



**SASKATCHEWAN MEDIA PRODUCTION INDUSTRY
2016 CONSULTATION REPORT**

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ABOUT THE CONSULTATION PROCESS

In January of 2016, the Saskatchewan Media Production Industry Association (SMPIA) undertook a process of consultation to help understand and identify the needs of the media production industry professionals in Saskatchewan.

An industry-wide survey was developed and released via Facebook and Twitter, 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 176 responses, 157 indicated they were residents of Saskatchewan and of these, 36 indicated a goal to leave the media production industry. This left 121 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.

In addition to the digital surveys, SMPIA staff met with industry stakeholders in Regina and Saskatoon. 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.

A Producer survey was also distributed 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 over time.

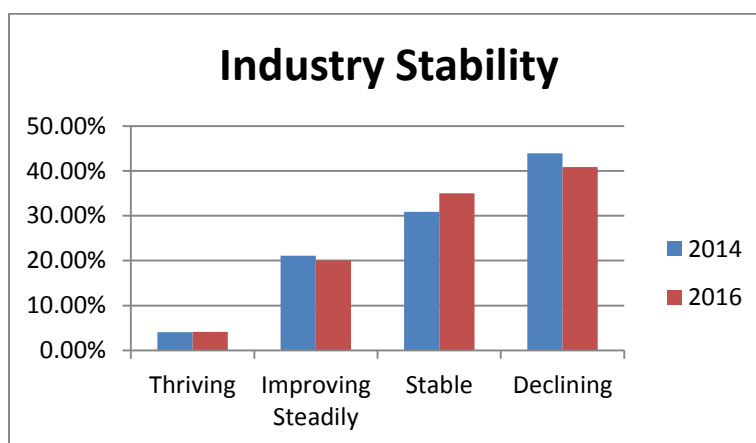
SUMMARY

The results of the 2016 consultation process reveal a picture of a divided Saskatchewan media production community.

In general, since the last industry survey was done in 2014, there are greater expectations for an increase in industry productions and stability. More than 50% of employers expect to increase or maintain the size and scope of their productions in 2016.

Employer Expectations for Size & Scope of Productions in 2016	Percentage
Increase	34.29%
Decrease	8.57%
Stay the Same	25.71%
Not Sure/Depends on Changes	31.43%

Overall, approximately 40% of respondents assessed their position in relation to their industry goals as *Declining*, which is an improvement over 2014, but remains a source of concern.



Increased levels of optimism are primarily felt amongst those individuals who directly access the funding with the outlook still declining amongst those who work for them or want to work for them. Approximately 49% of non-employer respondents indicate that their situation is *Moving away from their goal* and none characterized their situation as *Thriving*. Just over 38% of industry members still in Saskatchewan are currently unemployed or working in another industry with 26% of those who remain anticipating that they may have to move out of province within the year.

The big picture challenges for the industry as a whole were once again *Lack of Work* and *Lack of Funding*. To address these, the industry has once again overwhelmingly identified *Regular or Well-Paying Work* and *Additional Funding* as their immediate needs, with the call for *Regular or Well-Paying Work* increasing significantly. While these terms meant different things to different respondents, these challenges were unanimously the top two challenges for every industry category.

“The current system is not bad for developing new Saskatchewan talent, but makes it very difficult to attract out-of-province investment that is necessary for the industry to function - for skilled people to be able to earn a living wage in the province.”

Top Obstacles to Success	2014	2016
Lack of work available in Saskatchewan. I am trained and have sufficient experience, but there are no jobs.	57.10%	73.39%
Lack of funding. The money available is too little or the wrong kind to support me or my business.	41.10%	35.78%

Top Needs	2014	2016
Regular or Well-Paying Work	40.70%	50.49%
Addition Project Creation or Development Funding	19.50%	19.42%
Marketing of Saskatchewan’s Film Infrastructure outside of the province	1.30%	8.74%

Because Saskatchewan no longer has a fulltime Film Commissioner, and given that a core function of a Film Commissioner is to generate and attract work for the province, the problem of a lack of *Regular or Well-Paying Work* continues to worsen. The industry is also feeling this absence in the lack of out-of-province marketing of the province’s industry infrastructure such as the Canada-Saskatchewan Production Studios (Sound Stage) and local production companies. These concerns heavily affect the outlook of the *Employees* of the industry, many of whom who rely on this activity to secure the large budget productions that generate *Regular or Well-Paying Work*.

Despite perception, overall, industry activity is increasing. Producers of small budget productions are finding ways to make the new program work, often citing the savings generated in interim financing costs by the 80% upfront payment as a welcome competitive advantage. However, the Saskatchewan labour force has not overly benefited from this increased activity. Low budget productions have struggled to pay industry standard wages, and as some productions have been accessing another province’s labour tax credit in addition to Saskatchewan’s all-spend program, much of the labour hires on locally filmed projects have been from out of province.

