

**SASKATCHEWAN MEDIA PRODUCTION INDUSTRY
2014 CONSULTATION REPORT**

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Industry Association (SMPIA)
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ABOUT THE CONSULTATION PROCESS

In January of 2014, the Saskatchewan Media Production Industry Association (SMPIA) undertook a process of consultation to help understand and identify the needs of the remaining media production industry professionals in Saskatchewan.

An industry-wide survey was developed and released via Facebook and Twitter, emailed to individuals on SMPIA's archived members lists, included in SMPIA's member communication tools, delivered to film training organizations to connect with students, and privately sent to industry individuals that were noticeably absent from all of the above channels.

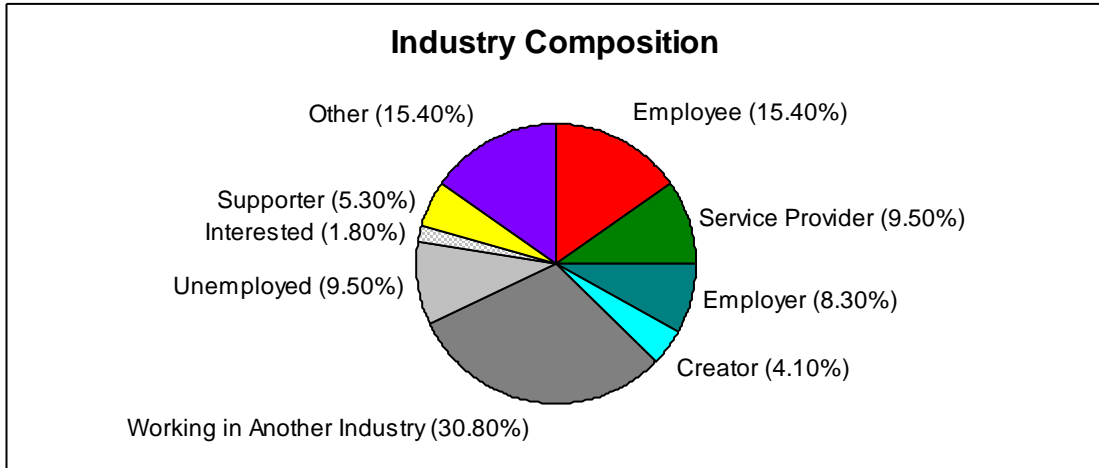
The campaign resulted in 218 responses, 27 of which did not complete the majority of the survey and thus did not provide details regarding their needs. Of these 218 responses, 187 indicated they were residents of Saskatchewan and of these, 41 indicated a goal to leave the media production industry. This left 146 respondents interested in continuing to be part of the Saskatchewan media production industry. The information collected regarding needs and solutions were restricted to this group.

A survey was also distributed to Producers using the same questions that were used to establish base measurements for the industry in November of 2011. This allowed SMPIA to gain an understanding of how the industry has changed and evolved in the past two years.

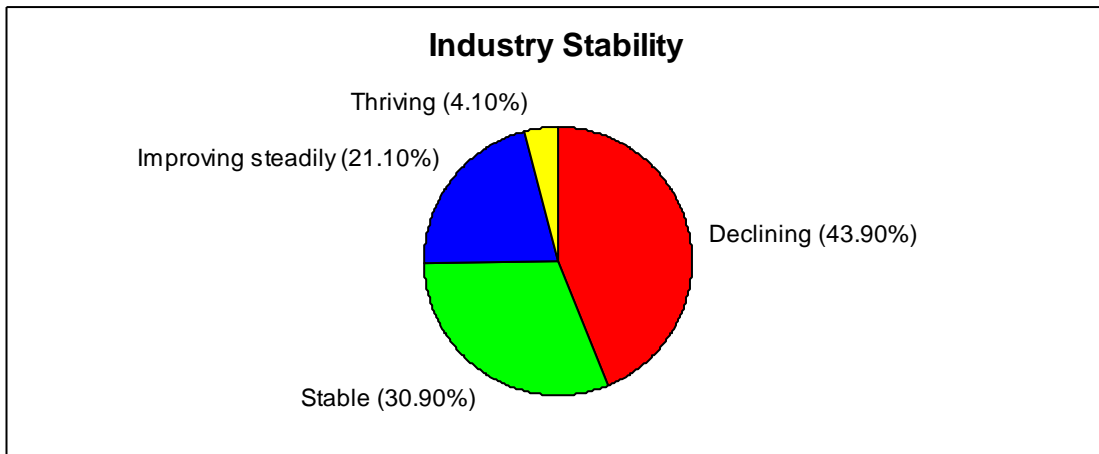
In addition to the digital surveys, in-depth interviews were done with 14 representatives from a cross-section of the industry. The interviews were intended to capture details that may be unique to an organization or community that may not have come through in the survey results.

AT A GLANCE

The Saskatchewan media production industry has been progressively downsizing and relocating over the past few years. The industry that remains is comprised of a cross-section of individuals who fill different roles that contribute toward the overall capacity of the industry to produce content.



42.1% of the 187 survey respondents still in Saskatchewan are not currently active in the industry, identifying themselves as interested in joining the industry, unemployed or working in another industry. 43.9% of those who were interested in continuing to be active in the industry feel their current situation is moving away from their goals.



Some of the people left in Saskatchewan are finding their way, and some are not. Industry capacity is down with a lack of skilled crew and equipment to service some genres of production. Those who are making ends meet are doing it in ways they do not necessarily want to be doing, but they are adapting in order to remain in the province. Focus is turning away from product creation and towards business development. A common expression in interviews was that where companies and individuals used to do 20% something else and 80% original production, they are now doing 80% something else and 20% original production.

Common Traits of Companies that are Doing Well

- Employ 8 or less people
- Most likely working in the Factual genre
- Diversifying to offer expanded services and do more work “in-house”
- Do Corporate work & plan to increase the amount of Corporate work done
- Feel current funding is sufficient & suitable in the short term, but not in the long term
- Seek opportunities to pitch products & services to investors/clients both in & outside of Saskatchewan

Common Traits of Individuals that are Doing Well

- Aspire to be Creators or Employers rather than remain Employees or Service Providers
- Diversifying to fill additional roles in industry or maintain an additional job or business
- Work with other industries & plan to increase work done with other industries
- Feel current funding is not sufficient or suitable in either the short or long term
- Seek networking opportunities with colleagues

The industry is experiencing a number of problems and there is little optimism amongst the community that things will improve. However there is also a strong common desire amongst those active in the industry to “move past the tax credit conversation”, and a continued determination to make something new out of the ashes that remain.

As 34% of survey respondents indicated that they may have to move out of province within the year, in the short term, the industry needs to be supported and stabilized to prevent further decline before it can then begin the long-term rebuilding process.

Biggest Challenges and Greatest Needs

The big picture challenges for the industry as a whole can be summarized as “workforce retention” and “infrastructure preservation”. To address these, the industry has overwhelmingly identified *Regular Work* and *Funding* changes as their immediate needs.

