

Moving Saskatchewan's Creative Industries Forward Consultation

FINAL REPORT

Prepared for the Saskatchewan Ministry of Parks, Culture and Sport

December 4, 2012



**Saskatchewan
Ministry of
Parks, Culture
and Sport**

For more information on this research
project, please contact:

Probe Research Inc.
Suite 850 – 125 Garry Street
Winnipeg, MB R3C 3P2

Tel: (204) 926-6565
Fax: (204) 926-6566
E-mail: probe@probe-research.com



TABLE OF CONTENTS

EXECUTIVE SUMMARY	2
1.0 BACKGROUND & INTRODUCTION	5
1.1 BACKGROUND	5
2.0 CONSULTATION FINDINGS	9
2.1 VISION AND OBJECTIVES	9
2.1.1 <i>Towards A Vision For The Creative Industries</i>	9
2.1.2 <i>Developing A Shared Vision and Objectives</i>	11
2.2 CHALLENGES FACING THE CREATIVE INDUSTRIES	13
2.2.1 <i>Identifying and Prioritizing the Challenges</i>	13
2.2.2 <i>Financial Support</i>	16
2.2.3 <i>Government Support and Recognition</i>	16
2.2.4 <i>Marketing, Tourism and Branding</i>	17
2.2.5 <i>Education, Creative Development and Youth Engagement</i>	18
2.3 SUPPORTS AND SERVICES	20
2.3.1 <i>Required Supports and Services</i>	20
2.3.2 <i>Delivery Model</i>	23
2.4 FINANCIAL ASSISTANCE	28
2.4.1 <i>Investment Pool</i>	28
2.4.2 <i>Tax-Based Incentives</i>	32
2.5 CREATIVE INDUSTRIES ASSETS	34
2.5.1 <i>Saskatchewan's Assets</i>	34
2.5.2 <i>The Canada-Saskatchewan Production Studio</i>	35
2.6 COLLABORATION	38
2.7 EMERGING TECHNOLOGY AND DIGITAL MEDIA	39
APPENDIX	41

APPENDICES

-  Focus Group Screening Instrument
-  Focus Group Moderator's Guide
-  Plenary Session Moderator's Guide

EXECUTIVE SUMMARY

Saskatchewan's "creative industries" refers to "the business and people involved in the production, distribution and marketing of cultural goods and services that have aesthetic, intellectual, and emotional appeal to the consumer and value in the marketplace."¹ These industries include such diverse fields as music and sound recording, film, television, interactive digital media, visual arts, crafts, writing, book publishing and the live performing arts. Collectively, these creative endeavors account for a major, yet still underdeveloped, amount of economic activity and employment in Saskatchewan. Yet more importantly – at least in the eyes of those who work in these industries every day – Saskatchewan's creative industries contribute significantly to the province's quality of life.

Although the purpose of this consultation has been to find ways to help the creative industries achieve greater commercialization and economic growth, the social dividend provided to the people of Saskatchewan and beyond by the province's creative industries is regarded as equally, if not more important than the economic activity generated by these creative pursuits.

There is a shared common objective of creating an environment where individual producers and those involved in creative businesses will earn adequate incomes and achieve national and international renown. However, the vision of how to achieve this goal is less clear. Some in the creative industries shared the view that broadly supporting artistic creation and providing financial and moral support to creative industries professionals will lead directly to economic success. Those involved in industries that are already commercially-oriented (such as film, music, book publishing and digital media) also advocated for targeted approaches intended to stimulate the production and dissemination of creative products. Other prerequisites suggested by creative industries stakeholders include adding additional educational capacity to train tomorrow's creative professionals, greater collaboration between different sectors, developing a "coherent" national and international marketing strategy and collecting data for the purposes of painting an up-to-date and accurate picture of economic activity in the creative industries. Taken together, these initiatives were perceived as ways to help Saskatchewan's creative industries address their major challenges.

Some macro-level challenges, such as the province's geographic location and the rising cost of living, are somewhat beyond the control of those in Saskatchewan's creative industries. Other inter-related challenges that were identified – including a perceived shortfall of funding, a lack of organizational/educational capacity and a limited ability to market outside Saskatchewan – yielded potential solutions, most of which involved additional communication and collaboration between government, creative industry stakeholders and the public.

¹Saskatchewan Ministry of Tourism, Parks, Culture and Sport, *Pride of Saskatchewan: A Policy Where Culture, Community and Commerce Meet*, <http://www.tpcs.gov.sk.ca/Pride-of-Saskatchewan>, p. 11.

Overshadowing much of this discussion, however, was the strongly-held and widely-shared view among creative industry stakeholders that the Saskatchewan government's recent decision to eliminate a refundable tax credit for film and television production was contradictory to the central goal of advancing commercial objectives in the creative sector. Time and again, representatives of the film industry (as well as other industries) noted that this decision has carried with it negative economic and social consequences, including Saskatchewan's newfound lack of competitiveness vis-à-vis other jurisdictions with refundable tax credits and the loss of talented individuals to other provinces that have similar incentives in place. Film industry professionals who participated in these sessions strongly advocated for the re-introduction of a refundable tax credit for their industry. Another proposed financial incentive – a non-refundable tax credit for all creative industries – was not regarded as a viable alternative. A non-refundable tax credit requires a taxable income: under this scenario, single-purpose film companies would not collect this benefit, while those in other creative sectors indicated that they currently do not (or would not in the future) earn enough income to make this a worthwhile incentive.

Given that access to capital is perceived to be a significant challenge for individual producers and businesses, one alternative that did have some support among stakeholders was the idea of establishing an "investment pool" that would fund product development and marketing activities in several creative industries. Very specific investment mechanisms modeled on those offered in other jurisdictions were put forward by film industry stakeholders and the broad parameters of this type of investment model enjoyed conditional support from those in other creative sub-sectors. Specifically, there was support for the idea of providing additional funds to activities that involve higher proportions of Saskatchewan creative content as well as the idea of dividing this pool into specific funding envelopes allocated to each sub-sector (with potentially different funding criteria for each sector). There was a greater degree of support for the idea of providing these funds in the form of grants, although stakeholders did acknowledge that this pool should incorporate other financing methods, including loans and equity positions. There is also an expectation that this investment pool will complement, rather than compete, with the funding activities and processes of the Saskatchewan Arts Board. In the final analysis, a number of key issues require resolution, including how the fund would be administered and how recipients of these funds would be chosen.

An investment pool would fit into a broad spectrum of supports and services offered to those in the creative industries. There is a widely-perceived need for marketing assistance and professional development/mentoring, in particular, with other important needs; including research and development, market research and training/assistance related to new technology. Although supports are currently offered to creative industries professionals by industry associations and dedicated agencies (in the case of film), the provision of the supports and services tends to be uneven across the whole range of creative industries – particularly for sectors that do not have industry associations (such as dance and theatre) or for those whose respective industry associations are more geared towards offering some services yet are less equipped to deliver others.

Some industry stakeholders do support the notion of continuing to have supports and services delivered via industry associations and the idea of creating a dedicated agency that would deliver marketing and product development services, in particular, was regarded as having some merit. Although there are concerns about creating a new organization from scratch, there is a desire among those in some creative industries to create a “hybrid” organization that complements the services currently delivered by existing industry associations. These stakeholders expressed the view that this entity should be governed by individuals representing the various creative industry associations.

These industry associations – and the ongoing legacy of the Saskatchewan Arts Board – are among the many assets that Saskatchewan’s creative industries have to offer. Other key sector assets include entrepreneurial and talented professionals and world-class venues from which to create. One of the most valuable assets in this regard is the Canada-Saskatchewan Production Studio in Regina. This purpose-built venue is one of the best places to make film and television programs in Canada. However, there were a number of ideas put forward during this consultation regarding how this asset could be utilized more effectively. While there is a strong and widely-held belief across all creative industries that this space should be used for its original purpose if possible, it was suggested that other complimentary activities could take place in this facility when it is not being used by film productions. This includes establishing a business incubator for emerging digital media and other creative sector startups, creating an arts education/design studio or utilizing one of the smaller soundstages as a performance venue. In order for these activities (or any others) to take place, however, stakeholders felt that the cost of renting this facility will have to become less prohibitive and the goal should be to find additional revenue streams. As well, it was suggested that the building should be managed by a new entity which could potentially be a proposed new product development and marketing agency that represents the various creative industry sectors. This organization, with this venue, was also perceived as a potential means by which the various creative industry sectors could achieve greater collaboration and harmony of purpose.

The issues affecting Saskatchewan’s creative industries take place against the backdrop of sweeping technological change. The rapid emergence of digital technology has profoundly affected the creative industries, both in terms of how creative products are made and how they are shared across time and space. Although those in the creative industries have dealt with this transformation in different ways, there is consensus that Saskatchewan’s creative industries professionals are not immune to these changes and most will either develop or access the skills required to cope in the digital environment. There is a desire for a support structure that helps individuals, businesses and organizations deal with these changes, either by directly teaching people how to use digital marketing and product development-related tools or by directing those who require these tools to those with the expertise to utilize them on their behalf. This support may come in several forms, including an investment pool, professional development/mentoring opportunities and guidance to those who can deliver these services on behalf of those who require them.

1.0 BACKGROUND & INTRODUCTION

1.1 BACKGROUND

In July 2012, the Saskatchewan Ministry of Parks, Culture and Sport (PCS) announced the launch of the Moving Saskatchewan's Creative Industries Forward public consultation. This consultation is intended to "position the Creative Industries as part of the province's Growth Agenda" which is "important to strengthening the province's quality of life and building an even stronger Saskatchewan."²

The creative industries are defined by the Government of Saskatchewan in its Cultural Policy as "... *the businesses and people involved in the production, distribution and marketing of cultural goods and services that have aesthetic, intellectual, and emotional appeal to the consumer and value in the marketplace.*"³ As part of this consultation, PCS secured the services of Probe Research Inc. to gather input from stakeholders from the various sub-sectors of the creative industries in Saskatchewan. This includes those involved in the creation, production and dissemination of creative products and services such as music and sound recording; writing and publishing; craft and visual art production; film, television and digital multimedia production; and the live performing arts (dance and theatre).

The following report provides an overview of the feedback provided by Saskatchewan's creative industries stakeholders regarding the future direction of this sector. It is based on the following activities which were conducted between July and November 2012:

- an online consultation, including the release of a discussion paper and responses to key questions from those who provided submissions;
- focus groups with individuals, businesses, and organizations directly involved in the creative industries; and
- a day-long plenary session of key sector stakeholders.

Online Consultation

PCS released a consultation document in conjunction with the Moving the Creative Industries Forward consultation initiative. This draft strategy document discussed ideas that would advance the commercial objectives of the creative industries, including the adoption of new and emerging digital technology. PCS invited individuals and organizations to provide written feedback concerning the key questions outlined in this consultation document before September 22, 2012⁴.

² Taken from <http://www.pcs.gov.sk.ca/Culture>

³ *Pride of Saskatchewan*, p. 11.

⁴ This document can be found at <http://www.pcs.gov.sk.ca/MovingSaskatchewanForward>

In total, 45 submissions were made by individuals and organizations from July 18 to September 22, 2012. The following table provides an overview of those who made these submissions:

Submissions by category type:

- Individuals: 25
- Creative sector businesses/organizations: 10
- Industry associations: 5
- Funding/government organizations: 5

Submissions by sector:

- Film, television and digital media: 23
- Visual art: 9
- Writing/book publishing: 4
- Funding organization: 3
- Dance/theatre: 2
- Music: 1
- Craft: 1
- Unsure/various⁵: 2

Probe Research analyzed the responses to the “key questions” contained in the consultation document and used these findings to shape the areas of inquiry for the focus groups held with stakeholders in October 2012.

Focus Groups

Probe Research facilitated eight focus group sessions with individuals representing various sectors of the creative industries. These individuals were recruited from lists provided to PCS by the various creative sector industry associations using a custom screening instrument (appended to this report) and received an invitation letter inviting participation in these sessions.

⁵ One submission did not identify the sector the author worked in, while another was a collective submission provided by multiple individuals working in different sectors.

Sessions were held at the following locations:

1. Monday, October 15, 2012, 6 PM	Saskatoon – Queen’s House of Retreats 601 Taylor Street West
2. Monday, October 15, 2012, 8 PM	Saskatoon – Queen’s House of Retreats 601 Taylor Street West
3. Tuesday, October 16, 2012, 6 PM	Saskatoon – Queen’s House of Retreats 601 Taylor Street West
4. Tuesday, October 16, 2012, 8 PM	Saskatoon – Queen’s House of Retreats 601 Taylor Street West
5. Monday, October 22, 2012, 6 PM	Regina – Crave Kitchen and Wine Bar 1925 Victoria Avenue, Regina
6. Monday, October 22, 2012, 8 PM	Regina – Crave Kitchen and Wine Bar 1925 Victoria Avenue, Regina
7. Tuesday, October 23, 2012, 6 PM	Regina – Golf’s Steakhouse 1945 Victoria Avenue
8. Tuesday, October 23, 2012, 8 PM	Regina – Golf’s Steakhouse 1945 Victoria Avenue

In total, 77 participants took part. The following table provides an overview of focus group participants by sector:

Industry Sector	Number of Participants	Proportion of All Participants
Film/television	23	30%
Music	14	18%
Visual art	12	16%
Digital media/emerging technology ⁶	9	12%
Craft	7	9%
Literary (writing/book publishing)	7	9%
Performing arts (dance, theatre)	5	6%
TOTAL	77	100%

These sessions were facilitated by Lloyd Fridfinnson, who is Probe Research’s Vice-President of Qualitative Research, and observed by Curtis Brown. All sessions were audio-recorded and participants signed a consent form indicating that they were aware that these sessions were being recorded. These sessions were also observed by Parks, Culture and Sport Minister Kevin Doherty; members of the MLA committee struck by Premier Brad Wall regarding the creative industries (Jennifer Campeau, Mark Docherty, Darryl Hickie and Laura Ross); and Margaret Huntington and Susan Hetu of PCS.

⁶ For the purposes of distinguishing between those in the film and television industry who use digital media, this category would include those involved in other pursuits, including web design, app development, computer science, etc.

