

Oregon's Growing Media Sector: Perceptions and Impacts

Survey Instruments and Written Comments

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Final Report

Prepared for:

Oregon Governor's Office for Film and Television

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INTRODUCTION

The Oregon Governor's Office on Film and Television (known as Oregon Film) promotes the development of the film, television, commercial, and interactive industry in Oregon. Oregon Film works to increase revenues, profile, and reputation of Film and Television both within and outside Oregon. The report analyzes the impacts of incentive programs offered by the Governor's Office of Film and Television on the media sector in Oregon.

This document includes the two survey instruments used to collect data for this project as well as written comments provided by survey respondents.

Survey Instruments

Survey of Incentive Recipients

The Community Service Center at the University of Oregon, in partnership with the Oregon Governor's Office of Film and Television and the Northwest Economic Research Center at Portland State University, are conducting this survey. Our objective is to learn more about how the media sector is contributing to Oregon's economy and to evaluate the incentive program offered by Oregon Film. Your participation in this survey will provide us with valuable insight. If your company has worked on more than one incentivized project, please provide responses based on all the projects that received incentives. If you are unsure of answers for specific questions, please estimate to the best of your ability. We anticipate this survey will take approximately 15 minutes to complete. If you have any questions regarding this survey, please contact Robert Parker at the University of Oregon at rgp@uoregon.edu or 541-346-3801.

Q1 In which incentive program(s) did you participate? (select all that apply)

- Oregon Production Investment Fund (OPIF) (1)
- Greenlight Oregon Labor Rebate (2)
- Indigenous Oregon Production Investment Fund (iOPIF) (3)

Q2 How did you hear about the incentive programs offered by Oregon Film? (select all that apply)

- Online list of incentives (1)
- Contact with Oregon Film staff (2)
- Trade industry publication (3)
- Word of mouth (4)
- Other (please specify) (5) _____

Q3-Q4 Please indicate the level of ease or difficulty you experienced with learning about and applying for the programs.

	Very easy (1)	Easy (2)	Neither easy nor difficult (3)	Difficult (4)	Very difficult (5)
How easy was it to locate information on the incentive programs? (1)					
How easy was the application process for the incentive(s) that you applied for? (2)					

Q5 Please indicate how helpful or unhelpful materials provided by Oregon Film were.

	Very helpful (1)	Helpful (2)	Neither helpful nor unhelpful (3)	Unhelpful (4)	Very unhelpful (5)
How would you rate the helpfulness of materials or advice provided to you by Oregon Film staff? (1)					

Q6 Please indicate how accurate or inaccurate you felt materials provided by Oregon Film were.

	Very accurate (1)	Accurate (2)	Neither accurate nor inaccurate (3)	Inaccurate (4)	Very inaccurate (5)
How accurate did you find the materials provided to you by Oregon Film staff? (1)				•	•
How accurate did you find the advice provided to you by Oregon Film staff? (2)				•	•

Q7 How would you rate the availability of information about the incentive programs?

- Excellent (1)
- Very good (2)
- Good (3)
- Fair (4)
- Poor (5)

Q19 Please estimate how many projects your company produced in Oregon between 2010 and the present, both incentivized and not? For this question, a project is defined as a feature, commercial, season of a show, or game.

Q8 Is your company headquartered in Oregon?

- Yes (1)
- No (2)

Answer If Is your company headquartered in Oregon? No Is Selected

Q9 Did incentives from Oregon Film contribute to your company working in Oregon?

- Yes (1)
- No (2)

Answer If Is your company headquartered in Oregon? No Is Selected

Q10 Please estimate the number of projects you completed between 2010 and the present where the incentive programs the deciding factor for choosing to work in Oregon?

Answer If Is your company headquartered in Oregon? No Is Selected

Q11 Please rate the level importance the following factors were in your decision to film in Oregon:

	Very important (1)	Important (2)	Moderately important (3)	Slightly important (4)	Not important (5)
Oregon Film incentives (1)				•	
Diverse location (i.e. mountains, coast, desert, etc.) (2)				•	
Proximity to other locations (e.g. easy to travel to and from) (3)				•	
No sales tax (4)				•	
Crew/talent base (5)				•	

Answer If Is your company headquartered in Oregon? No Is Selected

Q12 Are you considering filming in Oregon again?

- Yes (1)
- No (Please explain why not) (2) _____

Answer If Is your company headquartered in Oregon? No Is Selected

Q14 Please provide your best estimate for the following questions (a ballpark guess is acceptable):

How many employees did your company employ on projects incentivized by Oregon Film since 2010? (1)

How many were Oregon residents? (2)

Answer If Is your company headquartered in Oregon? No Is Selected

Q17 Did incentives from Oregon Film increase the number of employees you used for your project(s)? If so, by how many? (Please estimate)

- Yes (1) _____
- No (2)

Answer If Is your company headquartered in Oregon? No Is Selected

Q16 For your spending in Oregon, what percentage of your budget was spent on the following categories? (Please estimate; figures must total to 100)

- _____ Oregon-based TV/film vendors (camera or lighting shops, sound stage, etc.) (1)
- _____ Labor (7)
- _____ Food and beverages (2)
- _____ Lodging (3)
- _____ Goods from local stores (hardware, props, etc.) (4)
- _____ Local services (not including freelancers/independent contractors in the media sector) (5)
- _____ Other (describe) (6)

Answer If Is your company headquartered in Oregon? No Is Selected

Q17 Were you able to purchase all of the equipment and products you needed in Oregon? If not, what was unavailable to you?

