303-492-8395, or Stephanie Two Eagles of the Colorado Film Commission at 303-892-3825.

1. Please provide the following information for your district for **2001**.

	Elementary	Middle School	High Schools
# of schools			
% with film studies classes			
% with film production program			

2. What subjects do you see integrating film and video into your school district?

History ☐ Geography ☐ Literature/English ☐

Drama ☐ Math ☐ Science ☐

Business ☐ Vo-Tech ☐

3. What weaknesses would you most like to improve relative to film studies in your school district?

Software ☐ Hardware/Equipment ☐ Curriculum ☐

Film Making Skills ☐ Technical Support ☐ Financial Support ☐

Instructor Knowledge/Skills ☐ Level of Interest ☐

4. Please list the primary equipment used for your programs.

5. Please describe any film programs or video production programs offered in your district?

6. What role do you think film education in secondary schools will have in the film/video/digital industry in the next five years?

STUDY OF COLORADO FILM/VIDEO/DIGITAL INDUSTRY – IN-HOUSE PRODUCTION

Your participation in this survey is critical in helping the Colorado Film Commission better understand and promote the impact of the film/video/digital industry in Colorado. Please have the person most familiar with your company or organization's film and video production provide answers to the following questions. If you need clarifications, please contact Gary Horvath of the CU Business Research Division at 303-492-8395, or Stephanie Two Eagles of the Colorado Film Commission at 303-892-3825. *If your company/organization* ***does not*** *have an in-house production unit, please answer questions 1-4 and return the survey. If your company organization* ***does*** *have an in-house production unit, please complete all questions and return the survey***.** Thank you.

1. Please identify the areas where your company/organization produced a film or video production in 2001:

a. Commercials/Promos		e. Television and Cable		j. Music Video	
b. Infomercials		f. Industrial/Corporate Film		k. Stock Footage	
c. Interstitial		g. Stills		l. Internet	
d. Documentaries		h. Sports Programming		m. Other______________	
		i. Training Videos			

2. What was the total estimated fixed cost (including payroll) of **in-house production** for 2001? $

3. What was the total amount spent on **outsourced production** in 2001? $

4. What percentage of your company or organization's film/video production was outsourced to **production companies in Colorado** in 2001? %

The following questions relate to in-house production. If your company or organization does not have in-house production, then please disregard the remaining questions and return the survey. Thank you.

5. What year was your company/organization's in-house production unit formed?

6. How many full-time equivalent (FTE) staff members did your company employ for production in 2001?
**FTE = one full-time employee (e.g., 1 person working 40 hrs/wk = 1 FTE; 2 people working 20 hrs/wk each = 1 FTE). Note: 1 person salaried to work 40 hrs/wk who works greater than 40 hrs/wk = 1 FTE.*

7. What is the size of your company/organization's production facility in square feet? sq. ft.

8. Which of the following categories best describes your production facilities' equipment?

Film Video Digital

9. Please provide a list of the basic equipment in your company or organization's production facility.

10. Does your company/organization use its in-house facilities to provide production services to other companies?

Yes ☐ No ☐

11. How much outside revenue did your company/organization generate in 2001 by providing in-house production to other companies?

$

12. Please describe any in-house production your company/organization provided in 2001 for other companies.

13. Please discuss any major issues affecting your ability to generate productions in Colorado.

14. Do you have any suggestions about how to better promote and market the film/video/digital industry in Colorado?