



Colorado Film Study

FULL REPORT | OCTOBER 2022

COLORADO



Prepared by

Lauren McCune

Filmmaker and Project Associate Cine Fe

John Van Wyck

Co-Founder and Executive Director Cine Fe

Dr. Michael Seman

Assistant Professor, Arts Management
Research Associate, Regional Economic
Development Institute
Colorado State University

With research assistance by

Samantha Sigler

Project Team

Colorado Creative Industries

Margaret Hunt
Christine Costello
Ruth Wilson
Libby Barbee
Sarah Harrison
Marcie Gantz

Denver Arts & Venues

Lisa Gedgaudas
Tariana Navas-Nieves
Brooke Dilling
Amber Fochi
Ginger White-Brunetti

Prepared for

Colorado Creative Industries

State of Colorado

Denver Arts & Venues

City and County of Denver

Special thanks to

The Colorado Office of Film, Television
and Media

WESTAF (Western States Arts
Federation) and Kelly Ernst, Business
Coordinator, Creative Vitality Suite



Note on terminology:

This study of Denver and Colorado's film, television, and media industry covered the following sectors:

Television production; commercial video production; advertising agencies; documentary filmmaking; scripted (fiction/narrative) filmmaking; experimental, animated, and short-form filmmaking; exhibition (movie theaters and film festivals); city and state agencies (relevant to film and media); education in film and media (high school and college); and video game production.

This report uses the terms "film industry" and "film and media industry" interchangeably to refer to all of these sectors collectively.

The report uses the term "filmmakers" broadly to mean any artist or professional involved in the creation of any filmic, cinematic, or video media. When referring to individuals or sectors not directly involved in media production (such as educators or film festival staff), the report specifies them by their professions.

COVER PHOTOS

Top: courtesy Sad Girl Productions

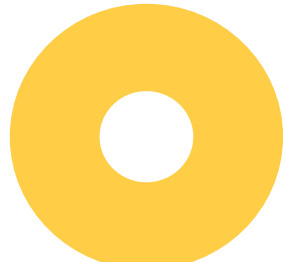
Bottom: courtesy Futuristic Films

THIS PAGE

Photo by Patrick MacLeod,
courtesy SeriesFest at Red Rocks

Table of Contents

1. Executive Summary	4	6. Conclusion	50
2. About the Study	9	7. Sector Spotlight	53
3. The Landscape	13	Television Production	55
A. Filmmaking in Colorado is Both Art and Industry	14	Commercial Video Production	57
B. Rapid Economic Growth Prior to COVID-19	17	Ad Agencies (for Commercial Video Production)	59
C. The Challenges	24	Documentary Filmmaking	61
D. Coping with Lack of Opportunity	25	Scripted Filmmaking (Fiction/Narrative)	63
4. Findings	26	Experimental, Animated, and Short-Form Filmmaking	65
A. Silos	28	Exhibition (Movie Theaters and Film Festivals)	67
B. Representation	29	City and State Agencies (Relevant to Film and Media)	69
C. Talent Retention	33	Education in Film and Media (High School and College)	71
D. Physical Infrastructure	34	Video Game Production	74
E. Online Infrastructure	35	Appendix	76
F. Support Programs	36	Appendix A: Demographics	77
G. Incentives	37	Appendix B: Employment and Economic Data Methodology	82
H. The COVID-19 Pandemic	38	Appendix C: Background on Film and Media Incentives	85
I. Emerging Trends Post COVID-19 Pandemic	39		
5. Recommendations	40		
A. Launch a Collective Strategy	42		
B. Prioritize Equitable Representation	43		
C. Leverage Strength in Existing Sectors	44		
D. Secure Shared Physical Infrastructure	45		
E. Create Funding Opportunities and Creative Support Programs	46		
F. Retain Denver and Colorado’s Talent	47		
G. Increase Film’s Cultural Footprint in Denver and Colorado	48		
H. Adopt a “Yes-and” Approach to Incentives	49		



1. Executive Summary



PHOTO
courtesy
Exposure Labs ▶

Executive Summary

The rise of streaming platforms, social media, and other digital media is driving unprecedented growth in the film, television, and media industry. A four-year study of Denver and Colorado's film industry found it growing rapidly and delivering a significant economic return to the city and state.

However, a lack of investment in infrastructure, support programs, and incentives has prevented the industry from being able to grow and create new jobs at scale. In the absence of readily available opportunities, many of Colorado's filmmaking artists and professionals are choosing to work independently or create their own companies, only to still face similar obstacles to growth.

Despite these challenges, the study found that the industry is one of growing potential, waiting to be unlocked. Many talented, skilled, and ambitious filmmaking artists and professionals choose to stay in Colorado. They cite their love of the state and their belief in its potential to become a hub of economic and creative activity for film.

As the number of creative professionals working in Denver and Colorado's film industry continues to grow, the opportunity to capitalize on that potential – and to build a more sustainable, inclusive, and prosperous industry in the state – has never been greater.

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

PHOTO
courtesy CU Denver
Film & Television

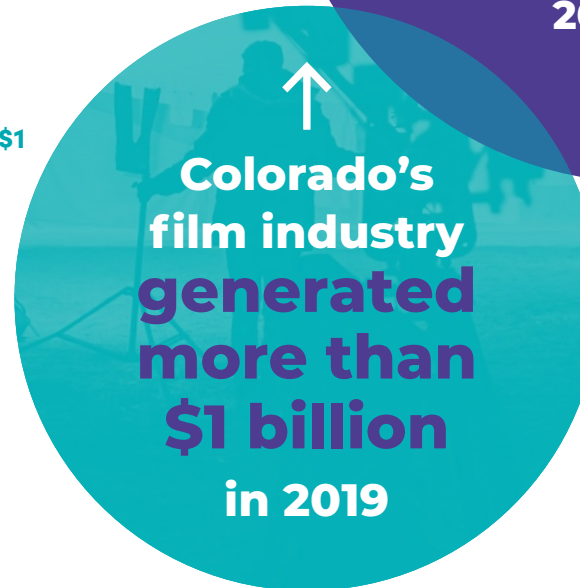
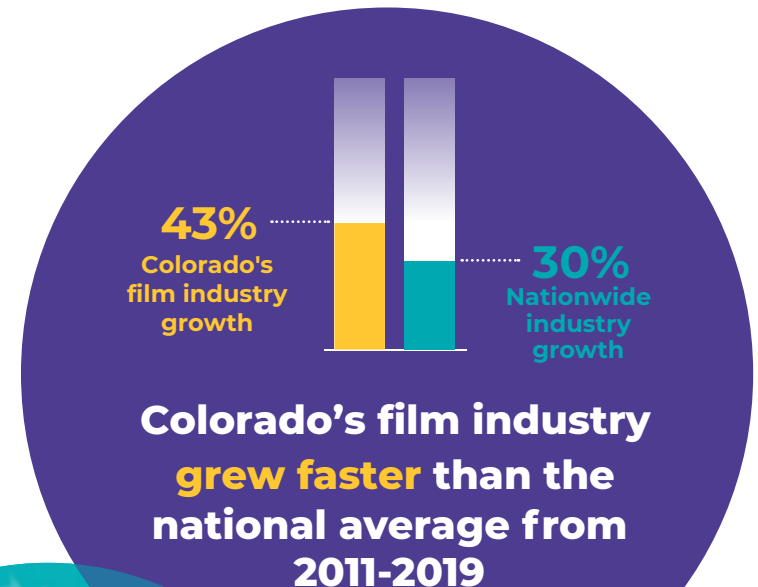


Highlights of the Study's Findings

In Denver and across Colorado, the number of filmmakers and creative professionals working in the industry was substantial and growing rapidly prior to the COVID-19 pandemic.

- + As of 2019, more than **15,000** Coloradans worked in the film industry. Of those, more than **8,700 (55%)** worked in the Denver metropolitan area.
- + Between 2011 and 2019, employment in Colorado's film industry **grew 43%**, faster than employment growth in the nation's film industry (**30%**), and faster than all Colorado's total employment growth (**21%**) during that time.
- + Between 2011 and 2019, employment in Denver's film industry **grew 48%**.
- + In 2019, Colorado's film industry **generated more than \$1 billion** in sales of goods and services.
- + Denver's film industry **generated \$727.4 million** in 2019, roughly **69%** of the statewide industry's sales of goods and services.

Jobs in scripted filmmaking and video game production are scarce due to the state's low incentive levels for film and media, so this growth appears to have occurred primarily in commercial video production.

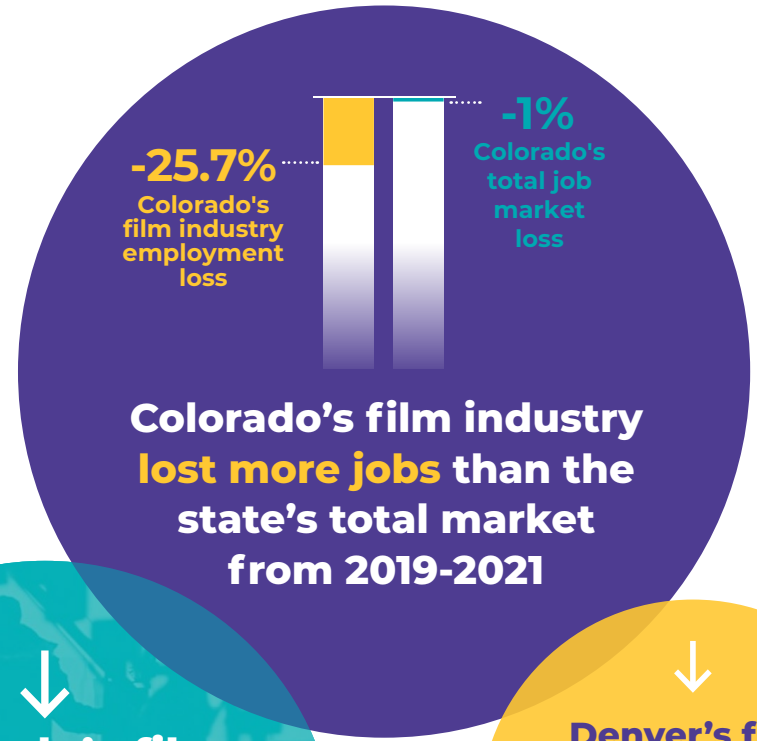


The COVID-19 pandemic led to severe job and revenue losses in Colorado’s film industry.

- Between 2019 and 2021, statewide film industry employment **fell by 4,092 jobs (-25.7%)**, a greater percentage loss than the national film industry (-19%) and Colorado’s total job market (-1%) experienced during that time.
- Between 2019 and 2021, Denver’s film industry employment **fell by 25.1%**.
- The pandemic’s impact on the statewide film industry’s sales of goods and services was noticeable, but less severe than it was on employment. From 2019 to 2021, Colorado’s film industry sales **fell 8.4%** from **\$1.04 billion** to **\$959.9 million**.
- Denver’s film industry sales **fell 10.1%** from **\$727.4 million** to **\$653.7 million** during that same period.

With Colorado’s film and media companies constrained in their ability to grow jobs, many Coloradans are creating their own companies or choosing to work as freelancers. This may have left Colorado’s film industry especially vulnerable to economic disruption, as employment loss from the pandemic was particularly severe amongst freelancers.

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



Colorado’s film industry lost more jobs than the state’s total market from 2019-2021



Recommendations Overview

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

- A Launch a collective strategy** that provides a vehicle for these efforts, facilitates collaboration across sectors, and gives filmmakers the opportunity to advocate for themselves and be represented in policymaking. More on page [42](#).
- B Prioritize equitable representation** in leadership, program design, and efforts to grow the filmmaking community. More on page [43](#).
- C Leverage strength in existing sectors** by focusing on what types of filmmaking are currently here and working, and using the immediate community to build on that growth. More on page [44](#).
- D Secure shared physical infrastructure** that individuals, companies, and organizations can use to meet, work, and collaborate. More on page [45](#).
- E Create funding opportunities and creative support programs** for filmmakers and film projects. More on page [46](#).
- F Retain Denver and Colorado’s talent** by making it easier for filmmaking artists and professionals to find the opportunities they need to stay and build their careers in the state. More on page [47](#).
- G Increase film’s visibility and cultural footprint in Denver and Colorado**, so Coloradans are more aware of the talent that exists in the state and the economic and cultural opportunity that can be unlocked by supporting it. More on page [48](#).
- H Take a “yes-and” approach to incentives** that treats all efforts to support Colorado filmmakers as necessary and complementary. More on page [49](#).

Find sector-specific recommendations on page [53](#)



2. About the Study



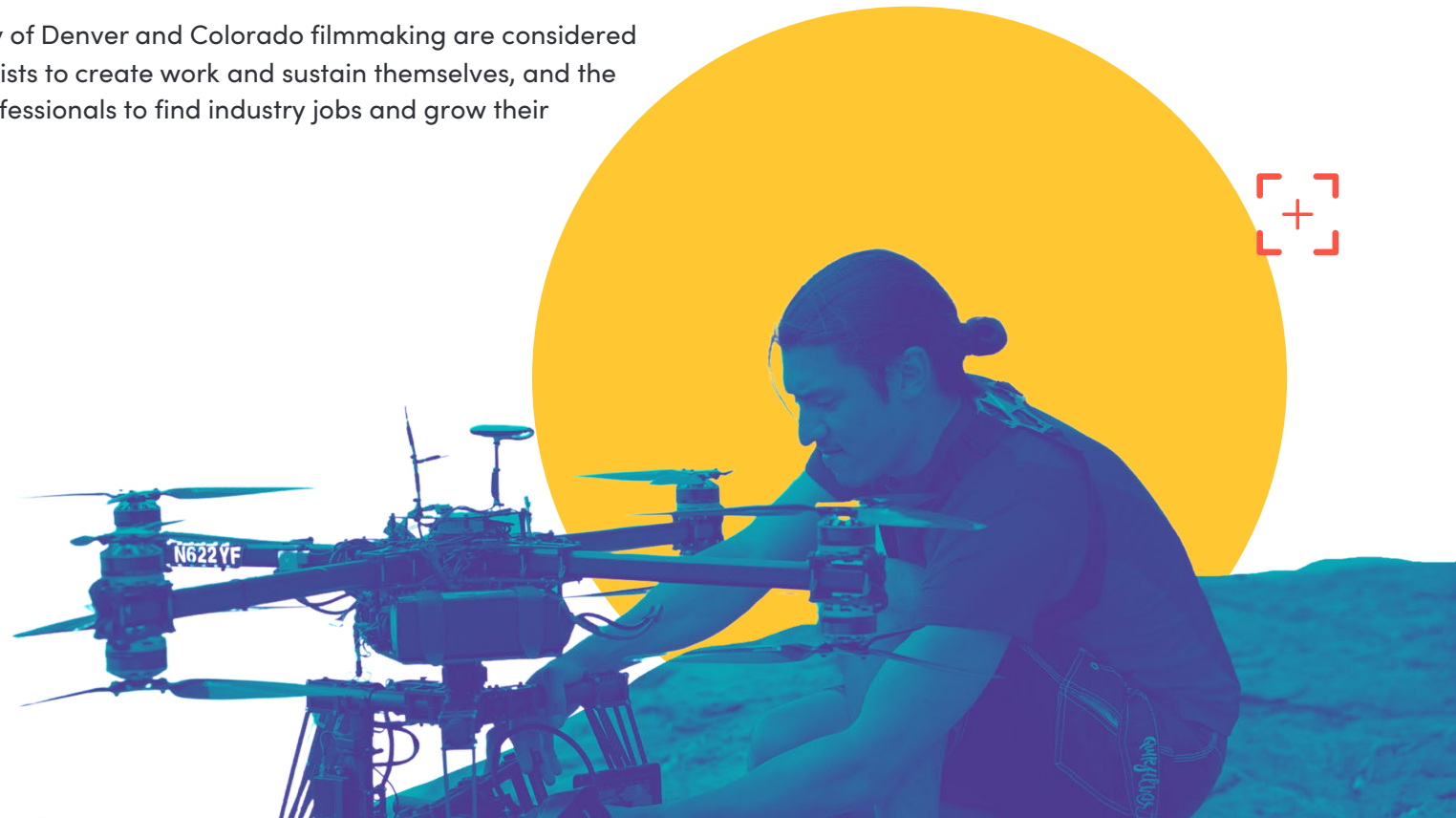
About the Study

This report is the culmination of a four-year study commissioned in 2019 by Denver Arts & Venues and Colorado Creative Industries. It is based on more than 150 interviews with individuals across Denver and Colorado's film, television, and creative media industry, as well as interviews with leaders of film communities around the country for comparative perspectives and insights.