- Yes (1)
- No (please explain) (2) _____

Answer If Is your company headquartered in Oregon? Yes Is Selected

Q18 Have Oregon Film incentives allowed you to expand your business?

- Yes (1)
- No (2)

Answer If Is your company headquartered in Oregon? Yes Is Selected

Q21 How many additional employees have you been able to hire because of Oregon Film incentives? (Please estimate in terms of full time equivalent positions)

Answer If Is your company headquartered in Oregon? Yes Is Selected

Q20 How many of your incentivized projects would not have occurred without incentives?

Answer If Is your company headquartered in Oregon? Yes Is Selected

Q22 Do you plan to expand your business in the future?

- Yes, and Oregon Film incentives will help. (1)
- Yes, but not because of incentives. (2)
- No (3)

Answer If Is your company headquartered in Oregon? Yes Is Selected

Q23 Have you combined Oregon Film incentives with incentive programs from other state agencies to grow your business? If so, which programs?

- Yes (please describe) (1) _____
- No (2)

Answer If Is your company headquartered in Oregon? Yes Is Selected

Q24 What other types of incentives would help you expand your business in the future?

Q25 Overall, how would you rate your experience with Oregon Film and the incentive programs offered by the Governor's Office of Film and Television?

- Extremely positive (1)
- Somewhat positive (2)
- Neither positive nor negative (3)
- Somewhat negative (4)
- Extremely negative (5)

Q26 Would improvements to the application process increase the likelihood of you applying for incentives offered through Oregon Film in the future? If so, how?

- Yes (explain) (1) _____
- No (2)

Q27 Which resources were the most effective in providing you with information about the incentives and application process? (select all that apply)

- Oregon Film Staff (1)
- Oregon Film website (2)
- Trade publication (3)
- Word of mouth (4)
- Other (please explain): (5) _____

Q28 Do you have any suggestions on how to improve information or materials about the programs?

Q29 Do you have any suggestions on how to improve the application process?

Q30 Would you consider applying for incentives through Oregon Film in the future?

- Yes (1)
- No (2)

Q31 Do you have any final comments about the incentive programs offered by Oregon Film or about working in Oregon?

Q35 We may conduct interviews after reviewing the survey results to further our understanding of the incentive programs. May we follow up with you at a later date?

- Yes (1)
- No (2)

Answer If We may conduct interviews after reviewing the survey results to further our understanding of the incentive programs. May we follow up with you at a later date? Yes Is Selected

Q37 Please provide your contact information if we need to follow up with you.

Name (1)

Email Address (2)

Phone Number (8)

Q34 That's all! Thanks for responding. Please click Next>> to submit your response.

Survey of Media Sector Professionals

The Community Service Center at the University of Oregon, in partnership with the Oregon Governor's Office of Film and Television, are conducting this survey. Our objective is to learn more about how the media sector is contributing to Oregon's economy and to evaluate the incentive program offered by Oregon Film. Your participation in this survey will provide us with valuable insight. If you are unsure about your answers, please estimate to the best of your ability. We anticipate this survey will take approximately 15 minutes to complete. If you have any questions regarding this survey, please contact Robert Parker at the University of Oregon at rgp@uoregon.edu or 541-346-3801.

Q2 Are you involved with any Oregon media-related organizations? Please check all that apply.

- Oregon Media Production Association (1)
- Mid-Oregon Production Arts Network (2)
- Southern Oregon Film and Media (3)
- Central Oregon Film Office (7)
- Silicon Shire (4)
- Oregon Games Organization (5)
- Other: (6) _____

Q3 What kind of media sector activities are you engaged in?

Q4 Please estimate how many projects you work on in an average year. For this question, a project is defined as a feature, commercial, season of a show, or a game.

Q5 Please estimate what percentage of you work originates within Oregon and out of state in an average year.

Within Oregon (1) _____

Outside of Oregon (2) _____

Q6 Please rate the level importance the following factors were in your decision to work in Oregon:

	Very important (1)	Important (2)	Moderately important (3)	Slightly important (4)	Not important (5)
Quality of life (1)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Favorable business climate (2)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Proximity to other locations (e.g. easy to travel to and from) (3)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
No sales tax (4)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Crew/talent base (5)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
State incentive programs (6)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q7 Are you usually able to purchase all of the equipment and products you need in Oregon? If not, what is unavailable to you?

- Yes (1)
- No (please explain) (2) _____

Q8 Are you usually able to hire all of the crew or staff you need in Oregon? If not, what is unavailable to you?

- Yes (1)
- No (please explain) (2) _____

Q9 Are you usually able to access all of the facilities you need in Oregon? If not, what is unavailable to you?

- Yes (1)
- No (please explain) (2) _____

Q10 How would you rate the general business climate for the media sector in Oregon?

