

Higher Education

Utah is home to 13 institutions that offer film and theater degrees, digital entertainment degrees, or both.

TOTAL FILM, THEATER, DIGITAL MEDIA DEGREES

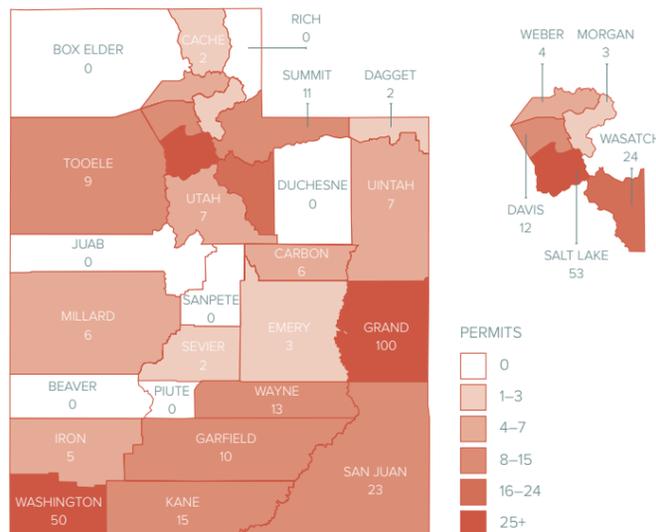
INSTITUTION	ENROLLEES (2015/16)	# OF SPRING 2015 GRADUATES
University of Utah	889	139
Southern Utah University	170	43
Utah College of Applied Technology	32	36
Utah State University	64	14
Utah Valley University	976	116
Weber State University	229	39
Dixie State University	125	13
Salt Lake Community College	296	28
Brigham Young University	561	132
Westminster College	54	7
Broadview University	25	25
Neumont University	5	5
The Art Institute of SLC (Being phased on in the next 3 years)	NA	31
Statewide Total	3,426	628

NA = No Longer Accepting Enrollments
For instances where <10 students/graduates were reported, the number is estimated to be five.
Source: Kem C. Gardner Policy Institute Primary Data Collection

Statewide Impact

Utah's geographical diversity provides opportunities for both urban and rural locations to benefit from film and digital entertainment production. Comprehensive film permit data is most readily available from state and federal permitting agencies. However, filming activities authorized by local governments and private entities are not always tracked and reported.

UTAH FILM PERMITS ISSUED BY STATE & FEDERAL AUTHORITIES IN 2015

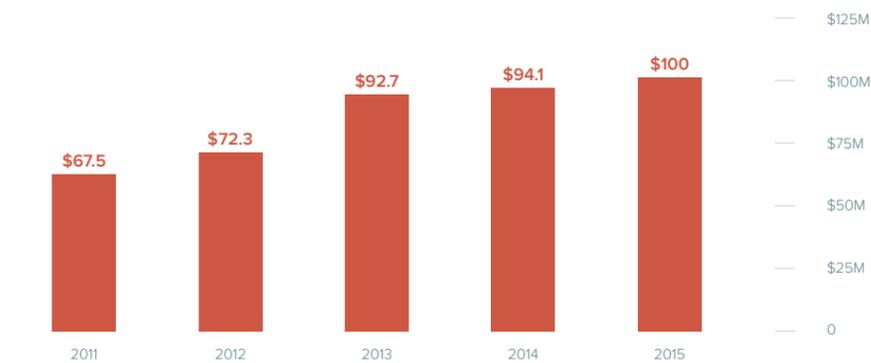


The film permitting agencies included are from the U.S. National Park Service (excluding Bryce Canyon National Park, Rainbow Bridges National Monument, and all National Recreation Areas and Historic Sites/Trails), U.S. Forest Service, The Bureau of Land Management, Utah DNR - State Parks, Utah Division of Forestry, Fire & State Lands, State of Utah School and Institutional Trust Lands Administration, and the Utah Department of Transportation. Does not include local or private film permit issuance; therefore, statewide film activity was higher than what is represented. For example, in 2015, Salt Lake City issued 123 film permits and Park City issued 15.