The underlying challenge with the current funding system remains not necessarily completing individual projects, rather using the funds in a way that will build and retain the Saskatchewan workforce and infrastructure required to realize individual projects moving forward. This will require the attraction of large budget production, which is difficult within the fiscal restraints of the current programs at Creative Saskatchewan. Further, the budget limitations of Creative Saskatchewan as well as the lack of alignment with national funding programs are a top factor in limiting the amount of investment that is being brought to Saskatchewan from outside the province. The majority of survey respondents felt that while the new system is working for some individual projects, it was not working for the overall economic development of the industry.

In order to move forward and maximize its economic potential, the industry requires support that ensures a competitive incentive program, strong labour force, and the infrastructure to support film production, combined with the active marketing of all three.

“The current funding model does not fill the void left after the demise of the SFETC. The amounts available now just don’t match the kind of investment needed to attract a major film/TV production that in turn would bring dollars into the province to employees of the industry, locations, businesses and service providers to the industry.”

To address the challenges identified in the survey, SMPIA has prepared a series of recommendations for Creative Saskatchewan that can be summarized as follows:

RECOMMENDATIONS FOR CREATIVE SASKATCHEWAN
1. Be strategic and focused on industry development
2. Offer competitive programs
3. Support the labour force in addition to producers
4. Actively solicit business
5. Follow national industry standards
6. Support innovation
7. Maintain control of the Sound Stages
8. Make funding predictable
9. Remain focused on professional commercial entities
10. Increase overall budget
11. Report annual economic impact
12. Consult with SMPIA prior to implementing change

“We need to retain our soundstage for the purpose it was built for, and we need a strong message from government that the industry is open for business again, in the form of a viable incentive package.”

THE SASKATCHEWAN MEDIA PRODUCTION INDUSTRY IN 2016

Of the 176 respondents 157 indicated they are still Saskatchewan residents, and of these approx. 73% expect to stay in Saskatchewan this year, and 27% are or may be leaving province this year.

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

Of Saskatchewan respondents, 78% are people that identify with an organization. Of the other 22%, many felt they either fit into multiple categories. A sizable chunk of those who responded *Other* indicated they were post-production personnel.

Organization/Area of Expertise	2014	2016
ACTRA (Actors)	29	30
IATSE (Crew and Crafts people)	36	27
DGC (Directors, Editors, Office, Set Management)	33	19
Writers Guild (Writers)	3	3
CMPA (Producers)	12	15
Other	56	27

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

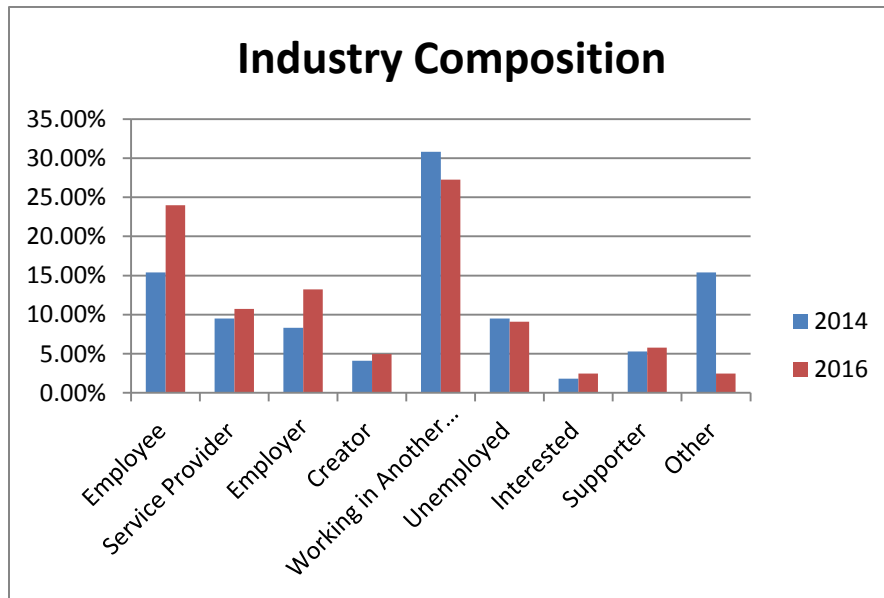
The majority of the survey respondents indicated that they work or wish to work in the *Dramatic* genre, followed by *Factual*. Of all the genres, people working in *Animation* were most likely to indicate their situation was *Thriving* and this genre had the largest increase as an area of expertise/interest. Only 14% of the community chose *Digital* as a platform they wanted to work in, down from 2014.

