

**The Yukon Screen-based Production Sector:
A Roadmap for Growth
2022-2027**

PREPARED FOR

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Executive Summary

The screen production sector is an increasingly strategic priority for many governments worldwide. This is due to a range of factors, including that screen production is a powerful, proven driver for economic growth, job creation and the development of valuable skills. The benefits of a dynamic screen-based production sector are economic, social and cultural.

The Yukon's screen-based production sector is unique in Canada. This small sector is driven by highly-skilled and talented individuals and companies producing award-winning films and creating a welcoming environment for large budget productions from away. While significant given the small population of the Yukon, the volume of local production is low compared to the opportunities afforded by continuing global industry expansion, and local companies face challenges in taking on more ambitious projects. These challenges are not unique to the Yukon and other jurisdictions have overcome them.

What follows is a Roadmap that will galvanize all segments of the industry to focus on its development and growth. This strategy is timely, as it builds on *Creative Potential*, the Yukon's creative and cultural industries strategy, by providing specific strategies and actions for the audio-visual sector.

With targeted intervention and relying on the strengths and capabilities of the current Yukon industry, it is feasible to overcome the challenges and grow the sector. The Yukon possesses all the components for growth and has developed strategies to support its creative and cultural industries, as well as innovation more broadly, which together with this strategy can help drive growth in the Yukon's audio-visual production sector. Together with this Roadmap these strategies can address the significant crossover of artistic and economic characteristics on which this sector is built.

In arriving at an assessment of the state of the Yukon screen-based production sector, the consultants reviewed documents and literature on industry trends and consulted with industry stakeholders via an online survey and in-depth interviews. The consultations were directed at Yukoners working in the film and television sector as producers, directors, writers, and other creative and technical crew, and extended to independent media arts professionals.

Vision: A Thriving Production Ecosystem

The Yukon screen industry is a thriving ecosystem of creative talent, skilled technicians and successful businesses. This ecosystem generates significant local employment, and has a consistent and growing pipeline of screen production activity. The Yukon screen industry achieves increased inward investment and employs more Yukoners.

Five Key Strategic Directions

This Roadmap has been developed around five key strategic directions.

The Five Strategic Directions of the Yukon Roadmap for Growth

1. Increase the Scale and Critical Mass of the Local Industry

1.1 Strengthen Production Companies

In order for the Yukon to have a stable and growing production ecology, strong production companies are needed with the capacity to invest in people, facilities and the development of intellectual property. To build critical mass in Yukon production companies, talented producers must develop their business skills and relationships and accelerate their careers. To create more sustainable companies, producers must diversify their income streams (television drama, corporate, commercial work, new distribution methods, etc.).

It is recommended that Yukon Media Development move forward to co-launch the Northern Canada Producer Accelerator, providing support to Yukon production companies to accelerate the business skills of producers. Through its programs Yukon Media Development should continue to provide support to Yukon producers to build their professional networks.

As part of the Yukon's roll out of the creative and cultural industries strategy, the Government should assess the needs of Indigenous and other diverse film and television producers and ensure that relevant initiatives are developed.

1.2 Boost Levels of Dramatic Development and Production Activity

It is recommended that Yukon Media Development introduce a series of initiatives to support dramatic content development and production. Best practices show that a key strategy employed in other jurisdictions to invigorate the local screen ecosystem is boosting production volume.¹ Drama productions are made with higher budgets, employ more people and provide opportunities to develop a wide range of skills. The goal of providing support for dramatic production is to contribute to a momentum and critical mass that could eventually generate a more robust level of production through series and feature films. In the best circumstances, a successful dramatic series could anchor the development of the local industry. Stakeholders identify scripted content as a top priority.

It is proposed that Yukon Media Development partner with a Canadian training institution, such as the National Screen Institute (NSI), to provide training opportunities to talented Yukon writers to develop dramatic concepts, scripts and series for film, television and digital media. This could include storytelling for web series, short films, for alternative platforms like Tik Tok, or feature films.

It is recommended that all of YMD's development and production programs should allocate a portion of their resources to support dramatic projects.

It is proposed that Yukon Media Development partner with the Canada Media Fund and a Canadian broadcaster to fully fund one Yukon-led dramatic web series that provides training opportunities for above- and below-the-line crew.

¹ *Best Practice in Screen Sector Development*, Op. Cit.

It is proposed that Yukon Media Development work with industry partners to create a Northern Production Forum to promote and facilitate a feature film production by Yukon producers.

The Yukon Government should provide funding for the production of professional quality music videos.

It is recommended that the Government of Yukon adopt a policy to hire Yukon companies and talent when procuring production services for commercial or corporate audiovisual production.

2. Attract More Guest Productions to the Yukon

Best practices show that guest productions act as an incubator for up-and-coming producers and crew. Guest productions will provide more, and more reliable, opportunities for skilled Yukoners to find jobs in the film and television industry. In order to successfully attract these productions to the Yukon, the territory's production rebate must be adjusted to provide greater certainty, and in a more timely manner, to producers wishing to shoot in the territory. In addition, greater resources will be needed to leverage more production in the Yukon. Yukon Media Development, as the Territory's Film Commission should also target its marketing efforts to attract at least one new non-Yukon production each year.

