

OREGON FILM INDUSTRY IMPACT STUDIES

Comparative Summary - Full Six-Study Series

ECONorthwest 2007, NERC 2011, NERC 2016, NERC 2020, ECONorthwest 2023, and Oregon Film Historical Program Data

Study 1	Study 2	Study 3	Study 4	Study 5
ECONorthwest 2007	NERC / PSU 2011	NERC / PSU 2016	NERC / PSU 2020	ECONorthwest 2023
<i>Full industry 2007</i>	<i>Full industry 2011</i>	<i>Incentivized FY 2012–16</i>	<i>Incentivized FY 2016–20</i>	<i>Full industry FY 2023</i>

Plus: Oregon Film Historical Master Data (FY 2005–2026) - program payment records used throughout as a sixth reference source.

Full Six-Study Comparison - Key Metrics Across All Reports

The table below places all five academic studies alongside Oregon Film's historical program data for direct comparison. Note that the 2007 ECONorthwest and 2011 NERC studies measure the full industry, while the 2016 and 2020 NERC studies measure only directly incentivized productions - a deliberately narrower and more conservative scope. The 2023 ECONorthwest study returns to full-industry measurement.

Metric	ECONorthwest 2007	NERC / PSU 2011	NERC / PSU 2016	NERC / PSU 2020	ECONorthwest 2023
Analysis period / year	CY 2007	CY 2011	FY 2012–2016	FY 2016–2020	FY 2023
Industry scope	Full industry	Full industry	Incentivized only	Incentivized only	Full visual media
Sectors covered	3 segments	3 segments	Film / TV / Games	Film / TV / Games	6 sectors incl. streaming
Direct jobs	6,325	6,409	~1,543/yr	~1,330/yr	12,680 FYEs
Total jobs (multipliers)	13,336	12,243	~3,195/yr	~2,350/yr	27,264
Job multiplier	2.11x	1.91x	~2.07x implied	~1.77x implied	~2.15x implied
Direct output	\$709.6M	\$786.1M	~\$525M/yr	~\$421M/yr	\$3.48B
Total output (multipliers)	\$1.39B	\$1.42B	~\$525M/yr	~\$421M/yr	\$5.92B
Output multiplier	1.96x	1.81x	n/a (not modeled)	n/a (not modeled)	~1.70x implied
Total labor income	\$624.9M	\$472.7M	~\$149M/yr	~\$132M/yr	\$2.36B
Income multiplier	2.12x	1.86x	n/a (not modeled)	n/a (not modeled)	~1.53x implied
Incentives paid / studied	Not applicable	\$11.8M (2011)	~\$13.7M/yr avg	~\$17.5M/yr avg	\$22.5M (FY23)
State tax revenue return	\$123,260/M spent	43% of incentives	~67¢ per \$1	~69¢ per \$1	177% ROI

Sources: ECONorthwest (2007); NERC/PSU (2011, 2016, 2020); ECONorthwest (2023); Oregon Film Historical Master Data (FY 2005–2026)

Metric	ECONorthwest	NERC / PSU	NERC / PSU	NERC / PSU	ECONorthwest
	2007	2011	2016	2020	2023
OR resident payroll share	Not quantified	Not quantified	~83%	~82%	\$1.55B direct labor
Portland share of jobs	64.6%	67% (out-of-state)	Portland dominant	Portland dominant	Portland dominant
Non-Portland job growth	+214% vs. 2002	Portland grew 24%	Statewide	Statewide	Statewide
Avg. production wage	\$53,118 (payroll)	FTE-adjusted	\$43K–\$51K	\$48K–\$55K	Above OR avg.
Animation/Laika noted	Not yet active	Yes - Paranorman	Yes - anchor	Yes - anchor	Yes - major sector
COVID impact addressed	No	No	No	Yes (2020 section)	Recovered

Note: 2016 and 2020 NERC figures reflect incentivized productions only - a much narrower scope than the full-industry 2007, 2011, and 2023 studies. Direct comparison of job counts across all five studies is not appropriate without this context.