This qualitative research was supplemented and informed by quantitative analysis of employment and revenue data from Colorado and neighboring states from 2011 to 2022.

Both the art and the industry of Denver and Colorado filmmaking are considered in the study: the ability of artists to create work and sustain themselves, and the ability of film and media professionals to find industry jobs and grow their businesses.

PHOTO
Director Jeff Orłowski and
Custom-Built Drone, ▶
by Catherine Yrisarri
© Chasing Coral,
courtesy Exposure Labs

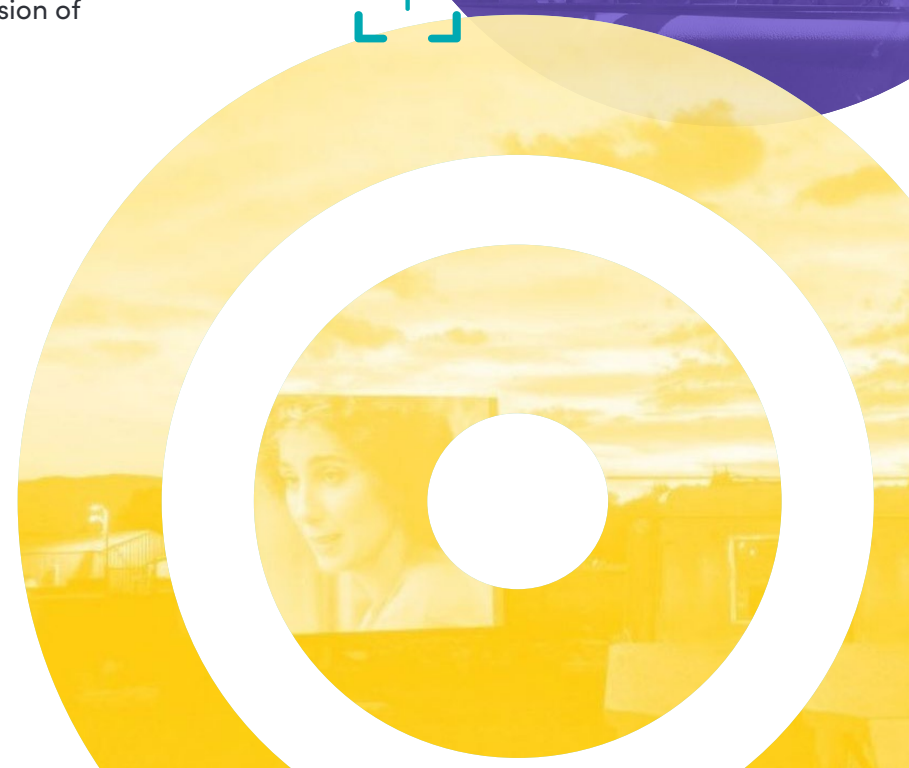


The goal of the study was to capture the current state of filmmaking in Denver and Colorado, understand what its greatest challenges are, and identify what could be done that would be most helpful and transformative for the artists and professionals who belong to this industry.

When the COVID-19 pandemic began in spring 2020, the study had been underway for more than a year. In response, the researchers conducted follow-up interviews in 2020 and 2021 with study participants to learn how the pandemic was affecting their livelihoods. The researchers also continued to track employment and revenue data from 2020 and 2021 in order to more fully understand the pandemic's impact and help inform the findings and recommendations of this report.

To clearly reflect the impact of the pandemic on Denver and Colorado's film industry, the employment and sales figures in this report are separated into two time periods: Pre-COVID-19 (2011-2019) and COVID-19 (2019-2021). Further discussion of the pandemic's impact is included among the study's "[Key Findings](#)."

PHOTOS
(Top) courtesy Sad
Girl Productions ▶
(Bottom) courtesy
The Lyric in Fort
Collins



Sectors

The world of film, television, and media is vast, and its boundaries often overlap and are subject to interpretation. In choosing which sectors to examine, the research team tried to be as comprehensive and inclusive as possible. The sectors included in the study were:



Television Production¹



Commercial Video Production



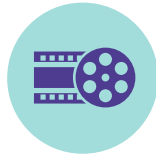
Ad Agencies
(for Commercial Video Production)



Documentary Filmmaking



Scripted Filmmaking
(Fiction/Narrative)



Experimental, Animated, and Short-Form Filmmaking



Exhibition
(Movie Theaters and Film Festivals)



City and State Agencies
(relevant to Film and Media)



Education in Film and Media
(High School and College)



Video Game Production

The study did not cover virtual and augmented reality (VR and AR). For the purposes of the study, outdoor recreation filmmaking (e.g. of skiing, snowboarding, and mountain biking) and live-event filmmaking (of concerts, sporting events, religious services) are classified as documentary filmmaking and commercial production, respectively. But, as both are relatively robust sectors in Colorado, the authors of the report recommend that future research consider approaching each as distinct sectors of their own in order to better understand their unique characteristics and needs.

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



3. The Landscape

PHOTO
Self-portrait by artist and
filmmaker Eileen Roscina ▶



A. Colorado Filmmaking is Both Art and Industry

The Art

Documentaries

The largest portion of Denver and Colorado’s creative filmmaking is in documentaries, which have a rich history in the state and remain an abundant cultural product. Documentaries by Coloradans are regularly screened at prestigious film festivals around the country, attract critical acclaim, and secure global distribution on streaming platforms. The study found significant opportunity in Colorado’s documentary filmmaking to highlight the state’s creative talent and raise the visibility of filmmaking in the state.

Narrative Filmmaking

Feature-length and episodic scripted filmmaking (often referred to as “narrative” or “fiction” filmmaking) is rarely filmed in the state, as this sector relies heavily on incentives, which are relatively scarce in Colorado. However, the appetite for scripted filmmaking is significant and growing. If systems are built to help filmmakers develop their projects and connect with investors in Colorado, then that can help the careers of Colorado filmmakers – even if they must shoot those films in other states as a result of incentives.

Short-Form Filmmaking

Colorado is also home to a considerable amount of short-form filmmaking, including scripted, animated, and experimental shorts. This work is often intended for nontraditional spaces

like art galleries and online video platforms. Many of the artists behind this work also create music videos and other content for Colorado’s plentiful musical artists. The study found exciting potential for more cross-disciplinary collaboration between Colorado’s filmmakers and its other artistic and cultural sectors. There’s also ample need for more exhibition space (both in-person and online) where audiences can find the works of Colorado filmmakers presented together.

Festivals

An essential piece of both the cultural and economic fabric of Colorado filmmaking is its theaters and film festivals. Colorado is home to a number of independently-owned theaters that bring films from around the world – as well as locally-made films – to Colorado audiences. Colorado's festivals range from being among the oldest in the country, to the most prestigious, to the newest and most inventive. Some of the most exciting work being done in Colorado film exhibition involve multidisciplinary and experiential events, sometimes bringing together artists from different disciplines to produce and present work together, offering audiences an experience that can’t be replicated by home viewing.



The Industry

Denver and Colorado’s film and media incentives relative to other states have historically been low.² As a result, very few large-scale scripted productions are filmed in the state. The absence of big budget filmmaking means that Colorado filmmakers turn to other sectors for both their art and their income.

Commercial Video Production

The largest segment of Coloradans who are employed full-time in the industry work in commercial video production. This sector produces video content for businesses in the form of advertisements for web and television, as well as videos for industrial, business-to-business, and training purposes.

Television Production Companies

Colorado is also home to several prestigious unscripted television production companies. While the nature of this content means that filming mostly takes place in other states, the companies are headquartered in Colorado, so most of the development, pre-production, editing, and post-production takes place in the state. Colorado’s television companies have more employees than the average company in any other sector, and they offer stable, well-paying careers.

Exhibition

Other notable employment sectors include film exhibition (movie theaters and, to a lesser extent, film festivals, which are numerous in Colorado, but also seasonal and dependent on volunteers), education (film schools), and live-event coverage (e.g. televised sports and religious services).

Video Game Studios

An exciting, more recent addition to the industry is video game development. Colorado is home to a small number of independent game development studios, creating innovative, critically praised, and globally popular games.

“

I should be looked at and recognized for exactly what I am, a small business owner. And as a small business, I am all in, every day. Everything is at stake when I start a new project. So, I don’t like being solely put in the category of “filmmaker;” that’s largely associated with the excesses of Hollywood.

– **Patrick Hackett**

Film Producer and Founder,
Neon Sheep

PHOTO by John Moore



² For background on film and media incentives and how Colorado’s incentive program has historically compared to those of other states, please see [Appendix C](#).

Colorado's Nationally Recognized and Celebrated Work

Colorado's filmmakers continue to create nationally recognized and celebrated work. Films by Coloradans are regularly screened at prestigious film festivals such as Sundance and SXSW, are distributed by streaming platforms such as Netflix and Hulu, and have earned critical acclaim, including Emmy awards and Oscar nominations.

Clients of commercial production companies in Colorado include brands such as Nike, Google, Ford, Budweiser, Gatorade, Volvo, EA Sports, and Lyft. Television studios in Colorado produce shows for major outlets like History Channel, Discovery, NatGeo, HGTV, and Food Network, and for streaming platforms such as Netflix and Amazon.



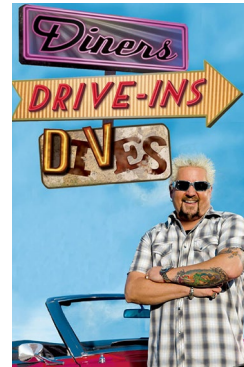
Chasing Ice



The Social Dilemma



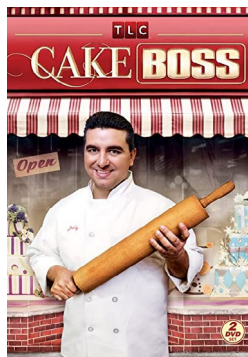
Life Is Strange



Diners, Drive-Ins and Dives



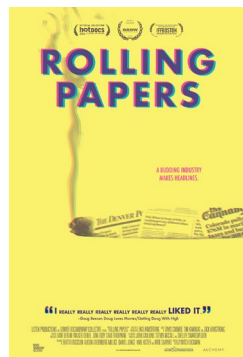
GATORADE



Cake Boss



Fixer Upper



Rolling Papers



Being Evel



B. Rapid Economic Growth Prior to COVID-19

Prior to the pandemic, the number of filmmaking artists and professionals in Colorado was significant and growing. **Between 2011 and 2019, the number of Coloradans employed in the industry grew 43%, a faster rate than the national film and media industry nationally and faster than overall employment growth across all industries in Colorado and nationwide during that time (Table 1).**³

Table 1. Comparative Employment Growth in Colorado and the United States: 2011 - 2019

Pre-COVID-19	2011 Jobs	2019 Jobs	2011 - 2019 Change	Percent Change
Colorado Film Industry Employment	11,094	15,893	4,799	43%
United States Film Industry Employment	702,124	909,834	207,711	30%
Colorado Total Employment	3,220,650	3,910,705	690,055	21%
United States Total Employment	177,737,118	202,565,867	24,828,749	14%

Source: CVSuite, United States Bureau of Labor Statistics, Lightcast

³ For insight on the methodology used to measure film industry employment and sales, please see [Appendix B](#)

In 2019, Colorado’s film industry supported 15,893 jobs, which was the highest number of film industry jobs among the “Four Corners” states (Colorado, Arizona, Utah, and New Mexico). Between 2011 and 2019, employment in Colorado’s film industry added 4,799 jobs, representing a 43% increase. **Although this growth is impressive, Colorado ranks third in the Four Corners region behind both Utah and Arizona** which experienced 54% and 49% increases in film industry employment respectively. By comparison, California’s film industry added 29,989 jobs between 2011 and 2019 for a 14% increase in employment, while New York added 17,242 jobs for a 19% increase. In contrast, Georgia’s film industry experienced substantial, incentives-driven growth between 2011 and 2019 adding 20,730 jobs which represents a 138% increase (Table 2).

Table 2. Film Industry Employment Growth by State: 2011 - 2019

Pre-COVID-19	2011 Jobs	2019 Jobs	2011 - 2019 Change	Percent Change
Georgia	15,026	35,756	20,730	138%
Utah	6,547	10,102	3,555	54%
Arizona	10,150	15,126	4,976	49%
Colorado	11,094	15,893	4,799	43%
New Mexico	5,328	6,838	1,510	28%
New York	93,045	110,286	17,242	19%
California	217,472	247,461	29,989	14%

Source: CVSSuite, United States Bureau of Labor Statistics

Although filmmaking takes place across the entire state of Colorado, the Denver metropolitan region is home to a substantial portion of activity within the industry and employment figures reflect that. Between 2011 and 2019, just over **2,800** jobs were added in the film industry resulting in a total of **8,762** jobs in 2019, a **48%** growth in industry employment during the time period. (Table 3). Denver's **8,762** film industry jobs represent **55%** of Colorado's total film industry employment.

Table 3. Film Industry Employment Growth in the Denver Metropolitan Region: 2011 - 2019

Pre-COVID-19	2011 Jobs	2019 Jobs	2011 - 2019 Change	Percent Change
Denver Film Industry Employment	5,914	8,762	2,848	48%

Source: CVSSuite, United States Bureau of Labor Statistics

The COVID-19 pandemic severely impacted film industry employment in all regions of the country and Colorado was no exception. Between 2019 and 2021, employment losses erased most of the growth that occurred between 2011 and 2019 in Colorado and nationwide. Like many sectors of the creative economy, employment losses in the film industry far outstripped employment losses across all industries. (Table 4).

Table 4. Comparative Employment Growth in Colorado and the United States: 2019 - 2021

COVID-19	2019 Jobs	2021 Jobs	2019 - 2021 Change	Percent Change
Colorado Film Industry Employment	15,893	11,801	-4,092	-25.7%
United States Film Industry Employment	909,834	737,045	-172,789	-19.0%
Colorado Total Employment	3,910,705	3,869,804	-40,901	-1.0%
United States Total Employment	202,565,867	196,996,839	-5,569,028	-2.7%

Source: CVSSuite, United States Bureau of Labor Statistics, Lightcast

Film industry employment was similarly affected in the Denver metropolitan region. Denver lost 2,200 jobs, representing a 25.1% drop in employment (Table 5). Like film industry employment at the state and national levels, the effects of the pandemic erased most of the film industry’s employment gains made between 2011 and 2019.

Table 5. Film Industry Employment Growth in the Denver Metropolitan Region: 2019 - 2021

COVID-19	2019 Jobs	2021 Jobs	2019-2021 Change	Percent Change
Denver Film Industry Employment	8,762	6,562	-2,200	-25.1%

Source: CVSSuite, United States Bureau of Labor Statistics

The staggering employment losses felt by the film industry at the local, state, and national level are largely concentrated in two specific areas of the industry. Movie theaters bore the brunt of the industry’s employment losses and it is still too soon to tell if employment at theaters will resume to pre-pandemic levels. The other area that experienced a rapid and substantial drop in employment includes those who freelance on film and television projects as directors, actors, makeup artists, camera operators, lighting technicians, and more. Given the strength of the film industry before the pandemic, it is reasonable to expect that much of this employment will return as the industry restarts and regains momentum.