3. Increase Workforce Capacity

Increase the Yukon's audio-visual workforce capacity, including both above-the-line and below-the-line talent.

The film and television industry is built on creative excellence. Recognizing this, jurisdictions around the world provide opportunities for above-the-line talent to continually hone their creative skills. These efforts result in better scripts and story ideas, better pitches and increased investment and ability to reach markets.

The Yukon faces a critical challenge with crew capacity. The shortage of skilled labour and difficulty in retaining skilled technicians are significant barriers to growth, both in terms of local production and international productions. The need for growing skills locally and for having opportunities for ongoing skills development was expressed by stakeholders during Yukon's Innovation Plan consultations.

Yukon Media Development should play an essential role in increasing workforce capacity by facilitating access to on-the-job training opportunities in the following ways:

- partnering with leading Canadian training institutions to support the ongoing development of above-the-line through high-quality training initiatives; and
- partnering with industry unions, guilds and associations, to provide credentialed on-the-job training opportunities, primarily for technical industry positions.

4. Improve Production Infrastructure

Availability of high-quality production space is a common challenge across all sizes of production. However, the situation in the Yukon is unique in that there is not currently any production studio that could support dramatic production, or other productions requiring indoor shoots. Collaborative and

creative spaces are critical infrastructure for the film and television sector, however, existing collaborative spaces in Yukon are not well adapted to the need for a production studio that could support local productions

It is recommended that Yukon Media Development participate in the development of potential partnerships to make a production studio available to Yukon-based and guest productions.

5. Consolidate Industry Development Efforts

There is an urgent need to support the industry with special initiatives that will elevate industry skills and capacity in order to grow the sector. However, it is unrealistic to leave such an important role to the industry in its current state of under-development. It is recommended that the position of Industry Development Officer be created within Yukon Media Development to design and deliver initiatives that will support the growth and development of the Yukon screen-based industry.

Summary of the Roadmap for Growth: Strategies, Actions and Timeframe for Implementation

Strategic Direction: Increase the Scale and Critical Mass of the Local Industry		
Action: Strengthen Production Companies		
Actions - Detail	Outcomes	Timeframe
Build producer business skills through specialized training	<ul style="list-style-type: none"> Yukon production companies take part in the Northern Canada Producer Accelerator Program 	Year one
Assess needs and ensure producer training for Indigenous and diverse producers as part of the Creative Potential Strategy roll-out	<ul style="list-style-type: none"> Yukon producers who are Indigenous or members of other diverse groups have access to high quality training opportunities to develop their producer skills 	Year two and on-going
YMD Funding for producer travel and organized missions to build business networks	<ul style="list-style-type: none"> Yukon-based producers build their networking and business relationships through repeated participation in industry markets and festivals, are successful in promoting their work and attracting sales. 	Year two and on-going
Strategic Direction: Increase the Scale and Critical Mass of the Local Industry		
Action: Boost Levels of Development and Production Activity		
Actions - Detail	Outcomes	Timeframe
Partner with a Canadian training institution to strengthen storytelling skills	<ul style="list-style-type: none"> Yukon production-ready dramatic web series, short films, features, etc. 	Year three
Allocate YMD Funds to develop and produce drama content	<ul style="list-style-type: none"> Yukon-led dramatic projects are developed and produced 	Year one and on-going
Partnership to fund a dramatic web series	<ul style="list-style-type: none"> One Yukon-led dramatic web series is produced 	Year three
Encourage one Northern feature film production	<ul style="list-style-type: none"> Yukon Media Development hosts a Northern production forum in partnership with a Yukon festival or industry event in another province 	Year three

Fund the production of music videos	<ul style="list-style-type: none"> Yukon production companies are better able to sustain themselves through contracts to produce music videos 	Year one
Yukon Government procurement of commercial, corporate productions	<ul style="list-style-type: none"> Yukon production companies are better able to sustain themselves through contracts to produce commercials and corporate videos for the Yukon Government 	Year two and ongoing
Strategic Direction: Attract More Guest Productions to the Yukon		
Actions	Outcomes	Timeframe
Clarify Production Rebate to be competitive with other jurisdictions	<ul style="list-style-type: none"> The rebate program is clarified to be automatic, with information on amount of funding available through this program publicly available to producers Yukon Media Development is able to promote and provide sureties that attract guest productions in the Yukon 	Year two and ongoing
Market the Yukon as a production location	<ul style="list-style-type: none"> Yukon Media Development attracts one new guest production each year 	Year two and ongoing
Increase resources available through the production rebate	<ul style="list-style-type: none"> Resources in the rebate program are increased and the Yukon hosts a greater volume of production activity each year 	Year three and ongoing
Strategic Direction: Increase Workforce Capacity		
Action	Outcome	Timeframe
Partnerships to ensure ongoing training opportunities for above-the-line talent	<ul style="list-style-type: none"> Yukon above-the-line talent have access to training opportunities provided by leading Canadian training institutions Yukon producers develop and pitch more competitive projects Yukon productions attract higher levels of investment 	Year three and ongoing
Partnerships to ensure ongoing credentialled training opportunities for below-the-line positions.	<ul style="list-style-type: none"> Yukon below-the-line professionals have ongoing opportunities to develop their skills and qualify for union or guild membership 	Year three and ongoing
Strategic Direction: Improve the Production Infrastructure		
Action	Outcome	Timeframe
Participate in developing a partnership that leads to the creation of a shared production studio	<ul style="list-style-type: none"> A partnership is formed and a shared production facility is created Yukon-based productions have access to a production studio The production studio provides an added incentive to non-Yukon productions to shoot in Yukon 	Year three
Strategic Direction: Consolidate Industry Development Efforts		
Actions	Outcome	Timeframe

