



SASKATCHEWAN MOTION PICTURE
INDUSTRY ASSOCIATION

Public Opinion Poll April 2012

The 'insightrix' logo is displayed in a white oval. The word 'insight' is in blue and 'rix' is in grey. A small registered trademark symbol (®) is to the right of the word. The oval is set against a blue background with a diagonal line pattern.

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Study Background

- On March 21st, 2012, the provincial government announced it will be eliminating the Saskatchewan Film Employment Tax Credit Program and will not be accepting new applications after July 1st, 2012.
- In order to assess current public opinion regarding the provincial government's decision to eliminate the tax credit program, the Saskatchewan Motion Picture Industry Association (SMPIA) contracted Insightrix Research Inc. to conduct a public opinion poll of Saskatchewan residents.

Study Objectives

The overall purpose of this study is to assess current public opinion among Saskatchewan residents regarding this recent announcement.

Specific objectives include:

- Examine top of mind impressions, familiarity and importance of the film, television and digital media production industry among the general public in Saskatchewan.
- Measure awareness of the Saskatchewan Film Employment Tax Credit Program elimination.
- Determine levels of public support and opposition to the government's decision to eliminate the Saskatchewan Film Employment Tax Credit Program.
- Assess support for future incentive programs to support the film, television and digital media production industry in Saskatchewan.

Methodology

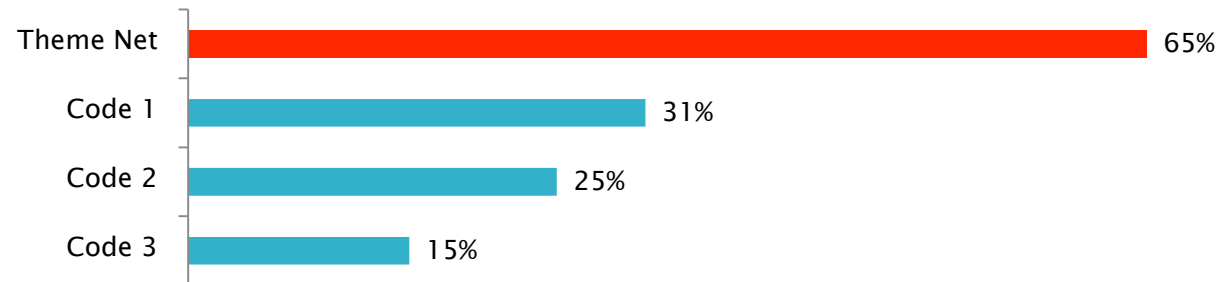
- Data were collected between April 19th and April 24th, 2012, using Insightrix's SaskWatch Research™ online panel. This panel is comprised of over 11,000 Saskatchewan residents and closely matches the general population of Saskatchewan on a number of demographic variables.
- A total of 813 surveys were completed.
- Quotas were set to ensure that the mix of respondents would be representative of the population of Saskatchewan. The table provided shows the distribution of responses.

Male	Current
18-34	115
35-54	141
55+	131
Total	387
Female	Current
18-34	117
35-54	157
55+	152
Total	426
Region	Current
North	160
Regina	160
Saskatoon	167
South	326
Total	813

Research Notes

- Due to rounding, not all results will add to exactly 100%.
- Each question includes a base description detailing the number of respondents who answered each question (n=#).
- Open-ended questions have been themed and coded into categories. In some cases, themes have been coded into 'Nets' based on commonalities. Nets are shown in a different colour and all items coded beneath it are included in the net. The percentages from individual codes may add to more than the 100% as comments from each respondent could be relevant to more than one code.

Net Example



- NOTE this research was conducted prior to the recently announced Provincial Government's non-refundable tax credit program.



Summary of Findings

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Summary of Findings

- Most respondents (74%) believe the film, television and digital media production industry is important to Saskatchewan, although fewer consider themselves to familiar (27%) with the specific activities of the industry.
- Awareness of the government's decision to eliminate the Saskatchewan Film Employment Tax Credit Program is high, with eight in ten respondents (79%) being aware of the decision prior to completing the survey.
- The majority of respondents oppose the elimination of the tax credit (60%) while one-quarter (25%) support the elimination of the credit. These proportions change very little once respondents are given specifics on the economic benefit to Saskatchewan, with opposition increasing to 63% and support decreasing to 24%.
- Most respondents (73%) say that having an incentive program to support the film, television and digital media production industry in Saskatchewan, similar in size to the current tax credit program, is important to them personally.