Employment isn’t the sole measurement of how many filmmakers are living and working in the state, as many filmmakers earn a living from other industries, but the data between 2011 and 2019 illustrates that the number of people in Colorado’s film industry was significant and growing before the pandemic. **This growth rate was more than twice that of traditional film-industry powerhouse states California and New York.**

Examining the economic activity generated by Colorado’s film industry offers further insight into the comparative dynamics of the film industry within the state and beyond. In 2019, **film industry activity in Colorado resulted in just over \$1 billion in sales of goods and services** which includes the cost of everything that goes into producing content, as well as the value of that content when completed.

While this places Colorado ahead of Arizona, New Mexico, and Utah, **the state places last amongst the Four Corners states when considering the growth of sales of goods and services** between 2011 and 2019. California, New York, and Georgia eclipse Colorado and the other states in the Four Corners region, but as with employment gains, only Georgia out of the three registers a higher percentage of growth in economic activity between 2011 and 2019 (Table 6).

Table 6. Film Industry Sales of Goods and Services by State: 2011 - 2019

Pre-COVID-19	2011 Sales	2019 Sales	Percent Change
California	\$54,558,380,069	\$79,667,720,768	46%
New York	\$19,392,391,605	\$29,697,661,592	53%
Georgia	\$1,254,122,138	\$5,668,897,726	352%
Colorado	\$649,784,854	\$1,047,864,618	61%
Arizona	\$459,685,951	\$973,019,455	112%
New Mexico	\$431,210,048	\$961,051,331	123%
Utah	\$373,966,785	\$844,728,203	126%

Source: CVSuite, United States Bureau of Labor Statistics

These numbers suggest California and New York are losing some of their competitive advantage to states which are strategically developing their industry clusters, namely Georgia and New Mexico. **In the Four Corners region, film production in Arizona, New Mexico, and Utah is rapidly increasing, which may threaten Colorado's position as the industry leader within the region in terms of employment and economic activity.** Netflix's purchase of Albuquerque Studios in 2018 and their recent announcement that they plan to spend an additional \$1 billion producing content there (on top of the \$200 million already spent), speaks to the changing landscape of film production both nationally and closer to Colorado.⁴

⁴ Fleming, Jr. M. (2020, November 23). "Netflix Commits \$1 Billion More In New Mexico Production Funding As It Expands ABQ Studios." Deadline. [Link to article.](#)

When considering the Denver metropolitan region, it is again apparent that the region is the leading hub in the state for film industry activity. **Between 2011 and 2019, the region experienced a 62% growth in film industry sales of goods and services with the region, registering \$727.4 million in sales for 2019, which represents 69% of all sales for the industry in the state (Table 7).**

Table 7. Film Industry Sales of Goods and Services in the Denver Metropolitan Region: 2011 - 2019

Pre-COVID-19	2011 Sales	2019 Sales	Percent Change
Denver Film Industry Sales	\$448,347,218	\$727,477,557	62%

Source: CVSuite, United States Bureau of Labor Statistics

As with employment, the COVID-19 pandemic also affected sales of goods and services generated by Colorado's film industry. The losses in sales of goods and services were proportionally less than those in employment, which suggests that many production and distribution firms were able to find ways to continue leveraging existing and new content during the pandemic, albeit through channels beyond theatrical releases.

Leading up to the pandemic, sales of goods and services generated by the film industry in both Colorado and the United States were strong (Table 8).

Table 8. Film Industry Sales of Goods and Services in Colorado and the United States: 2011 - 2019

Pre-COVID-19	2011 Sales	2019 Sales	2011-2019 Change	Percent Change
Colorado Film Industry Sales	\$649,784,854	\$1,047,864,618	\$398,079,765	61.3%
United States Film Industry Sales	\$100,528,372,536	\$157,324,368,207	\$56,795,995,671	56.5%

Source: CVSuite, United States Bureau of Labor Statistics

Between 2019 and 2021, sales of goods and services sustained losses in Colorado and the United States, but these were less severe than the employment losses in these regions (Table 9). Relative losses in sales of goods and services specific to film were higher in Colorado than the country as a whole.

Table 9. Film Industry Sales of Goods and Services in Colorado and the United States: 2019 - 2021

COVID-19	2019 Sales	2021 Sales	2019-2021 Change	Percent Change
Colorado Film Industry Sales	\$1,047,864,618	\$959,954,212	-\$87,910,406	-8.4%
United States Film Industry Sales	\$157,324,368,207	\$155,203,680,549	-\$2,120,687,658	-1.3%

Source: CVSSuite, United States Bureau of Labor Statistics, Lightcast

The pattern of losses in sales of goods and services is mirrored by the film industry in the Denver metropolitan region. The pandemic is responsible for a 10.1% decline in sales of goods and services within the region between 2019 and 2021 (Table 10). This loss, while challenging, is still less stark than the precipitous loss in film industry employment in the region during the same time period. More insight on how the pandemic affected the film industry in Colorado is presented later in this study.

Table 10. Film Industry Sales of Goods and Services in the Denver Metropolitan Region: 2019 - 2021

COVID-19	2019 Sales	2021 Sales	2019-2021 Change	Percent Change
Denver Film Industry Sales	\$727,477,557	\$653,780,659	-\$73,696,897	-10.1%

Source: CVSSuite, United States Bureau of Labor Statistics, Lightcast

C. The Challenges

Despite the robust growth of Denver and Colorado’s film industry prior to the COVID-19 pandemic, there were a number of underlying challenges.

Those interviewed for this study made clear that they feel constrained by a scarcity of creative and professional opportunities, which aren’t growing fast enough to satisfy the demand for them.

Even prior to the COVID-19 pandemic, most interviewees reported difficulty finding jobs, growing their businesses and careers, and meeting and collaborating with others in the industry.

Nearly all interviewees who had moved or returned to Denver and Colorado over the last decade (many of whom were originally from Colorado) said they were drawn by the appeal of living in the state, rather than the presence of available jobs. Graduates of Colorado’s film schools who chose to stay in Colorado said the same: they were staying in Colorado despite the scarcity of employment opportunities because they love Colorado and believe in its potential.

PHOTO by Kathleen Maloney, courtesy Sarah Megyesy



“

I want to be able to stay in Denver and Colorado. But I have been considering leaving because of opportunity and affordability. Right now Denver is in between, where it's not as affordable as other places, and there aren't yet enough opportunities to make staying here possible.

– Sarah Megyesy

Independent filmmaker and Creative Director, Videos That Matter

D. Coping with Lack of Opportunity

With few readily available opportunities in large-scale production, **a majority of interviewees simply created their own opportunities.** These included freelancing or starting their own companies after not being able to find jobs, choosing film projects that could be completed with very small crews or by themselves, and becoming multidisciplinary instead of developing a single specialty.

These artists and professionals also forged their opportunities in sectors that were less reliant on large-scale production. Although mention of the “film industry” often conjures images of Hollywood studios and big-budget movies, the study found that most of Colorado’s filmmaking art is being made in documentary and short-form work, and **most of its industry exists in non-traditional sectors such as commercial video production, unscripted television production** (reality TV), **live events** (e.g. sporting events, concerts, and religious services), **and video game development.**

That most of Denver and Colorado’s filmmaking artists and professionals create their own opportunities, and do so in non-traditional sectors, may help explain many of the study’s key findings.

PHOTO by Guy Viau

“

When you’re in Colorado you have to be a Swiss Army Knife – learn how to do everything and be willing to take any position on a set when the job is available. By contrast, in LA, I have to be extremely precise in what I tell people I do.

– Kent Youngblood

Producer and Creative Director, Movie Mogul Productions



4. Key Findings

PHOTO
courtesy Diego
Rodriguez



Key Findings

In the broadest terms, the study found that the biggest obstacles to growing Colorado filmmaking are affordability for artists and affordability for companies.

Lack of affordability for artists is primarily the result of a housing shortage in Colorado Front Range cities.

Lack of affordability for companies arises because companies in film, television, and video game production pay more to work in Colorado than they do in other states (a result of Colorado's lack of competitive incentives relative to other states, combined with a relatively high cost of living).

A state can keep and attract artists and creative professionals if the cost of living is sufficiently low or if it grows creative-sector jobs quickly enough to meet demand. **But doing neither puts dual pressures on creatives, growing their costs while constraining both incomes and opportunities.**

The issues of housing availability and film incentives are solvable, but require long-term, strategic, and collective work. In the meantime, the purpose of this report is to provide a shared understanding of the challenges and opportunities that face Colorado filmmaking and to offer suggested steps toward progress that can be presently taken. What follows is a list of key findings that will inform those steps.

“

There's so much tension around artists and whether they can afford to live here. I think a lot of the development in Denver has been partially a result of the success of our large arts community. I think the arts are a big part of why people want to live here. I'd like people to understand that connection between the arts and our success and growth.

– **Lares Feliciano**
Artist and Filmmaker

PHOTO by Jeremiah Corder



A. Silos

The most common description of Colorado filmmaking by interviewees was “extremely siloed.”

Artists and professionals alike expressed widespread desire to be more connected to their peers.

A majority of those interviewed said they would be interested in mentoring others, but few were aware of opportunities through which to do so.

A number of interviewees who run commercial production companies said they would like better relationships with their counterparts at peer companies. These interviewees cited the benefits of networking and the ability to better organize and advocate for their sector.

PHOTO courtesy Rocky Mountain PBS



How do we get that attitude, that Denver is as creative as LA or NY or Atlanta? Somehow you have to instill the idea that we are in this together and we have each other's back. That western frontier attitude of 'I'm going to do this all on my own' – that's not how you make a movie.

– Lee Gash-Maxey

Film and Television Producer and
Executive Director, Colorado Black
Chamber of Commerce

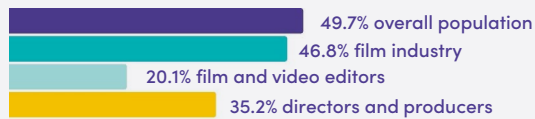
B. Representation ⁵

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

Representation by Gender Statewide

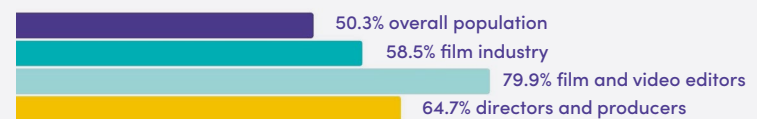
Women

Women make up 49.7% of the state’s population and 46.8% of the state’s film industry, but represent only 20.1% of its film and video editors, and 35.2% of its directors and producers.



Men

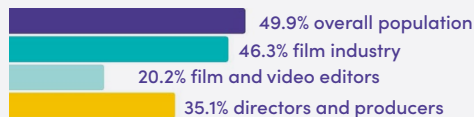
Men make up 50.3% of the state’s population and 58.5% of the state’s film industry, 79.9% of its film and video editors, and 64.7% of its directors and producers.



Representation by Gender in Denver

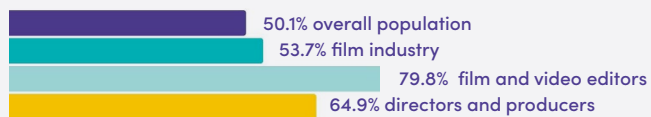
Women

Women make up 49.9% of the city’s population and 46.3% of the city’s film industry, but represent only 20.2% of its film and video editors, and 35.1% of its directors and producers.



Men

Men make up 50.1% of the city’s population and 53.7% of the city’s film industry, 79.8% of its film and video editors, and 64.9% of its directors and producers.

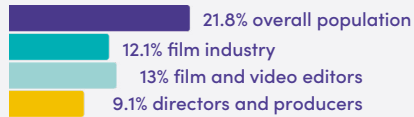


⁵ For more information about the demographic makeup of Denver and Colorado’s film industry, please see [Appendix A](#).

Representation by Race and Ethnicity Statewide

Hispanic or Latino

Coloradans who identify as Hispanic or Latino make up 21.8% of the state's overall population, but only 12.1% of the state's film industry, 13% of its film and video editors, and 9.1% of its directors and producers.



Asian or Asian American

Coloradans who identify as Asian or Asian American make up 3.2% of the state's overall population, 2.3% of its film industry, 3% of film and video editors, and 2.9% of directors and producers.



Black or African American

Coloradans who identify as Black or African American make up 4% of the state's population, 2.8% of its film industry, 3.9% of its film and video editors, and 3.7% of its directors and producers.



Native American or Alaska Native

Coloradans who identify as Native American or Alaska Native make up 0.6% of the state's overall population, 0.1% of its film industry, 0.1% of its film and video editors, and 0.1% of its directors and producers.



White

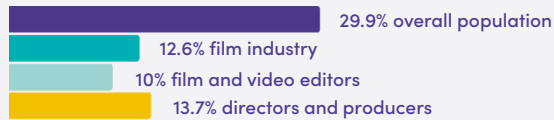
In contrast to other races and ethnicities, Coloradans who identify as White make up 67.5% of the state's overall population, 78.1% of its film industry, 73.7% of its film and video editors, and 80.8% of its directors and producers.



Representation by Race & Ethnicity in Denver

Hispanic or Latino

In Denver, Hispanics or Latino residents make up **29.9%** of the population, but only **12.6%** of the city's film industry, **10%** of its producers and directors, and **13.7%** of its film and video editors.



Asian or Asian American

In Denver, Asian or Asian American residents make up **3.6%** of the city's overall population, **2.5%** of its film industry, **3.1%** of its directors and producers, and **3.2%** of its film and video editors.



Black or African American

In Denver, Black or African American residents make up **8.9%** of the city's overall population, but only **3%** of its film industry, **4%** of its directors and producers, and **4%** of its film and video editors.



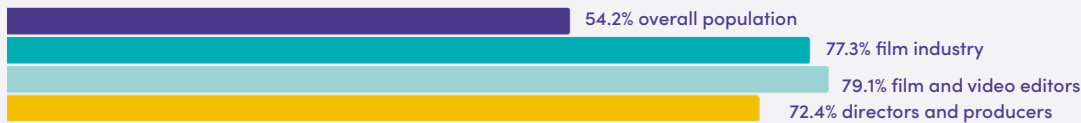
Native American or Alaska Native

In Denver, Native American or Alaska Native residents make up **0.5%** of the city's overall population, **0.1%** of its film industry, **0.1%** of its directors and producers, and **0.1%** of its film and video editors.



White

In Denver, White residents make up only **54.2%** of the city's overall population, but **77.3%** of its film industry, **79.1%** of its directors and producers, and **72.4%** of its film and video editors.



Racial Disparity and Lack of Representation

Interviewees from racially and ethnically underrepresented backgrounds were less likely than their White counterparts (with similar experience levels and skill sets) to belong to, have relationships with, or work with Colorado's larger and more established membership organizations, production companies, or state and local agencies.

The population of students enrolled in Colorado film programs appears to be far more racially and ethnically diverse than the state's film industry and far more representative of the state's overall population. But most students, many of whom graduate with student loans, feel they need to move to states with readily available jobs.

Interviewees also reported persistent experiences of discrimination, harassment, and abuse while working in the industry. This is unfortunately not unique to Colorado but nonetheless appears to have an exacerbating effect on equitable representation in the state.

The lack of representation and persistent threats to worker rights and safety in Colorado's film industry require direct and sustained attention and deliberate, strategic action across all sectors statewide.

“

My family is the last Latino family on our block on the Northside. It all used to be Latino. Same in RiNo. And they've all been pushed out. So, we want to celebrate and put a spotlight on the more diverse artists still here in Denver.

– **J.D. Gonzales**
Director of Photography,
Founder of Livalittle



PHOTO by Cliff Shapiro



C. Talent Retention

Although the total number of Coloradans in the industry is growing, many are choosing to leave for states with more opportunities.

Talent loss appears to be most common among recent college graduates, or those seeking entry level positions, and those with advanced careers in a specialized field (e.g. cinematographers, actors, editors).