<p>Create the position of Industry Development Officer to design and deliver initiatives</p>	<ul style="list-style-type: none"> • Yukon production companies and industry professionals have access to ongoing opportunities to develop their business skills • Storytellers enhance their creative skills, leading to more competitive projects • Yukon production companies build their business relationships and networks, and grow their business activity through increased investment and sales • Below-the-line industry professionals have ongoing opportunities to develop their skills and the pool of available crew expands 	<p>Year two, the position is approved and funded</p> <p>Year three and ongoing, the position is filled and events are organized and delivered</p>
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Introduction and Mandate

1. Preamble

1. Approach and Methodology

This document charts a five-year Roadmap for growing the Yukon screen-based production sector.

In arriving at an assessment of the state of the Yukon screen-based production sector, the consultants reviewed documents and literature on industry trends and consulted with industry stakeholders via an online survey and in-depth interviews. The review of government documents revealed production trends in Yukon and formed the basis of a statistical and economic analysis of the local industry, which can be found in Annex IV of this report. The review of literature examined trends in the screen-based production sector internationally, nationally, the factors affecting these trends and best practices for growing domestic screen-based production industries implemented in other jurisdictions.

The online survey was directed at Yukoners working in the film and television sector as producers, directors, writers, and other creative and technical crew and extended to independent media arts professionals. A total of 55 people responded to the survey for a response rate of 64%. A total of nineteen (19) interviews were conducted with stakeholders. Annex II of this report provides a detailed analysis of the survey findings.

2. A Bold Vision

The Yukon screen-based production sector is small. The volume of local production is low and companies face challenges in taking on more ambitious projects. Instead of creating more highly skilled jobs for Yukoners, lower budget productions are crewed by individuals wearing multiple hats. At the same time, there is talent and passionate drive amongst the production companies who call the Yukon home. The production sector is in need of a bold vision to guide its development so that it may become a thriving industry.

It is also worth highlighting that many of these issues are not unique to the Yukon and other jurisdictions have overcome them. Jurisdictions that have successfully grown their local industries have cohesive ecosystems, competitive incentives, workforce capacity, production and post-production facilities and services and an overall policy-friendly production environment.² With targeted intervention, and relying on the strengths and capabilities of the current Yukon industry, it is feasible to overcome the challenges and grow the sector.

3. The Roadmap

Based on the research and consultations described above, a bold vision has been developed to guide the growth of the Yukon screen-based production sector over the next five years. This Roadmap has been informed by the views of stakeholders and industry best practices. It is based on an understanding of, and appreciation for, the current state of Yukon's production ecosystem, its recent production trends and opportunities afforded by the wider environment.

² *Best Practice in Screen Sector Development*, Prepared by Olsberg SPI for the Association of Film Commissioners International, September 13, 2019.

The results of the global and national scan of industry trends, coupled with the perspectives of Yukon stakeholders, revealed the challenges and opportunities facing the Yukon screen-based production sector. Based on the evidence gathered through these multiple lines of evidence, a five-year Roadmap has been developed, which we are confident will position and revitalize the Yukon screen-based production sector for growth.

This document is structured around four key sections:

- Section I provides a snapshot of the Yukon screen-based production sector;
- Section II examines the challenges and opportunities for the production ecosystem in the Yukon;
- Section III presents a “big picture” view of the external forces in the environment that are impacting on the screen-based production sector globally and nationally, where these are of particular relevance to the Yukon;
- Section IV recommends a vision and identifies five overall strategic directions to be adopted and actions to be implemented to support the growth of the screen-based production sector in the Yukon.