Film & Digital Entertainment Industry

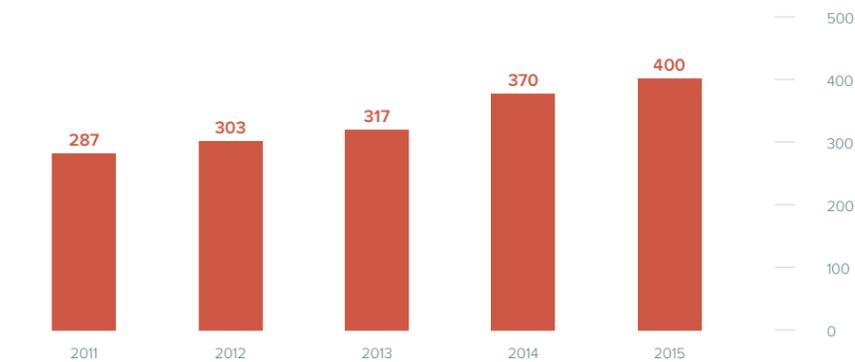
Based on the Utah Film Commission's film, digital entertainment, and content creation workforce survey results from May of 2016, Utah's film industry added 800 average annual jobs from 2011 to 2015.

UTAH FILM INDUSTRY AVERAGE ANNUAL WAGES (millions of 2015 dollars)



*Includes NAICS 51211, 51212, 51213, and 51219
Note: 2015 BLS data is preliminary.
Source: U.S. Bureau of Labor Statistics

UTAH FILM INDUSTRY AVERAGE ANNUAL ESTABLISHMENTS



*Includes NAICS 51211, 51212, 51213, and 51219
Note: 2015 BLS data is preliminary.
Source: U.S. Bureau of Labor Statistics

Types of Film & Digital Entertainment Jobs

- 3D Modeling
- Animation
- Animation/VFX
- Audio Design
- Concept Art
- Director
- Rental/Management
- Game Designer
- Lighting/Compositing
- Match Moving
- Matte Painting
- Props
- Producer
- Rigging
- Shading/Texturing
- Game Programmer
- Storyboards
- Distribution
- Live Support
- Level Designing
- Music Composition
- QA/Game Testing
- Studio Management
- Construction
- Casting
- Writer
- Voice Over
- Actor/Extra
- Editor
- Transportation/Driver
- Location/Scout
- Grip/Gaffer/Electrician
- Buyer
- Wardrobe/Costuming
- Composer
- Photography
- Personal Care (Hair, Makeup)
- Art Director/Set Designer
- Director of Photography
- Postproduction/Special Effects
- Food Services/Catering
- Animal Trainer/Wrangler

Self-Reported Jobs in response to Utah Film Commission Workforce Survey

2016

Utah's Film & Entertainment Industry Data Findings

UTAH
FILM COMMISSION

Data Partner

Kem C. Gardner
POLICY INSTITUTE
THE UNIVERSITY OF UTAH

Utah Film & Digital Entertainment Report Summary Methodology

October 2015 thru June 2016, Kem C. Gardner Policy Institute analysts conducted research to assess the current state of Utah's film and digital entertainment industry. Data on the incentive program, educational opportunities, economic sectors, and geographic activity related to the industries was incorporated.