- Very supportive (1)
- Supportive (2)
- Neither supportive nor unsupportive (3)
- Unsupportive (11)
- Very unsupportive (12)

Q11 What are the greatest barriers to working in the media industry in Oregon?

12 What can Oregon do to support the media sector as a whole?

Q13 What can Oregon do to support your media sector activities?

Q14 How is your business structured?

- Sole proprietorship (1)
- Limited liability company (2)
- Corporation (3)
- Partnership (4)
- Cooperative (5)
- Other: (6) _____

Q15 Do you/your business have employees other than yourself?

- Yes (1)
- No (2)

Q16 Do you plan to grow your business in the next 5 years?

- Yes (1)
- No (2)

Display This Question:

If Do you/your business have employees other than yourself? Yes Is Selected

Q17 Please estimate the total full-time equivalent (FTE) employment of your business, including yourself.

Q18 Please estimate your annual gross revenue from media-related activities. This information will help us to understand how the media sector contributes to Oregon's economy. The information will be kept confidential.

Q19 Do you have any final comments about working in the media sector in Oregon?

That's all! Thanks for responding. Please click Next>> to submit your response.

TRANSCRIPT OF WRITTEN SURVEY COMMENTS

The two survey instruments used at the primary data collection tools for this study included open-ended questions where respondents could type in comments. This appendix includes the comments.

Oregon Film Media Incentives Survey

Do you have any final comments about the incentive programs offered by Oregon Film or about working in Oregon?

- We had a very good experience working in Oregon. WILD shot all over the state. The film office was extremely helpful throughout.
- Many of our Local Crew members are becoming industry professionals. Film work requires great incentives and a large pool of capable crew. When Production Companies based outside the state absorb out OPIF fund, they pocket it and take the Post-Production out of Oregon. If the IOPIF fund was robust enough to keep local Production Companies in state, you will find they do Post-Production here as well which would grow Oregon's Post-Production abilities, facilities, and bring in additional \$\$ from projects that may be produced elsewhere. We have some great Effects Houses in Oregon due largely to Grimm and other shows, but Great post-production facilities as well as sound stages only work with healthy indigenous backing.
- I was a little intimidated applying for the incentives at first and a little skeptical I would hit the necessary threshold for qualifying, but with the encouragement from the Oregon Film office I was able to get the incentives and easily passed the requirements. It was eye opening to realize how much money my company spent on local goods and services in the community on just this one project. It made me very proud to be an Oregonian (I am a recent transplant). And I have to admit, knowing the incentives were there, encouraged me to choose a local business over out-of-state competitors on a lot of purchases. This had an unexpected benefit of introducing me to businesses and products that I didn't know were in my own backyard and bonded me closer to the Oregon and Portland community.
- increase the overall cap - more incentive means more work
- Please keep up the great work!
- Our company has funding to produce more projects per year with increasing larger budgets, however, because there is a limit to the OPIF funds we will have to move our productions to another state. Our funders require incentives they believe that OPIF is inadequate. That is too bad. I started my company to create jobs in Oregon and now I have to move out of state and take the jobs elsewhere.
- Thank you! We wouldn't have made 3 features in Oregon or ultimately moved our production business to Oregon without the incentive program.

- The programs and the Oregon Film Office provide essential support to Oregon's media industry and are a great investment for the state.
- "Keep up the great work & partnerships (with OMPA, etc.) championing the film industry's extremely positive impact on our state!
- Tell us how we can help!"
- "Technically, we invested in editorial workstations, a shared area network and editing equipment which allowed us to staff up and deliver more than 50 videos for the global event. As this last April, we delivered all of the videos for the annual global sales conference, while growing our employee base from 15 to 25 in the past two years as well as hiring 40+ contractors to create and deliver the content.
- I feel this is truly a success story for the rebate. Since we have invested those rebate funds annually into greater capacity, we have captured more and more work for the Adidas global sales films. Historically, those creative video assignments were fulfilled equally by creative/production firms in Germany and Amsterdam. But since our investment of the rebate dollars, those projects (and associated good paying jobs) have stayed right here. And in between those sales conferences, Sockeye has been producing content for the likes of OHSU, The Nature Conservancy, Portland State as well as a number of consumer brands.
- And today, our 2015 rebate was earmarked to support Sockeye's marketing expansion into Europe to offer similar services to global brands, of which we believe will yield much more creative work for our Oregon-based creative community as most of the work we are awarded in Europe will be done here in Oregon."
- Wonderful program and film office. continuing to expand the program's relevancy for game development would be fantastic.
- It was an amazing process though out. The rules and regulations were clear online as well as through staff. Not a complaint in the world.
- The annual cap on the incentives is by far the biggest impediment to our shooting there more often. Seems like one or two TV shows use most if not all of the available rebate funds.
- My accountant really appreciated all the help Tim Williams and Nathan Cherrington provided over the past years.
- Thank you!"
- While we thus far haven't expanded our regular staff headcount based solely on the tax incentive programs, the incentives have allowed us to expand our creative offerings, our client roster and subsequent work opportunities for our freelance talent pool. With aggressive plans for expansion in longer format content--and the goal of sustained additional staff positions--the incentive programs will become ever more critical in helping us grow and our helping the Oregon production community grow in return. We are very grateful for the support from the Oregon legislature!