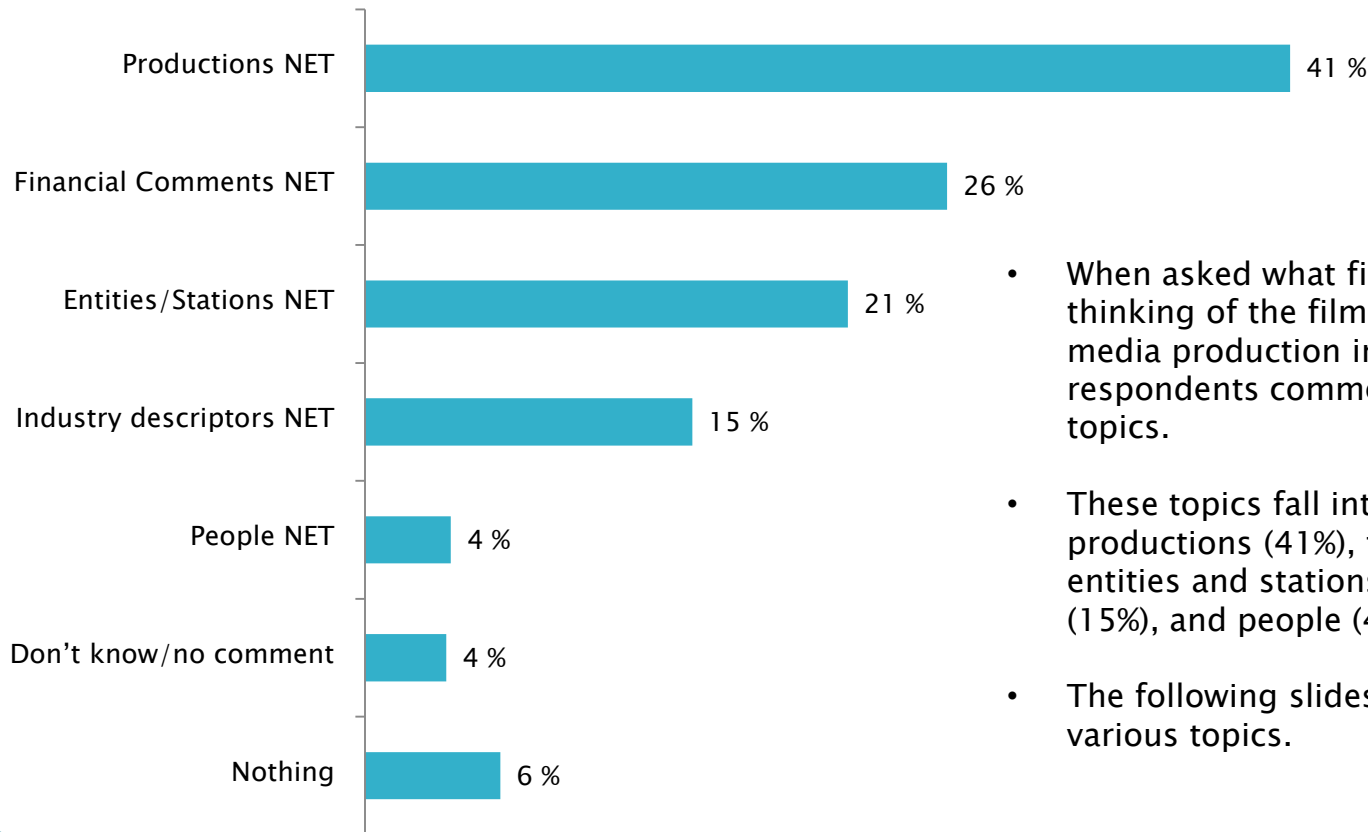


Detailed Results

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Initial Thoughts

When you think of the film, television and digital media production industry in Saskatchewan, what first comes to mind?

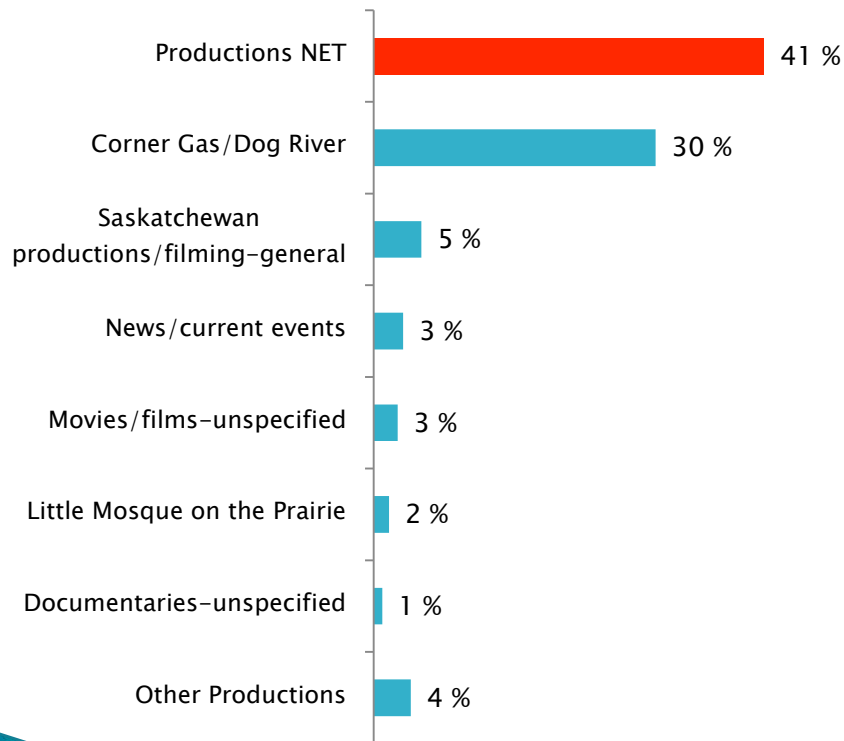


- When asked what first comes to mind when thinking of the film, television and digital media production industry in Saskatchewan, respondents comment on a wide variety of topics.
- These topics fall into categories including productions (41%), financial (26%), various entities and stations (21%), the industry (15%), and people (4%).
- The following slides give more detail on the various topics.

