

Software and Media Production



There are many reasons why Clackamas County continues to be a preferred location for the software and media production cluster. The natural scenic beauty of the Cascade Range dominated by Mt. Hood provides a rugged landscape with wild and scenic rivers and a range of settings that also provide convenient access to Portland. It is clear why major motion pictures (such as *Wild*, *Twilight*, *Untraceable*, *The Haunted*, and *The Shining*) and television series (such as *Librarians*, *Leverage* and *Grimm*) and television series (such as *Librarians*, *Leverage* and *Grimm*) have selected Clackamas County for their studio productions. This cluster is also comprised of nationally renowned publishing and broadcasting companies and creative designers, graphic artists, performers and writers. Representative software and media production companies in Clackamas County include: Waggener Edstrom, Dark Horse Publishing, AEC, Inc., Oregon Publications Corp., Pacific Marketing & Publishing, Pacific Coast Crewing, SuperGenius, Funnelbox, and Electric Entertainment.



Economic Benefits to Clackamas County and the Region

The software and media production cluster is an important component of the Clackamas County economy. Its vitality is measured by direct economic impacts, secondary benefits, and strategic market opportunities. Additionally, software and media generates business for professional and service industries, and promotes unique career-level employment opportunities.

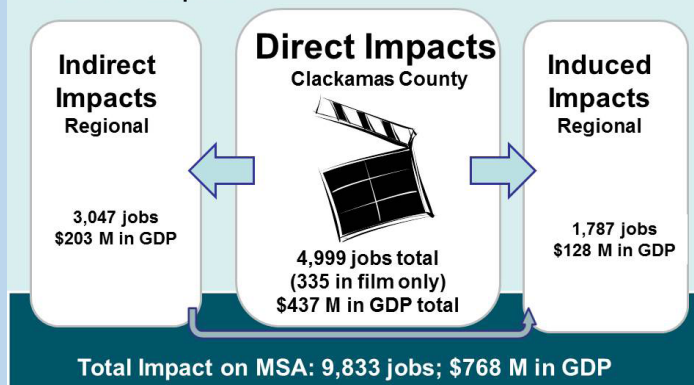
This cluster's prominence is driven in part by several software and media production companies located in various Clackamas County urban and rural office and industrial settings. As a direct economic benefit, production costs, employee compensation, and tax payments account for \$437 million in annual GDP for Clackamas County.

Software and Media Production Cluster Current Stats for Clackamas County

- Gross Domestic Product (GDP): \$437 M
- Cluster Share of County GDP: 2.4%
- Exports/Sales from Outside Region: 32%
- Direct Employment: 4,999
- County Businesses: 264
- Number of Businesses in the Top 100: 2
- 10-year Job Growth Forecast: 25%
- Cluster Location Quotient (LQ): 1.07

Source: compiled by FCS GROUP based on IMPLAN (2013), adjusted to 2015 dollars. 10-year forecast provided by the Oregon Employment Department. GDP = gross domestic product. Location Quotient (LQ) depicts relative share of this industry's contribution in Clackamas County compared to this industry's contribution in the 9-county Metropolitan Statistical Area.

Software & Media Production 2013 Impacts



CLACKAMAS COUNTY ECONOMIC LANDSCAPE
Software and Media Production

Software and Media Production Cluster: Annual Economic Benefits

	2010	2013
Location Quotient for Cluster in County	5.2	1.07
Contribution to County GDP	1.4%	2.4%
Business Establishments in County	332	264
Average Labor Income in County(per job)	\$31,483	\$38,238
Total Labor Income in County	\$175,740,000	\$191,150,000
Employment		
Direct Jobs in Clackamas County	5,582	4,999
Secondary Employment	2,647	4,834
Total Direct & Secondary Employment	8,229	9,833
Direct GDP and Output in Clackamas County		
Direct GDP (Value Added)	\$415,700,000	\$436,710,000
% Traded Outside Region	43%	32%
Output	\$781,430,000	\$876,500,000

GDP = Gross Domestic Product.

Source: Analysis by FCS GROUP. All data in this table with the exception of business establishments, are based on 2010, 2013 IMPLAN estimates. Employment reflects total jobs (full and part time workers as well as the self-employed). Estimated business establishments are derived from the Oregon Employment Department. Location quotients are based on Clackamas County's relative propensity to attract employers within this cluster in comparison to the nine-county Portland-Vancouver Metropolitan Statistical Area (MSA). *Note: Dollar figures are adjusted to 2015 dollars.*



Software and Media Production: Strategic Market Opportunities

The software and media production cluster is thriving in Oregon due in part to excellent cost advantages and direct incentives provided by the state. This includes production and labor investment rebates offered by the Oregon Production Investment Fund (OPIF), and the Greenlight Oregon Labor Rebate. In addition, Oregon has a rebate program for local filmmakers through the Indigenous OPIF program. The nationally regarded high quality of life continues to attract creative professionals to Clackamas County and the region with specialties in software and media production. This combined with Oregon's renowned "Silicon Forest" high tech setting, low cost of living, and ample regional labor force should foster growth in the software and media production cluster for many years.

Software and Media Production Cluster North American Industrial Classification System (NAICS) Categories

5111: Publishers

Includes newspapers, periodicals and book publishing.

5121: Motion Picture and Video Industries

Includes TV and movie productions.

5122: Sound Recording

5151: Radio and TV Broadcasting

5191: Internet Publishing and Broadcasting

5419: Advertising and Related Services

7113: Promoters of Performing Arts and Sports

7115: Independent Artists, Writers and Performers

Sample of Software and Media Companies in Clackamas County

AEC Inc.
Autodesk Inc. *
Dark Horse Comics
Electric Entertainment
Hawsoft Inc.
Jeppesen Sanderson Inc.
Oregon Publications Corporation
Pacific Coast Crewing Inc.
Pacific Marketing & Publishing Inc.
SuperGenius
Waggener Edstrom Inc. *

Source: Oregon Employment Department; FCS GROUP
 * Indicates top 100 County Business Listing



Existing Software and Media Production Companies in Clackamas County: Annual Regional Economic Output by Location*



* Reflects total economic output attributed to business activities measured in 2013 using the IMPLAN model for Clackamas County.

Career Opportunities

Software and media provides a substantial range of opportunities from technical production assistance to acting and performing. The following are the representative occupations:

- Technical Director
- Actor/Entertainer/Performer
- Musician/Singer
- Audio Producer
- Equipment Operator (i.e., sound, lighting)
- Graphic Designer
- Book Keeping and Accounting
- Set Design



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Resources

Clackamas County Business & Economic Development
www.clackamas.us/business

Business Oregon
www.oregon4biz.com

Film Oregon
www.filmoregon.org

Source Oregon
www.sourceoregon.com

NW Film Center
www.nwfilm.org

Oregon Governors Office of Film & Television

<http://oregonfilm.org/>

Oregon Media Production Association
www.ompaa.org

Clackamas Community College
www.clackamas.edu

Clackamas Workforce Partnership
www.clackamasworkforce.org

Contact Information

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