Plenary Session

Stakeholders representing a variety of creative industry associations, funding providers and business-related organizations were brought together for a final “plenary session” on November 1, 2012, at the Delta Hotel in Regina. This session provided stakeholders with an overview of some of the key findings to emerge from the consultations and discuss and in additional detail some of the strategic considerations for the future of the creative industries. This session was attended by 32 participants and was observed by several PCS staff. Minister Kevin Doherty and members of the MLA committee also attended a portion of this session.

2.0 CONSULTATION FINDINGS

The following section provides the in-depth findings to emerge from this consultation regarding the creative industries in Saskatchewan.

2.1 VISION AND OBJECTIVES

2.1.1 TOWARDS A VISION FOR THE CREATIVE INDUSTRIES

The draft consultation document published on the PCS website put forward a proposed vision along with draft principles and outcomes for stakeholders to consider. Although these were put forward for discussion purposes, they were intended to signal general intentions with respect to the broad objective of achieving greater commercialization in the creative industries.

Vision: Saskatchewan is a leader in the creative economy with strong content companies supported by outstanding creative talent innovating new products and services excelling in the development and use of new and emerging technologies.

Principles:

1. Sustainability
2. Growth and innovation
3. Return on investment to the province
4. Open to all Saskatchewan creative industries
5. Cross-industry collaboration
6. A common approach for the development of the creative industries
7. Early adoption of emerging technologies to drive the creative economy

Outcomes:

1. Increase sales, revenue and investment attraction
2. Long-term growth of existing companies and successful new start-ups
3. The economic potential of creative industries is unlocked through the use of existing and emerging technologies

Several individuals commented that the draft strategy is too narrowly focused on commercialization and felt that the overall goal of increasing commercial sales for this sector is counterproductive without first placing an emphasis on creating high-quality works. Indeed, several individuals who filed submissions and who participated in the focus groups found the emphasis on the term “creative industries” and the absence of references to “artists” to be troubling. As one respondent, whose opinion reflected the perspective of many others who made submissions, noted: *“Commodification of cultural outputs does not add value to them. We should support cultural activity on [its] own merits. If we do that right the economics will take care of themselves.”* Some from the visual art and craft sectors in particular also took issue with the absence of the term “artist” and that the draft strategy does not discuss existing programs that support artistic creation, such as those delivered by the SAB. Some felt the proposed vision requires an emphasis on supporting individual producers who create great works of art as well as fostering a creative milieu that will make Saskatchewan attractive to individuals who appreciate how a vibrant cultural scene contributes to the overall quality-of-life of the province.

Another observation frequently offered by stakeholders was that the draft strategy is too heavily focused on the “distribution” aspects of the creative industries and does not sufficiently consider the work that goes into creating and producing cultural products. As one submission from an individual stated, “[the Strategy is] trying to create a marketplace but lack[s] the vendors to actually sell the goods.”

Although the emphasis on “emerging technologies” was welcomed by some of those who provided submissions, this notion held little resonance for those who felt that the distribution aspects of the creative industries are secondary to the process of creation. For those engaged with the visual arts and crafts, in particular, the notion of adopting emerging technologies was seen as largely irrelevant, as they indicated their products could not be distributed digitally. At the same time, there was also some disagreement between those who felt the statement was too “future focused” (and, therefore, not describing the current reality of Saskatchewan’s creative industries) and those who recognized that vision statement as aspirational in nature.

Those from the film industry voiced a somewhat different set of objections to the draft strategy. Many film industry representatives frequently pointed out that the stated goal of the vision statement – to enhance commercial objectives in the creative sector – is at odds with recent government policy decisions. The government’s decision to cancel the Saskatchewan Film Employment Tax Credit (SFETC) in the 2012 provincial budget, these representatives argued, was hugely detrimental to Saskatchewan’s film, television and digital media companies and their ability to increase sales and revenue. Broadly speaking, their argument was that the absence of a refundable tax credit (or any other type of “bankable” financial incentive intended to stimulate film production) leaves Saskatchewan’s film industry at a competitive disadvantage relative to other provinces. The elimination of the SFETC, industry representatives noted, has already prompted professionals involved in the film industry to leave the province to seek work elsewhere.

Not all of the comments regarding this draft strategy were negative, however. A handful of those who provided submissions indicated that the overall intent of the draft is “*bang on*” and reflects “*exactly what needs to happen*” in Saskatchewan’s creative industries. Another individual noted that the framework provided in this strategy should do more to provide “synergy” between the private sector, government and those in the creative industries.

Although very few alternatives to this draft vision and strategy were forthcoming in the focus groups or online submissions, one focus group participant did craft an alternative vision statement, as follows:

“In Saskatchewan, we see our artists as significant contributors to our well-being and to a thriving economy. To that end, we support our artists to innovate, create and help to move their art to those who also value it and buy it.”

When this statement was shown to participants in the plenary session, it was widely praised by those in attendance. Stakeholders, generally speaking felt that this vision better reflects a balance between arts and culture as a significant contributor to both the economy and to residents’ overall quality-of-life.

2.1.2 DEVELOPING A SHARED VISION AND OBJECTIVES

In the plenary session, stakeholders were asked to describe how they would like Saskatchewan’s creative industry to evolve and to identify what specific actions must be taken in order to achieve their collective vision.

There is a common desire among creative industry stakeholders regardless of sector and background, to achieve both financial and artistic success. One participant said Saskatchewan’s goal should be to become “the envy of the nation,” with others expressing a desire for Saskatchewan’s creative sector to gain a national and international reputation for leadership, innovation and artistic excellence. Part and parcel of this is the notion that those in this industry will be “thriving and sustainable,” with creative industries professionals making a reasonable income. One specific measure attached to a proposed vision for the creative industries was to have Saskatchewan boast the highest number of “cultural tourism” visitors among Canadian provinces. Other desired components of this vision included greater public and government appreciation for the creative sector, as well as additional educational and training opportunities for young Saskatchewan artists to develop their skills and abilities without leaving their home province.

When asked to identify what exactly needs to be done to achieve this shared vision, industry stakeholders mentioned the following items:

- **Greater government/public support:** There was a strong sense that the creative industries are not a priority for the provincial government. This conclusion was reached because these industries are only mentioned briefly during major government policy pronouncements such as the Throne Speech or budget). There was a sense that the provincial government needs to provide additional “moral support” and recognition of this sector of the economy, as this would improve the standing of this sector in the eyes of the public. As one individual commented, *“I know the value of agriculture to this province and I think it’s great, but I would like the public to know as much about arts and culture too and value it ... if everyone believed how important arts and culture is, it would be incredible.”*



- **Adequate financial support:** On a similar note, additional financial support for the creative industries is seen by many stakeholders as a prerequisite for this sector to achieve the shared vision for prosperity.
- **Additional educational/training capacity:** As in the focus groups, some plenary session stakeholders expressed the view that Saskatchewan exports creative individuals to other provinces. One idea is to develop “centres of excellence” within the province to train individuals in different disciplines. 
- **Additional collaboration:** This includes both collaboration between creative disciplines, as well as collaboration across economic sectors. For instance, some stakeholders felt that other economic sectors (for instance, health care) would benefit from an infusion of creativity. As well, it was felt that additional sector collaboration would lead to creative industry professionals sharing best practices.
- **The development of a “coherent” national and international marketing strategy:** Some felt strongly that in order to achieve greater commercial success, a coordinated strategy for all creative industries is required.
- **The collection of comprehensive and “realistic” baseline data:** There are several key challenges associated with the data collected on the creative industries, including that the data may be relatively old, may be incomplete and may not reflect current trends. There is some dispute among stakeholders regarding some of the data used to develop an economic picture of Saskatchewan’s creative industries, which meant that there is a desire to ensure that measurements of this sector are comprehensive and encapsulate all of the key sectors. As well, some stakeholders felt that measures of “success” should not just be monetary and should be more intrinsic in nature. 

Some stakeholders felt that any proposed strategy must include an additional focus on the “creation” aspects of the creative industries rather than the marketing and distribution aspects which are discussed at length in the PCS consultation document. Broad support for artistic expression and long-term goals related to artistic excellence were regarded by some as an important, yet underemphasized, aspect of a strategy for the creative industries. As well, there were some questions about how the creative industries and the desire to be seen as a creative province must be part of building an overall “brand” identity that is communicated to provincial, national and international audiences.

2.2 CHALLENGES FACING THE CREATIVE INDUSTRIES

2.2.1 IDENTIFYING AND PRIORITIZING THE CHALLENGES

While Saskatchewan's creative industries have several individual and collective strengths, those who participated in this consultation also identified a number of strategic weaknesses facing this sector. Although these challenges manifest themselves in each sector in slightly different ways, they are broadly similar throughout the province's creative industries. The specific challenges identified by stakeholders in the focus groups and online consultation are as follows:

- **Lack of funding:** There continues to be a perception among stakeholders that Saskatchewan's creative industries are under-resourced and that funding provided by the EAB and other arts organization funders is insufficient. There was a very clear sense from a number of individuals and industry association representatives that achieving growth and development requires funding for creation to be enhanced. As Canadian Artists Representation/le Front des artistes canadiens (CARFAC) Saskatchewan noted in its submission: *"A comprehensive approach is one that recognizes the primary role of the creator as the foundation that the industry is built on, where there is support for pure creative research, not just commercialization of the arts but systems that support and recognize the creation of quality content and promote excellence in the arts."* While this focus did not necessarily preclude additional activities that support marketing and/or commercialization, the argument that many individuals put forward was that additional funding in support of creation would lead to economic stability and greater commercial success.
- **Lack of predictable funding/investment mechanisms:** Similarly, one of the key issues raised by stakeholders is that these industries not only lack "funding" in a general sense, but that the mechanisms that could support growth are no longer predictable. This was discussed in the context of the film industry in particular, as several participants (including filmmakers as well as those from other sectors) indicated that the removal of the SFETC and the lack of an alternative investment mechanism has hampered film production in the province and put Saskatchewan at a competitive disadvantage compared to other jurisdictions that have refundable tax credits or other types of investment mechanisms. Those from the film industry repeatedly noted that Saskatchewan needs an incentive in place that is both predictable and "bankable", meaning that it is recognized by production companies and financiers as offering a potential return on investment.
- **A lack of organizational/sectoral capacity and collaboration:** It was also noted that the different industry associations individually and collectively lack the capacity to achieve commercial objectives, although this is somewhat related to the issue of funding. Some participants described the creative sectors as "fragmented" and lacking in the ability to strengthen their respective sectors. Some also highlighted the fact that there is a great deal of competition for a relatively small amount of funding. *"Each part of the industry has organized themselves. I believe the capacity is there, but it's in tiny chunks there and there. They have to try to get us together somehow,"* was how one participant described the situation.

- **Lack of educational capacity:** Saskatchewan is perceived as lacking educational capacity in certain sectors. Those from the craft industry, in particular, noted that because their sector lacks a dedicated training program, young artists interested in honing their craft skills will train elsewhere and remain in those places rather than return to Saskatchewan. Another individual pointed out that there is a lack of funding for graduate students in specific sectors, which makes research difficult. Another key issue identified by some stakeholders was the recent decision by the Universities of Saskatchewan and Regina to make changes to their respective Bachelor of Fine Arts programs. Some focus group participants feel these changes will have a detrimental effect if budding Saskatchewan creative sector professionals attend universities in other provinces to obtain a BFA.
- **Loss of talented professionals:** Similarly, there is also a consensus that Saskatchewan has difficulty retaining talented professionals and that there has been a “brain drain” or “exodus” of creative professionals. This issue closely ties to the notion that Saskatchewan lacks educational capacity in certain sectors. Some, particularly those involved in digital technology, lamented that Saskatchewan loses talented individuals to other jurisdictions, which creates both a shortage of senior professionals as well as difficulty mentoring individuals entering the creative sector. Those from the film sector, in particular, noted that the cancellation of the SFETC has accelerated this trend in their industry.
- **Cost of living increases:** Research regarding the development of the creative industries shows that jurisdictions that are relatively affordable will often act as hubs for the creative sectors, as low housing prices and the availability of affordable studio space will be attractive to creative industries professionals. Saskatchewan’s historic affordability relative to other jurisdictions was regarded as a positive attribute for those in the creative industries; however, recent increases in housing prices and commercial real estate, in particular, were seen as problematic for those in the creative industries.
- **Lack of appreciation for the creative sector:** Some focus group participants decried what they considered to be a lack of appreciation for the arts and culture in the province. Some also felt that Saskatchewan does a poor job of informing citizens about the accomplishments of individuals in the creative industries. This was attributed to a lack of resources as well as a lack of will on the part of government to celebrate those achieving great things in the creative industries. A couple of focus group participants noted that the practice of providing visiting dignitaries with Saskatchewan Roughrider jerseys as opposed to cultural products feeds a perception that the work of creative industries professionals is not appreciated by government or the public.
- **‘Insularity’:** Several participants noted that Saskatchewan’s geographic location, far from major population centres, puts the province at a disadvantage relative to other jurisdictions (some individuals, such as touring musicians, did feel that this location is an advantage). Although little can be done about the province’s geographic location, some participants felt that isolation has bred a degree of ‘insularity’ among those in Saskatchewan. Some participants noted that this is sometimes manifested in a lack of openness towards those who come to Saskatchewan from other places.