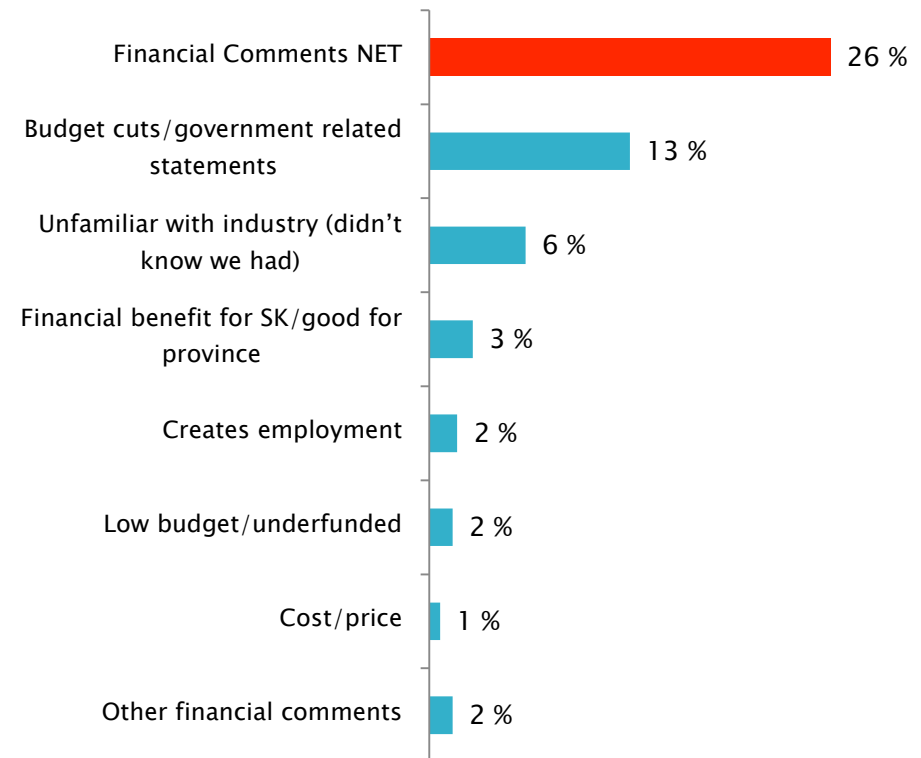
Initial Thoughts – Detail

When you think of the film, television and digital media production industry in Saskatchewan, what first comes to mind?

Productions



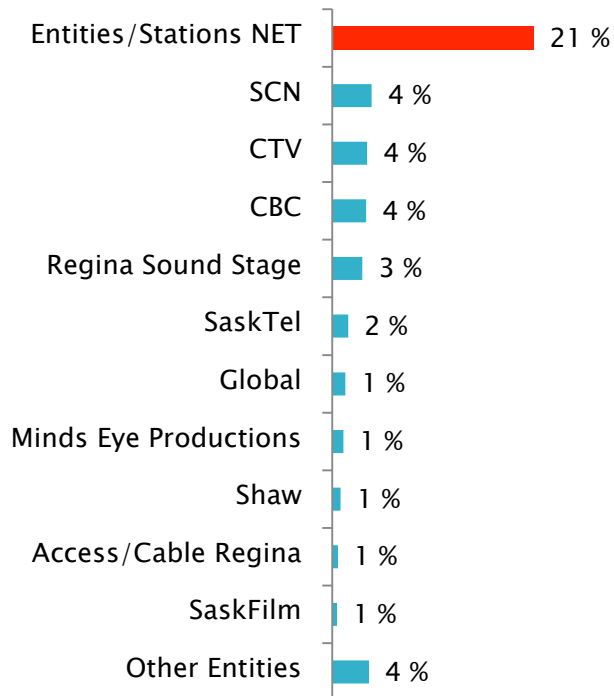
Financial



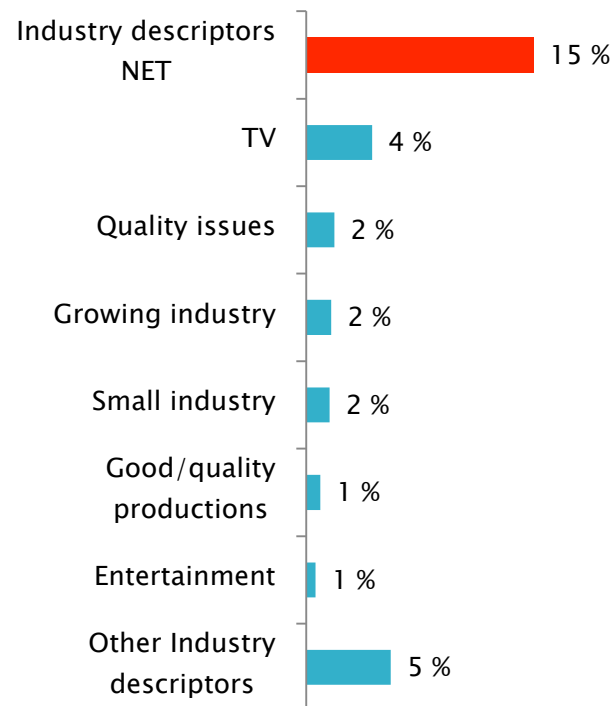
Initial Thoughts – Detail

When you think of the film, television and digital media production industry in Saskatchewan, what first comes to mind?