Coloradans who stay and those who move to Colorado (often having built their career in another state) were more likely to be multi-disciplinary (e.g. director-producers) or to have brought an existing business to Colorado (with clients in other states).



PHOTO courtesy Jeff Litchford



As the incentives go away, we lose all the work that is keeping the actors here. That is already happening. I had this conversation last week with an actor we usually work with who moved to Georgia. And then when the jobs leave, people are less likely to move here. Students are less likely to choose schools here. It's a cycle.

– Jeff Litchford

COO, Deck Nine Games



D. Physical Infrastructure

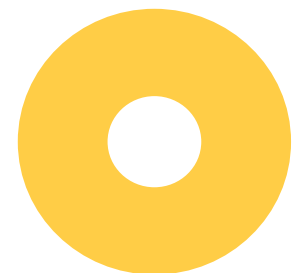
One of the most frequently cited need across all sectors of interviewees was physical infrastructure.

Artists and professionals alike desired affordable, accessible, and conveniently located production studio space for film shoots. Some cited the need for easier access to equipment and more competitive prices for equipment rentals as well.

Professionals at the top tier of production in Colorado expressed a need for a state-of-the-art soundstage and multi-camera studio.

Many interviewees said that having a central hub for meeting other filmmakers would be transformative. Ideally, this space would be flexible and could include office, co-working, and meeting areas, and also be used for social and networking events, as well as exhibiting films and screening works in progress.

Although Colorado has lost much of its physical infrastructure since the birth of incentives in the 1990s, the study's comparative research found instances in other states of foundations and government agencies helping secure and sublease such spaces.



E. Online Infrastructure

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

Platforms cited most often as a need were ones that would connect:

- Producers and filmmakers to local resources and qualified freelance crew
- Prospective candidates to jobs, positions, and opportunities
- Potential clients and agencies to established production companies.

The study found that multiple attempts had been made at creating online databases for filmmaking professionals and production companies, but there wasn't yet a site that offered a comprehensive list that was easily filterable, practically sortable, and frequently updated, and also included the past clients or past work of those listed.

This seemed to contribute to interviewees' perceptions that the industry was shrinking despite the opposite being true, and it appeared to inhibit the ability of artists and professionals alike to find opportunities and one another.

PHOTOS
(Top) by Lindsey Ragsdale,
courtesy Diego Rodriguez
(Bottom) from the set of
Urban Conversion,
courtesy Patrick Hackett.



F. Support Programs

Programs that connect filmmakers to financial or creative support for their projects were one of the most common and successful ways for states that do not offer competitive film and media incentives to foster and sustain independent filmmaking.

Programs for financial support include: **project markets**, **pitch forums**, and **investor programs** that recruit and educate potential film investors and connect them directly with projects and filmmaking teams.

Programs for creative support include: **fellowships**, **artist-in-residency programs**, and **masterclass programs**.

The study found that although Colorado currently has very little in the way of these support programs, there was significant appetite for them – not only among filmmakers, but also among potential investors and institutional stakeholders such as cultural organizations that might have the capacity to help host such programming.

“

I have family in Atlanta who tell me to move there and they can immediately hook me up with support and jobs. But I love Denver. And I want to do my work here. I want to tell stories here.

– **Brien Hollowell**
Filmmaker and
Photographer

PHOTO self-portrait by Brien Hollowell



G. Incentives ⁶

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

Nearly all interviewees agreed that more generous and sustained incentives would be extremely helpful to grow the industry in the state.

It has historically been difficult to pass such incentives in Colorado, and the study found that the uncertainty of whether higher incentives would ever be passed (and held steady), combined with the high stakes of what an impact those incentives would bring, have sometimes contributed to attitudes that were almost fatalistic: that nothing meaningful will change unless more generous incentives are passed, so nothing else is worth doing in the meantime.

Although this all-or-nothing stance was a minority view among interviewees, those who expressed it were less likely than their peers to be interested in or involved in community building and long-term strategic planning. However, the majority of artists and professionals interviewed perceived this view as false dichotomy. The majority expressed a desire to

not only pass incentives, but also build community and embark on a long-term strategy that wasn't dependent on legislative outcomes in the interim.

These interviewees said they would love it if Colorado one day was able to attract large budget production, but even if that day never came, they still wanted to be better connected to one another, collaborate more often, and feel a greater sense of shared belonging and purpose.

A commonly expressed view among this majority was that these other forms of organization and planning were not contrary to the interests of incentives – rather, they were complementary. A frequently made point was that a well-organized industry can advocate for itself in a way that a poorly organized one cannot.

The most commonly expressed desire among interviewees regarding incentives was to move from an “either-or” conversation to a “yes-and” one.

⁶ For background on film and media incentives and how Colorado's incentive program has historically compared to those of other states, please see [Appendix C](#).



Streaming has created a tectonic shift in the market. There is going to be a lot of expensive content, both scripted and unscripted. There are going to be more opportunities, more slots to fill, more money to make. And it's possible to shoot all around the world, around the country. So, there is a lot of opportunity for Colorado.

– Jim Berger

CEO, Aspen Mountain Media, Former
Chairman and Co-Founder, High
Noon Entertainment

PHOTO COURTESY Jim Berger



H. The COVID-19 Pandemic

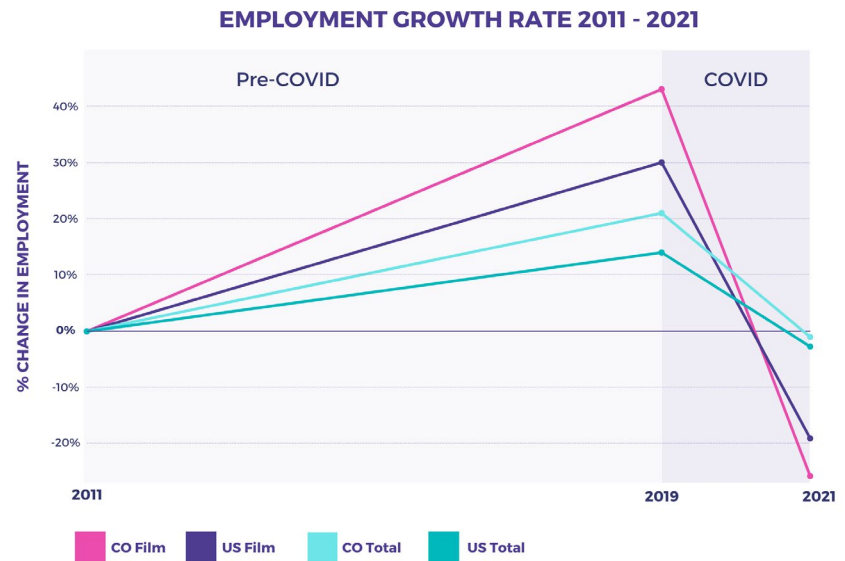
The COVID-19 pandemic exacerbated the challenges faced by Colorado’s filmmaking artists and professionals and made the need to address them more urgent.

Film and media companies in Denver and Colorado have struggled for years to grow jobs, leading many artists and professionals to freelance or create their own companies. This struggle was belied by growing employment and sales figures for the industry, but those top-line numbers have masked the underlying challenges (described in Key Findings A-G).

Freelancers were among the hardest hit by the pandemic in Colorado’s film industry, with job losses rivaled only by those who worked in exhibition (e.g. movie theaters and film festivals). That Denver and Colorado’s film industry lost a greater percentage of jobs than the film industry nationally – after a decade of much faster growth – suggests that Colorado filmmaking’s reliance on freelancers made it more susceptible to economic disruption.

In this way, the pandemic revealed the challenges listed in this study’s Key Findings to be not merely unfortunate constraints, but genuine liabilities to Colorado’s filmmaking economy.

More detail about the economic impact of the COVID-19 pandemic on Denver and Colorado’s film industry is available on page [17](#).



I. Emerging Trends from COVID-19

The pandemic accelerated existing trends in the industry in Denver and Colorado, as well as nationwide.

Labor Turnover

Many artists and professionals in Denver and Colorado who had been contemplating a move prior to 2020 were prompted by the pandemic to relocate – some to states with more readily available industry jobs, some to attend graduate school, and others to pursue a new industry entirely. Simultaneously, the researchers found a striking increase in the number of artists and professionals moving to Colorado, many of whom had already built established careers in film and media in other states, and nearly all of whom were attracted to the quality of life in Colorado, but who had not yet found ready opportunities here.

Remote Work

The expansion of remote work helped make it possible for production companies to work with corporate clients they wouldn't have prior to the pandemic, and for freelance professionals to find employers they wouldn't have found previously. Interviewees at several commercial production companies said the pandemic inspired them to find agencies and clients in other states – opportunities they say they may not have sought if it hadn't been for the pandemic. At the same time, many of the country's largest studios and production companies developed remote workflows for post-production (e.g. editing, sound, color, and graphics), allowing their post-production professionals to work from anywhere in the

country. This shift meant that many highly skilled, high-income professionals working on large-budget films no longer must live in Los Angeles or New York to continue building their careers.

Home Viewing

The COVID-19 pandemic accelerated the trend for audiences to view more movies at home instead of in theaters. When state and local COVID-19 guidelines effectively suspended all indoor theatrical screenings in 2020, many Colorado film festivals and several theaters began offering at-home (“virtual”) screening experiences, which helped offset some revenue losses. Colorado exhibitors also found success with outdoor screenings (e.g. drive-in movies or outdoor seated experiences). However, theatrical box office sales had been slowing for years prior to the pandemic, and ultimately COVID-19 may have simply brought the exhibition sector to its current inflection point more quickly than had been anticipated.

Video Games

The video game industry experienced remarkable growth during the pandemic. Although production was initially slowed in 2020 as developers switched to working from home, consumer demand for video games increased sharply. Between 2019 and 2021, global video game sales increased 26%, reaching \$191 billion. The market has grown consistently since 2015, and after contracting slightly in 2022 (-1.2% to \$188 billion), sales growth is expected to return in 2023.⁷

⁷Ampere Analysis (2022, July 5). “Global games market forecast to decline in 2022.” Market analysis. [Link to article.](#)

5. Recommendations



PHOTO
by James Balog from
Chasing Ice, courtesy
Exposure Labs



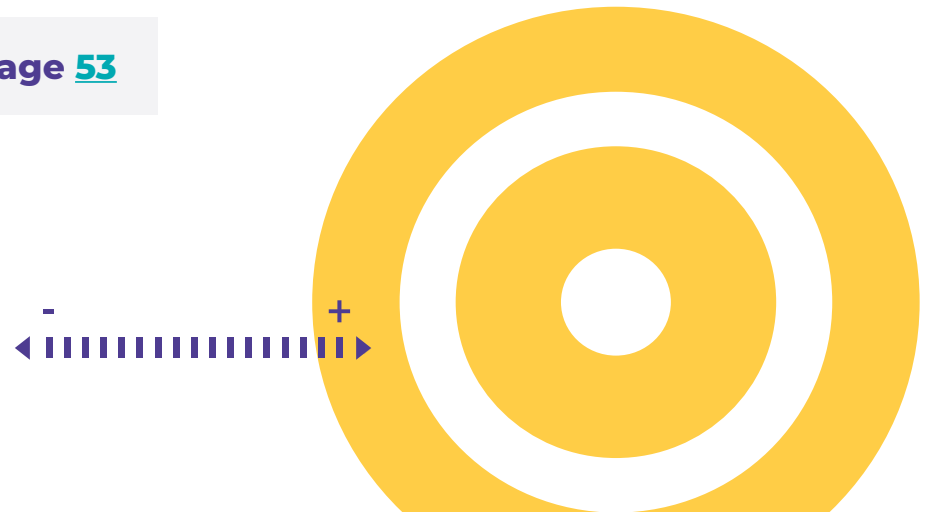
Recommendations

In order to fully realize the incredible creative and economic potential of Denver and Colorado’s film, television, and media industry, individuals and organizations need to come together – both within sectors and across them – to establish a shared vision with specified goals and a strategic plan for achieving them.

Possible objectives for a steering committee, informed by the study and recommended by the authors of this report, include:

- A** Launch a collective strategy
- B** Prioritize equitable representation
- C** Leverage strength in existing sectors
- D** Secure shared physical infrastructure
- E** Create funding opportunities and creative support programs
- F** Retain Denver and Colorado’s talent
- G** Increase film’s visibility and cultural footprint in Denver and Colorado
- H** Take a “yes-and” approach to incentives

Find sector-specific recommendations on page [53](#)



RECOMMENDATION A

Launch a Collective Strategy

Unify efforts

Use an overarching strategy to support individual initiatives and programs that would otherwise have to succeed on their own.

Foster partnerships

Use the strategy to identify and foster opportunities for collaboration among both public and private entities to achieve shared objectives.

Provide transparency and accountability

Build a steering committee that reflects the diversity of the state and the statewide industry, is answerable and accessible to members of the industry, and that is accountable for collective progress.

Generate visibility

Use the strategy to promote the state's film and media industry and raise public awareness of the industry and its benefits to Colorado.

PHOTO
The Arts Academy at Pueblo
County High School, set and
prop design team for Angel
Street, courtesy Gregory Howell



RECOMMENDATION B

Prioritize Equitable Representation

Capture industry data

Establish standardized practices for capturing and evaluating demographic data across sectors, so progress can be measured.

Launch leadership initiatives

Launch initiatives to recruit and retain leaders from underrepresented backgrounds to membership organizations, steering committees, and other stewarding entities.

Launch hiring initiatives

Launch initiatives to empower companies to formalize and expand their hiring practices, making it easier for them to find prospective employees beyond existing interpersonal networks.

Create filmmaker support programs

Create programs to support filmmakers from historically marginalized backgrounds. Support can be financial (grants), creative (mentorships and fellowships), and/or professional development (classes).

PHOTO by Shelly Perry



“

I like the idea of empowering people and getting their stories to tell. Every person is a potential filmmaker because everyone has a story to tell.

– Stewart Tucker Lundy

Actor, Producer, and Editor

RECOMMENDATION C

Leverage Strength in Existing Sectors

Build a commercial sector strategy

Build a coordinated strategy, supported by local and state offices, and focused on commercial video production – Colorado’s largest and fastest growing sector. Identify the opportunities larger companies need to grow their workforce, and the opportunities smaller ones need to achieve financial sustainability.

Launch a “Made in CO” initiative

Launch a sustained, strategic, and cross-sector “buy local” campaign that promotes Colorado’s creative media artists and professionals and raises the profile of the state as a home of premier media-making.

Create a recognizable image or logo, developed and designed with input from industry members, that serves as an identifying “stamp” for work that is made in Colorado.

The intention of this initiative should be to eventually expand the number of sectors involved in the campaign, potentially including potentially those beyond filmmaking (e.g, tech).

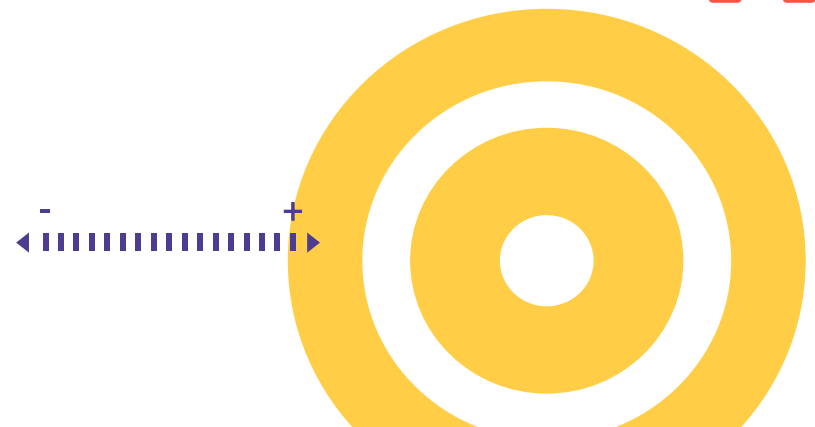
Create a rebate program could also be created that rewards local spending if certain thresholds are established and met.