After presenting this list of challenges identified in the focus groups and adding additional challenges/issues to be addressed, plenary session participants prioritized these items as part of a strategy for the creative industries. This was done with a choice modelling exercise using dots. The following table provides an overview of how participants ranked these challenges to be addressed:

Rank	Item/Challenge	Dots
1	Adequate financial support	29
2	Develop educational capacity	17
T3	A cohesive/up-to-date national and international marketing strategy	16
T3	Build a Saskatchewan “brand”	16
5	Government support and recognition	15
T6	Develop strategy to look beyond Saskatchewan’s borders	11
T6	More creative development	11
8	Youth engagement and alignment	9
9	Develop ‘wraparound’ for the creative industries	8
T10	Develop supportive tax strategy	7
T10	Promote creative industries tourism	7
12	Address differences and similarities among sub-sectors	6
13	‘Brain drain’/outmigration of talent	3
T14	Bring back SFETC	1
T14	Public value/address lack of appreciation for arts/culture	1
T14	Cross-sectoral collaboration	1
T17	Intra-sectoral collaboration	-
T17	Support for education to build creative identity	-
T17	Baseline data across sectors	-
T17	Broad measures of success identified	-
T17	Learn from best practices	-
T17	Rising cost of living	-
T17	Geographic isolation	-
T17	Lack of collaboration	-
T17	Industry is not perceived as credible	-
T17	Have sectors present more often to government	-

From this prioritized list, a number of items were combined so that they could feed into a small group strategic discussion regarding the development overall strategy for the creative industries. These categories were combined based on feedback offered by stakeholders at the plenary session. These challenges are:

1. Financial Support for the Creative Industries
2. Government Support and Recognition for the Creative Industries
3. Marketing Strategy, Tourism and Branding
4. Education, Creative Development and Youth Engagement

2.2.2 FINANCIAL SUPPORT



In order to achieve the goal of increasing financial support for the various creative industries, participants indicated that the provincial government needs to provide additional funding and that the SAB should continue to play a prominent role in delivering funds to producers. There is also clearly a role for a potential marketing and product development agency, although stakeholders have a number of questions regarding how this would be structured and funded. Those in this group discussion stressed that the different industry associations need to be represented by a sector voice and that an organization like the Saskatchewan Cultural Industries Development Corporation (SCIDC) should be able to play this role. SCIDC has represented a number of industry associations in the past and it was suggested that its membership could expand to include newer organizations (like the Saskatchewan Interactive Media Association) and sectors not represented by industry associations (such as theatre and dance). The notion of consultation with key stakeholders, was regarded as a necessary prerequisite in order to ensure that the sectors' financial needs are met.

The broad strategic goals associated with additional investment in the creative industries were defined as twofold: obtaining more funding and gaining a greater understanding of government's expectations and intentions for this sector. There is a perceived disconnect between government intentions and the funding provided and it was suggested that any strategy needs to find ways to bridge this gap. As well, there was a notion that increased funding needs to be provided to support activities such as product development. Another key goal was to leverage other resources into additional government funding, and to explore alternative financial aid to support the creative industries. Potential measures of progress towards achieving these goals included an increase in funding from current levels and increased resources for organizations that will play a key role in advocating for the creative sectors such as the Saskatchewan Creative Industries Development Council (SCIDC).

2.2.3 GOVERNMENT SUPPORT AND RECOGNITION

The provincial government was regarded as potentially playing a major role in providing more support and recognition to the creative industries. It was suggested that government needs to educate the public on the value of the creative industries and must promote the funds it puts into this sector as an "investment" rather than an expense. The industry associations (as well as key funding organizations such as the SAB) within this sector were also regarded as playing a leading role, as they need to align their key messages with the broadly-stated goals put forward by government. For this to happen, it was suggested the provincial government and the various creative sectors have an open dialogue to ensure that the provincial government listens to the needs of all sub-sectors and takes appropriate action based on this feedback.



Stakeholders felt that individual goals need to be set by each creative industry sub-sector, but that the broad goal of increasing recognition of the creative industries needs to relate to measuring the extent to which these industries are valued by the Saskatchewan public. It was suggested that this could be measured by public opinion polling. Other aspects of this included measuring the level of overall support the creative industries and each sub-sector receive from the provincial government as well as other indicators such as financial support and support for educational initiatives. All of this, it was suggested, needs to be discussed in the broad context of ensuring that Saskatchewan has a vibrant arts and cultural “scene” and portraying the creative industries as something which contributes to Saskatchewan’s quality-of-life. It was also suggested that other national and international strategies for celebrating and recognizing arts and culture need to be examined and, if necessary, applied to Saskatchewan as best practices.

2.2.4 MARKETING, TOURISM AND BRANDING

One of the key goals related to developing a coherent national and international marketing strategy was to have an integrated approach for the various creative industries that includes a “unified element” encompassing all creative sectors as well as individual identities for each sector included in this strategy. This would require increased collaboration between the different sectors that constitute the creative industries. Another key issue is to define the elements that would go into this marketing strategy (such as identifying key markets or distinguishing creative products/sectors) and providing the appropriate resources to conduct these marketing activities (e.g. attending national and international showcases and meeting potential buyers of Saskatchewan-made cultural products).



A marketing strategy was regarded as requiring a laddering approach that begins with the individual creative industry professional and flows upward to the industry associations and potentially towards a dedicated marketing agency. While the individual producer may not be able to market his or her own work successfully on their own, they would be able to offer support to one another through mentoring initiatives which would, in turn, be facilitated and supported by the industry associations. These industry associations were also regarded as playing an important role in this strategy. Their role could be augmented by a dedicated marketing agency that would deal with the “commonalities” of each sector and provide marketing assistance in a more comprehensive and efficient manner, with the industry associations providing important feedback and “on the ground” market intelligence. This notion that a potential marketing agency would deal with sector “commonalities” was regarded as being important, as it would ensure that a broad marketing strategy respects the different needs and variations of each creative industries sector. While the industry associations (and a potential marketing agency) were seen as playing a lead role, there would also be an important role for government and other arts funders.

Some specific actions to be taken as part of this marketing and branding strategy would be to encourage cross-marketing between sectors at every opportunity and to build upon strategies that promote Saskatchewan’s creative industries in different ways, including “reverse trade shows” where several sector representatives travel to a particular location to showcase Saskatchewan’s creative sector professionals as well as bring people to Saskatchewan to expose them to talent within the province. Although this strategy may not yield measurable short-term outcomes, stakeholders felt that this is a long-term strategy that will yield positive results over several years.

2.2.5 EDUCATION, CREATIVE DEVELOPMENT AND YOUTH ENGAGEMENT



“Education” was regarded broadly in this context, as it could be taken to mean public education regarding arts and culture or specific training regarding artistic practices as well as developing other required skills related to business administration and marketing. The goals offered here are to increase opportunities and build additional demand for professional development activities for creative industries professionals that might include programs, workshops and mentoring (among other things) related to specific artistic practices as well

as other necessary skills like marketing/branding, technology training and business development. All of this ties into a broad goal of ensuring that the ongoing education and creative development of young professionals will ensure that these individuals continue to stay in the province and practice their respective “crafts” locally.

To further facilitate the sharing of knowledge related to “common” skills required by all creative industries professionals (such as marketing and business development), it was suggested that the different sectors need to share resources and collaborate closely with one another. Funding organizations such as SaskCulture and other similar entities were regarded as playing a key role in ensuring that sharing and collaboration takes place.

On the artistic side, stakeholders put forward the idea of establishing a College of Arts and Design that would fill some of the education gaps in the creative industries (for example, training for those who wish to learn craft, as discussed earlier in this report) and would allow for the sharing of resources across sectors. In addition to establishing more “formal” education programs to address these gaps, it was also noted that there are other ways to deliver specific types of training, such as incubators and collaborative workshops, and that these efforts should be supported.

It was felt that PCS must take the lead in addressing these needs, as it may have the ability to promote culture across government (and to the public) and to have a coordinating role that the industry associations may be unable to achieve on their own. Some of the proposed measures used to assess the success of this strategy include basic economic indicators (such as the number of people/companies working in a sector, income levels, etc.) as well as Saskatchewan’s “retention rate” for younger creative industry professionals.

2.3 SUPPORTS AND SERVICES

2.3.1 REQUIRED SUPPORTS AND SERVICES

Stakeholders consulted for this project were asked to identify potential types of supports and services that could be put in place to promote growth and commercialization. From these ideas and elsewhere, a broad list of potential supports and services to be offered to those in the creative industries were presented to focus group participants. These included:

- General information/“wayfinding” services
- Marketing assistance
- Professional development
- Business skill development/entrepreneurial training
- Market research
- Research and development
- Training/assistance with new technology
- Opportunities for collaboration/innovation

In the plenary session with key sector stakeholders, participants expressed the view that trying to focus on one or two of these key areas would be a “self-defeating exercise” and that all of these things need to be provided to creative industries professionals. As individuals in different sectors have different needs, it was suggested this broad list of supports and services may be accessed by individuals, businesses and organizations in the various creative sub-sectors. At the same time, the means of providing these services needs to be relatively broad to ensure that individual sectors do not become “pigeonholed” by only receiving specific types of supports. Stakeholders indicated there must be a role for the creative industry associations to come together to coordinate how these supports and services are delivered. Commercialization supports delivered to the biotech industry (which contains many different types of large and small companies working in diverse fields) was held up as an example of how supports and services of commercial objectives could be delivered.





With respect to the individual supports and services, however, marketing assistance was mentioned as a major need by those involved in the film and music sectors. It was pointed out that SaskMusic and SaskFilm have more programs in place to provide marketing assistance to musicians and filmmakers that allows them to travel to showcase opportunities, but that these opportunities are limited by the amount of funding available. A number of participants felt that many individual producers do not have the time, or even the inclination, to market themselves and their work and that it would be very advantageous if support for these activities could be provided. As a participant in a focus group session in Saskatoon explained, *“It is unrealistic to expect the artists can or want to do these things. They need professional help and this is where the government comes in. This is where the artists need the support.”* In its online submission, SaskMusic advocated for the creation of a new agency that would provide marketing assistance to individuals. Some participants also noted that organizations such as the Saskatchewan Trade and Export Partnership (STEP) could be called upon to play a greater role in this regard.

Professional development and mentoring was mentioned by a number of those who responded to the online call for submissions. Several people noted that the industry associations provide many of these opportunities already by offering seminars and workshops, but that these efforts should be enhanced. However, many stakeholders noted that there can be an onerous cost involved when individuals and businesses access many of these services. Professional development opportunities that require participants to travel to a particular location or pay a fee to attend a specific course, for example, were regarded as barriers to linking creative sector professionals with supports and services. Some sectors were regarded as having more supports in place than others. As one filmmaker put it, *“If these other artists had access to same travel grants I do in film, it would be tremendous, If they had that same opportunity in visual art or writing and could network with the right people from both a sales/distribution and learning opportunity, it would be great.”* One-on-one mentorship was also seen by some to be a superior alternative. While professional seminars were regarded as helpful to a point, this was not seen to be as desirable as intensive mentorship opportunities. As one participant said, creative entrepreneurs *“... need someone to mentor them rather than sit in a room with 20 people and listen to a presentation ... these are specific skills, it’s highly technical.”*



Although it was not always described in these terms, support for research and development (or “product development”) is also seen as an important need for those in the creative industries. For those engaged in digital or emerging technology, in particular, universities are regarded as playing a major role in supporting these efforts. One participant in a Regina group pointed out that in order to conduct research and development successfully, universities need more financial assistance to be able to develop programs that train creative sector professionals and support innovation.

Market research is regarded as a missing component of the creative industries in Saskatchewan, as several participants expressed the opinion that few have a clear understanding of the size and specifics of the potential marketplace. Additionally, there was uncertainty regarding the economic activity generated by the creative industries. This was mostly attributed to a lack of accessible data regarding the various creative industry sectors, and it was suggested that more should be done to make this information available to those in the different sectors so that they can better position themselves to identify market trends.

There were mixed views regarding training related to new technology. While some felt this would be beneficial, it was noted that industry associations help make their members familiar in a general way with new technology at conferences and events. Some stakeholders, however, felt that the application of new technology is not particularly relevant to their respective creative discipline. On-going assistance in this regard was seen as desirable. Others felt that members of the creative industries should be able to purchase the technological expertise of professionals rather than add to their personal skill set.



Opportunities related to encouraging collaboration and innovation were also seen as a necessity by some discussion participants. As previously noted, some creative industry professionals feel they are somewhat isolated and that opportunities to stimulate cross-sectoral collaboration would be very beneficial. At the same time, however, some pointed out that collaboration already takes place organically. Taken together, a combination of these supports would be required to provide *“a strong foundation/launching pad to support creative entrepreneurs,”* in the words of one individual. By having these services available to both individuals and businesses and matched to their individual objectives, stakeholders hoped that a broad palette of these supports could assist creative industries professionals in achieving commercial objectives in a structured, targeted and coordinated manner.

2.3.2 DELIVERY MODEL

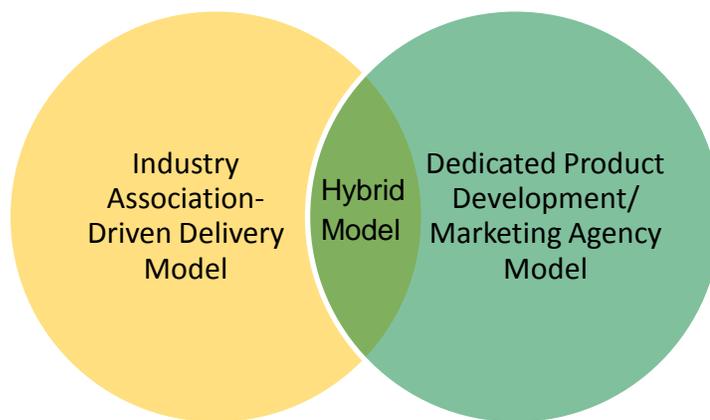
In addition to discussing which specific supports and services are required by Saskatchewan's creative industries professionals, a great deal of time was spent assessing how to deliver these supports and services. Generally speaking, the ideas for delivering these services centered around two potential models:

1. The establishment of a product development and marketing agency for some/all of the creative industries; and
2. Support provided directly to the industry associations.

One submission, in particular, advocated for the creation of a product development and marketing agency. SaskMusic's vision of what it calls "Creative Saskatchewan Inc." would see a new entity whose broad mandate would be to work towards *"the development and marketing of cultural products produced within the Province of Saskatchewan."* SaskMusic suggested that this organization should be established as a Crown corporation and modelled on similar product/market development organizations found in other provinces, including Manitoba and Ontario. It was suggested that this organization should be the entity that provides funding to sector organizations, conducts marketing activities on their behalf and continues to develop the digital multimedia sector in the province.