- All in all it's a really great program and I hope it sticks around for years to come!
- It has absolutely made a difference to our business. We have been able to hire at least 2 FTE's because of the rebate, and we also provide a very valuable paid internship program...in large part because of the incentives.
- This is a very good program but unfortunately it is underfunded. When we had our TV show in Portland there were only two other TV shows filming and they took up a majority of the funds so we were not able to fully capitalize on the incentive. There needs to be a more equitable way to divide the available funds.
- We had a great experience shooting in Portland. The crews, the vendors and the venues we dealt with were all top notch. Everyone we met was very helpful and extremely willing to assist us in every way possible. The Oregon Convention Center was fantastic, and it's staff and management were all first rate! The Film Office was extremely helpful and always there to answer questions and act as a resource to us as we were in pre-pro and production. They are all a great representative for the State of Oregon! I look forward to the opportunity to shoot in Oregon again in the future!
- Nope
- This is a great program. It really works. I convinced many clients to come to Oregon so that we could take advantage of the incentives. Those projects could easily have been done out of state.
- Keep project greenlight please.
- "On average, 90% to 95% of our work comes from outside of the state. 40% to 60% of our work comes from outside of the country. It is difficult to compete with other states and Canada's film incentives programs but the Oregon's film incentives help to make that possible. We go get work from outside of Oregon and hire local talent. On some of our campaigns, China is basically outsourcing to us for Oregon labor. This is pretty special.
- Lastly, we have been investing heavily in new technology, inventions, patents and game changing social networking. This would not have been possible without the Oregon Film Fund incentives.
- "Just very grateful for the terrific response to my first Oregon feature HOUSE OF LAST THINGS which has been released worldwide. I hope we can work together again on VOODOO LOUNGE, but, as I mentioned before, Development Incentives are necessary if we are to compete with larger Hollywood Productions.
- We really appreciate the Greenlight Rebate and the talent we've been able to add to our roster because of it. We love that the incentive pushes us to keep our dollars here in our own beloved community. We appreciate all the Oregon incentives for valuable talent they've brought to our area. We're able to tap into those resources for our own business too!

- The film office was extremely helpful for us. Whenever we had questions, they were quick to help us.

Oregon Media Professionals Survey

What are the greatest barriers to working in the media industry in Oregon?

- Most of the incentive money is for large scale tv and movie productions, not commercials and corporate work. I work on the commercial and corporate end.
- Awareness of disability rights. We provide closed captioning. Most advertisers do not include closed captioning in their ads. And when pushed about it by their own clients, will tell their own clients they won't do it for a variety of reasons, usually mostly because time or budget has not been set aside to add captions. Viewers are missed by a lack of captioning.
- Getting enough work.
- specificity of film's creative settings
- Money - I don't have enough of it to get the equipment & pay crew
- From a talent perspective, the greatest barrier is the perception that local performers are inferior to LA or (to a lesser degree) NY talent. Oddly this misconception is more prevalent with local producers than those who bring work up from LA. The best way for a local actor to raise their profile in PDX is to move to LA for a few years and come back, whether or not they're successful down there. I do voice work in markets all over the country, and in fact all over the world, from my Portland based studio, but can't get much of a leg up locally. It shouldn't be that way, but it is.
- Being a performing artist of color, I sometimes encounter systemic racism and white fragility. For example, roles are sometimes advertised for white characters when there is no storytelling reason why those roles must be played by white people. Or, I am considered for ethnic roles before I am considered for roles that are or should be generally open. Writers sometimes deliberately or inadvertently create culturally insensitive or racist content, and are hostile or dismissive of feedback from performers -- for instance, pretending to misunderstand criticism of lazy writing that perpetuates stereotypes. On set, I have overheard conversations about diversity casting being an impediment to creating quality content, when in reality, barriers to real quality opportunity interfere with the creation of quality content. / / Between friendly and hostile work environments for performing artists of color, I feel like the split is 50/50. Just when I feel like I can be at ease, something bad happens: I receive a script with racist content, get an inquiry for a stereotypical role, hear or see something hurtful on set. / / And then, I need to be cautious about whether I should call out the bad behavior or the misconception. How solid is my relationship with the people who hired me? Can I expect my agent to back me up? How badly will my standing up for what's right or standing up for myself damage my chances of getting my next paying gig (i.e., my ability to make a living)? / / It is exhausting to have to be an activist and educator

and political analyst on top of my work as a performing artist and an employee at my day job. And due to the overall inadequate education system in the U.S., particularly in Oregon, it is difficult to find other performing artists of color and white allies who have a solid enough understanding of civil rights history and political activism to band together as a force for change. ON TOP OF DOING OUR WORK AS ARTISTS. / / For me personally, the greatest barrier to working in media in Oregon is the white supremacist perspective through which I'm not perceived as a complete person to the same extent that white people are perceived as complete people.