Create a single online company and talent finder

Explore creating a website – or updating an existing one – that provides consolidated listings of production companies in Colorado that is sortable, filterable, and consistently updated, so that people and businesses can quickly find production companies that are a good fit for their project needs and budget level.

Create classes for business-development training

Provide professional training resources that are specific to the film industry, particularly commercial video production, that offer experienced advice on how to grow one’s business.



RECOMMENDATION D

Secure Shared Physical Infrastructure

Secure shared physical infrastructure through public-private partnerships.

Work with local or state agencies and/or private foundations to secure and/or help subsidize physical infrastructure that can be rented out to serve one or more of the needs most often cited by interviewees:

- Sound stages
- Multi-camera studios
- Flexible workspaces for media artists and professionals
- Screening rooms (for feedback screenings, community screenings, etc.)
- Flexible event spaces (for networking events, industry markets, masterclasses, and group workshops, etc.)

Explore the repurposing and/or retrofitting of existing buildings.

Explore flexible/mixed-use spaces that filmmaking artists and professionals can use on a shared basis (rather than a few bearing the costs themselves and the rest being unable to afford or access that space).



PHOTO
by Devon Wycoff from the set of
The Boardinghouse Reach,
courtesy Geoff Marslett



RECOMMENDATION E

Create Funding Opportunities and Creative Support Programs

Create grant programs

Launch programs that provide grant funding to filmmakers to help them develop, produce, and complete their film projects.

Create investor programs

Launch programs that recruit and educate investors, invite filmmakers to submit projects, and then present projects to investors for potential funding.

Create project markets

Host events through which filmmakers can meet investors, foundations, and other financiers one-on-one and pitch their projects to them.

Create pitch panels

Host events through which selected filmmakers present their projects in front of an audience that includes investors, foundations, and other financiers (often including corporate sponsors) as well as interested members of the public.

Create programs to support underrepresented voices

Create or expand existing programs dedicated to supporting filmmakers from historically marginalized backgrounds, including women, LGBTQ individuals, and racially and ethnically marginalized people. While all support programs should sustain recipients representative of the populations that they serve, programs that specifically champion the work and support the careers of filmmakers from historically marginalized backgrounds are needed to help correct prevailing, historically rooted inequities.

Create artist-development programs

Establish fellowships, mentorships, masterclasses, and artist-in-residency programs that provide training and skill-building for filmmakers.

RECOMMENDATION F

Retain Denver and Colorado's Talent

Create an internship placement program

Launch a program to handle internship applications and placements that would provide early-career professionals with a single place to apply, while also removing a tremendous amount of administrative burden that is currently being done redundantly by companies across the state.

Expand film-business curriculum

Expand classes and services that give students exposure to business development, client negotiations, client management, and financial management practices. For programs that prepare students for the industry, especially those with students interested in staying in Colorado, building students' business acumen is a key opportunity.

Explore artist-centric curriculum

Explore education tailored to the students' unique interests, skill sets, and disciplines. (For programs that prioritize creative development, the study found that calibrating courses to fit their students' passions, rather than the reverse, often produced more innovation and higher student satisfaction).

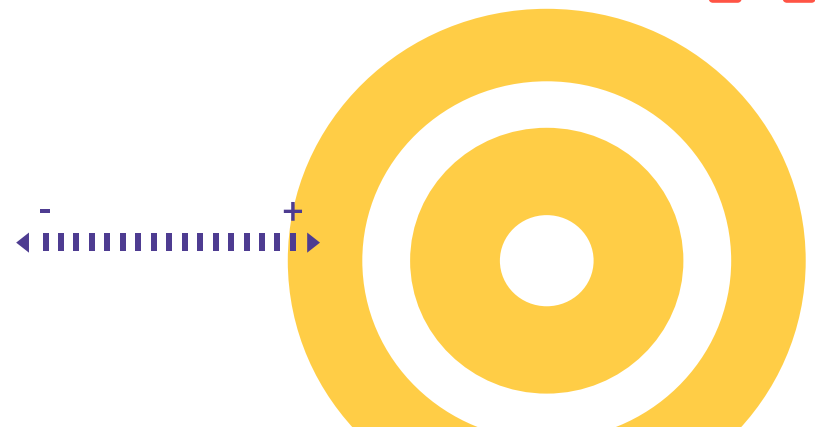
Expand and strengthen alumni tracking

Build data tracking for information about where students go after they graduate (e.g. where they go to find work, what kind of work they find, etc.). Schools, students, and the statewide industry would benefit significantly from access to this data.

Establish worker-rights and worker-safety systems

Create reporting mechanisms, accountability measures, and support resources for those who have experienced harassment, discrimination, or abuse while working in the industry.

Provide training resources for young and emerging filmmakers, including those in film schools, as well as those veteran to the industry, that educate them on their rights and responsibilities, as well as how to run a safe and accountable film shoot or workplace.



RECOMMENDATION G

Increase Film's Visibility and Cultural Footprint in Denver and Colorado

Create cross-disciplinary collaboration programs

Launch programs that connect Colorado filmmakers to other artistic and cultural sectors (e.g. music, street art, dance) to foster cross-sector collaborations that help artists in both sectors make new work and build community.

Host local exhibition showcases

Expand or combine existing Colorado film showcases to give filmmakers the opportunity to see more of each other's work, and offer the general public more exposure to the work of fellow Coloradans.

Explore creating a website to exhibit Colorado filmmaking

Explore creating a website and/or channel where visitors can find the latest work by Colorado filmmakers across sectors and disciplines.

Introduce multidisciplinary event programming

Create events that include film exhibition as part of a larger experience (e.g. with music, food, dancing, and other cultural offerings). Many exhibition organizations and companies are re-establishing an advantage over at-home streaming through this practice.

Help exhibition organizations foster community by becoming places for social gatherings and regular interactions (the way many music venues do). Nationwide, exhibition organizations that already do this appear to be more resilient than those that rely solely on ticket and concession sales.

PHOTO
from Prospectors,
courtesy High Noon
Entertainment ▶



RECOMMENDATION H

Take a “Yes-and” Approach to Incentives

Treat the effort to pass more generous incentives as part of a holistic, long-term strategy

To succeed, a collective strategy to support Denver and Colorado filmmakers and media professionals should:

- Position efforts to support filmmakers and other creative media professionals in the short term (e.g. with grant programs) as complementary to efforts to support them in the long-term (e.g. with the passage of robust incentives held steady over a long period of time).
- Ensure progress is made year over year, regardless of legislative outcomes.
- Measure that year-over-year progress.

Prioritize coalition building

Identify and recruit key allies within and beyond the film and media industry on an ongoing basis so the coalition of support is always growing.

Leverage grassroots support

Create opportunities for industry members to support efforts for greater incentives in ways that are constructive, on-message, and complementary to the larger strategy.

PHOTO
from the set of Help Wanted,
courtesy Patrick Hackett ▶



6. Conclusion

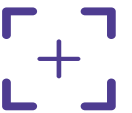


PHOTO
courtesy Diego Rodriguez

Conclusion

Colorado deserves to have its stories told. It deserves to be a place where its artists can thrive and where economic growth generates cultural growth rather than coming at its expense. Denver and Colorado filmmaking offers that opportunity, and it is poised to flourish.

A large and fast-growing number of Coloradans have been finding ways to build successful careers and make inspiring and innovative work despite limited access to shared infrastructure, institutional support, or collaborative opportunities. As their numbers grow, so does their shared desire to address these constraints and build a more prosperous, equitable, and vibrant industry together.



Interviewees across sectors understand the limitations of an industry constrained by weak film and media incentives, and many expressed a desire for more opportunities to help change the incentive system. However, an overwhelming majority said that they would like to build support programs and infrastructure that aren't wholly dependent on incentives.

This requires moving from an “either-or” view of incentives to a “yes-and” one, through which efforts to support Colorado’s filmmakers independent from incentives are treated as complementary to incentive-focused efforts.

It also requires understanding that the sectors and their needs are interconnected and interdependent, and so, too, must be any initiatives aimed at supporting them. Therefore, any efforts aimed at supporting filmmaking artists and professionals should be part of a holistic strategy that encourages participation from multiple sectors.

This report’s findings suggest that an inclusive, multi-sector, and community-driven strategy aimed at establishing collective advocacy, securing shared infrastructure, and creating professional and artist support programs would produce lasting benefits for Denver and Colorado’s filmmaking artists and professionals.

Further, the findings suggest that such a strategy would help create a foundation from which Colorado’s film and media industry can identify and build new opportunities for itself into the future. Denver and Colorado have the ingredients they need to build a better future for its filmmakers, and the first step to building a whole greater than the sum of its parts is simply by bringing those parts together.



There’s a lot of short-sightedness when it comes to film. There’s a failure to understand that it’s not just about the film industry, or even just ancillary industries like service and hospitality. It’s the life that it breathes into communities – and how that new life brings more income and opportunities for everyone.

– Sylvia Gregory
CSA, Casting Director

PHOTO by Jennifer Koskinen



7. Sector Spotlight



PHOTO
courtesy Colorado
Film School

Sector Spotlight

The following are key findings for each sector, including its core characteristics, the needs most frequently cited by relevant interviewees, and possible ideas to meet those needs and generate additional creative and economic opportunities. Many of the ideas (described hereafter as “opportunities”) come from interviews with study participants in Colorado.

Others were inspired by comparative research and conversations with leaders in film communities in other states, with a specific focus on states also facing limited incentive programs. Unless explicitly stated, all of the ideas included are intended to work regardless of whether Colorado passes more generous, long-term incentives.

Sectors Studied:

- Television Production
- Commercial Video Production
- Ad Agencies (for Commercial Video Production)
- Documentary Filmmaking
- Scripted Filmmaking (Fiction/Narrative)
- Experimental, Animated, and Short-Form Filmmaking
- Exhibition (Movie Theaters and Film Festivals)
- City and State Agencies (Relevant to Film and Media)
- Education in Film and Media (High School and College)
- Video Game Production



PHOTO
actors in motion-capture
suits at Deck Nine Games
in Boulder, CO





Television Production

Characteristics

Few but sizable: While there are only a small number of television production companies in Colorado, they are large in terms of staff size and project volume. They offer well-paying and often long-term, consistent employment to specialized workers.

Specialize in unscripted: These companies produce mostly unscripted or “reality” shows and sell them to cable channels and streaming platforms. These programs are widely popular, available on major cable channels and streaming platforms, and watched by audiences all over the world.

Filmed out of state: Given the nature of unscripted television programming, most of these companies’ shows are developed in Colorado, then filmed on location where the talent or subject is based (usually other states), and finally edited and finished back in Colorado.



PHOTO
by Devon Wycoff from the pilot
of Raven and Blackjack created
by Meryem Ersoz featuring a
Razr arm car from Blackwing ASL



Needs

Production studios: Access to state-of-the-art production facilities, specifically a multi-camera studio, sometimes known as a “shiny-floor studio,” for in-studio and competition-based reality shows.

Talent pool: Access to and ability to hire experienced crew, especially editors.

Greater visibility: Many Coloradans watch shows made by Colorado’s television production companies, but few realize it.

Opportunities

Shared physical infrastructure: As many sectors described similar and overlapping needs, shared studios, potentially through public-private partnerships or foundation support, would secure access to high-tech space while keeping costs down.

Incentives: Passing bigger incentives would allow more shows to be filmed in Colorado and bring greater access to talent, resources, and production studios. More specifically, consistent and long-term incentives would allow for producers to plan for multi-season productions, which provide some of the industry’s most stable and lucrative jobs.

Public promotion: A campaign to promote media-making being done in Colorado, would increase awareness of the sector and its influence. This, in turn, would aid in advocating, help experienced crew find the companies that need them, and signal to TV companies in other states that Colorado is a place where successful companies in their sector do business.



Commercial Video Production

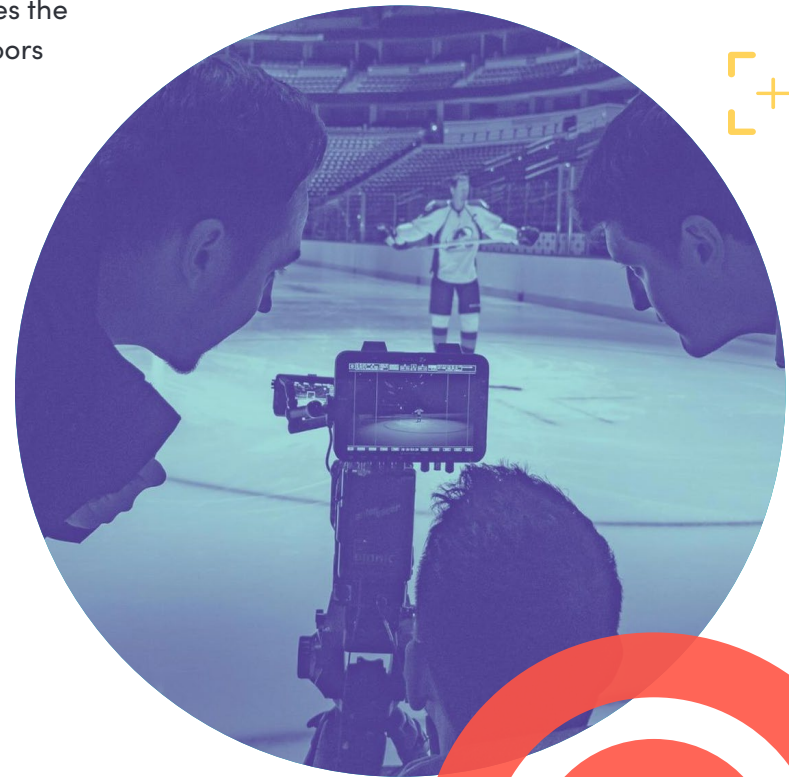
Characteristics

Largest sector: Commercial Video Production is the largest sector in Colorado filmmaking in terms of employment and is still growing. It is comprised of several large companies (7+ employees) that serve national clients and produce big-budget projects, a larger number of mid-sized companies (3-6 employees) that often serve regional clients and produce slightly smaller projects, and a very large and growing number of small companies (1-2 employees) that work mostly (but not exclusively) with local clients on small-scale projects.

Variety of work: While much of the commercial work being done utilizes the scenery of the Rocky Mountains and highlights Colorado's great outdoors and active recreational and fitness industries, many companies have found other unique specialties such as animation, motion graphics, or documentary-style campaigns, or catering specifically to the Front Range's many medical facilities.

Small companies: Although the number of commercial video production companies is growing, almost everyone interviewed in the sector said that scaling (growing the size of their companies, working with bigger budgets, and being able to hire more people) was very difficult.

PHOTO
Milan-Hejduk on set
for Budweiser
courtesy Diego Rodriguez



Needs

Greater collaboration: An overwhelming majority of interviewees expressed a desire to be better connected to their counterparts at peer companies.

Organized marketplace: Those interviewed wished for the ability for potential clients and ad agencies to more easily find the companies that are the best fit for their project and budget, as well as a resource for production companies to more easily find talent to fill both short-term and salaried positions.

Business training: Education for early-career professionals in business development, client relations, and project management.

Equitable representation: To grow the number of professionals from underrepresented backgrounds, making the sectors more representative of the state's population.

Opportunities

Collective organizing: Collaboration across companies and with other sectors (including ad agencies and government offices dedicated to creative industries) would allow the sector to more effectively advocate for and represent itself.

“Made in CO” initiative: A sustained, strategic, and collaborative campaign to build the reputation of Colorado as the hub of high-quality media making that it is.

Online infrastructure: A website with a consolidated, sortable, and filterable database for potential clients and ad agencies to easily identify Colorado production companies for their projects, as well as a site where companies can more easily find the talent they need to fill both short-term and salaried positions, and a place where jobseekers can easily find opportunities.

Entrepreneurial training for filmmakers: Educational programs to help professionals learn how to grow their businesses and careers, and training focused on client cultivation, project management, and best financial practices.