Top Obstacles to Success	Percentage
Lack of work available in Saskatchewan. I am trained and have sufficient experience, but there are no jobs.	57.1%
Lack of funding. The money available is too little or the wrong kind to support me or my business.	41.1%

Top Needs	Short Term	Long Term
Regular work	40.7%	35.3%
Different Funding	19.5%	26.2%

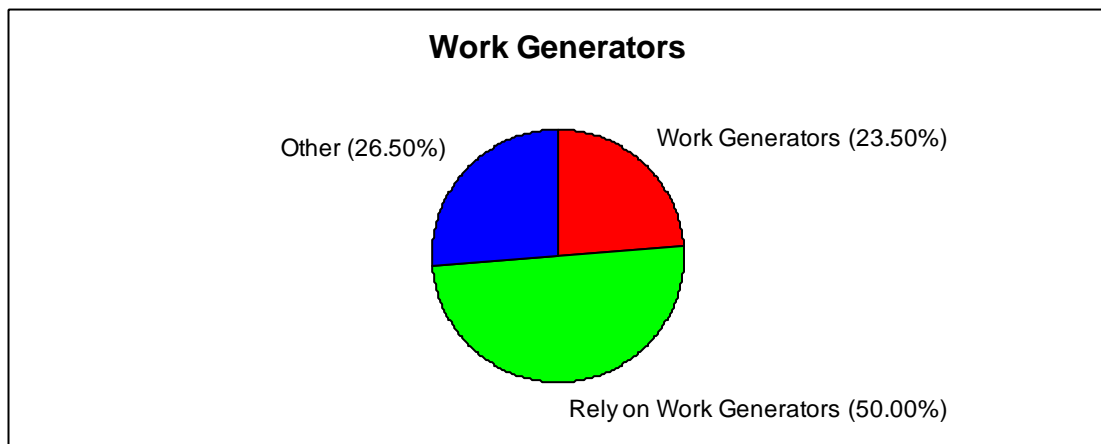
The industry's real challenge with the current system is not to complete individual projects; rather it is to figure out how to best use the new funds in a way that retains the workforce and infrastructure for future projects. While the \$250,000 cap is often cited as a major obstacle, the reality is that even if the cap was removed and larger projects more easily allowed, unless the

\$5M budget is increased, it will only be possible to fund a few projects done with traditional models of business. And a few traditionally modelled projects will not be enough to sustain the number of companies, industry personnel and infrastructure that remain. Removing the cap and making other small changes will not solve the industry's real problem. There is simply not enough money in the fund to generate enough work by itself.

Much of the industry accepts that the current environment will require innovation to survive (as many are already doing), but feels that both industry members and their funders need to innovate in order for the industry to stabilize. There is a desire for a collective focus on increasing the amount of *Regular Work* available and supporting the generation of non-traditional business for the industry in new and non-traditional ways.

Priorities

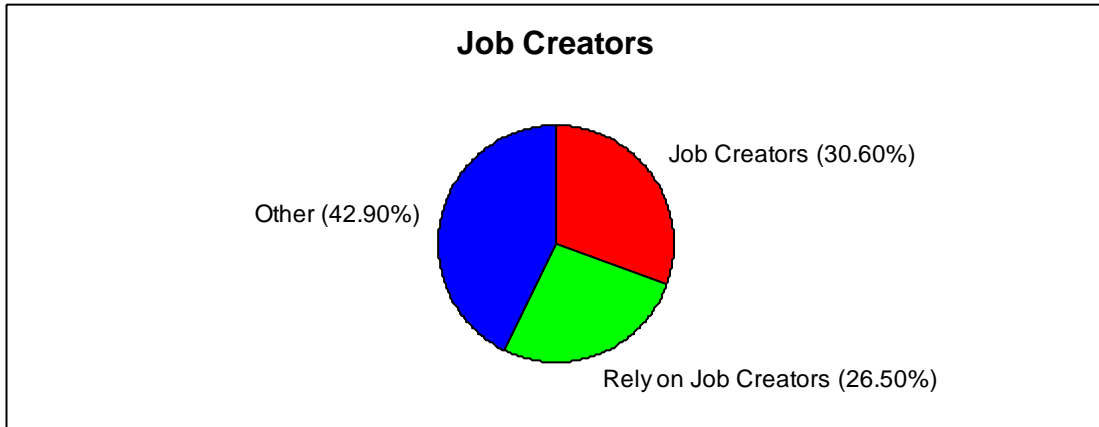
As *Regular Work* is the most pressing need of the industry, it is the current “work generators” and “job creators” of the industry who must be supported in all the ways they need to maintain and increase the amount of employment they generate if the industry is to be stabilized.



23.5% of the active industry identifies as “work generators”, that is *Creators/Employers* that own or create the original intellectual property, and 50% of industry members fill roles that work on or support the development, realization and distribution of those properties. Because the majority of industry relies on work that begins with these individuals and would like to continue to rely on work generated by these individuals rather than generate their own work, “work generators” play the most critical role in the production ecosystem.

“Job creators”, that is *Employers* and *Service Providers* who hire others, are also important factors in the pursuit of *Regular Work*. While the source of work for the “job creators”, especially *Service Providers*, has traditionally been the products created by “work generators”, that is changing as strategies like equipment rentals and corporate service work are being explored. *Regular Work* that is generated for the industry outside of the confines of creating products can be equally valuable to individuals who are struggling and thus it is important to support the activities and efforts of the “job creators” in addition to the “work generators”.

Just over 26% of survey respondents rely and plan to continue relying on employment generated by the “job creators” of the industry.



As the current “work generators” and “job creators” are already competing for local market share, it is not the amount of people generating work that needs to be increased, rather the amount of work the generators are doing and the value it provides for those who depend on it. This will require a number of strategies, such as looking to other industries, looking out of province, exploring new funding models and encouraging productions that are traditionally funded without government support.

Until there is enough work to support the industry that remains, if the workforce and infrastructure are to be maintained, the industry needs to focus on increasing the value of the employment provided by existing projects. Projects that generate “high-value employment”, meaning employment that is long term, high paying, or valuable enough that it will attract and maintain *Employees and Service Providers*, should be championed.

What will success look like?

Signs that the industry has begun to stabilize and recover include:

- An increased sense of stability and security amongst the Saskatchewan media production industry
- A maintenance or increase in the number of jobs reported to be part of the Saskatchewan media production industry
- A maintenance or increase in the number of “work generators” such as production companies/producers in Saskatchewan
- Diversified and increasingly sustainable media production businesses & personnel that are less vulnerable to market and policy changes
- Increased investor confidence
- More positive perceptions of the Saskatchewan media production industry both in and outside of Saskatchewan

“The most important thing for the Saskatchewan industry is to realize that we are not in Kansas anymore, to get over what has happened over the past few years, and to take a deep breath and start to build something new.”

STATE OF THE INDUSTRY

The results of this consultation process reveal a picture of a rapidly changing Saskatchewan media production community that is working hard to reinvent themselves. A common expression in interviews was that where companies and individuals used to do 20% something else and 80% original production, they are now doing 80% something else and 20% original production.

Companies

There are less companies than there were in 2011 with fewer employees and fewer projects being completed. These companies have become more diversified, offering expanded services such as equipment rentals, and completing more projects and activities “in-house” than in the past. These companies are actively seeking out new strategies and markets. Companies expressed a focus on work that can maintain their current employees and infrastructure. Many have turned to increased advertising and industrial work (Corporate) to sustain their businesses, and that has led to increased competition within the industry for local market share.

Most remaining companies report that last year was the worst year their business has ever experienced. Several indicated they could afford to remain another year to see if things improve before they may have to relocate or do most of their work in another province.

Common Traits of Companies that are Doing Well

- Employ 8 or less people
- Most likely working in the Factual genre
- Do Corporate work & plan to increase the amount of Corporate work done
- Feel current funding is sufficient & suitable in the short term, but not in the long term
- Seek opportunities to pitch products & services to investors/clients both in & outside of Saskatchewan

Individuals

Individuals who remain who may be employees, service providers or creators in the industry are also diversifying. Many are becoming “jacks-of-all-trades” who fill multiple roles. Most have other jobs, businesses, or do at least some work for other industries. Those who aren’t diversifying are most often unemployed or mostly working in another industry.

The overall demand for service providers, freelancers and specialist companies has decreased in Saskatchewan as companies diversify and become “one-stop shops” for clients. Therefore, individuals are also competing with companies and each other for market share as the work decreases.

The sense is there are too many people for too little work, people are being paid less for doing more, and they aren’t getting to do what they do best or want to be doing. Approximately 35% indicate they could move out of Saskatchewan within the year.

Common Traits of Individuals that are Doing Well

- Want to be creators or employers rather than remain employees or service providers
- Work with other industries & plan to increase work done with other industries
- Feel current funding is not sufficient or suitable in either the short or long term
- Seek networking opportunities with colleagues

WHO IS THE SASKATCHEWAN MEDIA PRODUCTION INDUSTRY NOW?