- Large companies within Oregon are still hiring a lot out of state companies due to perceived "cachet". Ironically, a number of my freelance friends often bid through their own companies here in Oregon with more competitive bids, the jobs are awarded to out of state firms, and they are then are hired as independent contractors in L.A. or Seattle to do the same job.
- None
- Apart from the sometimes onerous permitting, difficulty of entry into some labor unions
- I imagine like in any state, the business climate. Is it vibrant or stagnant? Right now, / I feel clients aren't spending as much money as last year. At least not in my area - animation, illustration.
- Being a Minority Native American Actor.
- Low budgets
- More workers than work, and a reluctance by some local concerns to pay for it. (I come from the Midwest; talent fees are higher there.) Also, there seems to be a reluctance in Oregon (Portland in particular) for artists in some fields to promote their work. That 'underdog' mentality creates a strange dynamic where successful artists are viewed as "too big for their britches." In addition, artists here view their work as their "gigs" rather than as their "business."
- budgets
- Our filmmakers' incentive runs out each year before the end - we miss having some productions here that would otherwise have come.
- Oregon incentive program is modest
- There should be more incentives given to independent filmmakers. Indie filmmakers will give prestige to the industry unlike these really bad shows like Grimm and Leverage. When you have people making good indie films accolades from top festivals will follow and you will have more films being distributed. It would be nice if there weren't any cap to the incentives and there was more money given to the indigenous fund. I like to shoot in Oregon, but have no problem following the money if I know that's the only way, or the best way, to get my film made.

- Crew and resources are hard to secure when tv shows are in full swing and there are lots of commercials shooting. Oregon is just big enough to get the work, but not big enough yet to be able to provide support when we're all working at capacity.
- Incentive competition from Canada.
- Many people all working in the same industry and not enough work
- Too many people taking local jobs and projects.
- The limits (caps) placed on incentives for companies that would bring multiple productions here.
- While public perception of media has grown in recent years, it's still hard to get financial and insurance support from many institutions. Also, wages for locally-produced projects continue to lag professional minimums.
- Equipment costs and education.
- Limited incentive program (even now with the highest incentive the state has ever seen the money runs out each year. Productions then go elsewhere). Also crew base. I believe crew base is now 2 or 3 deep. Top level crew hires go fast leaving new shows coming in with the B or C level crews.
- Not enough projects.
- A more robust Tax incentive program would bring in hundreds of millions of dollars of film and TV work.
- We don't have nearly enough projects, nor routes to train more qualified crew, crew members in entry positions hold them for way too long, as the higher positions are not available. people over qualified for PA work take visiting commercial PA gigs, because they pay ok, and most producers fill upper positions from outside of the state
- Lack of more crews, large sound stages. This will come with more incentive money
- We are new to the party, but resources here in Central Oregon seem to be still developing. We are making a conscious effort to develop relationships with partners, and we are also introducing ourselves to companies and individuals who are like-minded and insist on high-quality production and deliverables.
- Knowing the right people
- The need for more big budget work. We create many small budget content pieces and commercials from \$600 - \$2,000.
- we need to assure that the growth rate for jobs matches the growth rate for incoming talent
- We need more recruiting. Drawing in more shows, commercials, etc.
- Awareness of our resources.

- Lack of regular, on-going production projects
- pay rate, lack of work in Southern Oregon
- A lack of jobs. I find my own work through internet crowdsourcing sites. It's tough to find people in Southern Oregon actually interested paying for a real commercial.
- Lack of feature films and TV shows shooting in southern Oregon.
- Always time-deprived and demanding info / assistance for inquiries, permitting, etc. with short notice.
- Not enough work coming into Oregon to fully support investment and improvements to infrastructure and a Small Market Mentality that allows investment dollars and experienced crew migrate to far off markets like Atlanta, Louisiana and Vancouver BC. Oregon is next door to California we need to make it a point that being next door to the Capital of media means we are the FIRST STOP when productions leave California.
- I haven't come up against any yet
- Local and affordable options for some of the high-end gear that I use often on my projects.
- None
- Not sure what the barriers are. I feel like the media industry in southern Oregon is pretty strong. I've been doing this exclusively for the past 27 years. It would be nice if we had more work here but I don't think there barriers betting in the way, it's more about the size of the community. The state incentives program has been responsible for work coming to southern Oregon.
- Lack of budgets
- People tend to have day jobs or limited availability
- enough access to clients
- Lower pay for labor than working in L.A. especially on commercials
- A lack of knowledge as to the cost of doing business for self-employed business owners, a lack of knowledge as to the costs of high quality video production.
- Work begets more work... there aren't enough project to be sustainable in So. Oregon.
- Lack of funding
- Limited large projects
- The network can be hidden at times.
- Not enough work
- Not enough projects coming to Oregon due to film incentive not being higher.

- Lack of connections / networking
- Lack of incentives for smaller independent productions. No support for independent media whatsoever. Community journalism is in a state of collapse.

What can Oregon do to support the media sector as a whole?