Utah's film industry represents **432** film-related businesses and **\$100 MILLION** wages & salaries

Utah's Film & Digital Entertainment Industry Report, October 2016, Kem C. Gardner Policy Institute

Industry Indicators

Diversity and rapid evolution of the industry make it hard to capture and track its full scope using traditional economic data sources. Independent analyses have quantified a limited snapshot of the following factors:



SUNDANCE FILM FESTIVAL

\$72.5 million Gross State Product in 2016

Source: Kem C. Gardner Policy Institute



COMMERCIAL/ADVERTISING PRODUCTION

\$9.2 million in Utah economic activity in 2016

Source: Utah Film Commission



FILM EXHIBITION

\$193 million in 2015

Source: Kem C. Gardner Policy Institute

Data is still needed to quantify the full economic impact of those and other industry sectors, including:



PUBLICITY VALUE OF FILMS MADE IN UTAH



INTERNET CONTENT CREATION (I.E. YOUTUBE)



CONTRIBUTIONS TO UTAH'S TRAVEL & TOURISM INDUSTRY



DIGITAL ENTERTAINMENT

Data Summarized by The Exoro Group

Economic Impacts of the Motion Picture Incentive Program

OVERALL PROGRAM RESULTS

The Motion Picture Incentive Program (MPIP) provides for a refundable tax credit of up to 25% of in-state spending by a motion picture company, and up to 100% of new state revenue generated by a digital media company.

MOTION PICTURE INCENTIVE PROGRAM INCENTIVE SUMMARY

FISCAL YEAR	BOARD APPROVED ENCUMBERED INCENTIVE	TOTAL INCENTIVE PAID	# FILMS COMPLETED	UTAH CAST & CREW**	UTAH SPEND
2005	\$1,048,000	\$810,375	4	254	\$7,223,205
2006	\$1,680,191	\$1,427,314	7	585	\$7,383,722
2007	\$1,327,000	\$798,427	4	574	\$13,900,813
2008	\$6,111,000	\$4,239,314	13	1,256	\$40,964,586
2009	\$6,836,612	\$7,033,631	5	825	\$26,994,459
2010	\$4,943,291	\$3,757,967	16	1,071	\$20,648,337
2011	\$3,700,075	\$3,173,438	12	787	\$17,219,960
2012	\$7,142,767	\$5,065,840	19	1,894	\$25,005,202
2013	\$9,821,638	\$8,083,805	26	2,512	\$35,775,225
2014	\$8,777,052	\$5,759,246	20	1,855	\$24,882,761
2015	\$13,832,271	\$4,152,195	20	1,470	\$19,349,530
TOTAL	\$65,219,897	\$44,301,552	146	13,083	\$239,347,800

*2014 and 2015 totals are preliminary; not all completed films were paid out by the publication date.

**Does not include extras

Note: The MPIP offered only a cash rebate through 2009; a refundable tax rebate was introduced in 2010.

Source: Utah Governor's Office of Economic Development

Every dollar of state incentives paid for FY 2015 MPIP projects was associated with **\$6.20** in new earnings for Utahns and **\$7** in new state GDP

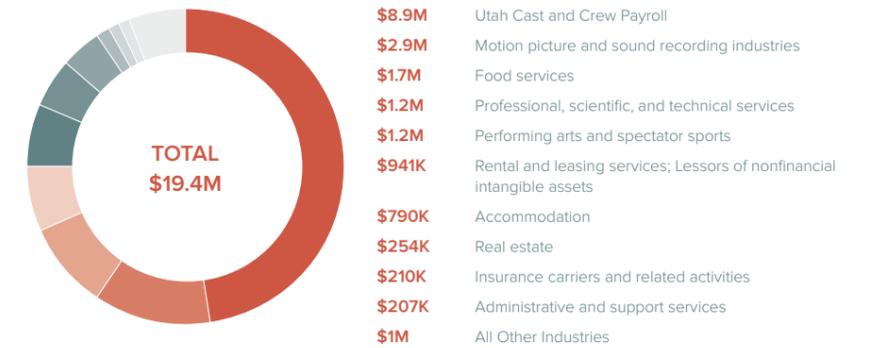


*The Kem C. Gardner Policy Institute analyzed 20 movie and television projects that film in Utah in FY 2015 and were closed out, i.e. fully audited and incentives awarded, as of July 27, 2016.