Of the 218 respondents 187 indicated they are still Saskatchewan residents, and of these approx. 66% expect to stay in Saskatchewan this year, and 34% are or may be leaving province this year.

What organization/faction of the industry do you primarily identify with?

Of Saskatchewan respondents, 67% are people that identify with an organization. Of the other 33%, many felt they either fit into multiple categories or didn't like the organizations and used this opportunity to indicate they filled these roles but not within the organizations listed. A sizable chunk of those who responded *Other* (approx. 42%) indicated they were post-production personnel.

Organization/Area of Expertise	Percentage
ACTRA (Actors)	17.2%
IATSE (Crew and Crafts people)	21.3%
DGC (Directors, Editors, Business Admin, Set Management etc)	19.5%
Writers Guild (Writers)	1.8%
CMPA (Producers)	7.1%
Other	33.1%

What genres do you work in or are you interested in working in?

The majority of the survey respondents indicated that they work or wish to work in the *Dramatic* genre, followed by *Factual*. Of all the genres, people working in *Corporate* or *Animation* were most likely to indicate their situation was stable and that they were still interested in the media production industry. Only 14% of the community chose *Digital* as a platform they wanted to work in and of the 5% responses that indicated *Other* as a genre of interest, several specifically indicated anything but *Digital*.

Genre of Interest/Expertise	Percentage
Dramatic film or TV series (movies, sitcoms etc)	74.4%
Factual film or TV (doc, doc series, reality TV, news, etc)	49.4%
Corporate (industrial, promotional, commercials etc)	30.4%
Animation	8.3%
Digital media (apps, video games, website content etc)	14.3%
Other	5.4%

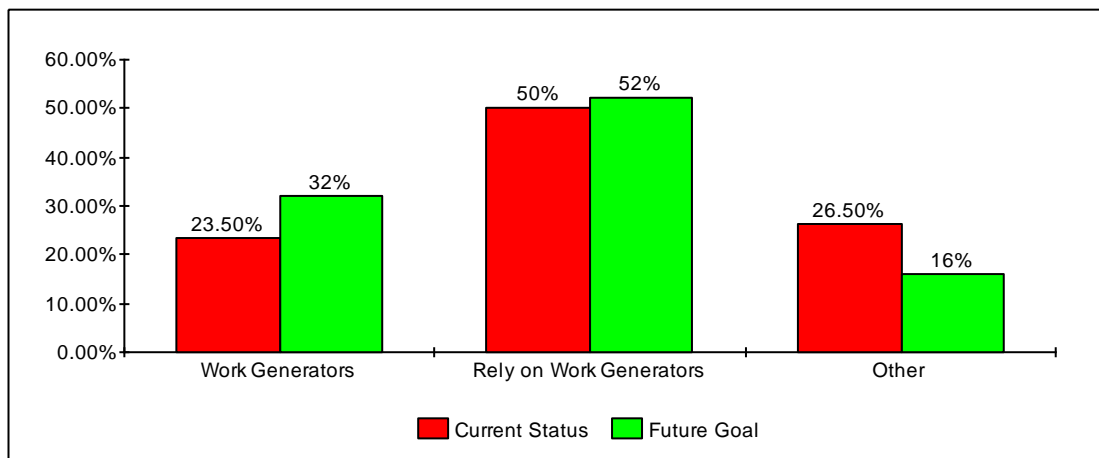
Note: Respondents could chose up to 2 areas of interest/expertise

Survey respondents were asked to indicate what role they were primarily spending 50% or more of their time filling currently in relation to the Saskatchewan media production industry. They were then asked what role they had a goal to fill and how they felt about their current situation in relation to that goal.

Industry Member Status	Currently	Aspire to be
An EMPLOYEE of the Saskatchewan media production industry? (crew member, office worker, editor etc that is hired by someone else to work on a project in which I have no ownership)	15.4%	20.5%
An EMPLOYER in the Saskatchewan media production industry? (producer, production company owner etc who holds an ownership stake in projects that I hire/contract other people to work on)	8.3%	14.5%
A SERVICE PROVIDER to the Saskatchewan media production industry? (caterer, post-production facility, marketer, service producer etc who owns a business that is contracted to provide services to an employer in the media production industry as defined above)	9.5%	8.4%
A CREATOR of original intellectual property that is sold to an employer in the media production industry for further production (writer etc) or produced without hiring employees (experimental filmmaker, hobbyist filmmaker etc).	4.1%	15.7%
A former Saskatchewan media production industry person now WORKING IN ANOTHER INDUSTRY in Saskatchewan	30.8%	24.7%
A former Saskatchewan media production industry person who is UNEMPLOYED and looking for work or working in the industry outside of Saskatchewan	9.5%	N/A
A SUPPORTER whose work is connected to the industry through partnerships, funding, celebration etc, (teacher, festival, association, funder etc), but who does not draw a direct profit or salary from industry projects or producers.	5.3%	4.2%
Someone who has no prior experience in the media production industry but is INTERESTED in joining it	1.8%	N/A
Other (<i>chose to list a combination of the above things they felt were equally occupying their time</i>)	15.4%	12%

Stability	Percentage
Moving further away from goal	43.9%
Stable, neither improving nor worsening in relation to goal	30.9%
Improving steadily toward goal	21.1%
Thriving, exceeding expectations or achieving goal	4.1%

Employers/Creators



Of the 187 respondents that are currently Saskatchewan residents, approximately 12% or 21 people identified as active “work generators” in the industry, that is *Creators* or *Employers* that own or create the original intellectual property that the rest of the industry works on. Of those, 12 people identify as “Producers” specifically. Because the majority of industry relies on work that begins with these individuals and wants to continue to rely on work generated by these individuals rather than generate their own work, *Employers* and *Creators* play the most critical role in the production ecosystem.

Of the current *Employers/Creators*, 12 indicated they were thriving or progressing toward their goal. Respondents who indicated they were doing well were more likely to have *Digital* and/or *Corporate* aspects to their business with only 1 of these respondents indicating that they didn’t do *Corporate* work.

In fact, the majority of the current *Employers* in Saskatchewan appear to have diversified their businesses in order to generate enough work and income to retain their staff. Strategies include increased corporate work, increased work with other industries, expanded services to be able to offer “one-stop” shops to clients, generating income through the rental of assets and developing properties to sell to others to produce.

Those respondents who are interested in *Corporate* work are already doing it and want it to increase, and that is indicative of most of the companies that are left. Only 2 *Employers* indicated they weren't doing *Corporate* work and were not interested in doing *Corporate* work. Survey results show that approximately 50% of industry business is now coming from *Corporate* work. The majority of people identifying as *Employers* and *Creators* had a goal to remain an *Employer* or *Creator*.

Most of the people aspiring to be *Employers* or *Creators* identify themselves as *Unemployed* or *Working in Another Industry* and consider their situation to be moving away from their goal. These individuals seek networking opportunities and support to travel to markets to pitch investors. Those who want to become *Employers* and are currently *Employees* in the industry sought mentorship opportunities in addition to the above.

“The avenues of success in the Saskatchewan media production industry are changing, but there are avenues to explore if living and working here is more important to you than doing the thing that you’ve always done in the way that you’ve always done it.”