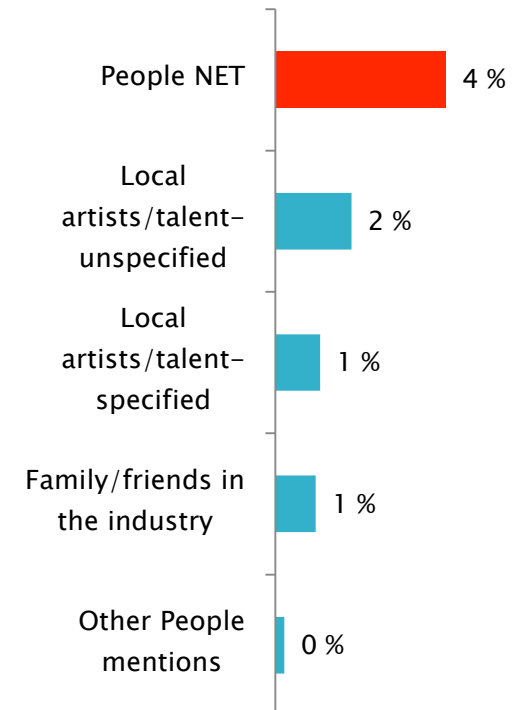
Entities/Stations



Industry Descriptors

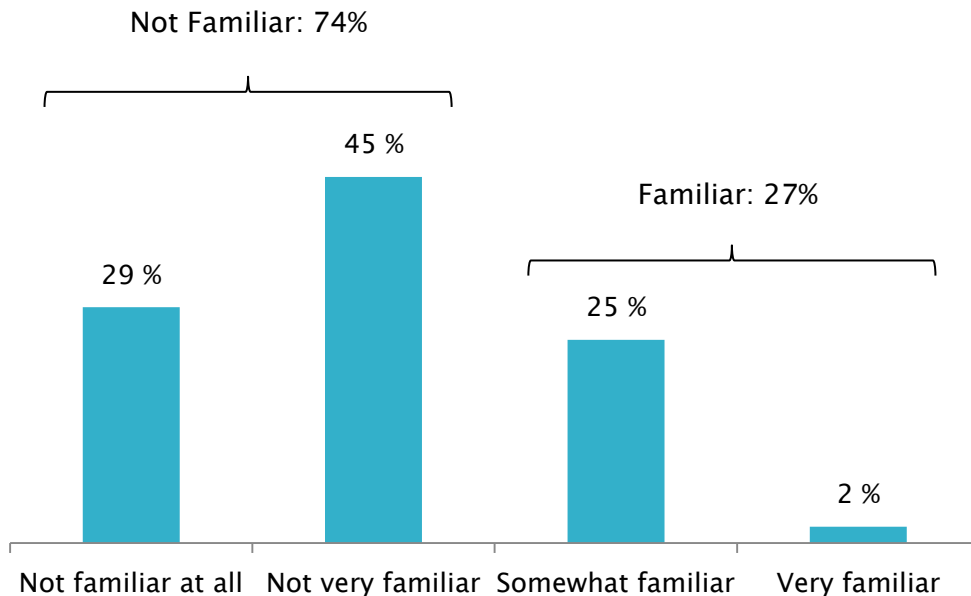


People



Familiarity with Industry

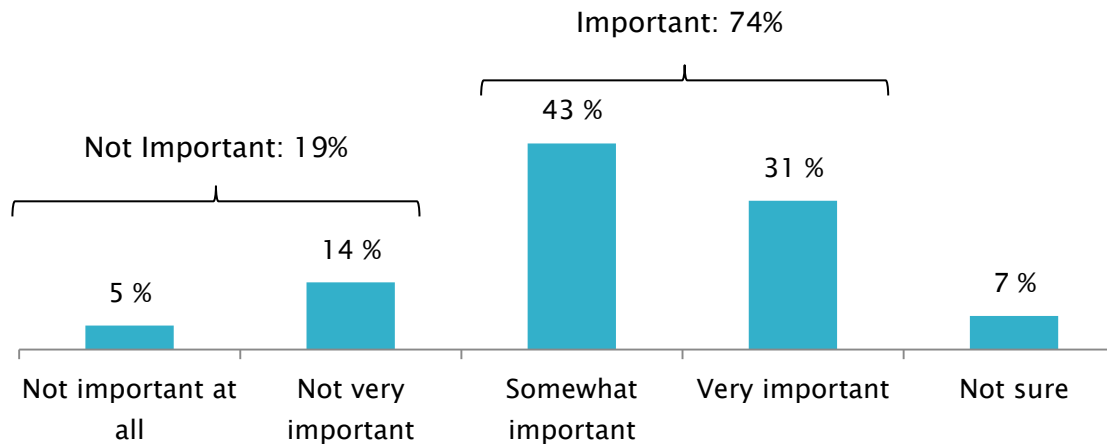
How familiar would you say you are with the activities that take place with respect to the film, television and digital media production industry in Saskatchewan?



- The majority of respondents (74%) are unfamiliar with the activities that take place with respect to the film, television and digital media production industry in Saskatchewan (45% not very familiar and 29% not familiar at all).
- Just over one-quarter of respondents (27%) are familiar with these activities (25% somewhat familiar and 2% very familiar).

Importance of Industry

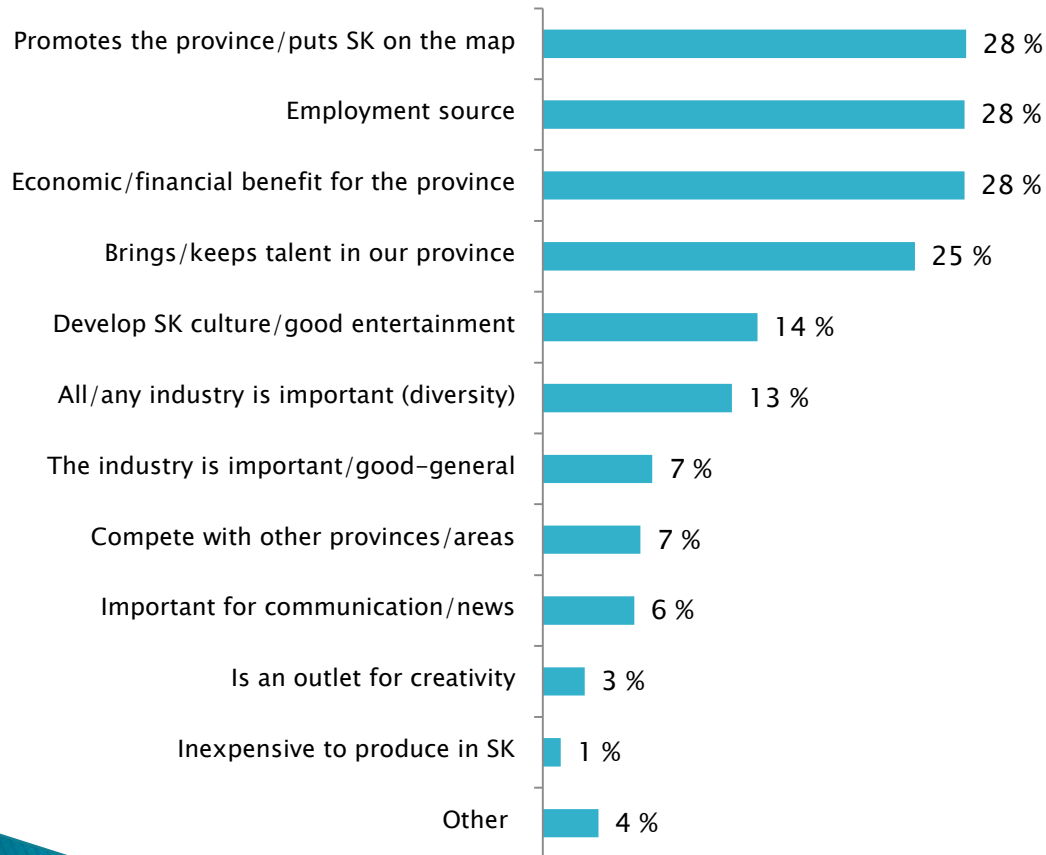
In your opinion, how important is it for there to be a strong and stable film, television and digital media production industry in Saskatchewan?