Measurable commitments to equitable representation: The implementation of formal hiring practices to support employers in recruiting beyond existing (informal) social networks.



Ad Agencies (Commercial Video Production)

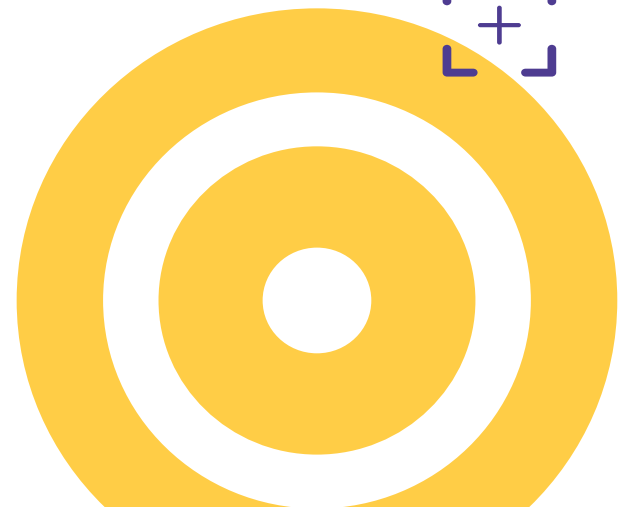
While the study attempted to connect with many of the top ad agencies in Colorado, only a few were available for interviews. Therefore, further research is recommended on the specific workings and requirements of this sector.

Characteristics

Robust economic sector: Only a portion of the sector's full-time employees are directly involved in making video content, but as businesses they are responsible for generating a significant amount of commercial production. It is a large and growing sector with a small number of large companies (200+ employees), a slightly greater number of mid-sized companies (100-200 employees), and a large number of small companies. While larger companies often have film and post-production teams employed in-house, mid-size and smaller companies are more likely to hire commercial video production companies on a project-by-project basis.

Out-of-state hiring: The overall impression from interviewees working in film was that ad agencies are more likely to hire out-of-state production companies and above-the-line crew for bigger budget projects. Most interviewees at Colorado production companies mostly believe this is because of the perceived prestige that hiring from places like LA and NYC can provide to clients. However, in the study's limited number of interviews with ad agencies, those interviewees said the disconnect had just as much to do with not knowing which Colorado production companies work on projects of similar size and budget to those the agencies manage.

Lacking representation: The sector appears to be much less representative than the state overall in terms of its demographic makeup, though heads of companies and organizations interviewed said they would like to begin investing meaningfully in addressing these disparities.



Needs

Cross-sector relationships: Better knowledge of and relationships with Colorado production companies.

Talent discovery: More efficient means to identify and recruit talented crew.

Talent pool: A wider pool of experienced crew and actors from which to recruit.

Equitable representation: Growing the number of professionals from marginalized backgrounds so the sector's makeup is representative of the state.

Opportunities

Greater collaboration: The study found multiple areas of shared interests between Colorado agencies, production companies, and other sectors, with the biggest barrier often being a lack of communication and coordination.

Online infrastructure: Those interviewed agreed that working with commercial production companies to build a website that serves everyone's needs would better connect agencies to the production companies, crew, and specialists they are seeking.

"Made in CO" initiative: Interviewees desired collaboration with other sectors in building Colorado's reputation as a hub of high-quality media making, and elevating the visibility and prestige of Colorado's agencies alongside its other vibrant and growing sectors.

Initiative to achieve equitable representation: A collective commitment to making the sector demographically more representative of the state's overall population, with goals and benchmarks that make it easier for companies to measure their progress toward that commitment.



Documentary Filmmaking

Characteristics

The dominant art form: Documentary filmmaking is the most widely made and widely recognized artistic filmmaking in Colorado, with documentaries by Colorado filmmakers regularly programmed at film festivals around the country and distributed nationally and internationally. Filmmakers include full and part-time professionals, many of whom also work in commercial filmmaking, with a significant number of artists and hobbyists as well.

Outdoors and out of state: Outdoor recreation and nature documentaries make up a sizable portion of the documentaries shot in Colorado. However, many of Colorado's documentary filmmakers shoot their films in other states (based on the locations of their subjects) and then edit and finish their films back in Colorado.

Scarce funding: Filmmakers who raise funds (either through grants or private financing) for their documentaries mostly do so outside of Colorado. Those who secured funding in Colorado almost all did so through personal relationships with investors rather than through any kind of institutional or programmatic support.

PHOTO
by Bethleen McCall
from *In a Dry Land*,
courtesy Sarah Megyesy



Needs

Community: Better ways of finding and sustaining connections to others working in documentary filmmaking.

Financial support: In-state funding opportunities.

Creative support: Opportunities to give and receive feedback, mentorship, development, and other forms of creative support.

Visibility: Promotion of Colorado films to the general public, who watch and enjoy documentaries by Coloradans without ever knowing their provenance.

Opportunities

Organizational collaboration: The number of membership organizations, artist collectives, and other groups is growing, and collaboration between the heads of these organizations would empower filmmakers in this sector to better advocate for themselves and their needs, as well as unlock new ways of supporting one another.

Investor programs: Programs that recruit and educate investors, and invite filmmakers to submit and present projects to investors for potential funding.

Project support programs: Programs that invite filmmakers to meet with funders and present their projects directly to them (e.g, pitch panels, project markets, etc.).

Exhibition showcases: Screening events dedicated to bringing the work of Colorado filmmakers to Colorado audiences.

Creative support programs: Programs that provide non-financial support, such as mentorship, feedback, referrals, and introductions.

City and state support: Many interview subjects wished for creative-arts publicity and events to promote and elevate the cultural status of Colorado cities and the state overall, highlighting the work of Colorado filmmakers, including filmmakers in artist funding opportunities, and expanding outreach to filmmakers to educate them on potential funding opportunities.



Scripted Filmmaking (Fiction/Narrative)

Characteristics

Incentive-dependent production: Along with video game production, scripted filmmaking is among the sectors most heavily impacted by the absence of robust state incentives. There are relatively few feature films or series being shot in Colorado, though many filmmakers in and outside of Colorado would love to shoot in the state if it were affordable.

Few companies: Very few production companies based in Colorado work primarily in scripted features or series. Many ancillary businesses that once depended on scripted production, such as equipment rental houses and casting companies, have either closed, relocated to other states, or adapted their businesses to cater to other industries.

Lots of development: While there is abundant screenwriting and project development in Colorado by professionals, artists, and aspiring storytellers, all of them struggle with a current lack of institutional support, and many of those who secure financing and shoot their films do both in other states. The rest rely on personal relationships with individual investors or a combination of crowdfunding and self-financing.

PHOTO
by Devon Wycoff from
the set of *The
Boardinghouse Reach*,
courtesy Geoff Marslett



Needs

Community: Better ways of finding and sustaining connections to others working in narrative/scripted filmmaking

Financial support: In-state funding opportunities

Creative support: Opportunities to give and receive feedback, mentorship, development, and other forms of creative support

Opportunities

Incentives: More robust and sustained state incentives would allow more scripted productions to be shot in Colorado, create jobs in the sector, sustain the businesses on which all scripted filmmakers depend (e.g. equipment, casting, costumes), and allow more talented cast and crew to stay and build their careers in the state.

Embracing development: Building infrastructure around preproduction and development – the research, writing, financing, and selling of film projects – would give filmmakers who work in scripted content more opportunities to make great work. Even if the films are shot in other states due to more competitive incentives, these filmmakers will have more opportunities to advance their craft and build their careers while also elevating the profile of Colorado’s talent.

Artist and project support programs: These programs are the same as those recommended for the documentary sector, and both disciplines can be supported within the same program. They include: investor programs (recruiting and educating investors and presenting them with projects of interest), project support programs (project markets and pitch panels), and creative support programs (mentorships, fellowships, and masterclasses).

Encouraging and supporting short-form: Many aspiring filmmakers interviewed felt they needed to write screenplays for full-length features, only to later find themselves seeking financing – often for years – while putting their creative work on hold. The study found that filmmakers who instead chose to work in short-length formats (short films, music videos, etc.) regularly produced more work, honed their skills and personal style, and in turn found themselves in greater demand.



Experimental, Animated, and Short-Form Filmmaking

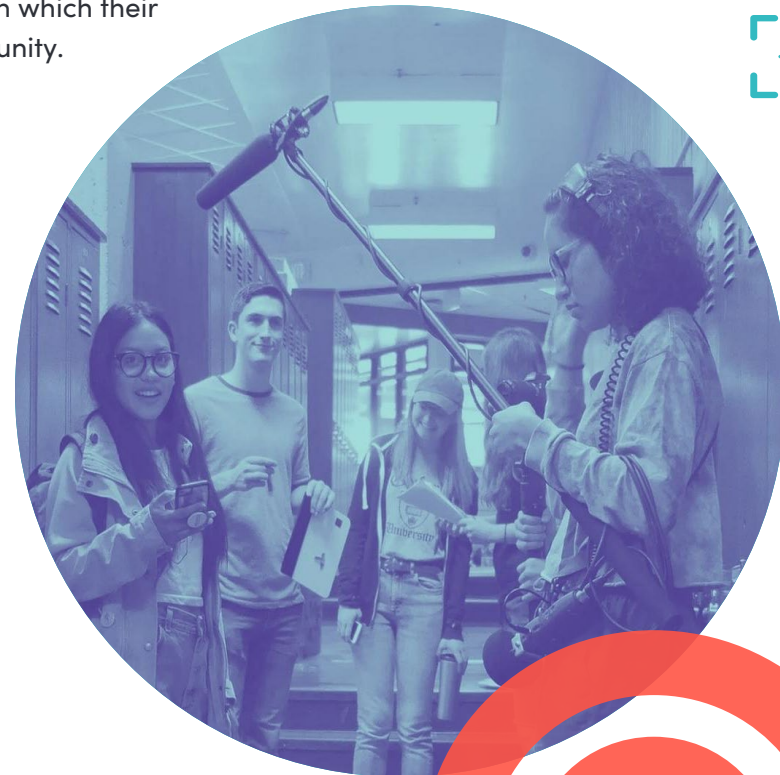
Characteristics

Vibrant production: Although there is little in the way of a shared identity, the study found a surprising amount of inventive, original work being done in Colorado with short-form, animated, and experimental filmmaking.

Varied exhibition: While more conventional scripted and documentary short films are programmed at film festivals, experimental work is usually exhibited in non-traditional venues such as art galleries or public spaces via outdoor projection. Experimental work is also exhibited online, along with music videos. Interviewees often expressed that they felt more connected to communities through which their work was exhibited (art, music, online) than a local filmmaking community.

Rich possibility: Made on lower budgets and in less time than feature-length films and series, and with runtimes that make them accessible to most viewers, this sector offers immense potential for supporting more artists, building communities of makers and audiences, and elevating the profile of filmmaking for Colorado's general public.

PHOTO
courtesy Sad Girl
Productions ▶



Needs

Physical infrastructure: Places for filmmaking artists to work and collaborate, as well as to hold feedback screenings and other events.

Artist and project support: Access to, or better knowledge of, funding opportunities available to Colorado artists.

Exhibition opportunities: More opportunities, both in person and online, for short-form work to be discovered and enjoyed.

Community: While many of these artists create their projects alone, most interviewees still desired the ability to meet, collaborate, and share resources with other filmmakers.

Opportunities

Exhibition showcases: There are several events throughout the year in different Colorado cities that exhibit the work of artists in this sector, particularly filmmakers of digital animation, short films, and music videos. These events offer a potential springboard for further growth if they could be scaled up and given greater visibility.

Online exhibition: A website where the work of Colorado filmmakers is curated, searchable, and filterable would also bring greater visibility and recognition for the artists and their work.

Shared spaces for work and exhibition: Interviewees working in short-form said that artist workspaces that offer opportunities to meet collaborators and peers and host screenings would have a transformational, positive impact.

Artist and project support programs: Whether it is broadening existing programs to include filmmakers or establishing new programs more tailored to them, short-form filmmaking is particularly well-suited to the budgets, timetables, and intended audiences of traditional artist-support initiatives (e.g. grants, workshops, artist-in-residency programs, etc.).

Cross-disciplinary programs: The most exciting and innovative work often springs from the collaboration across artistic disciplines. Short-form filmmaking offers endless opportunities for elevating the lives, stories, and work of others, whether artists, businesses, or communities. For example, Colorado is home to countless musicians, almost all of whom would like more exposure, and innumerable talented filmmakers, many of whom would like to build their portfolios. Programs to support collaborations like these would be mutually beneficial to both communities and help celebrate Colorado's culture.



Exhibition (Movie Theaters and Film Festivals)

Characteristics

Many great festivals: Colorado is home to a large number of film festivals that range from among the oldest in the country, to the most prestigious, to the newest and most innovative. Festivals are held annually in cities across the state, including: Grand Junction, Pueblo, Crested Butte, Fort Collins, Vail, Colorado Springs, Breckenridge, Golden, Nederland, Greeley, Lyons, Boulder, Telluride, Aspen, and Denver.

Tightening margins for theaters: The traditional theatrical model has been under pressure from the rise of streaming services. Exhibition was among the sectors most impacted by COVID-19, which accelerated a trend toward at-home viewing.

Underrepresentation: Heads of theaters and festivals acknowledged that their core audiences tend to be older, more affluent, and mostly White, and that cultivating younger and more diverse audiences was among their highest priorities. Additionally, the leaders, employees, and boards of most exhibition organizations were less diverse than the state's overall population.



PHOTO
Of Film on the Rocks
Drive-In, courtesy
Denver Arts & Venues

Needs

Growing and broadening audiences:

Reaching and building audiences to include new, younger, and more diverse patrons.

Competitive advantages to streaming:

New offerings and experiences that can't be replicated with at-home viewing.

Diversifying revenue: The creation of new revenue streams in addition to growing traditional ones (such as concessions, ticket sales, sponsorships, and donations).

Opportunities

Event-based programming: The study found that nationally, exhibition organizations that programmed events – especially multidisciplinary ones that included features like music and meals, or that took place in non-traditional venues such as outdoor settings or repurposed buildings – found more success in both growing their audiences and building a sense of community, loyalty, and belonging among those audiences.

Community-driven programming: Another tactic of exhibition organizations has been building authentic, long-term relationships with film-loving organizations and individuals, especially those who belong to communities that are less represented among current patrons, and working with those individuals to design and host programming that builds new audiences over time. This is often described as programming “with” audiences instead of programming “to” them.

Placemaking: In the same way that many music venues operate as gathering places even when not hosting shows, creating spaces that draw people in to meet and socialize throughout the week would grow a more reliable audience while building revenue streams through food and drink.

Filmmaker friendly: As a group, filmmaking artists and professionals are among the hungriest to gather, watch, and discuss films together – and interviewees across Colorado told interviewers that they sought more physical places to do so. Many theaters find success cultivating long-term relationships with filmmaking communities and co-hosting programming with them. Many festivals have grown their public presence and audience sizes by hosting events that connect filmmakers to each other and to funding opportunities (e.g. project markets and pitch panels).



City and State Agencies (Relevant to Film and Media)

Characteristics

Desire to help: All interviewed city and state agencies shared a strong desire to better understand and support filmmaking in Colorado.

Art and industry: Filmmaking is relevant to arts and culture, as well as to economic development, but has often been overlooked in policymaking conversations about both.

Incentives: Because of their importance, incentives have played an outsized role in discussions about how to help Colorado filmmakers, but the study found that this has often been at the expense of other ideas that would be complementary in purpose.



Needs

Community representation: More ways to hear from and work with filmmaking artists and professionals from all sectors and backgrounds, so each can contribute to designing and carrying out long-term strategies for their sectors and for the industry at large.

“Yes-and” thinking: Move beyond “either-or” thinking about incentives to a long-term strategic approach that takes an additive (“yes-and”) view of them, so that the work toward greater incentives doesn’t inhibit other efforts to support Colorado filmmakers while incentive programs are strengthened.