Genre of Expertise/Interest	2014	2016
Dramatic film or TV series (movies, sitcoms etc)	74.40%	76.86%
Factual film or TV (doc, doc series, reality TV, news etc)	49.40%	42.15%
Corporate (industrial, promotional, commercials etc)	30.40%	32.23%
Animation	8.30%	13.22%
Digital media (apps, video games, website content etc)	14.30%	14.05%
Other/None	5.40%	4.96%

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

INDUSTRY COMPOSITION

The Saskatchewan media production industry is comprised of a cross-section of individuals who fill different roles that contribute toward the overall capacity of the industry to produce content. 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.



Survey respondents 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)	23.97%	38.02%
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)	13.22%	29.75%
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)	10.74%	10.74%
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).	4.96%	9.92%
A former Saskatchewan media production industry person now WORKING IN ANOTHER INDUSTRY in Saskatchewan	27.27%	N/A
A former Saskatchewan media production industry person who is UNEMPLOYED and looking for work or working in the industry outside of Saskatchewan	9.09%	N/A

Industry Member Status con't	Currently	Aspire to be
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.	5.79%	8.26%
Someone who has no prior experience in the media production industry but is INTERESTED in joining it	2.48%	N/A
Other (chose to list a combination of the above things they felt were equally occupying their time)	2.48%	3.31%

Optimism is particularly low in those who are looking to enter or re-enter the industry. 38.84% of the 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*. However, 60% of those who are interested in becoming active in the industry indicated that they feel their current situation is moving away from their goals, up from only 43.9% in 2014. It is important to note that this inactive group includes individuals from both *Employer* and *Employee* categories.

“I am relatively new to the industry. I’ve gone through a career change in the past couple of years and film/TV is something I know that I would excel at and make a living doing if the work was here.”

Stability	2014	2016
Moving further away from goal	43.9%	40.83%
Stable, neither improving nor worsening in relation to goal	30.9%	35.00%
Improving steadily toward goal	21.1%	20.00%
Thriving, exceeding expectations or achieving goal	4.1%	4.17%

“For what I do, work is few and far between. Ideally we need funding that will support an ongoing TV series and a greater abundance of films so that crews (myself included) can have more stability of employment without having to seek work outside of the film and TV sector.”

“(We require) Stability in the industry. Moving away from jury based grants towards market-triggered financing incentives, whereby producers and investors can feel confident that Creative Sask financing is based on market interest, not by adjudication, is one way that the industry in Saskatchewan can be more instrumental in attracting business to the province.”

Successful Industry Members

Those who indicated that their situation was *Thriving* or *Improving* were most likely to be an *Employer* working in the *Animation* genre. These individuals cited the following reasons they felt they were finding success.

Reasons for Success	Percentage
Regular high-paying work	2.22%
Skilled crew/personnel	11.11%
Professional Development and Training opportunities/funding	11.11%
Mentorship opportunities/funding	6.67%
Market intelligence	4.44%
Project creation funding	13.33%
Opportunities/funding to promote my services to new clients/partners	4.44%
Local Networking opportunities	20.00%
Market and Export Funding and/or Opportunities	6.67%
Marketing of the province's film infrastructure to investors out of province	6.67%
Other	13.33%

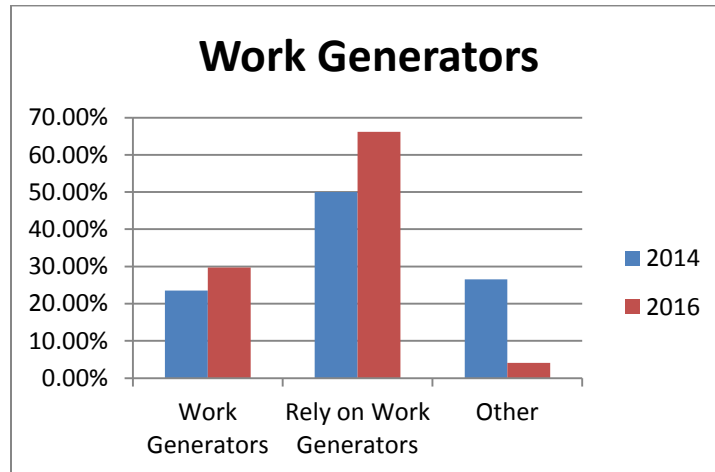
Those who indicated *Other* attributed their success to Lack of Competition and Hard Work.

“I think I am finding success DESPITE the current situation here and because of my own persistence and ability to develop business and a presence outside of the province.”

“We are a small tight knit team of dedicated and passionate people who refuse to quit and believe our stories are worth telling.”

Employers/Creators

Of the 121 respondents that are currently Saskatchewan residents, approximately 22 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 these “Work Generators”, 15 people identify as “Producers” specifically. This is up only marginally from 21 people with 12 of them identifying as Producers in 2014. 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 22 current *Employers/Creators*, 10 indicated they were *Thriving* or progressing toward their goal, down from 12 in 2014. Respondents who indicated they were doing well chose *Lack of Funding* as their top challenge followed closely by *Lack of access to buyers*, and suggested market facilitation and travel support as required solutions.