- Three-quarters of respondents (74%) believe it is important for there to be a strong and stable film, television and digital media production industry in Saskatchewan (43% somewhat important, 31% very important).
- Conversely, one-fifth (19%) believe a strong and stable industry is not important (14% not very important and 5% not important at all), while the remainder (7%) are unsure.

Reasons as to Why the Industry is Important

*Why do you feel it is either **somewhat important or very important** for there to be a strong and stable film, television and digital media production industry in Saskatchewan?*

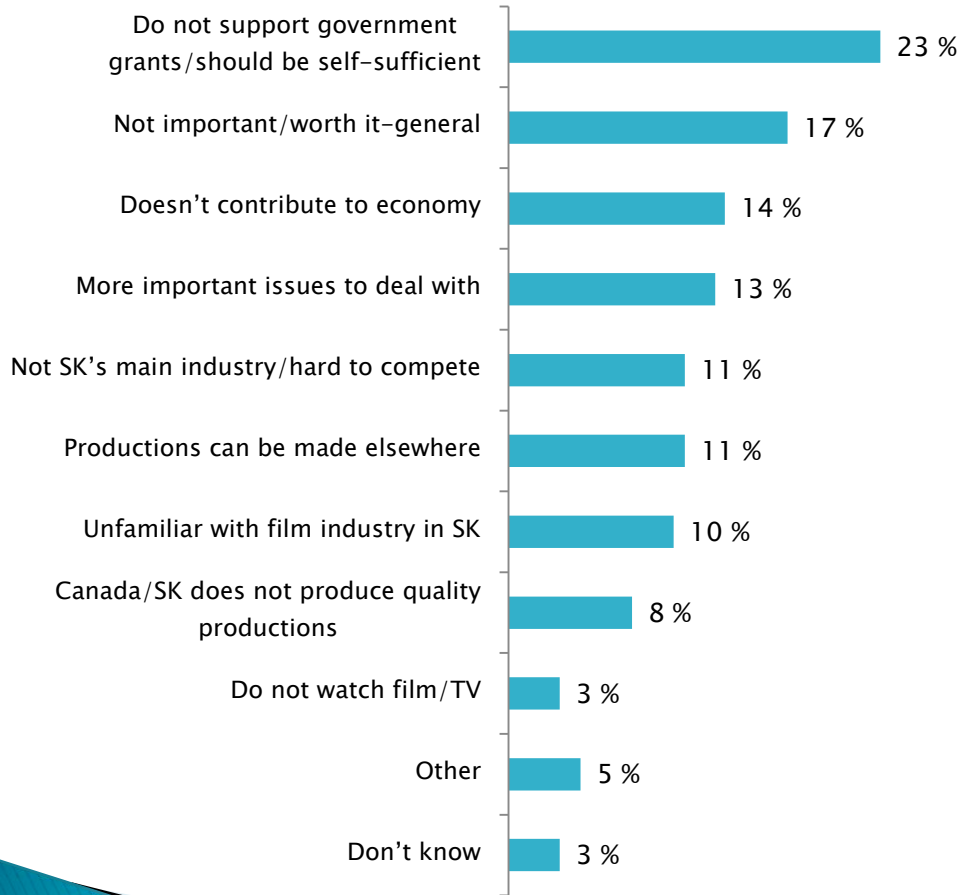


- Those respondents who believe the industry in Saskatchewan is either somewhat important or very important were then asked why they believed this.
- At least one-quarter of respondents indicate that the industry is important because:
 - It promotes the province/puts Saskatchewan on the map (28%).
 - It is an employment source (28%).
 - It benefits the province economically/financially (28%)
 - It brings/keeps talent in our province (25%).

Q4a. Base: All respondents that believe the industry is either somewhat important or very important, n=602. Multiple responses possible.