Service Providers

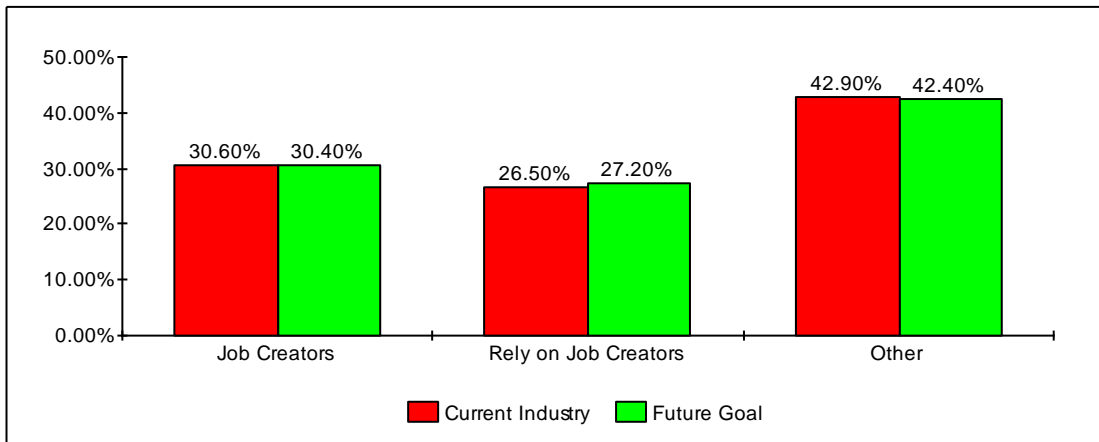
16 respondents indicated they were *Service Providers* to the industry with 10 indicating that they had a goal to remain *Service Providers*. 42.9% of *Service Providers* listed their situation as moving away from this goal with only 4 indicating the situation was improving. 1 *Service Provider* indicated business was thriving and this *Service Provider* was working in the *Digital* media genre.

Many of the *Service Providers* who remain appear to have expanded their businesses to include other services and creative enterprise endeavours. The 5 companies who indicated that their situation was improving or thriving all indicated that between 10% and 100% of their business currently comes from the provision of services to other industries.

Approximately 19% of *Service Providers* indicated they weren't doing work with other industries and 100% of those companies were not interested in doing work with other industries.

Service Providers were commonly looking for networking opportunities to generate new business. *Service Providers* would welcome market and export support and opportunities to promote their businesses and services to clients in and out of Saskatchewan.

Employment



26.5% of survey respondents rely and plan to continue relying on employment generated by the "job creators" of the industry, that is *Employers* and *Service Providers* who hire others.

There were 130 current fulltime jobs reported. 55 of these can be attributed to 1 *Service Provider* who spends only 10% of business working with the media production industry, leaving 75 combined fulltime jobs in the industry from other sources. 68% of these remaining jobs were with companies that worked in the *Corporate* and/or *Digital* genres (most indicated both), and 75% of those companies reported that more than 50% of their current business activities involved providing services to other industries. In simpler terms, there are few full-time jobs for people working primarily on traditional original intellectual property for the media production industry.

In addition, respondents reported 8 part-time employees and 84 contract workers. 64% of these contract workers were attributed to companies that work in *Animation* and the majority of which were based in Saskatoon. These companies were also most likely of all survey respondents to indicate they had work but there was no one qualified available to hire.

2 companies representing 10 jobs total anticipate a decrease in their staff this year, both of which were *Service Providers* that do not work in the *Corporate* genre and were uncertain if they would be able to remain in Saskatchewan.

8 companies anticipated increases in the amount of people they employed in the coming year. 75% of these companies were working in the *Factual* genre and 100% of them were doing some kind of *Corporate* work.

Considering there are more companies that expect to increase employment in the coming year than expect to decrease, and with 26 of survey respondents indicating they are spending most of their time as *Employees* compared to 34 respondents indicating their goal is to be an *Employee*, the desired employment goals for the industry appear within reach if the current levels of employment can be maintained and if available skills and personnel can be matched to demand. In order for new entrants to find a place in the market however, jobs will need to be increased.

Employees

This is the second largest group of survey respondents. Most members of this group had a goal of remaining *Employees* in the media production industry. 38.4% had a goal of being an *Employer* or *Creator* in the future and 7.7% wished to be *Working in Another Industry*.

Of this group, only 20.9% felt their situation was moving toward this goal or thriving, approx 41.7% indicated it was stable and 37.5% indicated they were moving further away from these goals. However, as 76% of respondents in this group did not expect to move away from Saskatchewan in the coming year, people who are employed in the industry currently appear to be willing and able to wait for the situation to improve.

The *Employee* group is primarily interested in the *Dramatic* genre with only 4 respondents indicating an interest in *Digital* media. *Employees* who indicated they worked or were interested in the *Digital* media genre were most likely to indicate that they felt their situation was moving away from their goal.

This group commonly wanted something from the past brought back. SCN, Tax Credits, Job Start/Future Skills, SaskFilm, and Showcase were all mentioned as things that should be reinstated to address the current issues in the industry. Many feel helpless and express a great deal of frustration and anger in their comments.

Employees who have a stable job were more likely to be happy with the funding currently available or make constructive suggestions to improve it. Most members of this group indicate they do not need training, and most are interested in opportunities to celebrate and show past projects.

Interested in the Industry

People who indicated they have no experience but were looking to enter the industry and students consistently had a goal of being either *Creators* of their own products or *Employees* of the industry but rarely anything else. They are primarily interested in *Factual* and *Dramatic* genres. *Digital* media was not chosen as an area of interest.

Entry-level people are most likely to indicate they need more experience to be successful. Entry level people are also the group that is most likely to want market intelligence as many of the other groups indicate they receive that elsewhere.

This group of respondents seeks opportunities to feel part of a group by connecting with

like-minded people, a stable job in a creative industry that allows them time to learn or explore their own creative endeavours, and easy access to funding for personal projects.

***“If students felt they could build a career here many would choose to stay.
To do that, there would have to be some sort of industry”***

“Without projects to work on, many students are forced to leave”

Working in Another Industry

The largest category of survey respondents were those currently *Working in Another Industry* who indicated they wished to remain *Working in Another Industry*.

In total, 40.2% of survey respondents are currently *Unemployed* or *Working in Another Industry*, and 60.3% of those have the end goal of continuing to *Work in Another Industry*. In other words, 41 people or approximately 22% of total survey respondents still in Saskatchewan, don't wish to be part of the Saskatchewan media production industry anymore regardless of what changes.

In order to ensure that the results were a reflection of the remaining production community and what they needed to remain, respondents who indicated that leaving the industry was their ultimate goal were not presented with the opportunity to rate their obstacles or needs. These respondents were however provided with the opportunity to submit general comments about industry re-growth and SMPIA's role toward the end of the survey.

Given this opportunity, the majority of the comments from this group were largely negative and filled with unconstructive insults regarding government and their actions to date.

***“This work environment is just not sustainable for those of us who worked
regular hours in support of projects.”***

WHAT ARE THE MAIN PROBLEMS FOR THE REMAINING INDUSTRY?

Survey respondents were asked to identify the main obstacles to reaching their goal, and in subsequent questions were asked to identify what they most needed to reach their goal in both the short and long term.

Surprisingly, all categories of respondents, regardless of desired position in the industry or current state, identified the same top obstacles and needs in both the long and short term. In other words, whether they were struggling or thriving, and individual or a business, a leader or just starting out, leaned artistic or commercial, they all consistently indicated that they require the same things in order to find success in the Saskatchewan media production industry.

Top Obstacles to Success	Percentage
Lack of work available in Saskatchewan. I am trained and have sufficient experience, but there are no jobs.	57.1%
Lack of funding. The money available is too little or the wrong kind to support me or my business.	41.1%

Top Needs	Short Term	Long Term
Regular work	40.7%	35.3%
Different Funding	19.5%	26.2%

Regular Work

The majority of respondents (57.1%) identified their main obstacle as being: *that they are trained and have sufficient experience, but there are no jobs available.* And the majority of respondents (40.7%) indicated that the most important thing they needed immediately to succeed was *Regular Work.*

Comments and interviews revealed that *Regular Work* meant different things to different categories of people.

For *Employees* in the industry who had a goal of being *Employees* in the industry, consistent and reliable work doing what they are currently trained to do or moving toward what they were trained to do was important.

“For me, it’s really all about the opportunity to work.”