More data: More regular and robust data collection across sectors would give city and state offices a better shared understanding of the overall industry – and better insight into how programs and initiatives can best serve intended communities.

Opportunities

Community-driven strategy: A multi-sector steering committee tasked with laying out a long-term vision and strategy for Colorado filmmaking, informed by community input and supported by local and state agencies, would help ensure that the needs and capabilities of each sector are represented. To succeed, this group needs to be inclusive of, transparent with, and accountable to the broader community.

Standardized data collection: Whether tracking the career paths of Colorado film students, calculating the amount a particular sector spent in the state’s rural areas over the course of a year, or capturing testimonials from business owners in those rural areas about the positive impact that spending had on their communities, implementing standardized (“turn-key”) practices that make it easy for individuals, organizations, and companies to collect and submit data would be enormously useful to state and local agencies.

Initiatives for equitable representation: City and state agencies are uniquely well positioned to help catalyze, support, and measure the progress Colorado’s film industry makes toward achieving more equitable demographic representation. Without centralized guidance, companies and organizations are left to their own intentions and follow-through. Better data collection and a transparent, diverse, and inclusive steering committee are crucial to this end.



Education in Film and Media (High School and College)

Characteristics

Large presence and diverse programs: Around 5,000 students are enrolled in college- and university-level film programs statewide, with roughly 3,000 of them in-state students. Some programs primarily teach the practical skills of filmmaking, while others focus on theory and critical analysis of film, and many offer combined curricula.

Exporting graduates: The majority of students interviewed said they would prefer to stay and build their careers in Colorado, but most felt that they would need to leave after graduating in order to start earning a steady income in the industry. Most professors interviewed said they felt an obligation to help students find work in states with large-scale production and therefore encourage them to begin looking for opportunities in other states prior to graduation.

Industry relations: With so few high-budget, scripted productions in the state, schools struggle to give students access or entrance to large-scale industry jobs. Many graduates who stay in Colorado often find they need to build their own commercial production company in order to make money, which necessitates business knowledge that not all students receive.

Impact on representation: After graduating, only some students have the resources to move to another state or start their own business in Colorado, so many graduates struggle to find viable opportunities in the industry. This likely winnows the demographic representation of Colorado's early-career professionals in a state where film students are demographically more diverse than the state's film industry.



PHOTO
courtesy CU Denver
Film & Television

Needs

Value distinction: Specific and distinct advantages over other programs around the country in order to attract prospective students.

- **Adaptive industry training:** Education that is more specifically tailored to the new and changing landscape of media-making as a whole (both in Colorado and globally), potentially focusing on episodic and/or commercial mediums, as well as training to build entrepreneurial skills.
- **Artistic development:** Curricula that supports, develops, and adapts to the creative expression of today's students, allowing for more unique forms of media-making and storytelling and incorporating current students' natural technological fluency.
- **Industry Connection:** Working relationships with Colorado companies that could provide mentorships, internships, and apprenticeships to give students real world experience.

Alumni tracking: Scalable systems for tracking alumni to provide schools with better data on the experiences of former students, as well as creating potential mentoring and networking opportunities for current students.

Opportunities

Collective organization: Growing film and media jobs in Colorado would help the state's film schools attract more prospective students, provide more internships and early-career jobs to current students, and allow schools to better track and support recent graduates. As Colorado schools and film programs have a shared interest in growing film and media jobs in the state, both would benefit from participating in a collaborative strategy aimed at growing Colorado's creative economy.

Internship placement programs: A shared program to handle internship applications and placements would provide students, graduates, and other early-career professionals with a single place to apply, while removing the redundant administrative burden from individual schools and companies.

Entrepreneurial and business curricula: Colorado film schools that want to distinguish themselves in terms of industry preparation could explore or expand classes and services that give film students exposure to business development, client negotiations, project management, and effective financial practices.

Opportunities (continued)

Artist-centric curricula: Today's students are fluent in more forms of film and media-making than any previous generation. Film schools that want to distinguish themselves based on the artistic and creative development of their students (as many art schools do) could explore education tailored to the students' unique interests, skill sets, and disciplines – encouraging students to generate work in more experimental mediums and formats (such as AR and VR, installation, hyper-short, hybrid, etc.) rather than mandating and evaluating performance in terms of a standard, scripted feature film model. The study found that programs that calibrated curriculum and training to fit their students' individual passions often produced more innovative work and higher student satisfaction.

Alumni tracking: Schools, students, state agencies, and the statewide industry would benefit from better data collection regarding the paths students take after graduating (e.g. where they go to find work, what kind of work, etc.). More consistent data collected from former students would allow schools to more accurately evaluate and better advertise their programs. Active alumni networks are also an invaluable resource for filmmakers (students, recent graduates, and professionals) to find work, funding opportunities, collaborators, and community.



Video Game Production

Characteristics

Huge and growing global sector: Video game production is the largest sector covered in the study in terms of global revenue – and growing. It offers high-paying jobs that include game designers, software developers, programmers, producers, writers, artists, animators, audio engineers, composers, sales representatives, and many others. Some companies also provide lucrative contract work to actors and voiceover artists.

Incentives-driven: Similar to scripted television and narrative film production, this sector's growth is heavily dependent on available incentives. Many of those interviewed said their companies were located in Colorado solely because the founders found it an attractive place to live, but each reported that growing their companies here is difficult, and scaling up would likely require either greater incentives from the Colorado or relocating elsewhere. Places like California, Texas, and most especially Canada offer seed funding, rebates, or credits that make production easier and can save a company up to 30% on its employee salaries. This means that it is often harder for Colorado's video game companies to offer competitive pay that would attract new talent.

Modest in number, impressive in output: Colorado has fewer video game production companies than states that offer more generous incentives, and they are significantly smaller than the most well-known global gaming brands. However, the number of companies appears to be still growing, and Colorado companies are already producing outstanding games that achieve commercial success, and receive exceptional critical praise and recognition.



You need a lot of different types of people to make a video game. You need coders, programmers, artists, musicians, and businesspeople – among many others. So not only is the gaming industry experiencing tremendous growth, it's creating jobs for incredibly diverse groups of people. On top of that, these games are art! Artists make them and when they're enabled to make them at scale, that can change a city's culture.

– **Zhenghua Yang**
 Founder and CEO of
 Serenity Forge



PHOTO courtesy Zhenghua Yang

Needs

Incentives: The financial support to start companies, promote production, and offer more competitive salaries for talent.

Access to talent: Easier access and ability to hire artists, designers, developers, programmers, actors, and other talent.

Visibility: Every interviewee in the sector said that most Coloradans, especially policymakers have yet to fully appreciate the enormous size of the industry, how fast it's growing, or the types of high paying jobs that it's creating.

Opportunities

Collective action: Many of those interviewed had not been involved historically in efforts to pass greater incentives in Colorado. As a sector that can readily show legislators the high-tech and high-salary jobs it creates, the significant tax revenue their sector generates for the state, and the cultural products it exports to the rest of the world, video game companies in Colorado are uniquely positioned to be effective allies and leaders in efforts to pass greater incentives.

Talent capture: A program or platform to connect talented professionals with companies wanting to find them could benefit Colorado's video game sector as well as others.

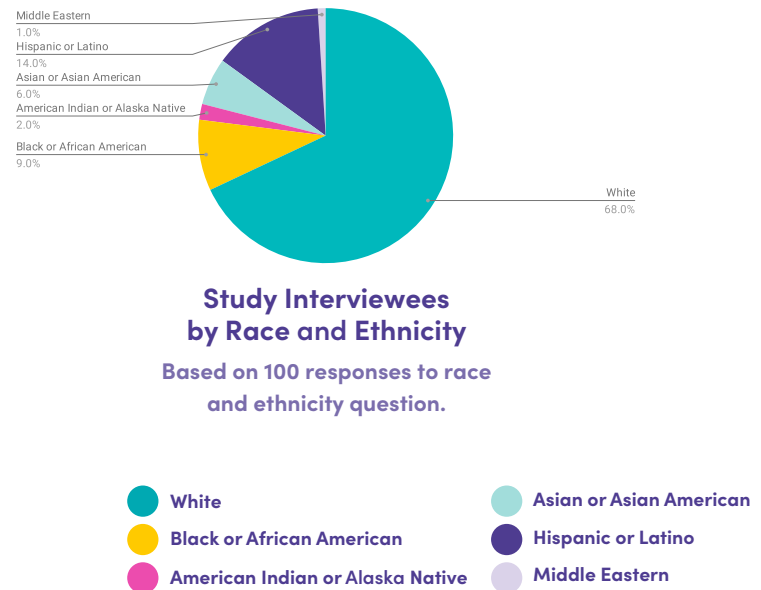
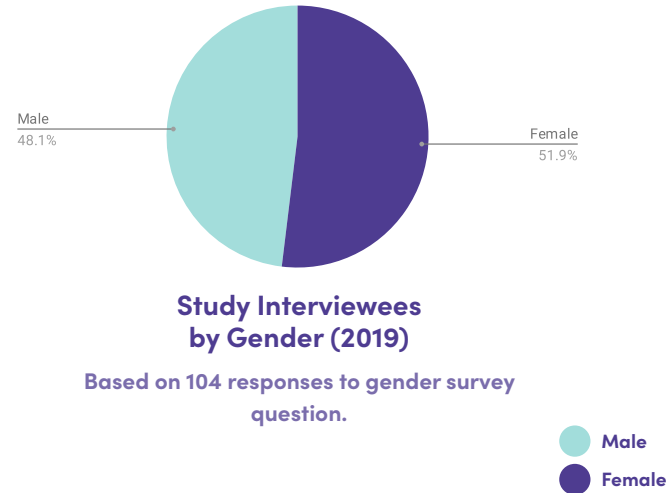
PR campaign: Whether in conjunction with or in addition to a broader "Made in CO" media initiative, a public relations campaign to elevate the profile of video game development in the state would be beneficial.

Appendix

Appendix A: Demographics

To track the demographic makeup of the study’s interviewees, the researchers invited each interviewee to complete an anonymous survey after their interview. More than 150 interviews were conducted and of those, more than 100 interviewees completed the survey, with 104 providing a response to the gender identity question and 100 responding to the question regarding race and ethnicity.

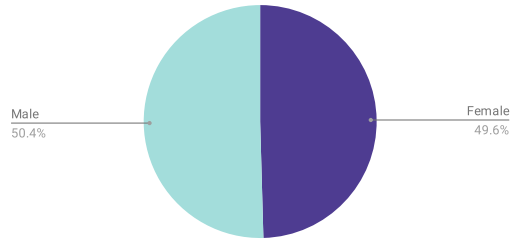
On the following pages are the results of that survey, alongside estimates of the demographic composition of the film industry in Colorado, Denver, and United States. These industry-wide demographic estimates are based on data from the “Core Creative Occupations” described in [Appendix B](#), and weighted by the relative size of each occupation in each of the regions listed below (Colorado, Denver, and the United States).



GENDER

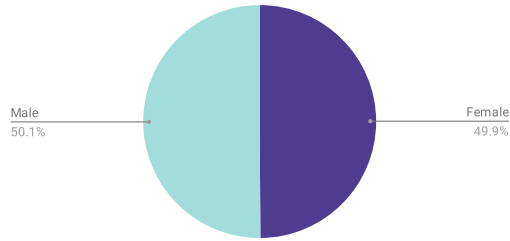


Overall Demographics



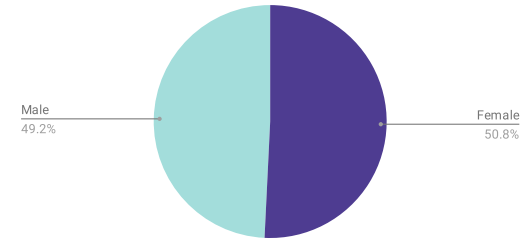
Share of All Coloradans by Gender (2019)

Source: U.S. Census 2019 ACS 1-Year Survey



Share of All Denver by Gender (2019)

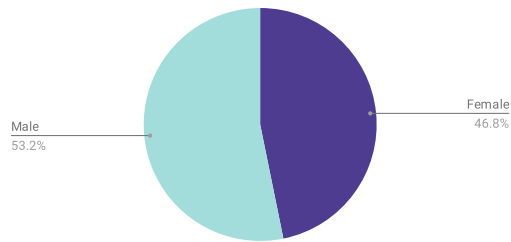
Source: U.S. Census 2019 ACS 1-Year Survey



Share of All U.S. by Gender (2019)

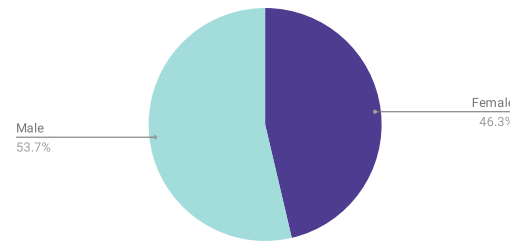
Source: U.S. Census 2019 ACS 1-Year Survey

Film Industry



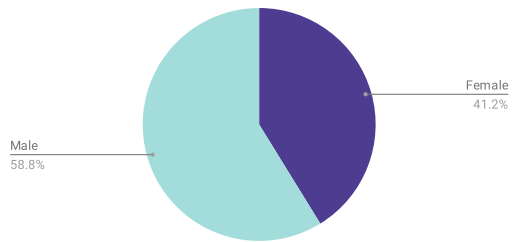
Colorado Film Industry by Gender (2019)

Source: CVSuite, United States Bureau of Labor Statistics.



Denver Film Industry by Gender (2019)

Source: CVSuite, United States Bureau of Labor Statistics.



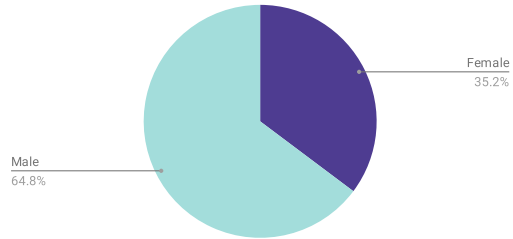
U.S. Film Industry by Gender (2019)

Source: CVSuite, United States Bureau of Labor Statistics.

GENDER

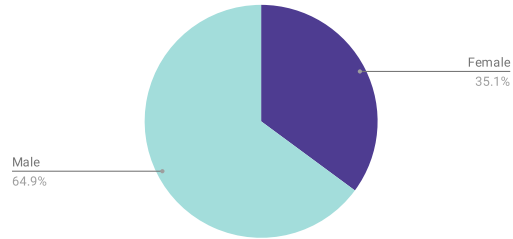


Directors and Producers



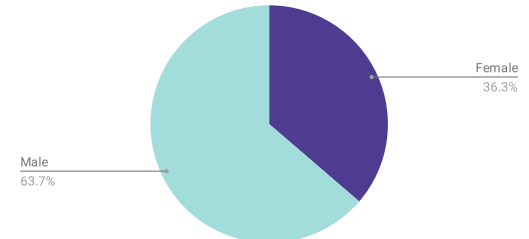
Colorado Directors and Producers by Gender (2019)

Source: CVSuite, United States Bureau of Labor Statistics.



Denver Directors and Producers by Gender (2019)

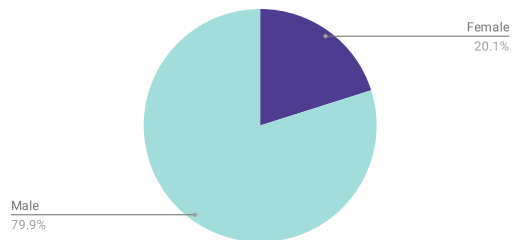
Source: CVSuite, United States Bureau of Labor Statistics.



U.S. Directors and Producers by Gender (2019)

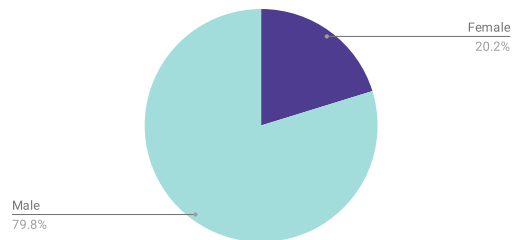
Source: CVSuite, United States Bureau of Labor Statistics.