Reasons as to Why the Industry is not Important

*Why do you feel it is either **not very important** or **not at all important** for there to be a strong and stable film, television and digital media production industry in Saskatchewan?*



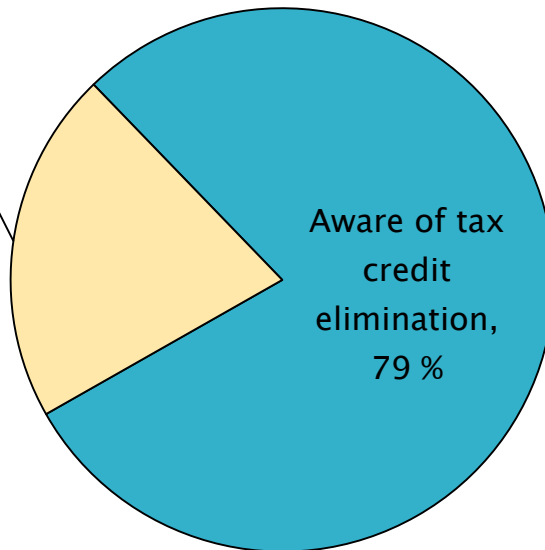
- Those respondents who believe the industry is either not very important or not at all important were also asked why they believed this. Respondents gave a wide variety of reasons.
- Just under one-quarter (23%) do not support government grants or believe the industry should be self-sufficient.
- Under two in ten respondents (17%) believe the industry is not important/not worth it in general, 14% believe it doesn't contribute to the economy, while another 13% believe there are more important issues to deal with.

Q4b. Base: All respondents that believe the industry is either not very important or not at all important, n=155. Multiple responses possible.

Awareness of Tax Credit Elimination

Before now, were you aware that in its most recent budget (announced March 21st, 2012), the provincial government eliminated the Saskatchewan Film Employment Tax Credit Program and will not accept new applications after July 1, 2012?

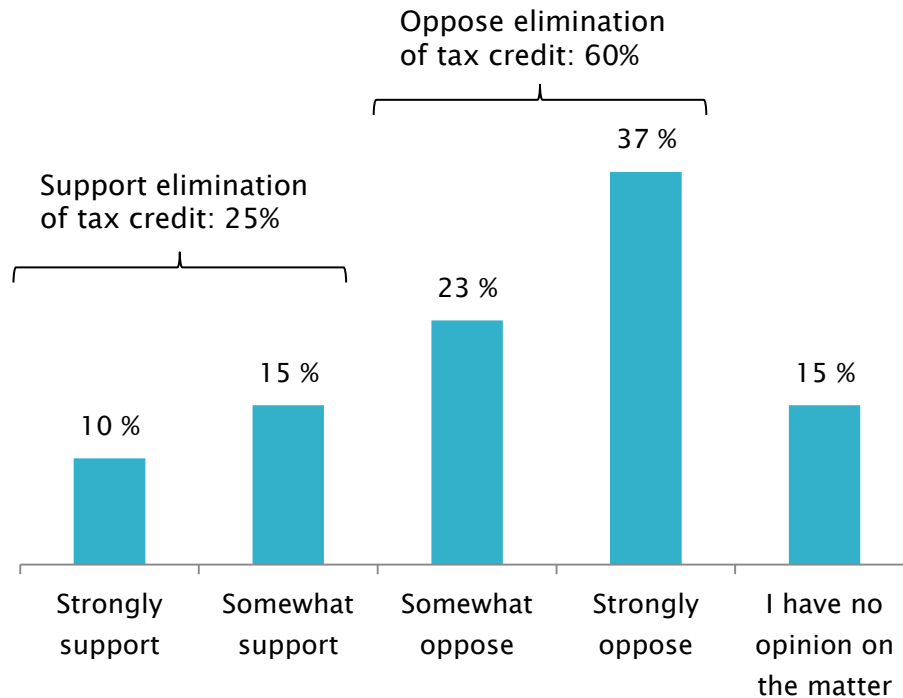
Not aware of
tax credit
elimination,
21 %



- Prior to doing the survey, the majority of respondents (79%) claim they were aware that the provincial government had eliminated the Saskatchewan Film Employment Tax Credit Program.

Tax Credit Elimination Support/Opposition

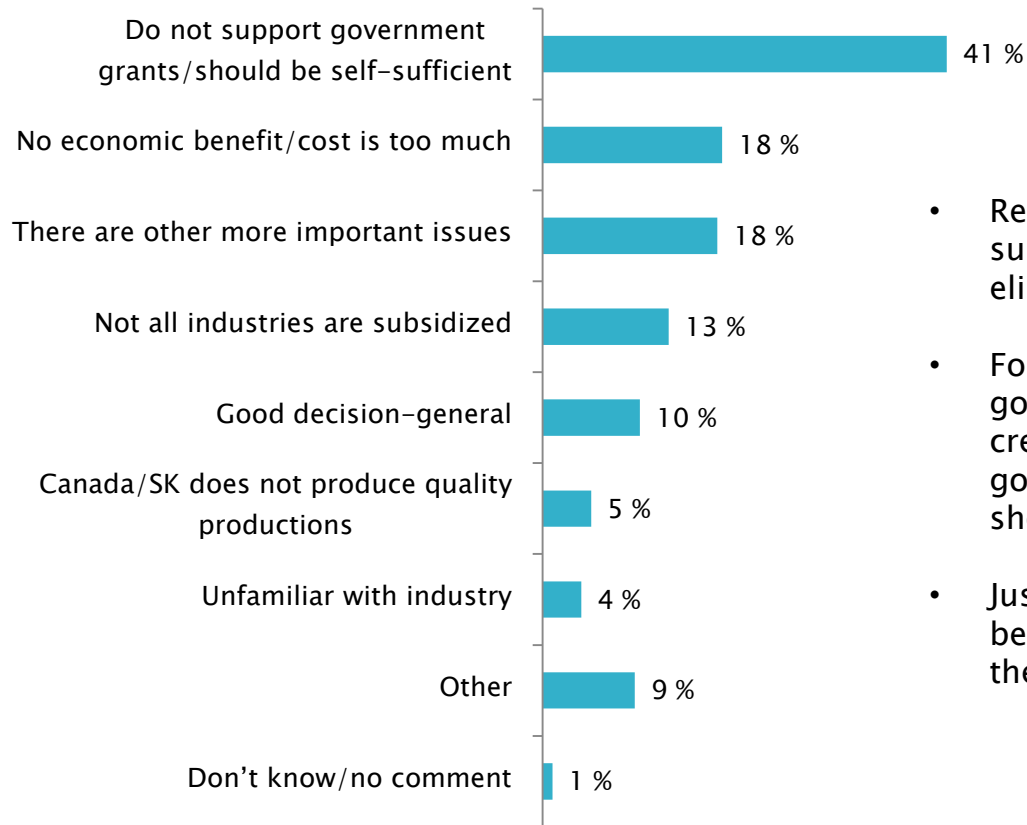
The Saskatchewan Film Employment Tax Credit Program is intended to assist Saskatchewan's film, television and digital media production industry in creating new employment opportunities for Saskatchewan residents involved in this industry. Typically 15% to 20% of the eligible production budget can be credited back to the company, to a maximum of 28.5%. Broadly speaking, do you support or oppose the government's decision to eliminate this tax credit program?