Creators and people who wanted to be *Creators* (generating intellectual property that could generate employment, but not directly employing people themselves) desired consistent and reliable employment in a creative industry, but were more likely to be open to a job that would not be considered their area of expertise. Examples included the opportunity to work at a theatre screening films or at a radio station doing audio work by night so their bills were paid and their contacts/skills were being enhanced, but their days were free to work on their own creative projects.

For *Employers* and *Service Providers*, *Regular Work* meant a steady flow of business coming from clients that would enable them to retain their employees, pay themselves, and ideally afford them the opportunity to do some creative production work in between the other work.

“I provide services for finished media productions. If there are no productions, there is no need for my services“

For industry *Supporters*, *Regular Work* was most often interpreted as regular work for the industry, as in the work that clients were doing that they supported so that there would continue to be a need for them to support the industry. For example, if films were not made, they would not be able to be entered in a film festival and thus that would affect the film festival.

“To have a successful industry, a continual flow of productions is a necessity.”

In total, approximately 50% of survey respondents that are actively working in the industry today do not create their own intellectual property. Instead they rely on work that stems from the creation of intellectual property by the “work generators”.

With Saskatchewan’s film commission, SaskFilm, no longer in existence, and given that a core function of a film commission is to generate work for the province, the problem of a lack of *Regular Work* is expected to get worse.

Different Funding

People *Working in Another Industry* who wanted to be *Creators* and felt their current situation was moving away from their goal were most likely to indicate *Funding* was a concern in the short term. People *Working in Another Industry* who wanted to be *Employers* and felt their current situation was moving away from their goal were most likely to indicate *Funding* was a concern in the long term.

Respondents that selected *Funding* as a concern were asked to identify why, with the majority indicating that current *Funding* is not sufficient or suitable for their projects.

Reason Different Funding is Needed	Short Term	Long Term
what is offered isn’t sufficient or suitable for my projects	78%	86%
what is offered is sufficient and suitable but I haven’t been able to access it	22%	14%

The number of respondents indicating that current funding is not sufficient or suitable for their projects increases in the long term, which would seem to indicate that more people feel they can work with what is available right now, but will have trouble continuing to do so.

Conversely, the number of respondents indicating that funding was sufficient but they couldn’t access it drops in the long term, which may indicate that many respondents anticipated that the problem of not being able to access available funding would start to resolve itself.

Funding is sufficient and suitable but not accessible

Employers who indicated their business was improving were most likely to say funding available is suitable. 2 respondents indicated that funding was sufficient and suitable and they had no problems access it, they just needed to continue to do so in the long term in order to ensure success.

Respondents who indicated that project funding is sufficient and suitable but they can't access cited the following reasons:

- Lack of knowledge or understanding of the programs
- Lack of personnel/community
- High barrier to entry

1. Lack of knowledge or understanding of the programs

Some respondents expressed that they needed to do more research to understand how the funding and the industry itself works.

***"It's not so much that I haven't been able to access it...
I don't know how to go about accessing it."***

2. Lack of personnel/community

Some respondents indicated that there was a lack of production companies to create projects or produce the projects generated by *Creators*, and thus the programs were not valuable in generating work opportunities.

3. High barrier to entry

Some respondents felt that the bar was too high for the remaining community to work with. There was a sense that it was designed for the old model of senior production companies and broadcast licenses rather than small companies without experience that were utilizing new business models. Some expressed that filmmakers needed more support early in their careers.

***"As a visual artist I can rent a space, invite people to view my work and then be eligible for funding to further my craft regardless of talent or merit.
In Film/TV why to get that same amount of funding must I not only incorporate my company, but also have producer related credits before I can apply?"***

"Requiring a broadcast license to trigger funds is a huge challenge and 20th century business model. My company requires access to a production fund that DOES NOT require a broadcast license."

Funding isn't sufficient or suitable

Respondents who indicated project funding isn't sufficient or suitable were commonly advocating for bringing back the tax credit throughout the survey. People who were currently *Working in Another Industry* and aspired to be *Creators* were most likely to indicate that current funding available was not sufficient or suitable.

In addition, it is interesting to note that many of these responses came from the *Employee or Service Provider* category who most often rely on the business generated by *Employers* rather than apply for funding for themselves. It is possible that responses from these individuals are based on perception and knowledge regarding what their clients or employers require rather than an expression of what they personally would use themselves.

It is also interesting to note that the problems cited by those that felt funding was suitable but couldn't access it were also shared by those who felt the funding was unsuitable. In other words, there is some consensus between supporters and non-supporters regarding problems with the current funding system.

While many respondents indicated that a refundable tax credit or another consistent and reliable industry standard business incentive was required if industry was to return, when asked to discuss options other than this, there were many *Employers, Creators and Supporters* who elaborated on concerns and responded with constructive suggestions on how current funding system barriers might be addressed. These concerns were echoed in interviews and included:

- Lack of knowledge or understanding of the programs
- High barrier to entry
- Genre restrictions
- Funding supports projects not company development
- Administration challenges
- Level of funding available

1. Lack of knowledge or understanding of the programs

Some respondents indicated they didn't understand the new programs that were available and that the funding models were unclear.

"We have not adjusted to this new reality."

2. High barrier to entry

Some respondents indicated that they lacked the required credentials to apply for funding and the ability to obtain advance funding commitments from other sources.

"I am unable to secure funding for my next feature film because I have not been able to sell my previous film."

“No one in the province is offering up front funds for my project”

Requiring a broadcast license or distribution agreement is an old media model that is being re-examined across the country. With broadcast consolidation and decreasing production funds, producers are finding it increasingly difficult to secure these commitments. While still an important indicator of investment and market interest, it is by no means the only accepted indicator anymore as new business models of online distribution, crowd funding and digital content creation become more popular and accepted.

Respondents perceived the current funding to be conditional upon securing these traditional triggers. Because they felt that the financial limitations of the current fund would make it is less likely that traditional bigger budget broadcast products could be produced, they felt these requirements should be adjusted to better support projects that would work. It was suggested that re-envisioning the trigger requirements to instead require a demonstration of 3rd party investment or a history with a market channel partner would open up the fund to digital platforms and more forward thinking business strategies that are better suited for the funds available.

“Those who have sold to online networks like iTunes, HULU or Netflix should be allowed the opportunity to grow their businesses using those market partners. My business model is built on selling online to Netflix, HULU and iTunes - they do not offer pre-license deals. They pay based on how good the content is and how many views/ads happen around a given show.”

3. Genre restrictions

Since traditional large budget projects are finding it difficult to work within the current model, many companies have begun to explore genres of production that can be produced with lower budgets and smaller crews. Many of these genres are not currently eligible for funding.

“The Arts Board won’t fund projects that are intended for commercial distribution, and rumours around Creative Saskatchewan indicate they will not support anything that presents as being on the experimental/art film/indie side, even if the end goal is distribution. There is a gap in current funding options where innovative, risk-taking media projects that are intended for widespread dissemination fall.”

“If we have Saskatchewan created content in genres that are marketable (current events or public affairs programming, Reality TV, Talk shows etc), why are we not able to access the same funds as a Feature film or TV show? Our industry is not left with many options and maybe the old restrictions should be looked at.”

“Where are the cooking shows, the infomercials, the Netflix dramas, the YouTube series, the virtual reality presentations? If tax credits are off the table, then incentives that bring these alternate productions to the province need to be put in place.”

4. Funding supports projects not company development

Unlike other creative industries, most professional media production work is secured based on an individual or company's track record. If a company has produced several \$1M features in partnership with someone and had success, they are likely to be considered by a funder to have the ability to do it again on their own. If a Director of Photography has a reel demonstrating a multitude of beautiful images, they are likely able to create beautiful images. Thus, new members of the media production industry (which has lost many of its experienced companies and personnel) require the building of companies and track records before they have the ability to generate broadcast commitments and leverage investment to create large projects again.