In other submissions from individuals and organizations, there was a wide degree of cross-sector support for the development of a potential product/market development agency. The consensus was that any agency tasked with marketing the work of Saskatchewan's creative industry professionals would provide a significant benefit, as this entity would provide a service that individual entrepreneurs and organizations may have difficulty conducting on their own. However, there were some concerns expressed that such an entity might compete for funding with existing programs that support individual producers and industry associations. As one organization noted, *"A marketing agency would be helpful in the growth and sustainability of the creative sector as long as it doesn't reallocate or diminish funds from [the] other two tiers that offer support [for] primary creation of artistic work and support for organizations."* In another submission, it was stressed that any organization that delivers supports to the creative industry sectors must be well-resourced and provide supports that serve their particular industry needs. *"It is far more important to make sure effective and well-resourced programming is in place than whether those supports come from a single agency,"* it stated. There was also a great deal of support for the idea of establishing a "representative" governance model for this type of organization, preferably with direct representation by those involved in the various sector organizations. The main rationale for this type of model was to ensure that the agency would be accountable to each of its constituent sectors. The exact formula put forward for board composition varied, however – SaskMusic indicated it would accept having the majority of representatives on this board appointed by government, while the Saskatchewan Media Production Industry Association (SMPIA) indicated that this board should be representative of, and responsive to *"... the major differences in size and impact that exist amongst the individual creative industries."*

In the focus groups, several participants noted that a dedicated organization would house marketing professionals in a single place and that these individuals “*may have expertise that our sector organizations might not have.*” Some also noted that a single organization focused on marketing would create efficiencies that cannot be achieved with several smaller organizations doing the same activities on behalf of their respective industries. However, many individuals representing several sectors felt that this “umbrella” approach to marketing the creative industries would be potentially problematic. Several pointed out that an agency may not be the best fit for marketing different sectors (which each have unique needs), while others were wary of the idea of creating what they termed “another layer of bureaucracy.” An additional concern was that a single marketing and product development agency would either take over the functions (and potentially funding) of individual sector organizations and the SAB, or diminish their organizational capacity indirectly by hiring away staff.



At the other end of the spectrum, a number of individuals and organizations supported the idea of having these supports and services delivered directly through the industry associations. The Creative Industries Growth and Sustainability Program (CIGS), which is administered by the SAB currently provides funding to four industry associations⁷ for the purposes of helping producers achieve greater commercial success. In its submission, the SAB put forward a detailed model to guide industry growth and development that builds upon this existing framework. The Accelerated Creative Industries (ACI) model would provide additional funding over a three-year period that would “*accelerate growth through sector-directed initiatives to increase commercialization and market activity.*” It would include three different sources of funding: a non-competitive “partnership fund” that would provide base funding to participating industry associations; a “growth fund” that would support targeted sector initiatives; and a “business development fund” that would provide a more flexible alternative to the current Flexible Loan Program (FLP). Although there were no specific figures associated with this funding model, the main objectives of this model are to achieve industry growth and development by adequately funding industry associations in a flexible and consultative manner.

⁷ These are the Saskatchewan Craft Council, SaskArt, the Saskatchewan Media Production Industry Association and the Saskatchewan Publishers Group. SaskMusic and CARFAC Saskatchewan previously took part in this program, but SaskMusic now receives funding directly from PCS and CARFAC has been re-designated as a Provincial Cultural Organization (PCO) and receives lottery funds administered by SaskCulture.

The main argument in favour of this type of model was that industry associations were perceived to have the best understanding of their members' needs and would be in the best position to deliver these services. However, some participants pointed out that these organizations may lack the resources and capacity to be able to do this effectively, and that this should be remedied by providing additional resources to these sector organizations. Another argument against this model was that it was seen to potentially contribute to the continuing "isolation" of the creative industry sectors and limits opportunities for cross-sector collaboration. Finally, for certain industries that have this type of marketing entity in place (such as SaskFilm in the case of the film industry), there were arguments made in favour of keeping the "status quo" in place and not creating a new or expanded organization.

Given these obvious pros and cons, participants in several groups expressed a preference for a "hybrid" approach that would be a combination of these two approaches. The vision for this hybrid approach was that it would deliver supports and services within a single entity, but that it would be governed by (and highly responsive to) the needs of each creative sector. When other provincial models, such as the Ontario Media Development Corporation (OMDC) and Manitoba Film and Music (MFM), were put forward in this discussion, some who were familiar with these organizations pointed out that those tasked with marketing individual sectors within these umbrella organizations worked largely independently of one another, even though they still achieve certain administrative efficiencies that would not be realized if these sectors were marketed on a totally separate basis. As one participant aptly put it, *"It's like General Motors – you've got Cadillac, you've got Chevrolet ... there are divisions in place."*

From the focus groups as well as the plenary session, there appeared to be a consensus that developing a "hybrid model" that includes a dedicated marketing and product development organization governed by (and accountable to) the sector organizations would be most desirable. Some of the other specific ideas and issues to emerge regarding what this "hybrid" organization would look like were as follows:

Implications

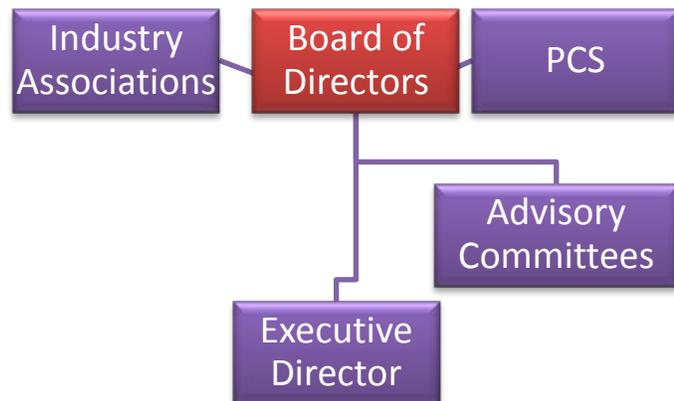
One of the main implications of this model was how it would fit into Saskatchewan's creative industries "ecosystem", in particular how it would build upon and augment supports and services offered by the sector organizations. It was suggested that this organization not only draw upon the expertise and abilities of the industry organizations, but also fill an important gap for those individuals whose sectors are not served by an existing industry association.

One of the other key issues around this relates to how this organization would co-exist with the SAB. The expectation and the hope is that this organization's mandate and activities would not conflict with the SAB, with the SAB responsible (as it always has been) for supporting individuals with creation and this new entity responsible for providing the resources to move what producers create to market. To use a technology metaphor or a plenary participant to describe the relationship, the SAB would continue to focus on developing the "intellectual property" (IP) and a new hybrid marketing/product development agency would be responsible for identifying and accessing target markets for this IP.

Governance

The expectation of stakeholders is that this organization would be operated by an executive director and specialist staff, with a policy board of government and industry stakeholders providing governance and financial oversight. One of the main features of a “hybrid” marketing organization which had resonance among stakeholders was the notion of having it governed directly by creative sector members, including industry association representatives (for those sub-sectors represented by dedicated industry organizations) and sector representatives (for those disciplines that do not have industry associations, such as dance and theatre). The perceived advantage of allowing industry associations to have dedicated seats on the board of this organization is that it would provide these associations with an opportunity to provide direct input from the associations and ensure that this new entity would be responsive to various sector needs. There was also an expectation that, in addition to having this agency report to PCS, other government ministries (such as the Ministries of the Economy and Advanced Education) may also have a say in how this organization operates.

In addition to having a board of directors that includes government and industry representatives, some stakeholders advocated for the province's post-secondary institutions to also play a role in providing strategic direction to this organization. Others advocated for “citizen” representation in the governance process. As a large board of directors might be



cumbersome, it was suggested that this organization could have a main governance-oriented board of directors as well as separate “advisory boards” of community/sector stakeholders who may provide advice and direction regarding specific issues.

Sectors

While similar organizations in different provinces⁸ may only include some sectors and not others, there were questions regarding which sectors should be included in this model. The film industry, it was noted, already has an entity in place that delivers many of these services, while the music industry desires a similar organization that would assist with product development and marketing. One of the key issues to be addressed regarding which sectors would be served by this new entity was whether creative businesses not included in the initial framework (or those without an industry association) would be able to access these supports and services. Stakeholders generally felt that this model should

⁸ For instance, MFM was created by merging Manitoba Film and Sound with Manitoba Music, while the OMDC provides these services on behalf of the film, television, music, interactive digital media, book publishing and magazine publishing industries and Quebec's Société de développement des entreprises culturelles (SODEC) provides services to the film/television, book publishing, visual art and music sectors (and also provides support for restoring heritage buildings).

include creative industry members who might not otherwise have access to such supports and services. Indeed, most of the content for this discussion did not preclude any sectors being unable to access this organization. Another key issue (which was also noted earlier) would be to ensure that this new entity's activities do not directly overlap with those provided by the SAB. As one stakeholder noted, "*we need to be conscious of existing structures in place.*"

Service Delivery

The key aspect of service delivery emphasized by stakeholders was that it would diagnose the needs of individuals and organizations and provide them with services as required. One participant likened it to "*an old-fashioned switchboard*" that serves different needs by "*... plugging the client into as many lines as possible, as quickly as possible.*" Having the industry associations at the table was regarded as a key component of service delivery to ensure that existing supports and services offered by these organizations are not duplicated and to maintain a degree of coordination. At the same time, it was noted that additional expertise would be required for this organization to be able to deliver specific marketing services to clients.

There was some concern expressed by one participant at the plenary session that an organization that delivers supports and services may be in conflict with other actors within the sector if it delivers a particular service on behalf of a client rather than simply referring this individual to someone who could do this on their behalf. Although this concern was not shared by others, it was stressed that this organization really should include a role as a "referral agent" when it is more appropriate to do so by fairly and objectively referring individuals to services that others could do on their behalf.

Other alternatives

Another "delivery model" idea raised in the final Regina group was to encourage a "cluster management" approach whereby a single business or organization would be responsible for conducting the marketing and business development activities of a cluster of creative industry entrepreneurs and organizations. There was little support for this model.

2.4 FINANCIAL ASSISTANCE

The following section highlights some of the discussion regarding specific financial incentives that could be put in place to assist the creative industries.

2.4.1 INVESTMENT POOL

In several of the online submissions, individuals and organizations stated that many creative industries professionals face difficulty accessing capital to be used to develop cultural products. This challenge is common to all creative industries, such as instances when:

- A filmmaker will require significant amounts of money to finance a film production;
- A musician, a theatre company or a dance ensemble will require upfront capital to stage a tour; or
- A potter or painter may require money for special materials to be used in the production of their work or may also require funds to transport and display these works in a gallery or at a show.

Although capital is a constant requirement, it is often difficult to demonstrate that an investment will yield a return, which makes access to capital through traditional channels difficult. As one professional noted in an online submission: *“Creativity is unpredictable – even fickle – so we cannot guarantee a return on the investment.”* Given that these individuals and small start-up businesses frequently face challenges accessing relatively small amounts of credit, there is a demonstrable “opportunity cost” in the absence of investment funds for these creative industries. *“One begins to wonder how much more economic value our industry could have brought to Saskatchewan if investment opportunities existed,”* the Saskatchewan Interactive Media Association (SIMA)’s submission stated.

Thus, when the idea of establishing an investment pool was put to focus group participants, there was conditional support among those in several sessions for developing an investment pool that would fund various creative sector initiatives. A proposed investment pool was generally seen as a means by which to help finance activities when they are at the product development and, in some cases, the marketing stage. Some specific examples of activities that could be financed by this investment pool included film/television/digital media productions, tours by performers, exhibitions of visual art and craft products and the distribution of digital media versions of other creative products (particularly recorded music and e-books).

One specific idea related to this that was put forward by both SMPIA and SaskFilm was for the Government of Saskatchewan to offer a rebate incentive on expenditures related to film, television and digital media. This “Saskatchewan Screen-Based Media Initiative” (SSBMI) would provide a production cost rebate to eligible companies registered to do business in Saskatchewan. Under this proposal, companies would be able to receive up to \$5 million per project, with the following criteria in place for different types of production companies:

<u>Proposed Saskatchewan Screen-Based Media Initiative (SSBMI)</u>⁹
<u>Stream I – Indigenous/Co-Production</u>
Minimum 30% Saskatchewan ownership
Minimum of six Saskatchewanians employed in key creative positions
30% of all eligible Saskatchewan costs
<u>Stream II – Foreign/Service</u>
Less than 30% Saskatchewan ownership of production
Minimum of four Saskatchewanians employed in key creative positions
25% of all eligible Saskatchewan costs
<u>General Eligibility Criteria</u>
Must be incorporated or registered to conduct business in Saskatchewan
Ineligible genres: news, talk shows, game shows, sports events, shows soliciting funds, reality TV, pornography, advertising, industrial/corporate, 25% stock footage, console or online video games (unless related specifically to a television or feature film), software/programming applications, video distribution platforms or aggregators
Total “spend” in Saskatchewan must be greater than \$50,000 (with a commercial license attachment) or \$100,000 (no commercial license attachment)
Maximum funding of \$5 million per project

Although this specific proposal was not presented in this way in the focus groups, the notion of offering “preferential” funding of projects that involve higher proportions of Saskatchewan-based creative professionals was regarded positively.

⁹ This proposal, including the eligibility criteria and distinction between indigenous/co-production and foreign/service productions, very closely mirrors the criteria in place for the Alberta Production Grant that is provided through the Alberta Multimedia Development Fund (AMDF). See <http://culture.alberta.ca/forms/AFD0006.pdf> for details.

At the same time, however, participants in the focus groups and plenary session raised a number of issues regarding the investment pool. Some of these specific concerns included:

- *Administration:* There were several questions about who might be responsible for administering this investment pool. While stakeholders who participated in the plenary session expressed some initial preference for a grassroots industry organization (such as SCIDC) to operate this fund, there was also support for having this investment pool operated by a dedicated marketing/product development agency if such an organization were created. The key issues here were to ensure that both government and industry have a voice in operating this fund, and to ensure that the eventual framework follows extensive consultation with key constituencies. It was suggested that the administrators of the investment pool should investigate “best practices” implemented for the administration of similar funds in other provinces/countries.
- *Form of Investment:* One of the key questions raised regarded the form this investment pool would take, with some debate taking place over whether grants, loans or some form of equity position would be desirable. For the most part, grants were seen as preferable to loans, while an equity stake was viewed as a potentially beneficial solution provided certain conditions are met. For instance, if the government were to take an equity position, those in the digital technology sectors in particular, stressed that the individual content producer must retain intellectual property rights. Stakeholders who took part in the plenary session indicated that all of these different types of financial tools (loans, grants and equity stakes) should be considered.
- *Funding Limitations:* In some focus group sessions, individuals representing the film industry questioned why this was being proposed given the broad similarities to the former SFETC. When it was pointed out that, unlike the SFETC, the amount distributed by an investment pool would be limited to whatever amount is set aside each year (as opposed to a potentially open-ended number of productions made in the province being eligible for a tax credit), there were concerns that not enough funding would be available to finance large-sale film productions and that demand from all creative sectors would outstrip supply. Indeed, another key question related to how much would be available for each creative industry as well as what amounts would be available to individuals, businesses or organizations.
- *Applicability:* Participants in a number of sessions made the point that the various creative industries are quite different in many respects and that an investment pool geared to meeting the needs of one sector may not be transferable or applicable to those in another. This point was made by those in the film industry, in particular, with some questioning whether the size of an investment pool would be adequate to finance film/TV/digital media projects. When it was suggested that an investment pool might provide different funding amounts and eligibility criteria for those in different sectors, there was relatively little opposition to this idea. It was felt, in general, that recognizing these inherent structural differences would be desirable.