- Just under three-quarters of respondents (60%) oppose the provincial government's decision to eliminate the tax credit program (23% somewhat oppose and 37% strongly oppose).
- One-quarter of respondents (25%) support the decision to eliminate the tax credit program (15% somewhat support and 10% strongly support).
- The remainder (15%) have no opinion on the matter.

Reasons for Decision Support

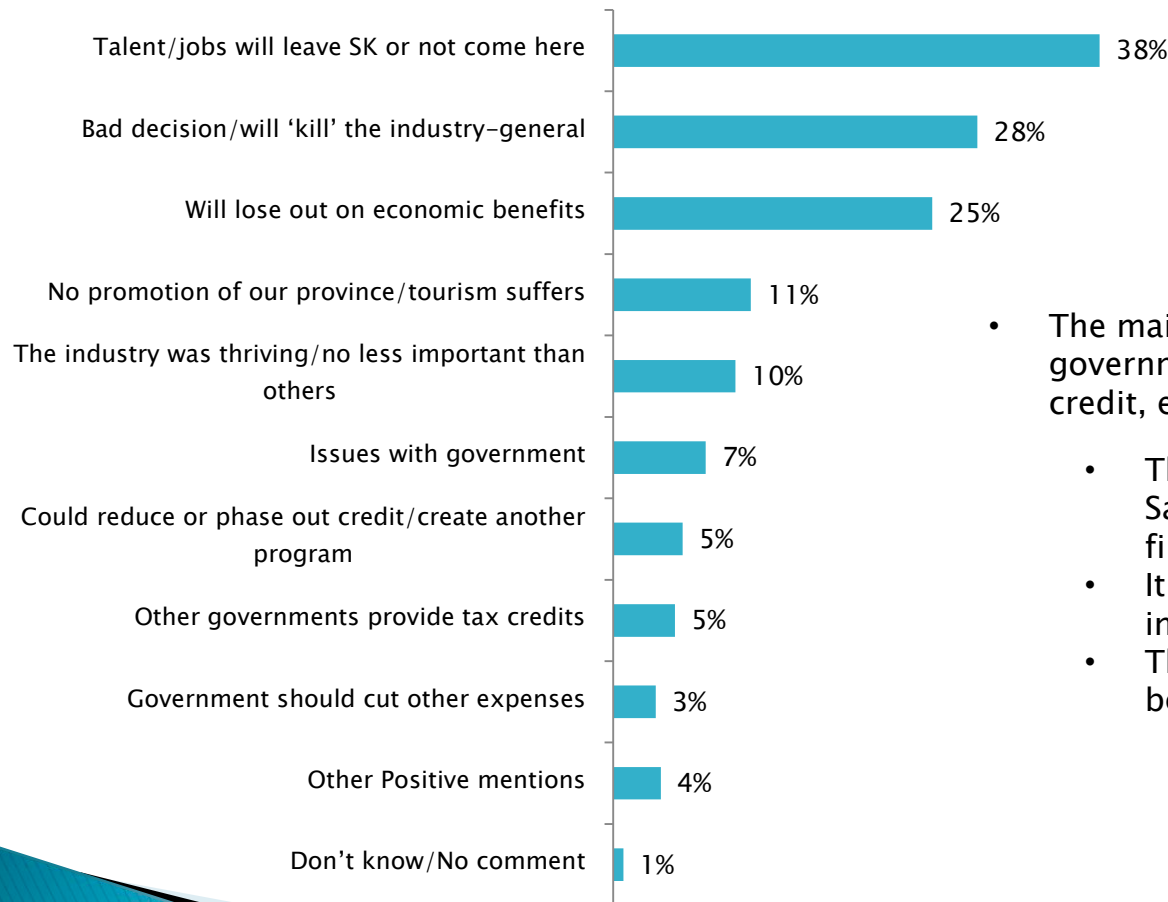
Why do you either *somewhat support or strongly support* the government's decision to eliminate this tax credit program?



- Respondents give a variety of reasons for supporting the governments decision to eliminate the tax credit.
- Four in ten respondents (41%) support the government's decision to eliminate the tax credit program because they do not support government grants or believe that the industry should be self-sufficient.
- Just under two in ten say there is no economic benefit or the cost is too much (18%) or that there are other more important issues (18%).

Reasons for Decision Opposition

Why do you either *somewhat oppose* or *strongly oppose* the government's decision to eliminate this tax credit program?