“I need investment in my company”

Some strategies suggested to help build companies were:

- Marketing funding to promote a company's services and attract business rather than only supporting marketing for projects
- Investigating programs like Screen Australia's Enterprise Program that seek to support the development of companies rather than projects
- Slate programs that provide reliable extended support for a company for a variety of things
- Support for companies that are working in *Corporate* genres since *Corporate* is often high paying work that does not involve government investment and the companies that are having success working with the new model are working in *Corporate* genres. Support could include discounted rates at the sound stage or a commitment to film all government commercial work with Saskatchewan companies.

“Ways of accessing funding should be less restricted to gain momentum and build a foundation to be able to approach larger projects such as Features. If we have to now incorporate Corporate work into our portfolios to sustain us, it would be nice to see grants available to our company to start such an undertaking.”

“Funding to help companies compensate some of their cost to go outside the province to bring in more national/international monies should be considered in more ways than just content type projects and maybe look at the building of a sustainable production business from the foundation up “

5. Administration challenges

The \$250,000 cap was consistently identified as a barrier for larger productions that generate employment such as *Drama* and TV series. The time required to review the requests to exceed this cap and lack of clarity regarding whether or not requests to exceed the cap would receive equal treatment by the jury were also expressed as concerns.

“The cash limit and length of time need to approve the funding makes achieving a successful, time sensitive program hard to complete.”

Comments regarding deadlines being unsuitable for production timelines and questions about the bankability of the funding were common.

“The program currently in place in 2013/2014 has not instilled confidence to funding agencies to establish a level of interim financing that is bankable.”

There were also many concerns surrounding the jury process. Some community members were concerned that the jury that was making funding recommendations did not understand the genre they were evaluating. It was noted that some projects that received development or marketing support were unlikely to be able to be filmed in Saskatchewan under the current funding guidelines, and therefore were not a wise investment of limited dollars.

In addition there were concerns regarding “cultural value” being used as a decision making metric because of the subjectivity and potential to enable censorship or limit market opportunities.

“You should be told the reason that your project was turned down for funding. We need to trust that the jury system is open, fair and objective. You don’t do business with people you don’t trust.”

Suggestions to address these concerns included ensuring a jury is comprised of professionals from outside the province that are experts in the genre they are judging, and making these juries public as the Canada Media Fund does so that clients feel confident in the judge’s qualifications. It was also suggested that the minimal amount of funding available should be given to companies and projects that generate more meaningful employment for the remaining industry.

“Money handed out so far reflects a lack of understanding of the industry”

While one producer did express that the new system was extremely efficient for his company, overall, there was a frustration with multiple changes to the guidelines and delays in providing required documents for productions to proceed. The community is hopefully the machine will become more well-oiled as it matures.

6. Level of funding available

The most common response regarding project funding was that the funding available was not enough to pay people a sustainable living wage for working on projects.

Select survey comments regarding insufficient funding:

- “The incentive is not efficient enough to bring in regular work...There is not enough funding to produce high quality work with a sufficient budget to pay the crew what they deserve to be paid and support everyday life.”
- “The problem is the actual credit is not enough to do TV shows here in Saskatchewan. TV shows were the ones who provide more work and money.”
- “The amount of funding offered (or lack thereof) is woefully insufficient to foster Saskatchewan based talent.”
- “It's not enough funding to pay all cast and crew to help those involved make a living.”
- “We need additional funding & incentives than what's currently available in the province in order to finance and produce large-scale projects such as dramatic TV series.”
- “There can't be a sustained industry without a larger incentive program for production.”
- “The productions are simply not large enough to sustain an industry in which people can make a living doing only that.”

“This affects both the creation of projects by Saskatchewan residents as well as interest in non-residents coming to Saskatchewan to film. Without the funding required for either of these options, no regular, stable work environment can be kept here.”

OTHER INDUSTRY CHALLENGES AND NEEDS

There was little consistency amongst obstacles and needs chosen outside of the top two *Regular Work* and *Funding*, which may be due to the fact that so few people felt they were as important. Most other categories had single digit responses.

Other Obstacles to Industry Success	Percentage
Lack of access to buyers/investors. I need to meet with decision makers.	12.5%
Lack of market intelligence. I need information regarding what buyers/investors/clients are looking for.	11.6%
Investor/Client confidence. Clients are hesitant to work with Saskatchewan.	10.7%
Lack of skills. I need training/mentorship.	10.7%
Lack of local skilled personnel. I have work but there is no one qualified who is available to work with or on my projects.	8.9%
Lack of experience. I am trained, but I need to build a resume.	8%
Other	12.5%

** Note: Respondents could chose 2 obstacles to success*

Other Industry Needs	Short Term	Long Term
Professional Development/Training Opportunities/Funding	6.8%	3.8%
Skilled Crew/Personnel	5.9%	9.5%
Opportunities/funding to promote my services to new clients/partners	5.9%	5.2%
Mentorship opportunities/funding	5.4%	1.4%
Market intelligence	5.0%	4.3%
Local Networking opportunities	4.5%	3.8%
Market and Export Opportunities	1.3%	4.5%
Marketing campaign to address investor confidence	1.3%	2.4%
Other		

** Note: Respondents could chose 2 immediate and 2 long term needs*

The majority of survey respondents who selected *Other* in these sections used these categories to indicate that the government, their policies or personnel were the main obstacle to success for the Saskatchewan industry and a change in those was the primary need for the industry to move forward.

Some commonality did emerge in challenges expressed in interviews. While these were not primary concerns, it was generally agreed that these were pressing issues that would need to be dealt with if the industry was to grow or maintain professional quality production.

Availability of Trained Personnel/Training

Several producers expressed concern regarding the lack of trained crew that remain in Saskatchewan having a direct effect on their businesses and product creation in the past year.

Producers working in *Drama* commonly explained that low-budget productions used to be able to rely on contracting personnel at lower rates while they were in-between big budget projects. As the big budget projects have left the province, those crews have followed the work or sought jobs in other industries. This has made trained crew personnel unavailable and unwilling to take time off from other jobs for low-paying low-budget work (seen as low-value employment). Producers are faced with having to bring crew in, use untrained crew or pay more to lure former workers, all of which are having an effect on the cost and quality of productions. One Producer attributed an additional \$100,000 or 10% increase to budgets to bring in and host non-Saskatchewan labour and equipment.

This concern was also expressed by companies looking to hire Animators. Animators often share skill sets with Digital Media creators and thus are in high demand. *Employers* commonly reported difficulty finding Animators to contract locally as most had left for more attractive opportunities in other cities where the projects were more interesting and the work more consistent.

Producers suggested a Deeming program to subsidize the hiring of outside crew in exchange for training local talent. The non-producing community was vocal in expressing their views that programs that had been used in the past to address these concerns such as Deeming and Job Start/Future Skills were not responsible or long-term solutions to this problem. Many felt these programs had been misused by Producers who had a tendency to use it as predictable project funding rather than subsidies for training on an as-needed basis.

There was also resentment regarding the idea of training people for the industry when so many people were out of work or underemployed. Existing crew members expressed fear of increased competition for existing jobs from new entrants who may be willing to work for less money or qualify for training subsidies. In addition, there was scepticism regarding this as a wise investment when the likelihood of being able to retain these individuals by providing regular work was small. Instead they favoured a program that would either focus on matching existing underemployed crew with available positions, or that could increase the value of the employment opportunity to encourage existing trained crew to accept the work.

The lack of remaining senior industry personnel was also a concern expressed by individuals who aspired to be *Employers* and *Creators*. With so many Producers gone, many emerging *Creators* talked about needing experienced Producers to either produce their stories or to apprentice with to learn how to do it themselves so they could progress to the next level. One senior Producer estimated receiving 2 calls a week with this kind of request. Senior Producers who were generally focused on trying to reinvent their businesses, felt they didn't have the time to donate to doing this, but acknowledged that if there was a financial incentive to do so they would consider it.