- *Eligibility:* When considering who should be eligible for this fund, stakeholders generally agreed that any individual, business or organization involved in the creative industries should be able to access this fund. However, there was an expectation that applicants would have to demonstrate that their activity is “commercially viable” and that this aspect would be taken strongly into consideration. At the same time, there was some debate about the extent to which this type of investment pool would fund “development” activities which have been funded historically by organizations like the SAB on the basis of artistic merit. For the most part, however, these discussions focused around how those eligible for funding would be using investment pool funds in a broader commercial sense, such as bringing cultural products to market.
- *Expertise:* There were concerns that those administering a single investment pool for the creative industries may not have the necessary expertise to evaluate funding proposals for industries with very different needs. Some participants said that careful thought should be given to determining who would be responsible for administering the fund, with an emphasis on making sure individuals who are knowledgeable about each respective field are tasked with making these decisions. There was some support among stakeholders for the idea of establishing peer juries to determine how resources would be allocated, while some situations might call for specific expertise evaluating project proposals. It was stressed here that the purpose of the funding should dictate who should be making these decisions and how they should be made. Once again, it was suggested that the administrators of the investment pool should investigate “best practices” implemented for similar funds in other jurisdictions.
- *Bankability:* Those in the film industry, in particular, stressed that an investment pool needs to be “bankable” in the sense that it would be recognized by lenders and other funding partners as a viable and predictable source of funding. As one filmmaker put it, “*It has to mesh with the global business model or it isn’t usable for us.*” It was hoped that funding from this investment pool would also leverage other investments from other sources, including federal financing programs (such as the Canada Media Fund, for example) and private lenders. It was noted, however, that two other provinces (Alberta and New Brunswick) have an investment pool model in place to finance film, television and digital media production in their respective jurisdictions, and that funding from these investment pools are accessed by national and international production companies.

2.4.2 TAX-BASED INCENTIVES

One of the key issues overshadowing this discussion related to a tax incentive structure for the creative industries. Stakeholders were specifically asked if a non-refundable tax credit, such as the one recently proposed for the film industry, would be of assistance.

For the most part, stakeholders agreed that a non-refundable tax credit would not be particularly helpful to the creative industries. Those in the film, television and digital industry, in particular, argued that a non-refundable tax credit model simply does not fit within the overall financial framework of their industry. The main reason offered for this was that production companies create “single-purpose” corporations for the purposes of making a specific film or television program and these entities are discontinued after a particular project is complete. Typically, these single-purpose companies do not report any taxable revenue because any remaining income is distributed to the partner companies which established the single purpose company. Because the single-purpose companies would not carry over tax credits that could be applied against future corporate income tax deductions, any tax incentive provided in a non-refundable fashion was regarded as irrelevant. Some representatives of the film industry said that while this type of tax credit might benefit a major company that would report a large amount of taxable income related to a particular production, Saskatchewan film, television and digital media companies do not fall into this category and it is unlikely that they would realize any benefit from this type of tax incentive. *“We spent months looking at this and it just doesn’t work for us,”* was how one film industry representative summed up their reaction to this idea. Those in the film industry repeatedly and consistently indicated that their preference is to receive a refundable tax credit that would be competitive with those offered by other jurisdictions. Representatives from the publishing industry also argued that their industry would benefit from a refundable tax credit model, noting that Manitoba and British Columbia have these types of incentives in place for their respective provincial publishing industries.

Refundable Vs. Non-Refundable Tax Credits		
	Refundable	Non-refundable*
Income Tax Payable	\$0	\$0
Tax Credit	\$50,000	\$50,000
Income tax return	\$50,000	\$0
Cost to Government	\$50,000 Direct Expense	\$50,000 In Deferred Revenue*
		*Can be applied against future income tax for up to 10 years, and can include current year and previous 3 years

Those in other creative sectors, meanwhile, indicated that a tax credit which allows one to defer paying personal or corporate income tax presumes that an individual or business actually generates enough of an income from these activities to pay taxes. Most stakeholders pointed out that since this is not the case for virtually all Saskatchewan producers, the benefit of a non-refundable tax credit would be negligible. As one creative entrepreneur also pointed out, those with more mature businesses are also more likely to reinvest back into their business any income they earn rather than pay taxes on it. A couple of those who made submissions indicated that investment capital (described in Section 3.4.1) would be more helpful at this stage than a non-refundable tax credit.

2.4.3 OTHER TYPES OF FINANCIAL INCENTIVES

In addition to these two specific types of financial incentives, focus group participants and those who made online submissions provided additional examples of tax-related incentives that could be put in place. This included the idea of establishing “tax-free zones” where individuals selling their products would not have to charge provincial sales tax for their work. Another idea was to exempt income tax for creative industry professionals, as is the case in Ireland.¹⁰

Some individuals also advocated for other forms of direct financial assistance for those in the creative industries, including cost of living allowances and increased grants provided by organizations such as the SAB.

¹⁰ Starting in 2011, Ireland implemented an income tax exemption on the first €40,000 (\$50,818 Canadian) of profits earned by resident writers, composers, visual artists and sculptors from the sale of their work. See <http://www.revenue.ie/en/tax/it/reliefs/artists-exemption.html> for additional details.

2.5 CREATIVE INDUSTRIES ASSETS

2.5.1 SASKATCHEWAN'S ASSETS

In many of the focus groups, participants were asked to identify what they considered to be the “positive attributes” shared by the creative industries in Saskatchewan. The main items identified by these stakeholders included:

- **Entrepreneurship:** In several groups, participants highlighted the “entrepreneurial” nature of Saskatchewan’s creative sector and indicated that those in this sector possess a great deal of ingenuity in the face of structural challenges such as a remote location, small population and limited funding for arts/culture. This sense of entrepreneurship, crossed with a cooperative spirit that encourages individuals to pull together for a common purpose, was seen by many participants as a prerequisite to success in the creative industries in Saskatchewan.
- **Human capital:** As many participants noted, Saskatchewan is home to a significant number of highly-talented individuals who represent a variety of professions. *“Broadly speaking, we have great talent in this province,”* one participant noted.
- **Cultural sector vibrancy:** For instance, those in Saskatoon pointed to the presence of a strong music and live theatre scene in their city, while those in Regina tended to point to the presence of a vibrant local film community in the province. 
- **Strong universities:** This was noted in particular by those from Saskatoon and those involved in digital media, as several of these individuals pointed to specific initiatives undertaken at the Universities of Saskatchewan and Regina and their respective research parks. These initiatives were seen to provide both important research and development resources as well as a pool of well-trained individuals to populate the digital media profession. 
- **Venues:** Several participants pointed to the presence of good venues in both Regina and Saskatoon for the creative industries. This includes the presence of performing venues for musicians and those in other performing arts (such as theatre and dance) as well as the presence of the Canada-Saskatchewan Production Studio in Regina.
- **Organizational strength:** Several of those who participated highlighted the capacity and ability of specific organizations within the province to support the creative industries. This included organizations such as SaskFilm, SaskMusic, the SAB, the Saskatchewan Craft Council (SCC), CARFAC Saskatchewan, SMPA and the Saskatchewan Writers Guild, among others.
 - The SAB, in particular, is held in high regard by those in the various arts occupations. *“It is amazing – one of the best and one of the oldest in the world. It’s going well, but they need more money. They are very important for supporting artists,”* was how one visual artist described it. 
 - Similar to this, individuals also pointed to specific programs and supports, such as the SAB’s Culture on the Go Program as well as support offered by the Saskatchewan Trade and Export Partnership (STEP).

2.5.2 THE CANADA-SASKATCHEWAN PRODUCTION STUDIO

One of the key provincial assets discussed during this consultation was the Canada-Saskatchewan Production Studio in Regina. This facility, which houses three purpose-built soundstages and a number of offices, is underutilized. Those who made online submissions and those who participated in the focus groups were asked to share their ideas regarding what could be done to optimize the use of this space.



Several of those who took part in this consultation advocated for the status quo. Those from the film industry were quick to note that the re-implementation of a refundable tax credit (or similar incentive) would mean that this space would be used for its original purpose. Indeed, several of those in the film industry bluntly stated that the idea of “repurposing” this space would be extremely short-sighted, as this space was built specifically for the needs of production companies. These individuals frequently noted that this soundstage facility is “purpose-built” and considered to be the best facility of its kind outside of major centres such as Toronto and Vancouver. The suggestion was made by these industry representatives (and many others) that the government should focus on finding ways to attract production companies to use this facility for its original purpose. Furthermore, they argued, converting some or all of the soundstages to some other purpose would be a fatal blow to Saskatchewan’s film, television and digital media industry as it would lose its major physical asset.



At the same time, however, there was also general agreement from those in the film sector (and in other sectors) that the space is underutilized and some complimentary activity could potentially take place in certain parts of the building, such as the vacant office spaces on the third floor or one of the smaller soundstages. By way of example, it was noted that the “fourth” soundstage (which is now operated by the CBC as part of its production facility) had been used for a dance production at one time and that this had been an appropriate use of this space when it was not being used for film and television productions. In offering this suggestion, however, several participants cautioned that any alternative uses of this space should not prevent the soundstage from being used for its original purpose when circumstances dictate. *“I feel really uncomfortable putting anything on the table without acknowledging it’s an important building and art form that has built an internationally recognized industry. ... Let’s have that conversation first and then discuss whether there are other things we can do in the meantime,”* one participant in a session said. Several other individuals in these sessions prefaced any remarks they made about other potential uses for this facility by indicating that their ideas were based on the assumption that:

1. The SFETC, or any equivalent financial incentive, will not be reinstated.
2. These uses of the Canada-Saskatchewan Production Studio would be secondary to its original purpose and would not prevent this facility from being used for its original purpose if the province’s financial incentive structure (or the broader economics of the global film industry) changes in the future. To this end, some individuals expressed the fear that a production company looking to use the soundstage would be told it was no longer available because it was being used for a dance recital, for example.

Potential Uses

Some organizations also put forward very specific ideas on how this space could be used.

- SaskMusic put forward the idea of creating a business incubator (called the “Saskatchewan Centre for Creative Entrepreneurs”) and housing it in this space. The Saskatchewan Interactive Media Association (SIMA) also broadly supported the idea of an incubator for their industry in particular. SaskMusic’s submission also suggested that, in addition to a business incubator, this space should also be used as the main office space for any new creative industries marketing body as well as creative industry associations. This organization also recommended that at least one of the three existing soundstages should be retained for its original purpose and the largest soundstage should be converted into a performing arts facility. SaskFilm, in its submission, noted that although the idea of having a creative industries business incubator in this space may have merit, a more in-depth feasibility study should be conducted beforehand.
- A submission from CrashBangLabs suggested that this space could be turned into a “makerspace” where creative industries professionals and those involved in specific disciplines would have an opportunity to collaborate with one another. This submission described a repurposed production studio as a *“go-to service provider and source of low-cost expert knowledge and development strategies for many other organizations and individuals who may be making use of the space.”* It would *“offer a common interaction area like an atrium or a café [that] would allow consultants, small business persons and creative professionals to interact, share work opportunities and ideas, and grow the community, and as a result, the industry.”*
- Takt Communications put forward a similar idea for the development of an “innovation centre” called StageOne. The broad vision of the StageOne concept is to use this space to house *“a vibrant community of creators, innovators and entrepreneurs who will work collaboratively to build exciting new business ventures and spur innovation in the province ...”* In addition to the “makerspace” described above, this facility could also include a “hot desking” environment where mobile workers could come in and collaborate on projects during the day as well as offering meeting space, studio/practice space and designated office space for various businesses and organizations. These ideas were echoed by SaskMusic and those engaged in digital media production, including one who envisaged this space being used by a large number of digital media companies and other types of interactive media companies, with a particular emphasis on having local companies use this space.

Other potential complimentary uses that were offered by stakeholders included:

- An arts education/design facility;
- A larger space for the SAB’s permanent collection;
- A retail space for selling Saskatchewan-made creative products;
- A publicly-accessible café/restaurant; or
- A materials testing facility.

It was suggested that some or all of these activities (particularly low-impact complementary activities) could provide the facility with additional revenue streams. Stakeholders frequently noted that the revenue structure for this facility is problematic given that the fees associated with space in this facility serves as a major barrier that prevents smaller companies and organizations from accessing this underutilized office space. Several participants in these sessions said that if rents were lowered, the third floor offices would be an ideal place to house creative sector organizations or an incubator for digital media startups while still maintaining the sound stages for their original purpose. Several individuals pointed out that it would be impractical to convert soundstages with 80-foot-high ceilings into office spaces. However, a couple of participants did suggest that these areas could be used to host performances and sector events at times. Another suggestion was that some of these activities could be delivered by “social enterprises” as opposed to for-profit businesses.

Operations/Governance

This facility is operated by the Ministry of Central Services. In terms of future governance and operation of this building, stakeholders suggested that this building should be managed by a new entity that could be either a Treasury Board Crown corporation or a not-for-profit organization. Stakeholders felt that it is important for those responsible for operating this building to be closely connected to the creative industries and to ensure that they are actually housed in this facility. Although it was expected that government would continue to invest in the capital and operating costs of this facility, some stakeholders expressed the view that adding diverse revenue streams may help cover some of the costs of operating this facility. As one stakeholder put it, *“We’ve used the word investment because that’s what it is. It’s a government-owned facility and it will have to remain government-owned ... but in the long turn, it should make money.”*

What About A Similar Facility In Saskatoon?