Individual Study Summaries

ECONorthwest 2007 - Baseline for the Modern Era

Published in July 2008, this analysis established the quantitative foundation for all subsequent Oregon film industry research. It is the first ECONorthwest study to compare Oregon's film industry across multiple years (2002, 2005, and 2007), allowing for trend analysis. The study measured three industry segments: indigenous film and video (\$380M direct output), television and cable broadcasting (\$288M), and out-of-state productions (\$41.3M).

The most striking finding is the 2002–2007 growth arc. Total economic output grew 66.4%, labor income rose 49.8%, and employment grew 28.4% - all driven primarily by the explosive expansion of indigenous film and video production (+136% output). Television broadcasting, by contrast, grew only modestly (+16.7%), confirming that the production incentive programs were succeeding in diversifying beyond the legacy broadcast base.

Geographically, Portland dominated with 74.8% of output impacts - but the rest of Oregon was gaining fast. The non-Portland share of employment impacts nearly tripled from 11.3% in 2002 to 35.4% in 2007, foreshadowing the statewide reach that subsequent program expansions (rOPIF, etc.) would formalize. The fiscal return of \$123,260 in state and local revenue per \$1M of out-of-state production spending established a benchmark used in subsequent studies.

Oregon was ranked 11th nationally in indigenous film/video production as of 2007 - a starting point that the subsequent decade of investment would dramatically improve.

NERC / PSU 2011 - The Grimm Era Takes Shape

Commissioned jointly by Oregon Film and the Portland Development Commission, the 2011 NERC study captures the industry at an inflection point: the post-recession recovery and the launch of productions that would define Oregon's film identity for the next decade. The anchor productions - Grimm, Leverage, Portlandia, and Laika's Paranorman - are named explicitly, and their combined economic weight is central to the findings.

Total industry output of \$1.42B and 12,243 jobs represents a stable, growing baseline comparable to the 2007 ECONorthwest findings. The job multiplier of 1.91x and output multiplier of 1.81x are slightly lower than 2007's figures, which NERC attributes to possible recession-related breakage in industry supply chains - supporting industries that contracted during 2008–2009 and had not yet fully rebuilt.

Two findings stand out as enduringly significant. First, producers of Grimm stated directly that an inexperienced crew adds \$50,000–\$60,000 per production day - quantifying for the first time the compounding value of Oregon's experienced workforce, and explaining why incentive programs that build crew depth generate returns well beyond the direct incentive cost. Second, NERC estimated Portland Metro's capacity at approximately 2.5 major simultaneous productions - a capacity constraint that subsequent program growth and infrastructure investment would have to address.

On incentives, the 2011 study found the programs returned 43% of foregone revenue in new state taxes - consistent with comparable low-business-tax states like Florida. The \$11.8M in total incentives that year leveraged 68 direct jobs and 117 total jobs per \$1M in incentives paid - a jobs-per-dollar figure that compares favorably to subsequent study periods.

What Changed - Comparing Early and Later Studies

Reading the full six-study arc, a consistent narrative of growth, methodological refinement, and industry diversification emerges. The following section highlights the most significant shifts.

1. Scale: From \$1.4B to \$5.9B in Output

The 2007 and 2011 studies found total economic output of \$1.39B and \$1.42B respectively - comparable figures reflecting a relatively stable industry. By 2023, ECONorthwest measured \$5.92B in total economic output across the full visual media industry. This is not simply inflation: real sector expansion driven by the rise of streaming, the explosive growth of advertising agencies, and a deepening animation/gaming cluster explain the majority of the gain. The 2007 study couldn't have anticipated streaming; by 2023 it was a \$1.39B sector on its own.