Individuals that were interested in mentorship and professional development, were seeking personal guidance regarding how to take the next steps with their own creative products. They did not want mentoring structures designed around subsidizing a mentor's projects. The idea of a mentoring program designed around the trainee's work where the trainee could apply to a funder with a plan and then if approved, select and hire their own mentor with the funds was well received. A fund like this could be used to "buy the time" of experienced personnel such as an Executive Producer to advise an emerging Producer, a Story Editor to review a script, or an experienced DOP to consult on a Cameraman's first major project.

“I would like to learn other skills (producing, development, entrepreneurial) that could help me create my own opportunities”

It should be noted that while concerns regarding mentorship and training were prevalent in interviews, there was little interest in these opportunities in the digital survey amongst the larger community who felt they were already trained. Of all respondents *Service Providers* were most likely to choose mentorship and/or training as a priority. Only 1 *Employer* indicated either of these was of top importance to them.

Availability of High-End Equipment

With the departure of equipment suppliers William F. White and PS from Saskatchewan, much of the professional equipment required to create projects is no longer available within the province. This has resulted in increased shipping costs to Producers to import necessary pieces. This concern was called “a real problem” by both large and small *Employers* across multiple genres and by industry *Supporters*.

Companies working on *Corporate* projects reported that this problem was also becoming a concern for their clients, particularly advertising agencies. Clients are being faced with choosing between changing the creative and reducing the quality of their projects to make due with available equipment, or increasing budgets to afford the imports. There are concerns that lower quality work and higher costs may lead to a loss of *Corporate* work to other jurisdictions that can deliver at the former levels.

Training institutions and emerging *Creators* also expressed concern at the recent unavailability of professional equipment. William F. White specifically was mentioned as a regular supporter of students and low-budget projects, often providing equipment for discounted rates or sponsorship outside of peak production season. For example, University of Regina students were formerly able to receive training on professional level equipment through partnerships with these suppliers, which resulted in higher quality projects and more value for the degree program.

Some respondents felt that an equipment supplier should be lured to return to Saskatchewan with incentives similar to those used by municipal governments that encourage businesses to establish local offices. Others felt that the decreased level of business in the province that had motivated the companies’ departures would likely make it unprofitable to return.

One suggestion to address the problem was to encourage Creative Saskatchewan to provide subsidies for out-of-province equipment use by production companies. Another idea was to provide a subsidy, grant or interest-free loan to a local organization or business that wishes to purchase equipment for the purpose of renting it to others in Saskatchewan. This could then be a source of revenue for the organization or business that would help it grow stronger. An organization that already has experience and infrastructure to maintain the equipment, such as the Saskatchewan Filmpool Cooperative, Paved Arts or the University of Regina may be ideal candidates for something like this.

“The limited number of funding opportunities do not provide sufficient financial support for most of my projects due to the high cost of products and services that must be purchased out of province because there are no comparable local options.”

Investor Confidence

The importance of outside investment for the media production industry can not be over-emphasized. For Producers, because only 30% of production financing is available from Creative Saskatchewan, the bulk of a project's funding will usually come from out of province. In addition, the industry will need to attract clients from other jurisdictions if it wishes to significantly increase the amount of *Corporate* and service work being done in Saskatchewan.

Examples of weak investor confidence in both the remaining infrastructure in Saskatchewan to support film production and in the new funding system are therefore concerning. There were reports of broadcasters green lighting productions on the condition that they would not be shot in Saskatchewan. Suggestions to address this included increased engagement with funders and clients outside of Saskatchewan to build relationships and send the message that the province is "Open for Business".

"There is no confidence outside the province that the industry is viable or relevant anymore."

Perception/Image

In addition to struggling with an image problem outside of Saskatchewan, a number of perceptions within Saskatchewan are creating problems as well.

1. Local industry attitudes

Senior members and *Supporters* of the remaining media production industry had the perception that the majority of the Saskatchewan industry was determined to continue fighting the government for a refundable tax credit. While it was commonly expressed that nothing would work as well as a tax credit, there was also wide spread fatigue amongst industry for the idea of continuing to fight for it. The common sentiment amongst individuals was that it was time to move on, but the common perception was that everyone else wanted to continue fighting. This perception was largely fuelled by negative discussions on social media, which are often led primarily by people who have moved or have left the industry.

2. The health of the industry

Many perceived that Saskatchewan organizations that supported the media production industry were struggling, but industry *Supporters* did not report feeling unhealthy. Some respondents indicated that enrolment was decreasing at training institutions in Saskatchewan, when representatives report that it is steady and/or increasing. There were also comments that funders were not getting any applications from local producers and would therefore not be able to fulfill their mandates, and yet Saskatchewan funders report feeling secure and positive about the work they are receiving.

3. Public perception of industry

In addition to concerns internal to the industry, there were concerns about perceptions of the industry amongst the Saskatchewan public and government. Respondents felt that industry was often seen as individual filmmakers motivated by creative expression who would do whatever it took to get something made, rather than accepted as production companies mass producing entertainment products for global consumption who have bills, employees and taxes to pay.

“This is show business, not show hobby.”

There were some, however, who saw this perception as an opportunity for artistic works to gain a greater level of funding and respect than they have in the past. If the non-industrial filmmaker can also be encouraged to ensure projects generate high-value employment and contribute to infrastructure preservation, supporting small artistic projects in more significant ways could be a model that is beneficial to all.

“Some jurisdictions consider their film industry as part of manufacturing. I have worked in film for many years and in absolutely no way do I consider my job a cultural job.”

Concerns regarding perception could be addressed through increased outreach, communications, engagement, celebration and marketing of the industry and its infrastructure. This would also be helpful to industry support organizations such as the training institutions that have limited resources for their own communications and promotion.

Lack of Community

Respondents who indicated *Local Networking Opportunities* were of interest to them overwhelmingly indicated that they required these with their *Colleagues* rather than with *Clients* or *Investors*. This is a reflection of the isolation being felt by many as industry activities and awareness decline and people leave.

Several *Employers* mentioned that they no longer knew who was left and available to hire. Individuals expressed the need to find others as a personal one, for collaboration and friendship, and students specifically indicated that lack of this community would be a motivating factor to relocate.

This problem could be addressed through resuming some of the regular industry outreach, communication and activities that SMPPIA and SaskFilm once offered.

“SMPPIA should create more opportunities to connect with others in the industry, and have longer AGMs to spend more time explaining to the membership what SMPPIA is doing and the goals for the upcoming year.”

TESTING IDEAS FOR INDUSTRY SUPPORT

5 specific ideas for supporting the media production industry were tested on survey respondents:

- Opportunities to showcase your completed creative projects or past work
- Opportunities to pitch your projects/services to investors or clients
- Training/mentorship dollars to upgrade your skills
- Mentorship/internship subsidies to train employees
- Partnership opportunities with other creative industries

Respondents were asked to rate them in order of usefulness and given the option to indicate that the choice was “not applicable” to them.

Opportunities to pitch investors and clients was the best rated idea for support with 41.3% of respondents saying this would be valuable and only 16.3% of survey respondents saying that this would not be useful to them.

25% of respondents indicated they were interested in *Opportunities to showcase completed projects*, however, as this was most consistently chosen by the *Employee* group who also indicated that they sought networking with colleagues over clients or investors, this may be more of a nostalgic choice than connected to generating new work. It’s also valuable to note that 22.8% of survey respondents, almost as many people who indicated their interest in this option, indicated that this would be of no use to them.

Training, mentorship and partnerships with creative industries rated low as ideas for support. This is likely due to the fact that the majority of respondents indicated they were already trained and those who indicated they were interested in working with other industries already were. Individuals who were not *Creators* or *Employers* but aspired to be *Creators* or *Employers* were most likely to value mentorship opportunities, and *Actors* and *Service Providers* were most interested in opportunities to connect with other industries.

“There is only one broadcaster in Saskatchewan. Saskatchewan producers who want to make TV need to go outside of Saskatchewan. There are no film distributors in Saskatchewan. Saskatchewan producers who want to make film need to connect with distribution outside of Saskatchewan”

“SMPIA can play an important role in bringing the Digital and TV industries together. All our projects are convergent so we always need digital media personnel to work with.”