In some of the focus group sessions held in Saskatoon, several participants felt that whatever happens to the Canada-Saskatchewan Production Studio is of little relevance to them because it is located in Regina and primarily serves filmmakers based in that city. Some felt that Saskatoon, as the province’s largest city and a hub for the creative sector in its own right, would also benefit from the presence of its own major collaborative space. The City of Saskatoon’s current transit terminal (which is slated for relocation) was suggested as a building which could be transformed into a similar collaborative space.

As well, it was suggested that events taking place at the Canada-Saskatchewan Production Studio (for example, artistic performances or conferences) could be shared with video streaming technology to participants at several locations throughout the province.

2.6 COLLABORATION

Participants in this consultation generally spoke of collaboration as something which happens in a limited and not particularly formal manner. *“Collaboration needs to be organic ... that’s the nature of it,”* one focus group participant in Saskatoon noted, with others adding that cross-sectoral collaboration takes place through the organization of major events (including art shows, summits or large cultural events)



or informally at creative sector hubs such as Saskatoon’s The TwoTwenty or Regina’s Creative City Centre, among other places. As noted earlier, many of the proposed ideas for optimizing some of the space within the Canada-Saskatchewan Production Studio in Regina in a way that brings those from other creative industries sectors into this building were seen as potentially fostering additional collaboration. This was particularly true for linking the creative industries sectors to the emerging (and growing) digital technology field.

Some film industry professionals also held up their industry as a “model of collaboration,” noting that a film based on a Saskatchewan author’s book, or one which uses a piece of music by a Saskatchewan musician, is a prime example of collaboration. At the same time, however, several participants did note that not enough collaboration takes place at the moment and that they would welcome opportunities to work more closely with those in other sectors. As noted earlier, some participants shared the perception that the creative industries remain within their own silos and that more should be done to break down barriers between different sectors. In order for collaboration to take place in a more complete way, it was suggested that more effort needs to be made around delivering the supports and services that all of those in the creative sector have in common, such as professional development, marketing, research and development, and training in new technology. It was hoped to a certain extent that the establishment of a dedicated product development and marketing agency, that includes a significant degree of sector input and governance, would also lead to greater collaboration.

There was some agreement that these activities will yield a larger degree of collaboration and that organizing opportunities for creative industry professionals to access professional development, or to learn how to market a product using digital media, could be beneficial. To many participants, this suggested a “sponsoring” role for government to make these opportunities happen, whether by organizing retreats and conferences or through more formal mechanisms such as SCIDC or other sector groups. However, a couple of participants were quick to caution that government should not be too involved in fostering collaboration that would otherwise take place on its own.

2.7 EMERGING TECHNOLOGY AND DIGITAL MEDIA

Broadly speaking, for the purposes of the creative industries, stakeholders agreed that digital media can be:

1. Viewed as a creative medium or product in and of itself – for example, a robotic sculpture or digitally-recorded music;
2. Used to create new digital tools and systems to be applied to existing types of creation, including in new ways that add value – for example, digital galleries showing visual art or implementing digital media techniques to other existing art forms; and
3. Used purely as a business tool to promote and distribute creative industry products – for example, a musician may start a website or Facebook page to promote his/her music or an upcoming tour, or a book publisher may use a digital platform to distribute an ‘e-book’.

Thus, one of the key questions addressed by stakeholders with respect to digital technology and the creative industries is whether these types of media are considered to be just another set of “tools” that will be incorporated into the practices of all of those in the creative industries or whether it merits its own special focus as something requiring attention by a new policy aimed at achieving commercialization. While the discussion paper spoke of how digital technology is transforming the creative industries and has required new ways of doing things, digital technology was not necessarily viewed as relevant to all of those who took part in this consultation.



Although most of those who made submissions and spoke to this issue described themselves as presently utilizing what might be considered “emerging technologies”. the actual use of these technologies varied considerably by sector and business. Many of those involved in the creative industries use websites and other types of online communication methods (including email, Skype and various social media platforms) to market their work and keep in touch with prospective buyers. Those in the film and digital media industry, in particular, noted that they use video sharing websites such as YouTube and Vimeo to promote their work. Individuals in this industry, in particular, noted that the digitization of screen-based media has transformed their industry, allowing them to market and distribute their work relatively easily and inexpensively. Indeed, there are now specific incentives in place to ensure that digital media is part and parcel of film productions. The Canada Media Fund (CMF) and Telefilm Canada explicitly encourage producers to incorporate digital media into their productions. This was also true for those in the music industry, while those in the book publishing sector noted that their industry is being rapidly transformed by the digital distribution of e-books. For those in other sectors, such as visual art and craft production, digital media and new technology was seen to be of less relevance given that they sell a tactile product that typically cannot be distributed by electronic means. However, there was an acknowledgement that these technologies are used to market products and provide representations of their works. For these individuals, digital technology is more likely to be used to market their work, and these informants generally expressed the opinion that, although they are not at the leading edge of new technology, they are sufficiently adept at using online tools to market their work.

Many of those who made submissions indicated that they had incorporated these technologies into their marketing activities in particular, but the consensus was that their usage did not mean that they were necessarily on the “cutting edge” of adopting new technology. The main barriers associated with the adoption of emerging technology were the prohibitive cost associated with developing new technology for their own use (for instance, the cost of developing mobile phone applications) as well as the challenges associated with marketing products in a huge global marketplace that relies on entirely-new methods of aligning demand with supply (for instance, the use of search engine optimization based on certain keywords).

The notion of creating an investment pool and additional support for training/assistance with new technologies, were regarded by some participants as potential mechanisms for fostering additional usage of new technology in the creative industries. Other ideas included strengthening the links between the digital media sector and other creative industries, including by bolstering the SIMA and providing continued/additional support for professional development activities regarding new technology and the creative industries. The key aspect of this is to ensure that those from the creative sector and those more rooted in the world of digital technology “continue to talk to each other.” As well, one specific idea in this regard was to have artists’ retreats regarding digital media.

Further to the idea of providing assistance to individuals to keep up with digital technology, some stakeholders suggested there should be a balance between providing resources to teach individuals how to do things on their own and linking them up with professionals who would be able to use these tools on their behalf. Given the steep learning curve and the evolving expertise required to master new forms of digital technology (particularly as it relates to content distribution), it was suggested that a framework needs to be in place for providing direct assistance, as opposed to training, when the situation warrants it. At the same time, some stakeholders agreed that a central resource (possibly including information regarding specific techniques and best practices) should be put in place. It was envisioned that this resource would be found alongside other supports and services offered to those in the creative industries. As with other supports and services, stakeholders envisioned government and industry associations working together to facilitate the delivery of assistance related to digital technology.

APPENDIX

- Focus Group Screening Instrument
- Focus Group Moderator's Guide
- Plenary Session Moderator's Guide

SASKATCHEWAN MINISTRY OF PARKS, CULTURE AND SPORT
FOCUS GROUP SCREENER QUESTIONNAIRE

My name is _____ and I am from Probe Research, a professional public opinion research company. Is (read name from list) available?

We are looking for people to join a special in-person discussion session on the evening of **Monday, October 15/Tuesday October 16/Wednesday October 17/Monday October 22/Tuesday October 23** regarding the future of the creative industries in Saskatchewan.

These sessions are lively and entertaining and you do not need any special knowledge or skills to contribute to these sessions. All we are looking for are friendly people who are willing to share their ideas and observations in a group with around 8 or 9 people like yourself.

1. Do you think you might be interested in attending a consultation session on the evening of **Monday, October 15/Tuesday October 16/Wednesday October 17/Monday October 22/Tuesday October 23**?

Yes..... 01 (CONTINUE)
 No02 (THANK AND TERMINATE)

2. Do you have a few minutes to answer some questions to see if you qualify for participation in this session?

Yes..... 01 (ASK NEXT Q.)
 No 02 (RESCHEDULE RECRUIT CALLBACK)

3. On a scale of 1 to 7 where “1” means “you are not at all comfortable” and “7” means “you are very comfortable”, how comfortable would you be speaking in a group with about 10 other people?

Not at all							Very
Comfortable							Comfortable
1	2	3	4	5	6	7	



(CONTINUE)

4. Just to confirm, which of the following creative pursuits are you/your organization involved in?

Film 01 (ASK NEXT Q.)
 Music 02 (ASK NEXT Q.)
 Visual art/painting..... 03 (ASK NEXT Q.)
 Craft/sculpture..... 04 (ASK NEXT Q.)
 Book publishing..... 05 (ASK NEXT Q.)
 Digital media/gaming..... 06 (ASK NEXT Q.)
 Other: ____ (xxx) 07 (ASK NEXT Q.)

5. And in what city are you based?

- Regina (POTENTIAL GROUPS 7-10)
- Saskatoon (POTENTIAL GROUPS 1-4)
- Prince Albert (POTENTIAL GROUPS 5-6)
- Other: _____ (Recruit to closest community)

6. There are different ways that people are involved in the creative industries. Recognizing that some people play several different roles in this area, which of the following two statements would you say best describes your main role in this area? That is, what it is that you do most of the time?

1. I am mainly involved in the creation and/or performance aspects of my chosen medium. (RECRUIT TO GROUP 1, 3, 5, 7, 9 IN APPROPRIATE CITY)
2. I am mainly involved in the marketing, operational and/or support aspects of my chosen medium. (RECRUIT TO GROUP 2, 4, 6, 8, 10 IN APPROPRIATE CITY)
3. *(Neither of these) – ask for name of organization/business they represent and recruit to appropriate even-numbered group – call if you have questions*

1. Monday, October 15, 2012, 6 PM	Saskatoon – Queen’s House of Retreats 601 Taylor Street West
2. Monday, October 15, 2012, 8 PM	Saskatoon – Queen’s House of Retreats 601 Taylor Street West
3. Tuesday, October 16, 2012, 6 PM	Saskatoon – Queen’s House of Retreats 601 Taylor Street West
4. Tuesday, October 16, 2012, 8 PM	Saskatoon – Queen’s House of Retreats 601 Taylor Street West
5. Wednesday, October 17, 2012, 6 PM	Prince Albert – Cooke Municipal Golf Course 900 22 nd Street East
6. Wednesday, October 17, 2012, 8 PM	Prince Albert – Cooke Municipal Golf Course 900 22 nd Street East
7. Monday, October 22, 2012, 6 PM	Regina – Crave Kitchen and Wine Bar 1925 Victoria Avenue (at Hamilton Street)
8. Monday, October 22, 2012, 8 PM	Regina – Crave Kitchen and Wine Bar 1925 Victoria Avenue (at Hamilton Street)
9. Tuesday, October 23, 2012, 6 PM	Regina – Crave Kitchen and Wine Bar 1925 Victoria Avenue (at Hamilton Street)
10. Tuesday, October 23, 2012, 8 PM	Regina – Crave Kitchen and Wine Bar 1925 Victoria Avenue (at Hamilton Street)

RECRUIT DETAILS:

Your characteristics are just what we require for the discussion group. The session will take approximately an hour and a half. Are you still interested in participating?

YES ___ (CONTINUE)

NO ___ (THANK & TERMINATE)

I just need to get a little more information for statistical purposes.

a) Gender: (DO NOT ASK ON THE TELEPHONE – WATCH QUOTAS):

Female: ___ Male _____

b) In what year were you born? _____

c) Can you please spell your first and last name? _____

d) At what telephone number are you most easily reached, should I/we need to re-contact you?

e) The Ministry would also like to send you a letter confirming your participation in these sessions. Can I please have your mailing address? _____

I have some information for you to take down. Do you have a pen handy?

- The discussion session will take place on the evening of **Monday, October 15/Tuesday October 16/Wednesday October 17/Monday October 22/Tuesday October 23** at 6:00/8:00 pm
- You must be there by 5:45 p.m/7:45 PM. and it is very important that you be on time.
- The sessions will be held at (INSERT LOCATION FROM ABOVE).
- There is street level parking available near the building.
- The session will take approximately 90-100 minutes
- You may not bring any children or someone else to the session.
- Refreshments will be provided.
- Once again that is (INSERT LOCATION) at 5:45/7:45 p.m. on **Monday, October 15/Tuesday October 16/Wednesday October 17/Monday October 22/Tuesday October 23**

If you require further information between now and **Monday, October 15/Tuesday October 16/Wednesday October 17/Monday October 22/Tuesday October 23** or are unable to attend the discussion group please call Sharon at Probe Research Inc. at (204) 298-3192.

We look forward to seeing you there. Good-bye.

Ministry of Parks, Culture and Sport (PCS)
'Moving Creative Industries Forward' Focus Group Discussions
— Moderator's Guide (Revised) —

October 19, 2012

Probe Research mainline: 204-926-6565

Module I — Agenda Setting

Module Synopsis: This module establishes the objectives of the discussion session and presents the ground rules that will govern the meeting. Areas of discussion in this module are included in compliance with the good practices guidelines of the Marketing Research and Intelligence Association.

- Moderator introduces himself.
- Explains purpose of the session: “We are here to discuss the future of the Creative Industries in Saskatchewan and specifically how they can focus on increasing their commercial success. While works of art have their own intrinsic value and they do not necessarily have to be a saleable product, this discussion is all about how people working in the creative industries can achieve greater commercial success.”
- “As you probably know, the government has launched this consultation process and is hearing from folks like you throughout the province. The purpose of this meeting today is to share your perspectives and talk about some ideas that have been proposed for these industries, as well as any other ideas you would like to share.”
- Explain need for frank input and that all expressed views are equally valid and important — “there are no right or wrong answers”. Discussions should be fun and relaxed.
- Explain presence of the Minister/MLAs/other colleagues are observing: “They are here to listen to what you have to say, but they will not be participating in our discussion directly.”
- Explain purpose of video recorder.
- Cell phones off.
- “To get our discussion started, I’d like to go around the room and have you introduce yourselves by telling me your name and your role in the creative industries.”