- Increase incentives for shorts and ultra-low budget projects
- It would be great if we could have something like the Freelancers Union for better buying power for health insurance and other benefits.
- Keep up the tax incentives. Most states do it now. We'd be in big trouble if we stopped supporting the industry.
- Get rid of the cap on incentives. Incentives bring in \$3 for every \$1 spent. If we had no cap, we'd have more productions, and our businesses would have more work.
- Provide a more inclusive environment to welcome newcomers
- Since a good majority of media professionals operate as independent contractors or as "permalancer" without benefits, it would be immensely helpful if the state would enable an organization like the OMPA to offer a group health plan for those independent media professionals who choose to live in this wonderful state.
- Continue to nurture and grow the tax incentive program
- Increase and bolster the incentive programs. Proportion them better to keep one or more productions from monopolizing them.
- The film and video office incentives are designed to attract films. However, as a producer of advertiser, the incentives have not been available to us because we don't drive the high numbers a film would drive. Yet, commercial production is an important stop gap for most film and video professionals. Oregon needs to offer incentives that apply to that work.
- Continue to provide tax incentives to the media sector. / / Research the demographics of people working in the media sector. / / Ask people from marginalized groups about their experiences, and commit to creating changes to the media sector that benefit ALL of its participants. / / Work with civil rights and social justice-oriented organizations such as the Portland Emerging Arts Leaders (PEAL); the Asian Pacific American Network of Oregon (APANO) Arts & Media Project (AMP); the Urban League; the Miracle Theatre Group (Milagro); PHAME Academy; Native American Tribes; and others to develop and publicize guidelines for working with communities of color and for portrayals of people of color. / / Reform education to include more history, art, and literature for, by, and about people from historically marginalized populations. / / Stop teaching people - especially children - that yellow-face, brown-face, red-face, etc. and whitewashing of roles originally written for people of color are acceptable. Make these practices unacceptable. / / Provide scholarships and grants to people from marginalized populations who want to work in media.

- Build the desirability and trendiness of the Oregon brand. Expand economic incentives for both indigenous and outside productions/gaming/media tech firms.
- I don't know.
- Provide ancillary services at a great cost to support the community.
- Subsidize youth education training programs.
- Keep up the incentives, make permitting easier, make labor union acceptance easier, protect workers and independent contractors in non-union productions by protecting them from wage fraud better than BOLI does now and helping contractors to collect unpaid invoices
- Not sure
- You can lead a horse to water, but...
- Bring in more Diversity and to include Native Americans in the mix of minorities.
- Support through incentives
- Incentives to bring more work here.
- remove the incentive cap
- Continue funding and increase the filmmaker's incentive
- continue incentives
- Media friendly practices in permitting and raise percentage and amount of incentives.
- Oregon could try to attract more talent by supporting indie filmmakers.
- keep lobbying and finding new ways to tap into new businesses to support it
- Continue to promote the geographic diversity of Oregon.
- Help provide additional funding opportunities for independent filmmakers, not just at the higher end level, but mid and low levels as well.
- Support Local.
- Remove or increase the cap amounts
- they are doing great.
- While I think the state still has work to do in building a qualified crewbase, great steps have been made (and will continue to be made if media is considered a component of the career technical education covered by Measure 98.) The next step is to start working on the local financing, insurance, and support services in the state.
- Continue to be the supportive community and environment you have been both on a commercial and narrative level. More work means more experienced crews means better work. Continue to make it easy to shoot in

Portland, continue to increase our incentives, continue to retain this state as a beautiful place to make things.

- I'm not sure, honestly. Continue to improve overall and that should garner more support.
- Be very proactive with educating the public, local Government and the state Legislature of the benefits of a higher incentive program. / / Once I'm done filming away from Oregon I plan to become very involved with this goal. As a 3rd generation 36-year veteran of the film and tv industry. As a 26 year Oregon resident. As a follower of incentive programs around the world with a special interest in Oregon's program I have much to say.
- Raise incentives to bring more projects to the state.
- The tax incentive program should be increased as that will directly effect and increase the amount of production in the state.
- Increase the incentives. I know that it is tough, and I'm appreciative of the increase achieved in the small session. It's heartening. From a rural perspective, it is challenging to build a new organization without funding, and without available incentives. / I think if we all were to work more closely together and present a united front at the American Film Market (Oregon Film, COFO, Southern Oregon), it would enable us to share to our core demographic just how accessible, professional and easy it is to film in Oregon.
- Increase incentive money
- Improve incentives. Remove the cap. We have wonderful resources here, certainly geographically, and also Oregon is poised to attract labor from California, Texas, etc. Please don't make the same mistakes that Texas made when Texas lost so much production to New Mexico, Louisiana, and even Michigan.
- Stay competitive with incentive programs
- Better market what Central Oregon has to offer. Offer filmmakers and large agencies more incentives to have large budget production done in Oregon. Showcase the talent we have in Central Oregon and the resources.
- keep increasing the incentive fund
- Retain or grow current incentives.
- Update online resources like the locations database and build a stronger awareness of Oregon incentives and resources throughout the industry.
- Promote and support attentively to keep Oregon an attractive place for productions (particularly serials)
- Increase incentives
- Cut taxes and deregulate.
- Bring out of state producers to Southern Oregon for a locations tour.