I. Snapshot of the Yukon Screen-based Production Sector

1. Overview of the Yukon Screen Production Sector

1.1 Economic Impact of Production

The Canadian film and television production industry in Canada generated \$12.2 billion in Canadian production expenditures in 2019-2020. With their very small populations relative to the rest of Canada, the Canadian Territories (Yukon, Northwest Territories and Nunavut) captured under one percent of this economic activity, accounting for a total of \$14 million in audio-visual production. In light of the size of their populations, this is significant. However, as the industry across the rest of Canada continues to grow, there is clearly room to seize more opportunities for the Yukon.³

According to Statistics Canada data, the Yukon audio-visual and interactive media industry contributed over \$7 M to the Territory's gross domestic product (GDP) in 2019. This activity supported 79 full- or part-time year-round jobs in the Yukon.

Figure 1: Economic Impact of audio visual and interactive media in Yukon in 2019⁴

	GDP ⁵	Economic Output ⁶	No. of Jobs ⁷
Film and Video	\$1,441 M	\$3,158 M	40
Broadcasting	\$5,484 M	\$8,312 M	37
Interactive Media	\$106 K	\$179 K	2
Total	\$7,031 M	\$11,648 M	79

1.2 Production Companies

There are approximately 30 screen-based production companies operating largely in Whitehorse.⁸ The vast majority are sole proprietorships or micro-companies (employing fewer than 5 people on a full-time basis). About 20 are incorporated as commercial companies.⁹

3 *Profile 2020: An Economic Report on the Screen-based Media Production Industry in Canada*, Prepared by Nordicity for the Canadian Media Producers Association, 2021, pages 6 and 12.

4 Source: Statistics Canada. Table 36-10-0452-01 Culture and sport indicators by domain and sub-domain, by province and territory, product perspective (x 1,000).

5 GDP is the economic value added associated with these cultural activities. This is the value added related to the production of culture goods and services across the economy, regardless of the producing industry.

6 Economic output consists of those goods or services that are produced within an establishment that become available for use outside that establishment.

7 Jobs are the number of jobs that are related to the production of culture goods and services.

8 Source: Screen Producers Yukon Association (SPYA); survey findings.

9 *Economic Impact Analysis of the Media Production Industry in Yukon*, Prepared by Nordicity for Yukon Media Development, August, 2019.

1.3 Original Content Production

Yukon-based production companies produced a total of 28 productions between 2016 and 2021. These projects received \$2,316,154 from the Yukon Film Production Fund. These productions had total budgets of \$13,134,107, of which \$8,236,222 (63%) was expended in the Yukon.¹⁰ Yukon producers create content in English and French. By far the most common production genre for domestic content is documentary.

Yukon Tourism is an important commissioner of commercial productions each year, contributing to the sustainability of Yukon production companies. Yukon Tourism, which commissions on average between \$350K and \$500K of commercial content each year has produced a small number of its own spots using local crew.¹¹

1.4 Guest Production

Location and service production by non-Yukon companies accounts for a significant volume of production activity each year. In the period from 2016-2017 to 2020-2021, the Yukon Location Incentive Program supported 16 projects with rebates totalling \$4,168,322. These rebates attracted a total of \$17,607,603 in production spending in the Yukon. Each dollar of rebate leveraged an additional \$4.25 in local production spending.

One multi-season television program, *Gold Rush*, produced by UK production company Raw TV, is responsible for the lion's share of Yukon Location Incentive Program rebates each year. Between 2016-2017 and 2020-2021, this series accounted for 87% of the total amount of rebates provided to productions.

1.4 Workforce

The Yukon has a small screen-based production workforce. An estimated 50 people surveyed and interviewed self-identify as working in the audio-visual sector.¹² It is not unusual for industry professionals to work in more than one capacity.

As the pool of skilled crew members supporting production in the Yukon is small, it is not unusual for key crew on larger productions to be brought in from elsewhere.

1.5 Production Infrastructure and Services

A number of Yukon production companies provide production services such as production management, location shooting, casting, equipment rental and post-production services.¹³ These services may be used by both non-Yukon and Yukon-based productions.

Screen Producers Yukon Association (SPYA) provides its members with rental access to professional grip and electrics packages. To foster media art creation, Yukon Film Society rents and lends professional production and post-production equipment to artists and filmmakers.¹⁴

10 Source: Yukon Media Development.

11 *Economic Impact Analysis of the Media Production Industry in Yukon*, Op. Cit.