CONCLUSION

Over the past two years, the industry has continued to downsize and relocate. Industry capacity is down with a lack of skilled crew and equipment to service some genres of production. The industry needs support to first stabilize, before it can grow.

The remaining industry is actively trying new strategies and adapting, and thus there is unlikely to be an entertainment business model discovered that isn't already being explored. Those who are interested in *Corporate* work and working with other industries are already doing so, and they need to not only continue to do so, but they need to increase the amount of work they are doing in these areas in order to survive.

If the amount of work in the industry overall is not increased, remaining stakeholders will compete with each other for more market share, leading to further decline. As *Regular Work* is the most pressing need of the industry, it is the current "work generators" of the industry who must be supported in maintaining and increasing the amount of employment they generate if the industry is to be stabilized.

This will not only require the companies to explore new models of business, but new models of support for these companies must also be explored by funders and other agencies as well - because what has worked in the past has been rejected and as a result, the kind of work, how it generated and who generates it is all changing. It's time for everyone to try something new.

"We need to realize that not all the pieces will fit together like they used to. How can we incorporate new players, participants, technologies and structures into the mix? How can we bend new opportunities to our advantage?"

There has been much discussion about how the amount of project funding being offered is insufficient for the industry, if the level of funding is unchangeable, perhaps changes can be made to increase the impact of the funds that are available.

Dramatic productions, which have traditionally generated the largest employment returns for Saskatchewan, are having trouble under the current model. There is not enough funding for professional productions at Creative Saskatchewan, and not enough funding for artistic productions at the Saskatchewan Arts Board. If there is room for middle ground or collaboration, breakthroughs in this genre might be made.

Series that were conceived as low-budget projects that can be done by small groups of people who multi-task with available equipment and non-traditional broadcast and distribution are seen by the community as most suitable for the current model. However, the individuals who are more accepting of this new model of production, often can't access funding to create products within it due to a high barrier to entry. If this barrier can be adjusted, breakthroughs with these individuals might be made.

The "work generators" and "job creators" of the industry must be supported in the activities that they undertake to generate work and create jobs, many of which will be different than they or the industry has undertaken in the past. They require assistance in becoming stronger through strategies such as diversification, innovation, and investment attraction. How can these endeavours be supported?

If the industry is to retain its current infrastructure, innovation must include exploring new ways to use existing assets. How can the sound stage be better leveraged as a production facility? How can post-production facilities and expertise be supported and utilized? How can traditional

industry workers be retrained and/or repurposed?

Corporate work and the provision of services is currently sustaining the “job creators” and “work generators” of the Saskatchewan media production industry. Genres such as branded entertainment, reality television and online programming are becoming profitable avenues of work generation that is not government funded outside of Saskatchewan. How can Saskatchewan companies be supported in including different kinds of work in their portfolios?

“The first step to building a new media production industry in Saskatchewan is to accept that it is a NEW industry.”

While investigating these strategies will assist the industry in moving toward stabilization in the long term, it is unlikely to address the problem of too little funding to retain workforce and preserve infrastructure in the short term. If resources can not be increased to support the entire industry, and considering that much of the industry has indicated that they can not work within the current limitations, many stakeholders expressed that it is important to shift the focus of the industry to support those who feel they can create work that preserves infrastructure and generates sustaining employment under the current system.

“There is not enough funding for all types of screen based projects at this time, so a refocus on what will work best in the long term to help rebuild the infrastructure that was lost will be helpful.”

If employment is a shared priority, the industry should choose to focus on supporting projects that generate “high-value employment”, meaning employment that is long term, high paying, or valuable enough that it will attract and maintain workers. In addition to current impact and risk assessment measures, funders could be asking “How many people will this project sustain and for how long?”. Projects that create high-value employment and sustain businesses, or are innovative in generating employment and sustainable models, could be favoured over projects that can not generate sufficient income to sustain even their creators fulltime for the duration of the project.

In this environment, 365 days of work for 1 person is likely more valuable to the industry as a whole than 1 day’s work for 365 people. Projects that offer below scale wages for primarily new entrants to the industry for short periods of time but take a large percentage of the minimal funding available to the entire industry, may not generate “high-value employment” that will contribute to the sustainability of the industry. Funding several low-budget projects that pay a comfortable salary for several skilled workers for several months, might be more valuable because it will stabilize a company and a group of *Employees* or *Service Providers*.

“The changing landscape contains smaller crews and more modest budgets”

Films that require those involved, including Producers, to work other non-industry jobs to pay the bills or ask for participants to volunteer their time to complete the project are unlikely to be creating “high-value employment” from an immediate financial perspective, however, they may be contributing to the long term growth, development and retention of an individual who aspires to become a “work generator”. As supporting future “work generators” is essential to ensuring the continuation of the industry, supporting projects like these may present high-value opportunities in

a way that is neither about the wages paid, nor the amount of days that people are employed, but rather about experiential training or mentorship. These opportunities and people must be supported as well.

“I’m trying to be cautiously optimistic that a small scale industry, focused on original productions can develop here, and I really think that’s where we should focus our energies.”

The community requires leadership as it searches for the best path forward. The industry needs someone to champion the re-envisioning of the kind of work that can be attracted and developed within Saskatchewan. With Saskatchewan’s film commission, SaskFilm, no longer in existence, someone needs to take responsibility for the essential roles that this organization used to fill if the industry is to thrive.

The community must also be reconnected and reunited to support each other through this transition. While many members are feeling and experiencing the same things, they are unaware that they have these shared experiences. They have lost track of each other, and many feel helpless and alone when they are not.

“SMPIA needs to get everyone to talk to each other again”

In addition, negative perceptions that are unnecessarily impeding the move toward this new industry in Saskatchewan must be resolved. *Employers* and *Supporters* primarily feel they are moving toward their goals, yet *Employees* feel that they and the industry are moving away from them. *Employers* and *Supporters* need to be more vocal about what is working to counteract the often overwhelming messages about what is not. Confidence and calm must be restored through vigilant communication, visibly demonstrated by the industry’s leaders and reassuringly imparted to others within industry.

The remaining industry is clear and uncharacteristically united in the things they need and don't need to help them through this transition. Listening and responding to these concerns is the most valuable thing that can be done to support the remaining industry at this time.

RESOURCES TO EXPLORE

- Building Sustainable Film Businesses: The Challenges for Industry and Government
<http://www.sfi.se/Documents/Omv%C3%A4rldsanalys%20och%20uppf%C3%B6ljning/%C3%96vrigt/Building%20sustainable%20film%20businesses%20-%20the%20challenges%20for%20industry.pdf>
- Incentive Changes for a Sustainable New Zealand Screen Industry
<http://beehive.govt.nz/release/incentive-changes-sustainable-nz-screen-industry>
http://beehive.govt.nz/sites/all/files/Screen_Production_Incentives_Cabinet_Paper.pdf
- The Challenges for Africa's Film Industry – Getting Financially Sustainable
<http://www.balancingact-africa.com/news/broadcast/issue-no97/top-story/the-challenges-for-a/bc>
- Building a Sustainable UK Film Industry
<http://industry.bfi.org.uk/media/pdf/q/r/BaSFI.pdf>
- Screen Australia Industry Statistics, Strategy and Research
<http://www.screenaustralia.gov.au/research/default.aspx>
- British Columbia Film's Submission on Canada's Digital Economy Strategy
<https://www.ic.gc.ca/eic/site/028.nsf/eng/00354.html>
- Canada Media Fund Industry Research
<http://www.cmf-fmc.ca/industry-advisory/category/industry-research/1/>
- Video: Attaining a Sustainable Industry
http://www.youtube.com/watch?v=M_gd15f5WxY
- Towards A Sustainable Investor Class For Film Culture And Business
<http://trulyfreefilm.hopeforfilm.com/2013/06/towards-a-sustainable-investor-class.html>