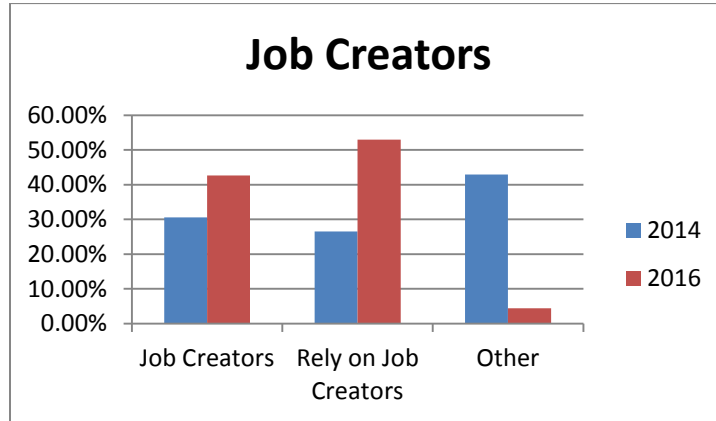
Most of the people aspiring to be *Employers* or *Creators* identify themselves as currently *Working in Another Industry* and only 15.38% felt their situation was progressing towards their goal.

“The media production incentive package currently offered in Saskatchewan does not conform to incentive packages offered in other jurisdictions (nor to the incentive package that was previously offered in Saskatchewan) and therefore investor money is by-passing Saskatchewan in favour of jurisdictions that have kept the more investor-friendly (and therefore industry-friendly) incentive packages.”

“Parameters often don’t allow for producer or others to get paid. This means projects get delayed or on hold to produce meaningful income while working on projects as time permits. Careers are not hobbies but current structure promotes film production as that.”

Employment

Just under 53% 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.



Overall, the industry’s “Job Creators” demonstrate optimism in their responses. 46.43% of *Employers* expect their number of employees to increase in 2016. Of note, 14.29% did indicate that their employment projections were dependent on changes in the industry or they weren’t sure.

Projections for Employment in 2016	Percentage
Increase	46.43%
Decrease	10.71%
Stay the same	28.57%
Not sure/Depends on Changes	14.29%

“(Employment) all depends if the government provides us the proper financing tools to compete with other provinces.”

Employees

The Saskatchewan labour force is the least optimistic segment of the industry with approximately 49% of non-employer respondents indicating that their situation is *Moving away from their goal*. None characterized their situation as *Thriving*.

“Crews will never develop when they are being paid \$10-12 an hour. These projects only benefit the producers and even they will not get much out of it.”

“The work is no longer available because of the lack of projects so I had to seek employment in another part of the province. I am too far away from the few unfunded (volunteer your time) type projects being offered, to keep working in the industry even if it’s just to keep up my skills and resume.”

WHAT ARE THE MAIN PROBLEMS FOR THE 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 goals.

All categories of respondents, regardless of desired position in the industry or current state, identified the same top obstacles and needs. 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	2014	2016
Lack of work available in Saskatchewan. I am trained and have sufficient experience, but there are no jobs.	57.10%	73.39%
Lack of funding. The money available is too little or the wrong kind to support me or my business.	41.10%	35.78%

Top Needs	2014	2016
Regular or Well-Paying Work	40.70%	50.49%
Additional Project Creation or Development Funding	19.50%	19.42%
Marketing of the Province's Film Infrastructure outside of the province	1.30%	8.74%

Regular Work

The majority of respondents (73.39%) identified their main obstacle as being: *that they are trained and have sufficient experience, but there are no jobs available for them*. And the majority of respondents (50.49%) indicated that the most important thing they needed to succeed was *Regular or Well-Paying Work*.

It is important to note that *Regular Work* means different things to different categories of people.

For *Employees* in the industry who had a goal of being employed 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 *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.

In total, over 66% 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“.

“My biggest comment or concern would be the need to create an abundance of work to keep the crews and grow the crews, and for that we need the infrastructure that will allow/encourage a TV series or larger projects to grow from within our province or even come here from outside our borders and employ our crews!”

Different Funding

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 or prospective work.

Reason Funding Changes are Needed	Percentage
what is offered isn't sufficient for my projects/ prospective work	54.55%
what is offered isn't suitable for my projects/prospective work	27.27%
what is offered is sufficient and suitable but I haven't been able to access it	18.18%
what is offered is sufficient and suitable and I have accessed it, I just need to continue doing this to be successful	0.00%

“I think the opportunities that exist here in Saskatchewan are fantastic. Unfortunately, I have not been able to take advantage of these opportunities due to lack of funds.”