12 Survey findings.

13 Source: SPYA.

14 SPYA website: <https://spya.ca>; Yukon Film Society website: <https://yukonfilmsociety.com>.

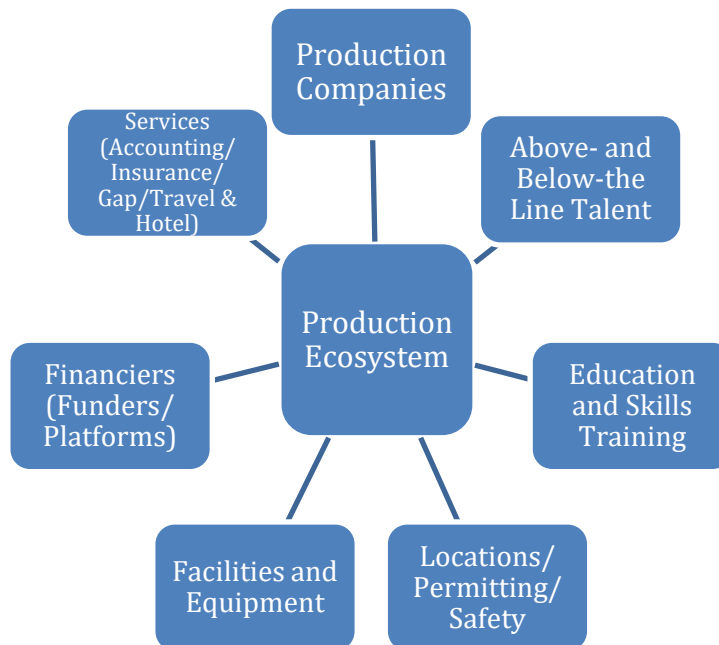
Post-production facilities are privately owned by production companies who may in some cases provide post-production services to other productions.¹⁵

II. Challenges and Opportunities for Yukon Screen-based Production

1. There Are Gaps in Yukon’s Production Ecosystem

Production is the engine that drives the film and television industry. However, there are gaps in every area of Yukon’s production ecosystem. As shown in Figure 2, a production ecosystem is made up of many talented individuals and companies, none of whom work independently of each other. However, the Yukon film and television industry is lacking in production capacity and volume, has a limited talent pool, and is characterized by an absence of production and post-production infrastructure, services, professional development opportunities and access to financing.

Figure 2: Production Ecosystem



1. Lack of Production Capacity

1.1 Not Enough Production Activity

Of all the challenges identified by Yukon stakeholders, the greatest ones are related to the limited production capacity of the sector. The Yukon has few experienced producers, who are for the most part micro companies or individuals, lacking the capacity to undertake a significant volume of production. To sustain themselves, production companies that strive to create original content based on their own intellectual property may also need to undertake contract work for commercials, corporate and music

¹⁵ Source: SPYA.

videos. The lack of production capacity was emphasized by interviewees, while some referenced their desire to build local teams and crews and to support local productions.

More than 57% of survey respondents indicated that there is not enough production volume in the Yukon to sustain the industry. As was noted by survey respondents,

Lack of production volume is a big hurdle to overcome. There is a need to attract more guest productions to raise the volume of production in Yukon. The territory must remove barriers to attract more of these.

Lack of experienced producers in the territory that have experience producing large scale film and tv productions can be limiting to Yukon directors and writers.

Sixty-five percent of survey respondents would like to see the number of productions increase, with 42% noting that higher budget productions should be undertaken and 33% agreeing that scripted productions are needed. Amongst interviewees, producers pointed to the lack of market financing for their projects, forcing them to work with smaller budgets and limiting their overall production activity.

Yukon producers interviewed for this study note that a critical mass of production that can generate a steady production pipeline is needed in order to sustain the screen-based production ecosystem. According to interviews conducted with producers, the Yukon lacks strong companies that can employ workers and contribute to working opportunities for others, a problem exacerbated by great geographical spread. The greatest challenges concern the lack of large productions that can employ many people for a long period. While Yukon's screen-based production sector is versatile, the industry is nevertheless small and niche.

Jurisdictions around the world that have successfully increased their production volume implemented strategies that balanced encouragement for locally produced screen content with foreign productions that use local production services. It was noted that the promotion of Yukon as a destination for non-Yukon productions is perhaps not as intensive as it may have been a decade ago. According to one interviewee, there used to be a lot more promotion of Yukon as a destination for guest productions.

Part of the challenge for the Yukon is the extent to which it can provide a surety to location services productions confirming their access to the Yukon's production rebate. In many jurisdictions rebates are awarded on an automatic basis, providing the certainty productions need to close their financing and advance their production planning in a timely manner. The other challenge for the Yukon is the amount of funding available through its rebate program, as compared to what other, larger jurisdictions may offer. For this reason, Yukon Media Development takes a more targeted approach to promoting the Territory as a production location.

1.2 Not Enough Experienced Production Companies

Of those that responded to the survey, 40% said there were not enough production companies. Our analysis shows that the Yukon has not succeeded in establishing companies with enough financial muscle to generate ongoing work opportunities. According to interviewees, producers with limited experience are being solicited to provide production services to larger projects due to a lack of available expertise.

While the Yukon has many documentary and short-film producers (both companies and freelancers), production of long formats such as television series and feature films is almost non-existent. This is despite the fact that these have been a goal of the local film industry for many years. The Yukon did

finally succeed in producing a full-length feature, *Polaris* in 2019, which is scheduled for release in 2022. It is an interprovincial co-production with the Northwest Territories. It is important to note that due to limited local post-production capacity, partners in Ontario and Quebec were brought into the *Polaris* project to share in the producing.

As noted by survey respondents,

Lack of experienced producers in the territory that have experience producing large scale film and tv productions can be limiting to Yukon directors and writers.