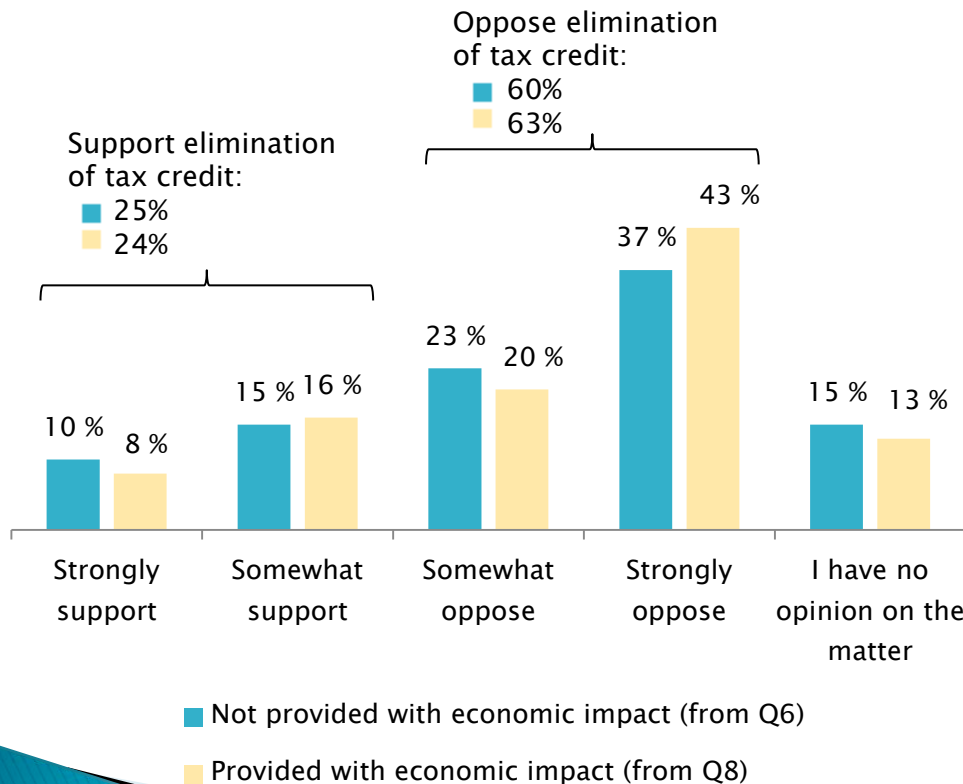


- The main reasons given for opposing the government's decision to eliminate the tax credit, either somewhat or strongly, are:
 - That talent/jobs will either leave Saskatchewan or not come here in the first place (38%).
 - It is a bad decision that will kill the industry (28%).
 - That we will lose out on the economic benefits (25%).

Q7b. Base: All respondents who oppose the government's decision to eliminate the tax credit program, n=484.

Informed Support/Opposition

Economic impact summary: Since the inception of the Saskatchewan Film Employment Tax Credit Program, the provincial government has disbursed roughly \$100 million dollars in tax credits. An independent report prepared by the Canadian Media Production Association states that over this same time period, roughly \$647 million dollars of economic activity has taken place in Saskatchewan as a result of the film, television and digital media industry. Knowing this, do you support or oppose the governments decision to eliminate this tax credit program?

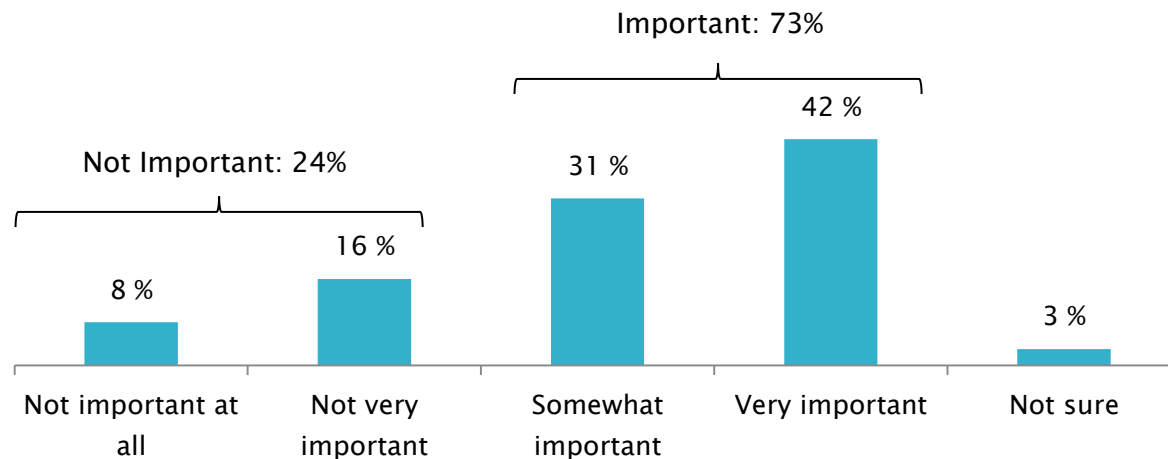


- When respondents are provided with the economic activity that has taken place in Saskatchewan as a result of the film, television and digital media industry, overall results are largely the same as prior to being provided with the economic activity statistic.
- Support and opposition for the elimination of the tax credit remains consistent overall however, more people strongly oppose the decision once being informed of the economic impact.

Respondents from Regina (73%) and Saskatoon (69%) are more likely than those from the north (53%) or the south (60%) to oppose the decision.

Importance of Future Incentive Programs

Once this tax credit program is eliminated, Saskatchewan will be the only province in Canada to not have an incentive program for the film, television and digital media production industry. Knowing this, how important is it to you personally that there be some form of an incentive program, similar in size to the tax credit program, to support the film, television and digital media production industry in Saskatchewan?



- After being informed that the elimination of the tax credit program will result in Saskatchewan being the only province in Canada to not have an incentive program for the film, television and digital media production industry, three-quarters of respondents (73%) say it is important to them personally (31% somewhat important and 42% very important) that there be some form of incentive program, similar in size to the tax credit program, to support the industry in Saskatchewan.
- One-quarter (24%) say such an incentive is not important to them personally (16% not very important and 8% not important at all), while the remainder (3%) are not sure.