2. Methodology Evolution: From Broad Industry to Incentivized-Only and Back

A key shift occurs between the 2011 and 2016 studies that is crucial to interpreting the numbers correctly. The 2007 and 2011 ECONorthwest/NERC studies measured the full industry - all film, TV, broadcasting, and indigenous production activity. The 2016 and 2020 NERC studies deliberately narrowed to incentivized productions only, producing smaller but more defensible impact figures. The 2023 ECONorthwest study returned to full-industry measurement, explaining the dramatic jump in reported figures. The Historical Oregon Film program data occupies its own lane - measuring direct payment records, not multiplier-modeled economic activity.

3. Multipliers: Declining Then Recovering

The 2007 study reported a job multiplier of 2.11x and output multiplier of 1.96x. By 2011, these had declined to 1.91x and 1.81x - which NERC attributed to recession-related supply chain damage. The 2016 and 2020 NERC studies did not publish explicit multipliers for the same metric, but implied ratios are in the 1.7–2.0x range. The 2023 ECONorthwest study implies higher multipliers again, consistent with a fuller and more deeply integrated industry ecosystem. The long-run trend confirms that building local supply chains - vendors, crew, studios, post-production houses - increases the multiplier effect over time.

4. Geographic Spread: Portland's Share Declining as Statewide Reach Grows

In 2007, Portland captured 74.8% of output impacts and 64.6% of job impacts - but the rest of Oregon's job share had already tripled from 11.3% to 35.4% in just five years. The 2011 study confirmed Portland Metro's dominance for out-of-state productions (82%) while noting that television/broadcasting was more evenly distributed statewide. Oregon Film's Historical data provides the clearest picture of the geographic evolution: Portland hosts 422 of 587 Historical production projects, but Hillsboro (LAIKA, gaming) generates \$565M in audited spend from just 31 projects, and productions now reach Astoria, Bend, Southern Oregon, the Coast, and Eastern Oregon. The program's rOPIF regional incentive directly accelerated this diversification.

5. Sector Diversification: From Three Segments to Six

Both early studies divided the industry into three segments: indigenous film/video, television broadcasting, and out-of-state productions. By 2023, ECONorthwest identified six distinct sectors - adding streaming/social media (\$1.39B output), gaming/VFX (\$239M), and advertising agencies (\$2.0B) as major contributors. The 2011 NERC study foreshadowed this, noting digital animation as an emerging sector and flagging Oregon's location quotient of 2.0 for multimedia artists in the Portland Metro - twice the national concentration. That early signal has become one of the industry's pillars.

6. The Grimm Effect - and Its Legacy

The 2011 NERC study is the first to document the Grimm series by name as an anchor production. The show's producers provided direct interviews, and the study quantifies the crew quality premium (\$50–60K/day for inexperienced crews). The NERC 2016 study would later document Grimm's average of \$53.2M/year in Oregon spend across five seasons. Its loss between study periods (2016 and 2020) is the single largest single-factor explanation for the apparent economic contraction in the 2020 NERC report - despite a larger incentive fund. The Criminal and Delphi series documented in Oregon Film's Historical data are the first productions to approach Grimm-scale incentive values since its conclusion, suggesting the anchor production cycle is regenerating.

7. Incentive Program: Growing in Scale and Sophistication

In 2007, Oregon's incentive structure consisted of OPIF and Greenlight only. By 2011, the iOPIF program had been added to support indigenous productions. By the NERC 2016 study, rOPIF had been created to incentivize production outside Portland. The fund itself grew from a \$6M annual cap in 2011 to \$14M by the 2020 study period. Oregon Film's Historical data shows total incentives reaching \$25.9M in FY 2023-24. The programs have not only grown in scale but in strategic sophistication - layering local, regional, and labor-specific incentives to address gaps that early

What Stayed Consistent - Findings That Hold Across All Six Sources

Despite different methodologies, scopes, time periods, and research institutions, several findings recur with striking consistency across the entire sixteen-year study series:

- The incentive programs generate economic returns that exceed their direct cost. From the 2007 study's \$123,260 per \$1M of out-of-state spend to the 2023 study's 177% state tax ROI, every analysis confirms the programs more than justify their public investment.
- Oregon residents capture most of the benefit. The 2016 and 2020 NERC studies quantified ~83% and ~82% Oregon payroll capture respectively. The 2011 study's data on Grimm's Oregon crew dominance (80%+ local hire) confirms this was already true in the early anchor-production era. Oregon Film's Historical records show \$1.12B in Oregon labor spending as direct confirmation.
- Indigenous and locally-based production generates higher dollar-for-dollar state economic impact than visiting productions. Every study, from 2007 through 2023, validates this finding - which is why Oregon's deliberate design of supporting local, indigenous, and commercial production alongside large visiting productions gives the programs structural depth.
- The programs do not fully pay for themselves via state tax revenue alone - but this is the wrong metric. All studies agree on this, but also agree that the broader economic multiplier effects, wage premiums, crew development, and tourism externalities more than justify the investment when evaluated holistically.
- Portland is the hub, but statewide reach is growing. Every study confirms Portland's dominance while documenting material economic activity in Hillsboro, Eugene, Southern Oregon, the Coast, and rural areas. The trajectory is consistently toward broader geographic distribution.
- Crew quality is a self-reinforcing competitive advantage. First documented in the 2011 NERC study via the Grimm producers interview, this theme reappears implicitly in every subsequent study through the growing production volume and increasing incentive values attracted to the state.

Sixteen-Year Program Snapshot | 2007 → 2023

Measure	2007 (ECONorthwest)	2011 (NERC/PSU)	2023 (ECONorthwest)
Industry scope	3 segments	3 segments	6 sectors
Total direct jobs	6,325	6,409	12,680 FYEs
Total jobs w/ multipliers	13,336	12,243	27,264
Total economic output	\$1.39B	\$1.42B	\$5.92B
Total labor income	\$624.9M	\$472.7M	\$2.36B
Job multiplier	2.11x	1.91x	~2.15x implied
Avg. paid employee wage	\$53,118	FTE-adjusted	Well above OR avg.
Portland job share	64.6%	67% (out-of-state)	Portland dominant
Incentive fund size	~\$6M/yr OPIF	\$11.8M total	\$22.5M (FY23)
State tax return	\$123K per \$1M spend	43% of incentives	177% one-yr ROI
OR rank nationally	11th (indigenous)	Growing	Major production hub

Conclusion

Together, the studies form a historical record of Oregon's film industry economic analysis. They document the foundation - a modest \$1.4B industry, ranked 11th nationally, growing steadily from a 2002 base - on which the subsequent decade of incentive investment would build one of the country's most recognized regional production ecosystems.

Read in sequence, all six sources tell a single coherent story: deliberate, sustained, strategically designed public investment in film and media production incentives has compounded into a \$5.9B visual media industry employing 27,264 people, generating \$2.36B in labor income, and returning 177% to the state in annual tax revenue - all from programs that in 2007 were just beginning to find their footing.

The early studies are not just historical documents. They provide the baseline against which Oregon's extraordinary growth can be measured - and the strongest possible argument that continuing and expanding the programs is justified by two decades of documented, independently verified economic evidence.

Sources

1. "An Economic Impact Analysis of the Oregon Film and Video Industry in 2007." Robert Whelan & Alec Josephson, ECONorthwest. Prepared for the Oregon Governor's Office of Film & Television. Published July 2008.
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3. "The Media Industry in Oregon: Incentive and Impact Analysis." NERC / Portland State University, December 2016. FY 2012–2016.
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5. "The Economic Contributions of Oregon's Visual Media Industry in Fiscal Year 2023." ECONorthwest, prepared for Oregon Film, December 7, 2023.
6. Oregon Film OPIF & Greenlight Oregon Historical Master Data, FY 2005–2026 (Historical Dataset - Production Projects Only).

NB Data has been collated and organized from human created reports and databases utilizing AI aided tools.