- Keep communicating state incentives and benefits of filming within the state.
- More Tax incentives to lure production here and State based investment in Legitimate World Class Sound Stages and Post Production Facilities to Oregon. 'Build it and they will come' Just take a look at what is happening with Marvel and Atlanta!
- Give incentives / Lobby to bring more companies to our state.
- Continue to promote local talent and encourage more outside the state/country to film here. Oregon is a stunning backdrop in many ways
- Not sure
- State Film incentives to bring in more or bigger productions.
- Have tours of Southern Oregon for location scouts
- continue with incentives
- More educational and networking opportunities for the smaller business owner in a variety of locations, i.e. not just Portland.
- Incentives; information links.
- Fund its artists
- Encourage out of state companies to bring their business to Oregon.
- Bring more out of state projects into Oregon - we have a tremendous opportunity to generate revenue and provide more consistent work for a large talent pool, as well as great locations and scenery for media and film projects.
- Help new filmmakers know the rules and regulations. Provide clear boundaries and what to do if accidentally crossed.
- Raise the incentive. Raise awareness about why filming in Oregon is important to the economic climate of the state overall.

What can Oregon do to support your media sector activities?

- Increase incentives for shorts and ultra-low budget projects.
- Have more incentives for the smaller scale commercial and corporate products. /
- I've been trying for over 20 years to get people to caption their commercials. Fred Meyer, Oregon Lottery, Goodwill all do it all the time. Help show some leadership on this issue to make TV more inclusive for people who can't hear. The City of Portland requires all TVs turned on in public places to have the captions turned on all the time. And your commercial spot stands out when it doesn't have captions. Your help would be appreciated.
- The same as above

- Further re: spreading out the incentives. For the majority of Oregon based actors like me, if we're very lucky we may book one day's work on a major show that benefits from the incentive program. That's great, and every actor in town aspires to this work, but it is very rare to book a recurring role or a different part in another episode. So we're "one and done." Producers demand new and different faces from the casting folks, so they have broadened the pool to include more Seattle based talent. It's understandable, but the net result is that the local talent pool as a whole doesn't see as much benefit as they might if there were increased incentives and part of the money was earmarked for commercials, low budget features, games, etc.
- The film and video office incentives are designed to attract films. However, as a producer of advertiser, the incentives have not been available to us because we don't drive the high numbers a film would drive. Yet, commercial production is an important stop gap for most film and video professionals. Oregon needs to offer incentives that apply to that work.
- Provide a better social safety net. Make housing and workspaces more affordable.
- Photographers struggle with their work being stolen/infringed upon and devalued constantly. Expand the ability to successfully prosecute for copyright infringement and to get payment at standard market rates if an image is used without permission. Once someone has blasted your image through the world wide web it is devalued, you have lost control of image rights and future revenue streams. It is very hard for a small business to go up against large firms who see no problem with grabbing your images that are very clearly marked "copyright all rights reserved" for their online magazine versions. Attorneys and insurance can help, but the overall climate of "it's ok to steal a photographer's image" without payment or attribution needs to be addressed.
- I don't know.
- Print Local
- Support credit programs for equipment purchases.
- support funding for documentaries and independent journalism, make permitting more affordable for such productions
- Not sure
- Again, it has everything to do with clients and there budgets. I really don't know how / a state can make businesses spend money when are taxes are increasing and the tax income is not being spent wisely.
- Continue to provide training and support of the media community
- Keep attracting work to Oregon.
- Same as above
- same

- Provide incentive rebates only when crew is hired that are located in Oregon; if a filmmaker brings in crew from outside the State, they do not get the incentive any rebates for those crew.
- They are doing a good job of that now, but again more funding helps me to promote more Oregon based filmmakers as well.
- More word of mouth.
- make more incentives available
- offer affordable venues to shoot.
- Continue to advocate for family-wage jobs within locally-produced projects (ideally union signatory.) The more we can support local production under the threshold covered by the i-OPIF, the more we'll be able to raise the wages for everyone working on locally produced projects and raise the quality of them so they can be sent out to market.
- I have a goal of directing an indie feature film in Oregon within the next 4 years, and I hope to be able to do it with the same sense of support that I feel right now as a young filmmaker making short films. / / I'll be spending an estimated \$250,000 and would love to see the incentives for a project of that nature increase.
- Provide more projects that require original music. too much "canned" music--farm music gets used on Oregon productions.
- See last answer.
- Raise incentives to bring more projects to the state.
- Just as the state of Oregon has subsidized the buildings of Server Farms in Prineville with huge tax subsidies--so too should the Politicians in Salem see that HUNDREDS of JOBS are created with every additional production brought to our state thru these tax incentives.
- Funding! As a one year old organization, funding is challenging as there is no sales tax in Oregon and therefore excess funds are not available for a film office. Program funding would be invaluable. / We are also creating an educational component for at risk youth and to have the support of Oregon Education would enable us to expand the program on a faster level than we are able to. /
- Increase incentive money
- Cultivate a viable Central Oregon hub. Help unify Central Oregon, facilitating connections between Central Oregon, Portland, and Oregon at large.
- Nothing comes to mind
- Give us opportunities to pitch business and use our resources. Did you know that we have a full production truck and shoot high school games live? Showcase the content that we produce. www.zolomedia.com, www.centraloregondaily.com, cotv.com, CO4.com (visitors network)

- Provide funding to SOU for programs that train college kids in video production.
- Continue funding for the film office and continue support in the form of incentives

Do you have any final comments about working in the media sector in Oregon?