Total time for module — 10 minutes

Module II — Assessing the Current State of Affairs

Module Synopsis: In this module, participants will share their views regarding the current state of affairs in Saskatchewan's creative industries. This will be assessed in further detail by having participants identify, at a high level, the various "strengths and weaknesses" of Saskatchewan's creative industries.

Online Discussion Paper Overview (SHOW ACCOMPANYING SLIDE)

- (Moderator) Did everyone here have an opportunity to review the online discussion paper?
 - What came to mind when you read it?
 - What do you think about the overall "vision" for Saskatchewan's creative industries that it articulates? (SHOW ON SLIDE)
 - Was anything missing that needed to be included?

The Current State of Saskatchewan's Creative Industries

- When you hear that term "creative industries," what comes to mind? What activities does that include?
- (MODERATOR AT EASEL) I would like to take a few minutes to lay out the big picture that we're going to be confronting today. I would like to make two lists: one is a list of the things that are going well when it comes to the creative industries in Saskatchewan, and the other is a list of the things that are not going so well. Where shall we begin?
 - (Probe for items such as):
 - Human resources development
 - Organizational capacity
 - Overall focus
 - Collaboration within the different industries
 - Size of the sector
 - (For each item raised) Why do you say that is positive/negative?
 - Which specific industries would you say this applies to? And are there industries where this is not the case? Which ones?
- What kinds of actions do you think would best support growth and development in the creative industries? Why is that?

Total time for module — 15 minutes

Module III — Proposed Innovations

Module Synopsis: In this module, participants will consider the merits and drawbacks of ideas that have been shared by those who have made submissions to the Government as part of the Moving Creative Industries Forward initiative. After considering some of these specific ideas on their own, participants will then have an opportunity to share their own ideas that could potentially strengthen the Saskatchewan creative industries.

- (Moderator) We're going to take a few moments now to discuss some of the different ideas that have been proposed in the consultation document and in the online submissions that people made to the Ministry.

Creative Industries Supports and Services

(Moderator) A number of different ideas have come out of previous research and this consultation regarding the need for various supports and services that would help those in the creative industries achieve greater commercial success. This could take a few different forms, and I'd like to discuss a few of these with you:

Investment Pool

- One of the issues that we heard about was that some individuals have difficulty financing their projects because they have large input or capital costs. One specific idea that has been suggested is to create an "investment pool" that would be commercially-oriented and help cover these costs. (It's important to note that this would be different than other types of funding available through organizations such as the Saskatchewan Arts Board or Canada Council.)
- Some of the ideas in the online submissions suggested that this investment would be based on a percentage of production costs – somewhere in the range of 25 to 30% - being funded by the Government. It could also take different forms, including a loan, or grant, or equity stake.
 - What is the best thing you can say about this idea?
 - What is the worst thing you can say about this idea?
 - What kinds of activities should this investment pool support?
 - What form should this investment take? (i.e. is it a loan, grant, equity stake...?)
 - How much should be offered through this investment pool?
 - Who should be allowed to access this fund? (Probe for whether it should be Saskatchewan-only, or open to those from other provinces/countries)
 - What kind of preference, if any, should be shown to Saskatchewan businesses/organizations? What would this look like?
 - What conditions should be in place?
 - Where should the funding for this investment pool come from?
 - Are there any particular sources of existing funding that could be used to create this investment pool?
 - How would you see this investment pool leveraging additional investments from other funding sources, such as the private sector or other government sources?

Non-Refundable Tax Credit

- Another idea is to provide a non-refundable tax credit. (NB: A non-refundable tax credit is a credit that is based on deferring the tax you pay on the income your business earns. It is different than a refundable tax credit in that you have to earn income in order to receive this credit, whereas a refundable tax credit provides a set amount whether income is earned or not). You can see the difference between these two types of tax credits on the screen:
 - Would you/your industry benefit from some sort of non-refundable tax credit? Why is that?
 - (If yes) How would this work?

General Supports (display list on the screen that includes the following bullet-by-bullet)

(Moderator): There are also other ideas for more general supports and services that could be offered. These supports might be offered “a la carte” they might be part of a specific program (training and professional development); or they might come in the form of financial assistance provided to enable the producer to address a specific need (research and development required to take something from concept/idea to a prototype, for instance) Here are some examples:

- General information/“wayfinding” (“Something to help you navigate how to get products to market”)
- Marketing/assistance getting products to market
- Professional Development
- Business skill development/entrepreneurial training
- Market research
- Research and development
- Training/assistance with new technology
- Opportunities for collaboration/innovation
- (FOR EACH) How would _____ be helpful to you?
- Are there any other supports/services that you think should be added to this list?

Support/Service Delivery

(Moderator) Building on what we have just talked about, I want to discuss a couple of other ideas that have come forward during the consultation on how the supports and services we just talked about would be handled.

Additional Support for Creative Industry Sector Organizations

- One idea that has come out of the consultation was the idea of providing more support directly to the creative industry associations, who would work with their members to advance commercial objectives. Right now there are several creative industry sector associations, including SaskMusic, the Saskatchewan Craft Council, CARFAC Saskatchewan for visual artists, the Saskatchewan Publishers Association and the Saskatchewan Motion Picture Industry Association. There are no associations for some creative industries, such as dance and theatre, while others like the Saskatchewan Interactive Media Association are just starting to build an organization.

(If it comes up: stress that we're not talking about what the Arts Board does – this is about providing funding that helps achieve commercial objectives).

- What is the best thing you can say about this idea?
- What is the worst thing you can say about this idea?
- Which industries/sectors would this work best for?
- Are there any other sectors that would not fit well under this model?
- What would be the outcome of providing this additional funding?
 - How would it help achieve commercial objectives?

Product/Market Development Organization

- The other idea that has been proposed is to create a new entity that would focus almost entirely on getting products ready for market and then marketing the work of those involved in the creative industries nationally and internationally. Although there have been a few different ideas proposed on how this organization would be structured, the idea is that it would operate in a similar manner to organizations like Manitoba Film and Music, the Ontario Media Development Corporation (OMDC) – if you are familiar with those.
 - What is the best thing you can say about this idea?
 - What is the worst thing you can say about this idea?
 - What should this organization look like?
 - How could this organization be helpful to you?
 - What kinds of activities should this organization be responsible for? (Probe for things like...)
 - Travel assistance for marketing
 - Market Research
 - Skills Development
 - Providing Financial Assistance
 - What products should it concentrate on?
 - What markets should it concentrate on?
 - Which industries/sectors would this work best for?
 - Are there sectors/industries it would not work for? Which ones? Why is that?

Additional Innovations

- (Moderator at easel) What other things could be implemented that would help strengthen the creative industries in Saskatchewan? (Generate list and for each one, ask):
 - How would this be helpful?
 - Which industries/sectors would this work best for? Are there any other sectors that would not fit well under this model?
 - Is there any way that this idea could incorporate digital technology? How so?

Production Studio Ideas

- One of the other issues that has been up for discussion is to find additional uses for the Canada-Saskatchewan Production Studios (the “sound stage”) in Regina.
 - What would this studio look like?
 - What kinds of activities would you like to see take place in this studio?
 - Are there any other potential uses for this sound stage? (Probe for ideas such as)
 - A general “creative space”
 - Cultural centre
 - Dance/theatre production and rehearsal space
 - Training space for various University of Regina programs
 - A ‘business incubator’ for different types of creative businesses
 - Cluster/technology hub for other types of digital media production, including video game development, software design, “makerlab,” etc.
 - Office space for other sector organizations (e.g. industry associations, non-profit organizations)
 - (For each) What do you think of this idea? Is it feasible?
 - What is the best thing you can say about this idea?
 - What is the worst thing you can say about this idea?
 - Which of these do you think is the best use for this sound stage?

Total time for module — 40 minutes

Module V — Problem Matching

Module Synopsis: In this module, participants will link the ideas generated from the online consultation (and any new ideas raised in Module IV) to the weaknesses/challenges identified at the outset of the discussion

Matching Proposals to Challenges

- Let's go back and revisit this list of challenges that we identified when we talked about what is working and what isn't working in the Saskatchewan creative industries today. What I want to do is talk about _____ **(Pick the idea/solution that they discuss in the most detail)** and discuss how this solution might help solve this challenge.
- (For each solution) Does this solution address many of the key weaknesses we have identified? How so?
- Is there anything that could be improved about this idea so that it fully addresses this weakness? What is that?

Total time for module — 10 minutes

Module VI — Partnerships

Module Synopsis: In this section, participants will discuss current efforts at cross-sectoral collaboration within the creative industries, as well as consider ways by which they might be able to incorporate partnerships with providers of digital technology services.

Current and Future Collaboration Initiatives

- How well do artists, creative businesses and sector associations work together right now?
- What other partners do they collaborate with?
- How could collaboration between these key stakeholder groups be improved?
- What steps could be taken to make this collaboration happen?

Opportunities for Digital Collaboration

- How do you personally incorporate digital technology into what you do?
- (IF NOT) What barriers/issues exist that are preventing you from adopting digital technology? (Probe for things like the cost, training opportunities, unfamiliarity with new technology, etc.)
- What other opportunities do you see to adopt digital technology into your activities?
 - What would be some of the positive aspects of this?
 - What would be some of the challenges?
- What kinds of activities would help connect those who are currently in other creative industries with those working in the digital technology field? (Make list and for each...)
 - What would you like to see come from this?
 - Who should be responsible for making this happen?

Total time for module — 15 minutes

Module VII — Moving Forward

Module Synopsis: This final module allows participants to share their views regarding their “ideal outcomes” from this process and to discuss the next steps that should emerge from this consultation

Next Steps

- What, to you, would be the ideal outcome from these discussions? What would you consider to be a successful outcome?
- What role do you hope to play in the future direction of the Creative Industries? What activities are you willing to do?
- What other steps need to be taken?
 - Who is responsible for taking these steps?

Total time for module — 10 minutes

Thank, Debrief and Dismiss Participants

Saskatchewan Ministry of Parks, Culture and Sport
'Moving the Creative Industries Forward' Plenary Session

Facilitator's Guide
Thursday, November 1
9 AM – 4 PM

Delta Regina, Novara Room – Regina, Saskatchewan

Probe Gen. office: 204-926-6565

Module I — Introduction

- *Opening remarks from the Ministry/Minister (if available)*
- Introduce the MLAs/mention the MLA committee struck by Premier Wall
- (Refer to slide) Explanation of objectives for the day:
 - Assess the current state of Saskatchewan's creative industries
 - Review and validate results of the online consultation/focus groups
 - Develop a vision, strategy and action plan for moving the creative industries forward
- Just by way of introduction, I think we should be clear that today's discussion is going to focus primarily on how we can help the creative industries better advance commercial objectives.
- We are going to cover a great deal of subject matter, some of which we will move through quite quickly. If we are not discussing something as thoroughly as you would like, please jot down anything that you think is unfinished business and we will be sure to discuss the your concern towards the end of the day.
- Explain need for full and frank input and that all expressed views are equally valid and important. Discussions should be collegial and relaxed.

Telephones on vibrate.

Opening Exercise

- Have everyone briefly introduce themselves and describe "... what specific outcome you would like to come out of today's discussion?"
- (Hand out sticky notes)
- What I would also like you to do is to write down on a piece of paper one specific objective that you feel needs to happen in order for the creative industries in Saskatchewan to better achieve commercial goals. Please write your name on your sheet as well.
 - If you are here representing a particular sector, I would like your response to be for your specific sector. For example, if you are here representing the music industry, I would like your response to pertain to the music industry.

- If you are here on behalf of a business, government or funding-related organization, I would like you to answer the same question, but to think about all of the sectors you consider to be the “creative industries”:
- When you are done, please hand these up to me – we will be discussing them in more detail later today (post notes on the wall somewhere and analyze over lunch hour)

Total time for module — 30 minutes

9:30 AM

Module II — Creative Industries Consultation Findings

How We Arrived Here

- To get started today, we want to briefly provide some context on what's been done to date. Although we know some of you have participated in these discussions previously, we do want to briefly touch upon where we have come from in this process and where we are going. In a moment we will also share some of the key findings from the focus group and online consultations with you
- *Ensure slides are distributed* – “if you have comments/notes, please write them in the margins so we can discuss them after we present these findings”
- Last year, three assessments were completed on the current state of the creative industries in Saskatchewan:
 - H.J. Linnen/David Murray report for Enterprise Saskatchewan
 - Probe Research report on the Creative Industries Growth and Sustainability (CIGS) Program
 - Innova Learning report on the Culture on the Go (CoGo) Program
- These reports conclude, in various ways, that Saskatchewan's creative industries are underperforming from a commercial point of view.
 - Saskatchewan creative industry exports = \$7m (Manitoba's is \$98m)
 - One of the lowest cultural industry employment ratios in Canada (“Culture sector workers” account for 2.1% of SK jobs vs. 3.1% nationally)
 - Industry leverages a lower-than-average amount of federal funding
- The Ministry launched a consultation process in July by releasing a consultation paper and inviting stakeholders to provide submissions/ideas regarding how these commercial objectives could be achieved.
- Probe Research also conducted a series of focus groups in Regina and Saskatoon. These were attended by Minister Doherty as well as the MLA committee struck by Premier Wall to listen to the concerns of those in the creative industries.

Online Feedback and Focus Group Findings

- Now we're going to provide a brief overview of the findings to come from the online consultations:

Online Feedback

- *45 submissions in total. This includes:*
 - *25 by individuals*
 - *15 by businesses and organizations*
 - *5 by funding organizations*

- Submissions by sector:
 - Film, television and digital media: 23
 - Visual art/craft: 10
 - Writing/book publishing: 4
 - Dance/theatre: 2
 - Music: 1
 - Funding organization: 3
 - Unsure/not stated: 2

- There was a concern that the proposed vision put forward for the creative industries is too narrowly focused. It was suggested instead that helping the creative industries achieve commercial goals means focusing on creating content and not solely on marketing “creative products.” The supports to be provided included partnerships with/support from government, access to market opportunities, professional development opportunities and strong industry associations.

- The approach to commercial development should be customized to the needs of creative industries themselves and a “one-size-fits-all approach” should be avoided.