Almost no one has done high-level work in TV and film as writer-director.

We are not investing properly in development.

Producers also noted the difficulty in finding local producers willing to board their projects and assist with the production. This was attributed to the small number of production companies and the fact that producers are often exclusively focused on their own shows. There is a need for line producers, production managers and production coordinators to increase production capacity. Some of the producers interviewed shared that they tend to work with producers in other provinces as it is too difficult to find local collaborators with the interest and experience needed.

1.3 Lack of Dramatic Productions

Yukon producers interviewed for this study note that there are not enough experienced producers in the Yukon, particularly in the area of scripted content and larger budget productions. Some producers are developing new dramatic series, but point to the difficulty in attracting market partners and funding. There is interest in producing dramatic content amongst emerging producers as well. An analysis of key trends in funded productions in the Yukon reveal that only two drama productions have been undertaken since 2016. (See Annex III for analysis.)

Interviewees pointed to the great opportunities provided by dramatic productions to showcase Yukon talent and that crew from elsewhere are impressed by all that Yukon crews can deliver.

1.4 Production Financing is a Challenge

To produce their original content films and shows, producers must put together their financing from an array of investors and funders. Producers interviewed for this study noted the importance of public funding in the financing of their productions. In particular, the Northern Incentive and the Franco-phone Minority Program of the Canada Media Fund, the programs of Yukon Media Development, and the Talent to Watch Program of Telefilm Canada have been instrumental in allowing producers to launch their careers. Also important to the financing environment is the community broadcaster Northwestel, which contributes financing and whose attachment to projects secures their eligibility to apply for other funds. The National Film Board was noted by several producers as an important partner in auteur driven documentary film production.

There are few sources of financing in the Yukon, forcing producers to seek investment in other jurisdictions, typically from broadcasters. This requires strong networks. The challenge for producers today is the ability to reach out to other broadcasters or distributors who could invest more heavily in Yukon productions, triggering additional resources from other film and television funders. It was noted that producers may be forced to limit their production budgets in order to close their financing, due to the

challenges associated with attracting financing partners or financing at the levels needed to make higher budget content.

While for some interviewees coproducing with producers and accessing funding from other Canadian jurisdictions was perceived as a realistic way to increase production volume, others noted that they lacked the experience and training to undertake coproduction.

Emerging producers are making music videos, though funding for this type of production is difficult to access, limiting the volume of production.

2. Need to Develop Business Relationships and Skills

In the Yukon, as in many other jurisdictions, the film and television production sector is characterized by self-employed workers and very small businesses. Several interviewees noted the need to provide more opportunities for producers to increase their business skills.

Some noted that they lack relationships with broadcasters and other buyers. A couple of producers noted that as the industry evolves quickly, they need timely access to intelligence about to whom to pitch their projects. Interviewees noted that there is a need to develop relationships with a wider array of broadcasters, including broadcasters and commissioning editors in other jurisdictions.

Festivals and markets provide opportunities for networking and relationship building with buyers and other filmmakers. However, few producers interviewed have had opportunities to attend critical festivals and markets in Canada or internationally. Producers also noted that they need time to develop these relationships and that events like producer/broadcaster “speed dating” pitch sessions have not been sufficient.

The pandemic has created more online industry events that can make some markets more accessible to producers in the Yukon. However, it was noted by interviewees, and has been reported elsewhere¹⁶, that online events work best for producers who already have established business relationships. To develop these networks, producers must have opportunities to get to know their potential partners in person. It is often the impromptu meetings outside of structured events that can have the greatest impact in relationship building. One producer spoke of the difficulty in accessing funding to travel to festivals and industry events to find partners. It was said to be a “long road” to build these networks and relationships.

3. More Indigenous and Diverse Stories

Interviewees pointed out that there could be more Indigenous stories driving Yukon production opportunities. Interviewees referenced the richness of Indigenous storytelling in the Yukon, which is being encouraged and developed through Yukon University and other organizations. However, it was also noted that Indigenous storytellers are not taking advantage of all the opportunities to make films and television programs. It was suggested that there could be funding dedicated to developing Indigenous talent and stories. Some support investment in Indigenous voices to support the development of Indigenous storytelling in the Yukon’s film and television industry.

16 Maria De Rosa and Marilyn Burgess, *Understanding the International Landscape for Canadian Documentaries: Treaty Coproduction, Promotion and Sales*, Prepared by Communications MDR for Documentary Organization of Canada (DOC), 2021.

Yukon's new creative and cultural industries strategy, *Creative Potential*, recognizes the value in fostering Indigenous and other diverse voices. One of the Guiding Principles of *Creative Potential* is to "Embrace inclusion and diversity."¹⁷ The Strategy notes that its diverse traditions are among the Yukon's greatest assets. Future program development should leverage these traditions to tell unique Yukon stories, including Indigenous stories.