- Keep up the good work and expand the incentives!
- The Executive Director of OMPA has been the most welcoming person I've met so far in the film network in Portland. Coming from LA, I have found a number of working professionals who appear to be completely uninterested in meeting or helping anyone who isn't from here.
- Thank you for doing this.
- This is a beautiful state to work in, we are all lucky to be here and should work together to build the creative capacity and creative economy in the state and neighboring region.
- The last two years have shown signs of improvement for my business. I think it's the combination of technological advances (lower equipment cost), more people conscious of video media potential and the population increases to our State, especially in the Portland area.
- It would help if labor laws and standard practices were the same as California's and the state worked with Contract Services Administration Trust Fund to make enrollment on the industry experience roster (and therefore acceptance to labor unions) easier for Oregonians, especially those who work primarily as freelancers for many different productions, because there are far less series and features available here than in LA.
- No
- Nope.
- Oregon is the place to be.
- A community has been built. Let's support it and help it grow.
- At a time when so many other traditional industries are dying, it's important to support an industry that's poised to grow here - e.g. filmmaking and media.
- More money and support should be given to indie films. If you compare Oregon to NY, LA, or more relatively sized cities like Austin or New Orleans you'll find that their support for indie films is far greater. / / What's the point of having a couple of shows up here like Grimm that's really terrible quality program, but brings some money, when you can create a much bigger indie scene making it possible to have several writers, directors and producers up here, developing their unique visions and staying put in Oregon so that as they grow as filmmakers they are able to create bigger projects and employ more people.

- I LOVE MY JOB AND THE PEOPLE I WORK WITH ARE TREMENDOUSLY GREAT!!!
- It is a good state with plenty of talented folks who just need more support and they will be able to help percolate into an even larger filmmaking community showcasing independent film and television programs on the caliber of any other production based state.
- Great Crews. Great Partnerships. Great State.
- Love OMPA
- I want to uplift this state as a go to location for filmmaking on the west coast and in the Pacific Northwest. Let's continue to bring in more shows and more feature films. / / If you need a young filmmaker to speak on behalf of the industry and why it's so important to me and my livelihood, please don't hesitate to reach out. I'm happy to represent my demographic.
- thanks for the survey.
- When incentive programs are set up and run well states give away pennies to make dollars. It can be good for all. Good for local crew and actors, local businesses and our tax base. Most states now have film incentive programs. The handful that bring in the most productions and out of state money have the largest and most respected ones. Oregon needs to raise our incentives to be in the running. The way to do this is to educate the voters. Educate our voted in officials and show hard data on how good this can be for our state. / / I'm educated and passionate on this subject. I can convey my thoughts to those listening. When I have the time, I will be happy to do so.
- I love working in Oregon and hope we support more projects in the future.
- As a South Eugene, High School Graduate--I went to California to secure a degree in Radio/TV. I would suggest that Oregon should develop more educational opportunities in Film and TV at high schools and Community Colleges for its students, especially those in lower economic levels. / /
- COFO is deeply committed to expanding awareness of Oregon as a production destination for out of area filmmakers. We are struggling with funding, but will continue to do this as a pro bono endeavor with the belief that it will be successful. / I would hope that eventually filmmakers will know our region as well as they know Portland, which is where the primary focus is now. / Greater collaboration between media partners would be advantageous, but that is also on us to reach out. / With the success of Grimm alone (\$200M over six years), it should be clear to legislature that production is a powerful, year round, recession proof industry that should receive greater funding that is currently available.
- We are excited to be here and want to do what we can to improve and cultivate production in Central Oregon. Please let us know what we can do to help you. / /

- You may want to come to Central Oregon to see what we have to offer. There's a reason that we are growing faster than any other region in the state:)
- I'm currently a very small operation in the initial stages of growth, so I hope to develop more working relationships within the state in the future.
- I think we have a wonderful opportunity for growth but we need sales people. Recruiters who know Hollywood producers, directors, etc. and not just people who log location sites or help once they get here. / / We need active recruitment and much more for Central Oregon. :)
- It is a great industry for our state. I hope it continues to grow.
- Ashland and Portland are great towns for independent media exhibition
- Once I graduate from college, I plan to give LA a try, but Portland might work too.
- Film inquiries in Central Oregon could grow and be more pro-actively served by the single resource that is currently in grassroots efforts - Central Oregon Film Office. We hope that the region and state continues to support their efforts. Thank you!
- I work as a PA. I work for other productions. I would love to see Oregon bring in more production companies into our state.
- So far I have found southern Oregon to be filled with incredibly bright, creative and resourceful media people. Portland fills voids we may have. / Also Tim Williams is terrific!
- No
- Oregon is an amazing place to work in film and TV because people are more relaxed and down to earth here than in L.A.
- It is a work in progress!
- Oregon is diverse and breathtaking in its landscape. It needs to be filmed.
- I like working here. The community shows a support that is encouraging and engaging.
- Love being here.