“It (the incentive package) is severely underfunded. Projects with a 1-2 million budget will not create long term and/or a viable industry.”

“If we're not competitive in terms of our funding system then there's no reason for producers to partner with anyone in SK. They are far better off in Alberta or Manitoba.”

OTHER INDUSTRY CHALLENGES AND NEEDS

There was little consistency amongst obstacles and needs chosen outside of the top two *Regular or Well-Paying Work* and *Additional 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	2014	2016
Lack of access to buyers/investors. I need to meet with decision makers	12.50%	9.17%
Lack of market intelligence. I need information regarding what buyers/investors/clients are looking for	11.60%	5.50%
Investor/Client confidence. Clients are hesitant to work with the new program	10.70%	8.26%
Lack of skills. I need training/mentorship	10.70%	4.59%
Lack of local skilled personnel. I have work but there is no one qualified, available or willing to work with or on my projects	8.90%	8.26%
Lack of experience. I am trained, but I need to build a resume	8%	14.68%
Other	12.50%	0.92%

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

Other Industry Needs	2014	2016
Professional Development/Training Opportunities/Funding	6.80%	4.85%
Skilled Crew/Personnel	5.90%	3.88%
Opportunities/funding to promote my services to new clients/partners	5.90%	2.91%
Mentorship opportunities/funding	5.40%	3.88%
Market intelligence	5.00%	0.00%
Local Networking opportunities	4.50%	2.91%
Market and Export Opportunities	1.30%	1.94%

** Note: Respondents could chose 2 needs*

Some commonality did emerge in challenges expressed in interviews and additional comments. While it was not a primary concern, it was commonly mentioned that labour force issues 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.

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* 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.

The suggestions made in 2014 to initiate training programs and incentives were repeated with greater urgency in 2016 by Producers. It should be noted that while concerns regarding mentorship and training were prevalent in interviews and in additional comments by *Employers*, there was little interest in these opportunities in the digital survey amongst the *Employees* who felt they were already trained. These individuals instead cited a lack of well-paying consistent work as the reason local trained crew are not filling available positions.

“Due to the exile of many industry professionals in recent years, it would be tremendously helpful to have a government subsidy for providing training in the industry with mentors from across Canada and Internationally in the case of coproductions. Much like the Job Start Future Skills program which enabled producers to bring mentors in from out of province to provide high level on-the-job training.”

“There needs to be a crew call program again. There is no way I could film a project here with the funding the way it is.”

“The production grant works for the size of projects I am producing. It would be helpful to have funding for training crew.”

TESTING IDEAS FOR INDUSTRY GROWTH

Attract Larger Productions

Employers and Creators (Work Generators) were asked what would help them increase the size and scope of their productions.

Better alignment of Saskatchewan's incentive programs with that of national funding bodies was the best rated idea for support with 48.57% of respondents saying this would help increase the amount of investment being attracted from out of province. Removal of the 600,000 threshold was close behind with 42.86%.

Help increase external investment	Percentage
Additional marketing of the province's media production infrastructure to investors outside of the province	34.29%
Removal of the \$600,000 project threshold	42.86%
Better alignment of Saskatchewan's incentive programs with that of national funding bodies	48.57%
Additional marketing and export support resources for my company	28.57%
Modernization of the Broadcast/Distribution requirement to recognize other sources of investment and distribution	34.29%
Other (not sure or nothing)	28.57%

** Note: Respondents were encouraged to choose all that applied*

“The budget cap for film and TV keeps our projects at a lower budget level which means many crew are forced to supplement their primary industry and passion with other employment outside of film and TV or quit it altogether.”

“There is not a high enough level of investment to sustain a continuous and ongoing industry and keep people from needing other sources of income. It definitely does not plug into the system as it exists everywhere else in the country. Much outside investment from sources like CMF and Bell are being missed.”

“I think it is the time to solicit US production companies to come to Saskatchewan because of our discounted Canadian dollar. I was working in Calgary and many US companies were there. We are missing the valuable opportunity.”

Attract Former Saskatchewan Residents

19 survey respondents indicated that they were not longer residents of Saskatchewan. Of these, 47.37% indicated that they would consider returning to Saskatchewan. 71.4% of those indicated that in order to return they would require assurance of *Regular or Well-Paying Work* available to them.

“(I would require) Consistent work opportunities in dramatic or comedic filmmaking and television feature films and/or TV series in Saskatchewan sanctioned by my Union and paying a comparable (to other filmmaking jurisdictions) living Union wage.”