Film and Video Editors



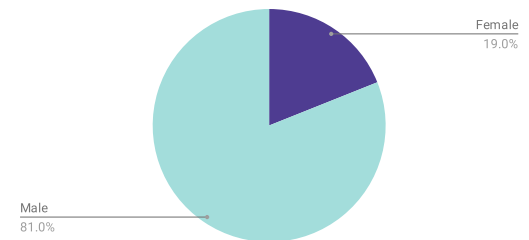
Colorado Film and Video Editors by Gender (2019)

Source: CVSuite, United States Bureau of Labor Statistics.



Denver Film and Video Editors by Gender (2019)

Source: CVSuite, United States Bureau of Labor Statistics.



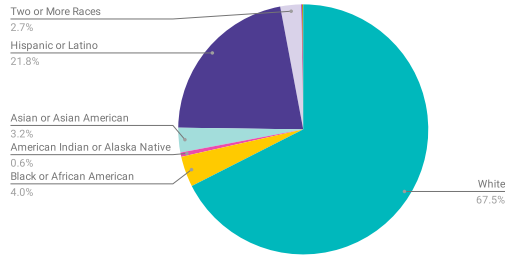
U.S. Film and Video Editors by Gender (2019)

Source: CVSuite, United States Bureau of Labor Statistics.

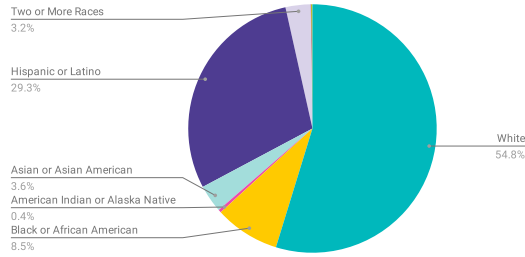
RACE AND ETHNICITY



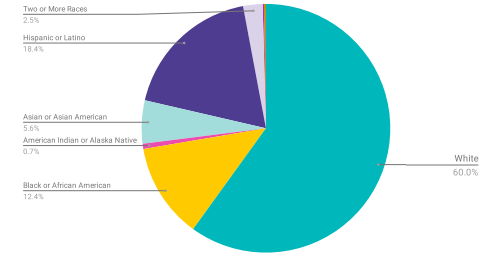
Overall Demographics



All Coloradans by Race and Ethnicity (2019)
Source: U.S. Census 2019 ACS 1-Year Survey.

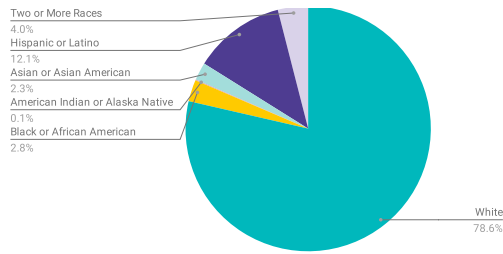


All Denver Residents by Race and Ethnicity (2019)
Source: U.S. Census 2019 ACS 1-Year Survey.

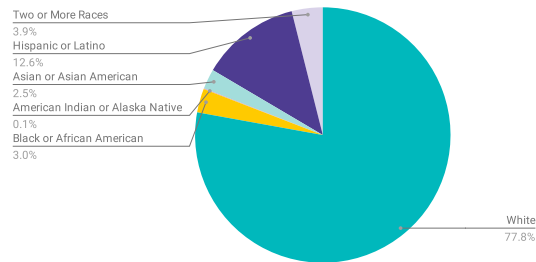


All U.S. by Race and Ethnicity (2019)
Source: U.S. Census 2019 ACS 1-Year Survey.

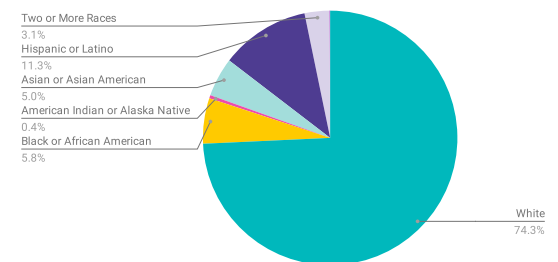
Film Industry



Colorado Film Industry by Race and Ethnicity (2019)
Source: CVSuite, United States Bureau of Labor Statistics.



Denver Film Industry by Race and Ethnicity (2019)
Source: CVSuite, United States Bureau of Labor Statistics.

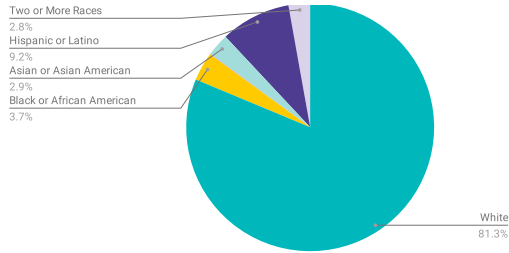


U.S. Film Industry by Race and Ethnicity (2019)
Source: CVSuite, United States Bureau of Labor Statistics.

RACE AND ETHNICITY

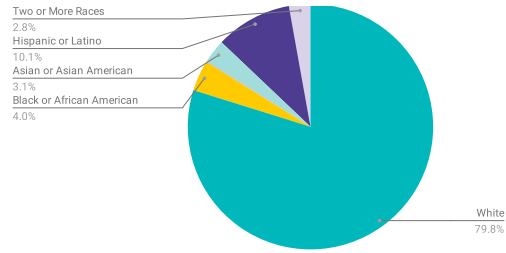


Directors and Producers



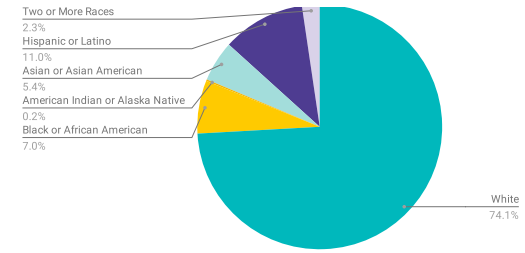
Colorado Directors and Producers by Race and Ethnicity (2019)

Source: CVSuite, United States Bureau of Labor Statistics.



Denver Directors and Producers by Race and Ethnicity (2019)

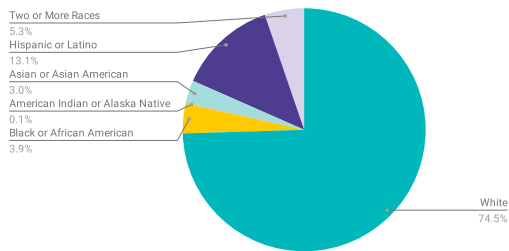
Source: CVSuite, United States Bureau of Labor Statistics.



U.S. Directors and Producers by Race and Ethnicity (2019)

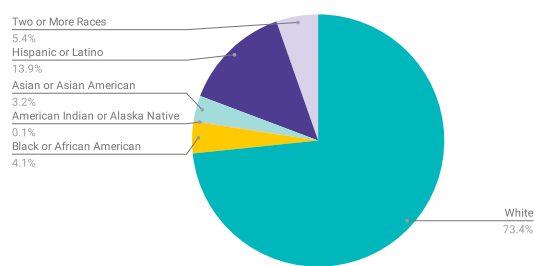
Source: CVSuite, United States Bureau of Labor Statistics.

Film and Video Editors



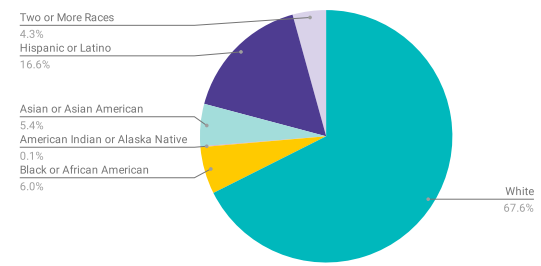
Colorado Film and Video Editors by Race and Ethnicity (2019)

Source: CVSuite, United States Bureau of Labor Statistics.



Denver Film and Video Editors by Race and Ethnicity (2019)

Source: CVSuite, United States Bureau of Labor Statistics.



U.S. Film and Video Editors by Race and Ethnicity (2019)

Source: CVSuite, United States Bureau of Labor Statistics.

Appendix B: Employment and Economic Data Methodology

The first step in analyzing the economic and employment dynamics of Colorado’s film industry was defining what comprises the industry. After reviewing similar studies, academic research papers, and methodologies offered by national associations, a list of industries and a list of “Core Creative Occupations” were created to capture film industry activity in Colorado and the regions used for comparison in this report (Table A1 and A2). These industries and occupations were selected from those identified and categorized by the Office of Management and Budget’s (OMB) North American Industrial Classification System (NAICS) and Standard Occupational Classification (SOC) system.

Table A1. Industries Comprising Colorado’s Film Industry

NAICS Code	Industry
512110	Motion Picture and Video Production
512120	Motion Picture and Video Distribution
512131	Motion Picture Theaters (except Drive-Ins)
512132	Drive-In Motion Picture Theaters
512191	Teleproduction and Other Postproduction Services
512199	Other Motion Picture and Video Industries
711510	Independent artists, writers, and performers

Source: U.S. Office of Management and Budget

Table A2. Core Creative Occupations in Colorado's Film Industry

SOC Code	Industry
27-1011	Art directors
27-1013	Fine artists, including painters, sculptors, and illustrators
27-1014	Special Effects Artists and Animators
27-1019	Artists and related workers, all other
27-1027	Set and exhibit designers
27-2011	Actors
27-2012	Producers and directors
27-2099	Miscellaneous Entertainers and Performers, Sports and Related Workers
27-3099	Media and Communication Workers, All Other
27-4011	Audio and Video Technicians
27-4012	Broadcast technicians
27-4014	Sound engineering technicians
27-4021	Photographers
27-4031	Camera Operators, Television, Video, and Film
27-4032	Film and video editors
27-4098	Lighting Technicians and Media and Communication Equipment Workers, All Other
39-3031	Ushers, lobby attendants, and ticket takers
39-3092	Costume attendants
39-3099	Entertainment attendants and related workers, all other
39-5091	Makeup artists, theatrical and performance

Source: U.S. Office of Management and Budget

Data pertaining to employment and sales of goods and services revenues for the selected industries were obtained by using the Creative Vitality Suite (CVSuite) data tool. CVSuite was developed by the Western States Arts Federation (WESTAF) specifically for creative economy analysis. The data used in this report was sourced by CVSuite from Lightcast and included information from the Bureau of Labor Statistics (BLS), Bureau of Economic Analysis (BEA), U.S. Census, and other city, state and federal organizations. Lightcast data sets are valuable for creative economy analysis as they capture employment at firms and establishments, those who are self-employed as solo practitioners, and those who earn second incomes from their work in the creative economy. This is important, as a substantial amount of work in the film industry is completed by those who are self-employed or work in a freelance capacity.

Data from all individual industries was taken directly from CVSuite except for “711510 Independent Artists, Writers, and Performers.” The authors estimate that only a portion of the total employment and sales of goods and services in this industry as stated by CVSuite is due to film industry activity. The final values for this industry as published in this report are based on the combined Core Creative Occupations share of the industry which was obtained through capturing each occupation’s employment percentage in the motion picture industry (obtained from the BLS’s “Occupational Employment and Wages, May 2019”) and applying those percentages to the overall employment in the NAICS sector 711510 taken from the BLS’s “May 2019 National Industry-Specific Occupational Employment and Wage Estimates.”

Appendix C: Background on Film and Media Incentives

Film and media incentives were introduced by Canadian provinces in the mid-1990s to attract film and television production and video game development. In response, states in the U.S. began introducing their own incentive programs to protect their industries, and the jobs and revenue they provide. Since the introduction of film incentives, states that were previously able to maintain healthy film industries solely with business-friendly policies have had to introduce their own incentive programs or witness the bulk of their industry leave for other states or provinces.

The industry sectors that typically receive most incentive funding are television production (scripted shows and to a lesser extent unscripted, or “reality” shows), movie production (particularly scripted feature films, and much less so documentaries), and video game development. There are countless types of incentive programs, but in general, a state incentive program uses tax revenue to help offset the costs of companies that choose to produce and spend in that state.

Three significant variables in a program are its cap (how much the state sets aside each year to fund the program), its percentage (what percent of a company’s production cost the state can offset), and its consistency over time (whether the cap is held steady year over year).

States that depend heavily on the film and media industry (e.g. California and New York) and states that are seeking to become major industry hubs (e.g. Georgia and New Mexico)

will set very high caps (ranging from \$200M–\$500M per year) or even remove caps entirely. Other states, such as Utah, Montana, and Oklahoma, are able to attract and sustain steady industry activity with lower incentive caps (\$8M–10M per year) by holding them steady over multiple years.

The percentage savings offered by most programs are between 20% and 30%, with some states occasionally offering as much as 40% back. Most programs provide these savings in the form of either a cash rebate or a tax credit. While most incentive programs attract one-time, standalone productions, the ability of a program to encourage companies to relocate, grow permanent jobs, and generate new infrastructure depends in part on whether the program’s cap is held steady (if not increased) over time. While a company choosing where to shoot a single movie only needs to know what a state’s incentives are for that year, companies deciding where to locate and grow their businesses need to know that a state’s current incentives won’t be drastically or frequently reduced in the near future.

Historically, Colorado’s incentive program cap has been comparatively very low, often between \$700K and \$2M and offers a percentage savings of around 20% on qualified productions, and the incentive cap has often fluctuated from year to year. Although the Colorado incentive program’s percentage savings is competitive, its exceptionally low cap level has meant that only a small number of companies are able to receive those savings each year, with the rest taking

their productions to states where they can save significantly on their costs. Additionally, the frequent changes in Colorado's program cap from one year to the next contribute to an unstable business environment for companies that would otherwise consider locating to the state.

Over time, Colorado's low incentive cap and lack of consistent levels have resulted in too few productions in the state to sustain many of the businesses that depend on them, companies such as those that rent out sound stages, camera equipment, and lighting and sound equipment, as well as casting and talent agencies. It has also led to an exodus of talent, with Coloradan actors and crew members moving to other states where work is more plentiful. (While the overall number of Colorado filmmaking professionals continues to grow, many report struggling to find experienced cast and crew – especially for larger productions that need to hire for more specialized positions.)

Therefore, low incentive levels therefore have a ripple effect for other sectors, such as commercial video production and smaller-scale independent filmmaking, which may not receive or qualify for state incentives but which benefit greatly from the ancillary businesses that depend on them (e.g. physical soundstages, equipment rental houses, and talent agencies) and on the types of skilled workers who need larger productions to build their careers in specialized roles.

Despite its constraints, Colorado's film incentive program is more thoughtfully and responsibly designed than those of many other states.

Several states, in a rush to attract film spending, have offered higher percentage savings (sometimes 30-40%) but the study found that states with percentages of 20-25% were still able to attract and retain industry activity. Colorado's incentive percentage is 20%.

Historically, some states have also been lenient or unclear in how they define qualified spending, but Colorado's criteria are specific and clear, making it easier to ensure that qualified spending must directly benefit Coloradans.

These features suggest that with even a moderate increase in cap level, held consistent over time, Colorado's film incentive program would be poised to maximize the effectiveness of that investment.

With a growing number of Coloradans in film and media asking for this support from the state, now may be the perfect time to make long-term incentives part of a larger long-term strategy.

For more information on how Colorado's incentive program compares to those of other states, please see these additional resources:

Film Tax Credits by State Map

Kevin P. Martin & Associates, P.C.

kpmfilm.com/film-tax-credits-by-state-map/

Production Incentives for Film & TV

Interactive Map Media Services

mediaservices.com/production-incentives/production-incentives-interactive-map/



DENVER
ARTS & VENUES



CINE FE



Colorado State University