**The Kem C. Gardner Policy Institute used detailed transaction data provided by the Utah Film Commission to construct employment, earnings, and expenditure inputs for the REMI PI+ model. REMI PI+ is a dynamic model that incorporates input-output, economic geography, econometric and general equilibrium components.

*IMPLAN is an economic modeling program that estimates transactions between producers and suppliers and final consumers in a local economy.

ESTIMATED UTAH EXPENDITURES OF FY 2015 MOTION PICTURE INCENTIVE PROGRAM PROJECTS BY INDUSTRY (millions of constant 2015 dollars)



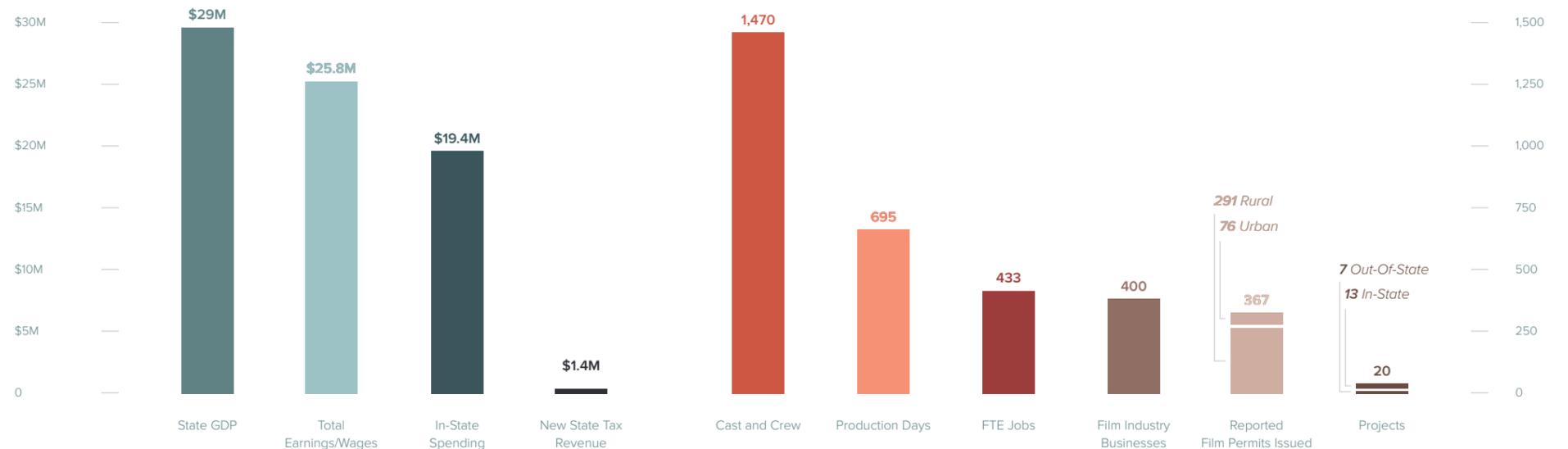
Source: Kem C. Gardner Policy Institute analysis of Utah Film Commission and IMPLAN data

ECONOMIC & DEMOGRAPHIC IMPACTS OF FY 2015 UTAH MOTION PICTURE INCENTIVE PROGRAM PROJECTS (millions of constant 2015 dollars)

IMPACT	DIRECT	INDIRECT/INDUCED	TOTAL
New Jobs (full & part-time)	119	314	433
New Earnings	\$8.9M	\$16.9M	\$25.8M
New Utah GDP	\$12M	\$17M	\$29M
New People	0	62	62

Source: Kem C. Gardner Policy Institute analysis of Utah Film Commission data using the REMI PI+ model

Return on Investment from Motion Picture Incentive Program



Based on \$4.2 million in refundable tax credits awarded to 20 projects in FY 2015

Source: Kem C. Gardner Policy Institute