In addition, *Creative Potential* recommends establishing baseline data to regularly measure, monitor and report on the economic and social impacts of the sector, including disaggregated data containing diversity information.¹⁸ The new programs of Yukon Media Development, launched during the undertaking of this study, have been designed to capture diversity information that can be used to inform future program development, for example, to support training initiatives for Indigenous and other diverse producers.

4. Lack of Production Infrastructure and Small Workforce

4.1 Too Few Training Opportunities

Yukoners have little opportunity to access specialized education or advanced professional skills training, which is typically available in other jurisdictions from post-secondary institutions, unions, guilds, industry associations, and specialized institutes.

While existing Yukon organizations provide some training, there is no dedicated post-secondary film or television production program in Yukon that could provide a steady pipeline of professionally trained talent. Yukon University offers a one-year certificate program in Multimedia Communication, which trains students in media, design and communications, with a focus on mastering multimedia design, software and tools. The program is not intended to direct graduates to careers in film or television.

Funding for film and media art projects was also said to be a challenge, even though this type of funding is critical to develop creative storytellers and other talent for the industry. It was noted by some that recent changes to the programs of Yukon Media Development may make it even more difficult for artists' films and videos to be made, undermining the development of talented new voices, including Indigenous voices.

There is a need for creative and cultural industries policies in the Yukon to consider both the creative and economic aspects of the film and television industry. Successful jurisdictions invest in and nurture both artistic talent and business development.

4.2 Unions and Guilds are Not Active in the Territory

It was noted that the unions and guilds are not very present in the Territory and do not run many training programs. Some interviewees pointed to the excellent training they had received through the Yukonic program, which was a training initiative built around the production of a series of 13 three-minute shorts, some years before. Yukoners were hired in key creative positions for which they received permittee credits with the respective guilds. The project had been supported by CanNor.

¹⁷ *Creative Potential: Advancing the Yukon's Creative and Cultural Industries*, Government of Yukon, November, 2021.

¹⁸ *Creative Potential: Advancing the Yukon's Creative and Cultural Industries*, Op. Cit.

4.3 Lack of Production and Post-Production Facilities

Yukon lacks a production studio for indoor shoots. Post-production facilities are also limited. Without this crucial infrastructure, it is near impossible to support and sustain a consistent pipeline of production.

Fifty percent of those surveyed identified lack of a production studio and post production facilities as major challenges facing the Yukon screen-based production sector. As one respondent pointed out, “we lack sufficient facilities... to take on productions that could bolster the sector.” As survey respondents said:

Lack of access to dedicated studio space that could be used for feature productions/TV productions can be limiting to large scale productions.

We lack the infrastructure, capacity and incentives to entice and attract consistent industry building projects at this point.

Not enough support to elevate our post production studio to a higher standard, and likely not enough projects to support that move if we did.

Interviewees pointed out that there is a need for proper studios to support dramatic production. One producer related that they had had to shoot their production in a commercial garage and as a result, they could not shoot with sound.

Interviewees were of the view that there are too few post-production studios. Production companies own their own post-production facilities, which may in some cases be loaned to other productions. There also exist a small number of sound recording studios servicing the music and screen production industries.¹⁹

Producers are doing their own editing in-house, or using one of a few local post-production houses. However, some are going to Vancouver, Toronto or Montreal for their post-production, either to access services not available in Yukon or due to their coproducing arrangements.

4.4 Lack of Services

Yukon production companies have limited access to business services such as accounting and audit or gap financing.

There is insufficient capacity to host guest crew members through existing accommodations. Producers noted that for some shoots they were very hard pressed to find suitable accommodations for everyone on the production.

4.5 Small Number of Available Crew

There is currently a labour shortage in the sector. According to interviewees, skilled technicians exist but they are difficult to hire by both local and guest productions. Often these in-demand crew are al-

¹⁹ Source: SPYA.

ready committed to projects. Despite a genuine desire to employ and grow a local crew, many stakeholders spoke of how producers must regularly bring in non-Yukon crew members despite this being more expensive and not guaranteed to be part of the credit reimbursement.

According to the survey conducted for this study, about 50 people work in the Yukon industry, typically in multiple capacities, covering only a few of the many positions to fill on larger productions. Out of 70 potential creative and technical professional positions in film and television production, Yukon survey respondents said they work in 28 positions, or 40% of the potential highly skilled jobs created by productions.

With a small workforce it is common for industry professionals to work in more than one occupation. Ninety percent of survey respondents work in two or more occupations in the industry, and 72% work in three or more occupations.

The industry is comprised largely of “above-the-line”²⁰ talent: producers, directors and directors of photography. The most often identified primary occupations by survey respondents were producers (27%) and directors (15%). The most often identified secondary occupations were director of photography (14%) and director (12%). The only head of department in which respondents said they worked was director of photography. The following positions can be filled by one or two of the Yukoners surveyed: 1st asst director, animator, art director, best boy/babe, camera operator or drone operator, casting director, key grip, location scout, location manager, picture editor, music composer, set decorator, sound recordist, sound mixer, screenwriter, and performer, voice performer or lead performer, video game artist.