RECOMMENDATIONS FOR CREATIVE SASKATCHEWAN

In a survey of 176 unique representatives of industry, SMPIA found that the Saskatchewan industry's top two challenges remain:

- **Lack of consistent work**
- **Lack of funding**

To address these challenges, SMPIA presents the following recommendations for consideration to Creative Saskatchewan. The focus of these recommendations can be simply summarized as:

- **Be strategic and focused on industry development**
- **Offer competitive programs**
- **Support the labour force in addition to producers**
- **Actively solicit business**
- **Follow national industry standards**
- **Support innovation**
- **Maintain control of the Sound Stages**
- **Make funding predictable**
- **Remain focused on professional commercial entities**
- **Increase overall budget**
- **Report annual economic impact**
- **Consult with SMPIA prior to implementing change**

RECOMMENDATION DETAIL

1. Be strategic and focused on industry development.

SMPIA recommends that Creative Saskatchewan ensure that its funding is focused on strategically incentivizing a healthy industry in Saskatchewan that operates under professional standards and generates return on investment for Saskatchewan

To achieve this, Creative Saskatchewan should actively recruit and encourage projects that make economic sense and contribute to the stabilization, growth and development of the Saskatchewan industry. Special incentives or initiatives to increase the attraction of large investment from outside the province and projects that offer high-value work such as series and multi-million dollar productions should be considered.

Further, SMPIA continues to recommend that Creative Saskatchewan establish a set of goals and objectives common to industry and government, and measuring programs and projects against these goals and objectives. Priorities of the industry include:

- projects that trigger significant out of province investment
- projects that create high value employment such as series or projects that pay union labour rates or a significant project for a first time director
- projects that preserve industry infrastructure such as the sound stage and post-production houses through significant use
- projects that contribute to sustainability by creating a downstream revenue source for Saskatchewan creators

- projects that utilize an innovative business model
- projects that feature a Saskatchewan story

SMPIA further recommends that these priorities and criteria be reviewed yearly and adjusted as necessary to ensure that they are appropriately supporting the industry in its recovery at that time.

2. Offer competitive programs

SMPIA recommends that Creative Saskatchewan work to improve the suite of industry incentives to bring them to a competitive level with incentive programs in other jurisdictions in Canada

The Saskatchewan media production industry is not currently operating at its full economic potential because investors for large budget projects are not choosing Saskatchewan over other jurisdictions. In order to attract more investment, it must make economic sense for business to be done in Saskatchewan when compared with the offerings in other jurisdictions. In addition, current and former employees in the industry have indicated that their top challenge is lack of consistent, employment that pays a living wage. Industry business owners have indicated that the primary impediment to increasing employment value is the lack of a competitive incentive program.

Achieving a competitive incentive program would require ensuring that the Saskatchewan media production industry has an equal playing field with its competitors through:

- removing the \$600,000 project threshold that creates uncertainty, confusion, subjectivity and delays for large budget projects.
- working to increase total funds available for industry so that large budget projects can be confidently realized
- developing special incentives for local hires and training to increase employment, skills and diversity of the crew base and service providers in Saskatchewan.
- developing special incentives for post-production that include visual effects and animation

The Saskatchewan media production industry has the potential to create jobs in the province at a time when jobs are needed and utilize the transferable skill sets of those that have been laid off from other industries. In addition, it can attract multi-million dollar investment to the province in a matter of months. The current state of the Canadian dollar adds additional incentive to act quickly to ensure Saskatchewan's offering is competitive.

3. Support the labour force in addition to producers

SMPIA recommends that Creative Saskatchewan adopt measures to support the industry labour force and ensure professional workplace conditions are enforced on projects funded by the agency

The Saskatchewan media production industry has lost significant infrastructure and is in need of incentives to rebuild a sufficient crew base. A number of producers have indicated a lack of sufficient skilled labour required to realize their projects in Saskatchewan. Adopting incentives and making program adjustments to support the labour force and labour development will help

address this problem. SMPIA recommends that Creative Saskatchewan consider the labour requirements and additional policies to incentivize local hires that are tied to grant incentive funding in other jurisdictions in Canada such as Alberta's key bonus structure.

In addition, SMPIA recommends that Creative Saskatchewan add clauses to the guidelines for the Screen-Based Media Production Grant that require labour on funded projects to follow Saskatchewan labour standards including adhering to the province's minimum wage, overtime and turn around standards, occupational health and safety guidelines, and requirements for employer funded deductions and benefits such as CPP and EI. This will ensure that industry workers have a safe and professional work environment that is conducive to building industry.

4. Actively solicit business

SMPIA recommends that Creative Saskatchewan increase active promotion and solicitation of business for and investment in Saskatchewan's media production industry

In order for investors to choose Saskatchewan as a business destination, they must be aware of the opportunities and incentives it offers. The industry indicated that increased marketing of the province's screen-based media infrastructure to investors outside of the province was a top requirement to increase the size and scope of productions filming in the province. This includes fully realizing the functions of an industry-standard Film Commission that is actively soliciting investment through aggressive marketing of Saskatchewan's infrastructure including the Canada-Saskatchewan Production Studios, Saskatchewan's post-production facilities and industry personnel, and the suite of incentive programs offered by Creative Saskatchewan.