- Access to capital (or financial assistance) is a major issue given the “capital-intensive” nature of developing products. The notion of developing an investment pool that would invest in Saskatchewan productions and initiatives had a great deal of resonance – we will be discussing this in more detail today.
 - Other types of desired supports and services include:
 - Providing different types of financial benefits (mainly in the form of refundable tax credits),
 - Opportunities for professional development/mentoring
 - Marketing assistance.
 - It should be noted that the likelihood of obtaining these supports and services really depended on the sector and the extent to which individual artists/organizations were “commercialized” in their operations.

- There are generally two schools of thought regarding how this assistance can be provided. One idea is to have support for commercialization provided through industry associations, while another idea is to create a dedicated agency that provide these supports and services to those in the creative sector.

- There are a number of ideas being put forward for the Canada-Saskatchewan production studio. While some want to see this space preserved in its entirety, there are proposals on the table that would contemplate other uses in this space, including:
 - A creative industries cluster/business incubator
 - Training/rehearsal space
 - Office space for the different sector organizations

- The use of digital technology is considered to be a reality for many creative entrepreneurs, with some of those in the industry further along than others in their usage of emerging technology. Presently technology assists marketing efforts, but it is also used in a significant way to produce art. There is a sense, though, that (with some notable exceptions) Saskatchewan is not on the cutting edge of technology and is largely trying to keep up with the pace of technological change.

Focus Group Findings

- Conducted 8 focus groups – four in Saskatoon on Oct. 15-16 and four in Regina on Oct. 22-23.
 - Participants invited to take part based on lists provided by industry associations to the Ministry
 - Breakdown of participants was as follows:
 - Film (23/77) – 30% of participants
 - Music (14/77) – 18% of participants
 - Visual art (12/77) – 16% of participants
 - Digital media and new technology (9/77) – 12% of participants
 - Craft (7/77) – 9% of participants
 - Publishing/writing (7/77) – 9% of participants
 - Dance/theatre/performing arts (5/77) – 6% of participants

- The main findings were as follows:
 - Participants felt the proposed vision and objectives for the creative industries put forward in the consultation document are too narrow and overly focused on the commercial aspects of their work. Some participants also felt that this statement did not describe the present reality (even though it was meant to be “future focused”).
 - The perceived strengths of Saskatchewan’s creative industries include the amount of local talent, the entrepreneurial abilities of those working in these industries, the abilities of specific organizations and the presence of good venues.
 - Specific challenges/weaknesses facing Saskatchewan’s creative industries include a lack of organizational/sectoral capacity, the loss of talented professionals to other provinces, the loss of the Saskatchewan Film Employment Tax Credit, the ability to educate up-and-coming creative sector professionals, a lack of public appreciation for arts/culture, the rising cost of living and ‘isolation’ (both geographically as well a sectoral basis within the province).
 - There was conditional support for the notion of establishing an investment pool that would help finance activities when they are at the product development and, in some cases, the marketing stage. However, there are a number of key questions and issues that would have to be worked out prior to implementing this (which we will talk about in more detail today).
 - The idea of creating a new non-refundable tax credit for those in the creative sector was rejected, either because it would not fit with existing industry models (for the film industry) or because of a concern that incomes are not high enough to yield a sufficiently-large credit.
 - As it was pointed out that there are barriers to accessing a number of services which assist creative sector professionals, there was some degree of support for making it easier for these individuals to access professional development, marketing assistance and product development in particular.
 - Participants were presented with the two delivery models discussed earlier – an industry association model and a product development/marketing agency model. When these two models were assessed, participants raised a number of pros and cons with both of these ideas. With no clear consensus between

these two options, there would often be support for a third “hybrid” model that would create a new agency that is governed by – and responsive to – the different sector organizations. (We will talk about this in more detail later today).

- Many of the concerns with the product development/marketing agency were related to the idea of delivering supports and services through an ‘umbrella’ marketing organization. Although there was some support in principle for this notion if it meant delivering services in a more efficient fashion, many of those noted that it would be extremely difficult given the different needs the various creative sectors have, and that they would not want to diminish the capacity of the Saskatchewan Arts Board or sector organizations. (This will be discussed in additional detail) Other suggestions/models emerged as well, including:
 - An enhanced role for the SK Trade and Export Partnership
 - ‘Cluster teams’ in place to assist groups of businesses/organizations
- There was some hesitation to convert the Canada-Saskatchewan Production Studio from its original purpose – however, it was suggested that some complimentary activities could take place in underutilized areas of this facility.
- A number of other potential innovations were suggested, including support for establishing creative industries hubs to foster collaboration, doing more to publicly celebrate the work of Saskatchewan artists, providing income tax relief to artists and creating an online portal for selling work produced by those in Saskatchewan’s creative industries.
- Although collaboration takes place in a semi-structured way, it was suggested that more effort needs to be made around delivering the supports and services that all of those in the creative sector have in common, such as professional development, marketing, research and development, and training in new technology.
- Most participants acknowledged that adapting to digital technology is a challenge they are working hard to meet in their respective sectors, with most noting that new technology is currently used for marketing rather than production. An investment pool was seen as one mechanism that could be used to support this transition to a greater extent.

Assessment and Discussion

- What comes to mind as you assess these key findings?
- Does anything here provide an insight that rings true for you?
- Do you object to anything presented here? What is that?
- Is there anything that seems to be missing? If so, what?
- What do you think are the implications of these findings? How so?

Total time for module — 45 minutes (15 minute break) -

10:30 AM

Module III – Vision and Goals

(Moderator at easel) Before we discuss our ideas for what needs to go into this strategy for the creative industries in Saskatchewan, let's reflect for a few minutes on what we think the broad "vision" needs to be for the different sectors.

- Where do you want the creative industries sector to be in Saskatchewan five years from now? Ten years from now?
- As an industry, what needs to happen in order to achieve this?
 - What's missing from the equation now?
- By the way, when we talk about having a vision for the "creative industries," which industries are talking about? Are there others we should be including? Not including?

Just to refresh your memory, here are the vision and desired outcomes ("goals") that were put forward in the consultation document (Show on slide):

Vision: "Saskatchewan is a leader in the creative economy with strong content companies supported by outstanding creative talent innovating new products and services excelling in the development and use of new and emerging technologies."

Outcomes/Goals:

1. Increase sales, revenue and investment attraction
2. Long-term growth of existing companies and successful new start-ups
3. Unlock the economic potential of creative industries through the use of existing and emerging technologies

- How does this statement align with your vision for the creative industries?
- Without getting too far into wordsmithing, what needs to be changed?
 - What else needs to be incorporated into this vision?
 - What needs to be removed from this vision statement?
- Do any of these goals need to be amended/changed? Which ones? How so?

Total time for module — 20 minutes

10:50 AM

Module IV - Building a Strategy for the Creative Industries

- (At easel) You've had an opportunity to hear what stakeholders feel are some of the main issues facing the creative industries. Just to recap, here are the ones that stakeholders mentioned were the main issues:
 - A lack of organizational/sectoral capacity
 - The loss of talented professionals to other provinces ("brain drain")
 - The loss of the Saskatchewan Film Employment Tax Credit
 - Educational capacity (e.g. curriculum and career development)
 - A lack of public appreciation for arts/culture
 - The rising cost of living
 - Geographic isolation
 - Lack of collaboration between sectors
- Are there any other items that you would add to this list?
- *(Dotmocracy): Hand out five dots to each participant:* "What I would like you to do is to prioritize these issues. Please place your dots next to the issue you think requires the most focus in this strategy. You can place all your dots next to one thing or you can spread them around, etc."
- *Discuss allocation*
- *(Identify the top four items and number participants)* What I would now like to do is to split you up into four groups and have you discuss each of these items in more detail. What I would like you to do is to discuss these items by answering the following questions:
- *(Provide handout of these questions and moderate small group discussion – Lloyd, Curtis and 2 Ministry staff to record, without imposing themselves a great deal...)*
 - Who needs to take the lead in addressing this issue?
 - Which creative industry sub-sectors need to be involved in this aspect of the strategy?
 - What specific goals need to be set in order to address this issue?
 - How should progress be measured in addressing this issue?
 - Is there anything else missing that needs to be included here?

(Once session reconvenes and everyone reports)

- What do you think of this idea?
- If we had to rate the attractiveness of this plan on a scale of 1 to 10, where would it register?
- If we had to rate the viability of this plan on a scale of 1 to 10, where would it register?
- What would have to change to make this plan more attractive or viable?

12:00 PM

Break for Lunch (30 minutes)

Total time for module — 70 minutes + 30 minute lunch

Module V — Discussion of Specific Elements

As we discussed earlier, there are a number of proposed ideas that were discussed during the focus groups. This included the following:

- An investment pool
- General supports and services
- The future use of the Canada-Saskatchewan Production studio
- Adoption of digital/emerging technology

We're going to split you up into four groups again and ask you to answer some key questions about each of these. They are as follows:

*****Number off participants again using a different order, and record the discussion in small groups – Lloyd, Curtis and 2 Ministry staff. Provide each group with a list of these questions with a small explanation for each.*****

Group 1: Investment Pool	Group 2: General Supports and Services
Who should be responsible for administering the investment pool (e.g. government, other organizations)?	Which supports on this list need to be emphasized?
Who should be eligible to receive funding from this pool?	What form should these supports take? (e.g. Should the service directly be offered, or should it be funding to access these services?)
What criteria/process should be in place to access this pool (e.g. What should it be used for?)	Who should be responsible for delivering these supports and services (including the investment pool)?
What amount should this pool provide for each sector? Should there be a cap on this fund?	What role should industry associations play in delivering these services?
How should this investment pool complement other supports and services?	Who should be able to access these supports and services? What other criteria should be in place for how they are accessed?
What form should the funding take? (e.g. loans, grants, equity stake)	
Who should make decisions regarding funding? (e.g. Juried, industry experts)	
What expertise should fund managers have?	

Group 3: Production Studio	Group 4: Digital Media
<p>What other uses/activities could take place in this building?</p>	<p>How should links be strengthened between Saskatchewan's digital media sector and other creative industries?</p>
<p>How can/should these activities fit with the original purpose of this building (production studio)?</p>	<p>What steps can be taken to help individual artists creative sector professionals incorporate digital media into their activities?</p>
<p>What additional resources are required to support other uses of this facility?</p>	<p>What else should be done to ensure individual artists/organizations keep up with digital media as it evolves?</p>
<p>Who should be responsible for operating/governing the production studio?</p>	<p>For what purpose/to what end should this be done?</p>
<p>Who should be responsible for covering its operating costs?</p>	<p>What resources do they require?</p>
<p>What should be done to make sure this resource benefits those from outside Regina?</p>	<p>Who should be responsible for making this happen?</p>

(Once session reconvenes and everyone reports)

- What do you think of this idea?
- If we had to rate the attractiveness of this plan on a scale of 1 to 10, where would it register?
- If we had to rate the viability of this plan on a scale of 1 to 10, where would it register?
- What would have to change to make this plan more attractive or viable?

1:45 PM

Total time for module — 75 minutes + 15 minute break

2:00 PM

Module VI — Organizational Structure

Moderator: During the focus groups, we put forward two potential models that could be used to deliver supports and services to the creative industries. Broadly speaking, they are as follows:

Option 1: Product Development and Marketing Agency Model

One of the ideas we heard was to establish a marketing agency that would be responsible for marketing and product development in the creative industries

- **This agency would be an organization largely funded by the Government of Saskatchewan. (What form it would take is not settled – it may be a not-for-profit organization, Crown corporation, or other model).**
- **It could be modeled on similar organizations in other provinces, including the Ontario Media Development Corporation (OMDC), SODEC (in Quebec) and Manitoba Film and Music.**
- **It would not replace the existing sector organizations – it would compliment their activities by providing expertise and services that these organizations are unable to offer on their own.**
- It would provide services on either a complete or on an “à la carte” basis

Option 2: Industry Association Model

- **Another idea we have heard is to provide more resources directly to industry associations for achieving commercial objectives**
- This happens to a certain extent already with some industry associations (but not all sectors are included in this model, either because they don't participate in this program or because they don't have an industry association)
- As with the other models, it would provide services on either a complete or on an “à la carte” basis

Moderator: We heard a number of arguments both for and against these two models. We also heard a number of participants propose a hybrid “Third Option” that would incorporate elements of these two models. Based on the feedback we heard – as well as the concerns some participants had about each of these two models – we are putting forward a framework for delivering supports and services that would be based on the following principles and outcomes:

Option 3: 'Hybrid Model'

- This would be an agency that would provide a variety of marketing/product development-related supports and services to the various creative industries.
- As with the other models, it would provide services on either a complete or on an “à la carte” basis
- It would employ people who possess an in-depth understanding of the needs of each of the creative industry
- It would not replace the various sector organizations – in fact, it would work closely with these organizations, understand their needs and engage them in a meaningful way.

Key Questions:

- (Moderator) This time we are going to split up into 3 groups (number people off):
 - Group 1: Product Development/Marketing Model
 - Group 2: Industry Association Model
 - Group 3: Hybrid Model
- What I would like you to do this time is to have each group discuss some key questions related to each of these models. This includes the following:
 - How exactly do you envision this model working for the creative industries in Saskatchewan?
 - What are the implications of implementing this model? What would have to change?
 - Which industry associations/sectors would fit best within this model?
 - What is the best way for this organization to deliver the supports and services we talked about earlier?
 - Specifically, how would an investment pool be managed under this model?
 - How would the future use of the production studio fit into this model?
 - How would this organization strengthen the capacity of industry associations?
 - How would this organization foster collaboration between different sector organizations?
 - How should this organization be governed?

Group Discussion:

- What decisions did you make in your group? What do others think of this?
- Based on what you've heard, if you had to choose which model would be best for Saskatchewan's creative industries, which one would you choose? (Show of hands)

Total time for module — 75 minutes

3:15 PM

Module VII - Review of Objectives and Unfinished Business

- Let's discuss the objectives you wrote down at the beginning of the day (NB: They will be categorized)
 - Did we achieve this objective in our discussion today?
 - What are your hopes/expectations going forward?
- Although we have had quite a lot of discussion, we have actually confined ourselves to some fairly narrow parameters. Is there anything that you wish to raise that you feel is important, but was not discussed today?

Discuss as required.

- **Closing remarks from the Minister (leave 15 minutes at the end of the day for this)**

Total time for module — 45 minutes

4:00 PM

Thank, Debrief and Dismiss Participants