In addition, Saskatchewan television and film producers have the disadvantage of residing in a province with minimal industry buyers and therefore incur higher travel costs to attract investment than their competitors or other creative industries. However, when buyers are secured, the total amount of investment and impact on employment and the GDP for the province of Saskatchewan is also significantly greater than that of projects in other creative industries. Industry producers have indicated that in order to increase investment and employment, they require increased marketing and export support for their businesses and products. This includes increasing the percentage of project funding available under the Market and Export Grant to 75%, as well as increased support and facilitation of trade missions and international networking opportunities with buyers at established industry markets.

In addition, the number of producers able to attract and lead projects must be increased in order to capitalize on the market opportunities available. Creative Saskatchewan's support of training and development opportunities for emerging producers has been very well-received and should continue.

5. Follow national industry standards

SMPIA recommends that Creative Saskatchewan align their program standards and guidelines with those of industry's national funders such as Telefilm Canada and Canada Media Fund

Saskatchewan producers have indicated that better alignment of Saskatchewan's funding programs with that of national industry funding bodies would help increase the amount of external investment their projects bring into Saskatchewan. This includes ensuring that financial

requirements for license fee thresholds, minimum/maximum levels of 3rd party investment and expenses are consistent with national industry standard percentages for all funding distributed to projects through Creative Saskatchewan's grant and equity programs. Ensuring minimum levels of external investment are maintained ensures that projects have sufficient funding to be professionally realized and that there is return on investment for the Saskatchewan economy.

The standards of national agencies have been developed over long periods of time with industry experts and are designed to ensure the economic growth and stability of industry rather than individual projects, which is consistent with the mandate of Creative Saskatchewan and the goals of SMPIA.

6. Support innovation

SMPIA recommends that Creative Saskatchewan modernize the broadcast and distribution requirements across programs to recognize alternative sources of 3rd party investment and non-traditional 3rd party distribution partners

The definition of Broadcaster and Distributor has evolved and so should the programs supporting content for broadcast and distribution. The principles of requiring investment from the 3rd party source and a documented relationship with a recognized 3rd party market channel distribution partner are sound economic principles and should be maintained, however, the program should be flexible enough to recognize the multitude and types of sources that can provide this assurance of project strength and viability, and that these two requirements may no longer be fulfilled by the same entity.

A documented relationship with a market channel distribution partner ensures that a 3rd party recognizes the value of the project and is prepared to use its professional resources to get the project to a paying audience. This role is important to ensure that funded projects have the highest likelihood of return on investment. In the past this role has been filled by broadcasters and distributors, but this role can now be filled by a number of professional 3rd party business entities and the nature of their relationship can be documented in a number of ways.

In order to ensure that the applicant is an export-ready Saskatchewan professional who is operating at a level that will ensure a high likelihood of return on investment and employment for others, minimum levels of 3rd party investment should be maintained in accordance with the genre and budget-level scales used by national funding bodies. But the source of this investment should not matter, recognizing funding obtained through crowd-funding, a venture capitalist or a philanthropist, provided the minimum level of investment is present upon application.

The requirement to have 50%-70% funding secured prior to application for the Screen-Based Media Production Fund is appropriate for productions that are produced and distributed with traditional models. However, in the case of digital media properties, SMPIA suggests the creation of separate criteria that will reward and encourage innovation but also satisfy the program manager that the project is viable and will generate employment and economic benefit for Saskatchewan. This may include an in-depth business plan, evidence of an applicant's history of success with new models and non-traditional partners, potential audience data and metrics, crowd funded financial contributions, demonstrated community engagement, and any additional means of ensuring the requirements of 3rd party investment and a relationship with a market channel distribution partner will be met.

7. Maintain control of the Sound Stages

SMPIA recommends that Creative Saskatchewan maintain management of the Canada-Production Sound Stages in accordance with the needs of film production and increase incentives and marketing to improve its use

The Sound Stage is a purpose-built resource and a key tool for investment attraction in the film industry. The requirement for Sound Stage facilities is dependent on a production's creative content rather than its budget size. With a focus on industry growth and re-development and the recent threshold increase that will allow multi-million dollar film projects, our industry requires, at minimum, 2 production stages and all the necessary supporting facilities (ie: production offices, dressing rooms, lunch rooms, workshop, access to the loading bay etc) for film production purposes. Ideally, however, all of the purpose-built facilities should be readily available for film projects as we rebuild.

In doing so, it is essential to our sector's success that the availability of the Sound Stage facility remains flexible enough to accommodate film projects and that bookings are coordinated between film projects. As the schedule for film projects is often not available several months in advance and changes frequently, it is often not possible to coordinate with public events or other bookings unless they can be moved as needed by Creative Saskatchewan in order to secure a film deal. Lack of availability of the Sound Stage in the past has resulted in film projects choosing to film in other jurisdictions. Creative Saskatchewan is the agency responsible for contact with investors and producers considering film production in our province, and they must be able to offer with certainty the Sound Stage facilities that each film requires in order to secure that activity. In order to do this, they must maintain control of the schedule for the production stages and all the supporting facilities including the production offices which are most universally required by film productions.

The Sound Stage facilities should be actively advertised to producers at location markets as part of a suite of incentives for film production and its use should be encouraged through incentivization and other means of traditionally attracting large scale business activity.

There are many buildings that could serve as an incubator or event space in our province, but only one Sound Stage for film production. A competitive incentive program and active marketing are required in order to fully maximize its economic potential.

8. Make funding decisions predictable

SMPIA recommends that Creative Saskatchewan increase the predictability, consistency, transparency and accountability of the decision-making process for juried funds

The current jury system includes elements of subjectivity that make strategic planning and consistency difficult and does not ensure that decisions are made by non-biased industry experts. SMPIA recommends that the jury system be replaced with a criteria-based assessment process relevant to the objectives of each fund and the project's contribution to the strategic development of the industry. This system should include a transparent appeal mechanism. A criteria-based system would increase transparency and allow Creative Saskatchewan's staff to apply strategic goals and market knowledge to decision making, while still enabling non-Saskatchewan industry experts to be accessed to provide opinion as required.

9. Remain focused on professional commercial entities

SMPIA recommends that Creative Saskatchewan avoid changes to the applicant requirements

It is important that the limited funding available to industry remain focused on serving the clients who meet the shared commercial objectives and mandates of Creative Saskatchewan and industry. The applicant requirements for the Screen-Based Production Fund are reasonable and ensure that clientele are export-ready Saskatchewan commercial entities who operate at a level that will ensure a high likelihood of return on investment.

Rather than seeing Creative Saskatchewan lower the bar to allow new entrants to access these programs, the industry encourages the provincial artistic agencies and organizations like the Saskatchewan Arts Board and Saskatchewan Filmpool Cooperative to continue to develop programs to support entry-level creatives to help them reach the professional investment levels required to eventually access the professional business incentive programs at Creative Saskatchewan.

10. Increase budget

SMPIA recommends that Creative Saskatchewan advocate for an increase to their overall budget so that the agency may support the creative industries at levels proportional to other provinces

The low ratio of total amount of funding available in relation to other Canadian jurisdictions and previous levels of funding in Saskatchewan is an obstacle to industry growth and investment attraction and fails to maximize the economic potential of the media production industry. To address this concern, SMPIA recommends that Creative Saskatchewan seek an additional \$1M for film production per year for the next 3 years, subjective to review and renewal. This level of media production funding attracts outside investment and creates the potential for a television series that would support the creation of continuing employment and career development; and it would effectively utilize the Soundstage infrastructure. SMPIA further recommends that Creative Saskatchewan consider siloing the funding allocated for film production so that all creative industries can have assurance of the availability of funds required to realize their projects.

In addition, efforts to distinguish the creative industry funding available at Creative Saskatchewan from the artistic community support available at the Saskatchewan Arts Board should be increased to ensure that the limited incentive funds are reserved for the intended clientele of each agency. The current eligibility restrictions that disqualify projects that have already received funding by the Saskatchewan Arts Board or SaskCulture ensure that this money is reserved for professional commercial entities who are not already receiving support from other agencies and is consistent with Creative Saskatchewan's commercial mandate.

11. Report annual economic impact

SMPIA recommends that Creative Saskatchewan track and report progress on industry-standard measures of success such as production volume, jobs created and total amount of investment from outside Saskatchewan on an annual basis

SMPIA applauds the economic impact study that Creative Saskatchewan has recently undertaken for the creative industries. It is important that Creative Saskatchewan continue to measure and report the outcomes realized as a result of Creative Saskatchewan's programs in a way consistent with economic media production industry standards on an annual basis. This will provide evidence of the return on investment to Saskatchewan's economy that Creative Saskatchewan's funding and the media production industry provides.

12. Consult with SMPIA prior to implementing change

SMPIA recommends that Creative Saskatchewan undertake further industry consultation in conjunction with SMPIA on any proposed new programs or program changes prior to implementation to ensure they meet shared objectives and will benefit industry

In order to ensure effective program transitions and outcomes, it is essential that any change to industry programs are done with the knowledge and support of industry. As SMPIA is recognized as the voice of industry and industry as the holder of expertise, it is appropriate that SMPIA assist in the consultation process.