The crew base was described as a decent base, but without enough skilled personnel to occupy key positions. Fifty percent of those surveyed indicated that there are not enough crew members to support the industry. One respondent said, “there seems to be a skills gap with respect to technical positions to take on larger scale productions that could bolster the sector.”

Very few Yukoners are qualified in “below-the-line”²¹ creative and technical positions such as Heads of Departments, production, creative, technical and post-production crew. Only a few Yukoners are credentialed with a Canadian union or guild. As noted by survey respondents:

Seems like a lot of above the line people available but few technicians trained in on set experiences/industry standard gear.

Difficult for emerging artists/technicians to justify costs of joining different unions, associations/ obtaining memberships.

Interviewees noted that producers typically fill the labour gap by wearing multiple hats on their own productions.

5. Lack of Sectoral Cohesion

Interviewees noted that there is a lack of cohesion in the film and television production industry. In particular, some interviewees stated that there is a lack of collaboration between organizations that

²⁰ “Above-the-line” refers to the positions responsible for the creative development of the film—before pre-production or principal photography ever begins. The people in these positions make major decisions about the look and feel of the project. The “line” refers to the separation in the production budget of these positions and all other positions.

²¹ “Below-the-line” refers to the positions responsible for the day-to-day work of making the film—during pre-production, production, and post-production.

could be working together to achieve common ends. There is not one industry-wide organization that represents all the players in the Yukon's production eco-system: production companies, independent filmmakers and media artists, media art and film cooperatives, film and video festivals, broadcasters, National Film Board (Yukon/BC Studio), interactive digital media companies, training and educational institutions, collaborative creative spaces, unions and guilds, Indigenous storytellers, the hospitality sector, Yukon Government procurement services and funder. This lack of cohesion is a significant barrier to advancing the development of the industry in the Yukon.

2. The Yukon Has Positive Attributes for Growth

2.1 Elements of a Creative Ecosystem Exist

The Yukon has numerous elements necessary for a vibrant creative ecosystem. At the centre of a creative ecosystem are talented individuals – artists, writers, designers, filmmakers, craftspeople and other creators, whose original ideas provide the foundation for the conception, production, distribution and dissemination of creative content and products. These creators work within companies or as self-employed workers. One of the defining features of the creative industries ecosystem is the networking and interaction that takes place between creators and businesses. On the periphery of the creative industries are the organizations that support the ecosystem: educational and training institutions, creative work spaces, incubators and accelerators, funding agencies and investors, associations and other sector organizations, distributors and broadcasters, venues, festivals, conferences and other events.

2.1.1 Newly Released Creative and Cultural Industry Strategy

The Yukon Government has recently released its cultural strategy, *Creative Potential: Advancing the Yukon's Creative and Cultural Industries* (hereafter "*Creative Potential*"). Amongst the objectives put forward by the strategy is to stimulate the sector's growth through new funding opportunities, notably to support creative expression, access to markets and career development and by investing in cultural infrastructure. Amongst the guiding principles of the Yukon Government's new cultural strategy are to: inspire bold innovation and creativity, collaborate, partner and engage community, and to embrace diversity and inclusion.²²

As the strategy notes, "investments in people, product, and infrastructure are all required to ensure a solid foundation is in place from which the sector can thrive." Amongst the strategy's many inspired actions is to foster knowledge. Within this action, of particular relevance to the film and television sector are the commitments to "continue labour market supports to enable access to sector-specific training to enhance specialized learning and career skills; encourage partnerships within the sector and with Yukon University to deliver programs that meet the needs of the sector; increase access to training; and, support diverse ways of learning such as mentoring, residencies and job shadowing."

2.1.2 Newly Launched Enhanced Production Rebate from Yukon Media Development

Yukon Media Development has launched a new suite of programs, of which its enhanced production rebate is a central element. New funding has also been introduced to support pre-development, a critical phase in the elaboration of new projects. The goal will be to encourage local producers to undertake more challenging productions, including scripted, that can employ more people. This will require Yukon producers to successfully leverage the new rebate program to attract additional sources of investment and close their financing at elevated levels. It will be important for the Yukon Government to

²² *Creative Potential: Advancing the Yukon's Creative and Cultural Industries*, Government of Yukon, November, 2021.

monitor its rebate program and ensure that it continues to be effective at supporting the growth of the local industry.

As discussed below, the new Rebate is also aimed at attracting guest productions and supporting skills development. With new resources dedicated to the Rebate program there is a greater opportunity to successfully market the Yukon as an attractive production location for one film with a budget of about \$1 million per year.²³ To grow the industry, this program could be enhanced to attract more guest productions.

2.1.3 Talented Creators and Rich Indigenous and Northern Culture Heritage

The Yukon is home to talented creators. There is great diversity of talent, from award-winning documentary filmmakers to creative companies skilled in everything from making commercials to scripted series. The Yukon also boasts talented creators in other sectors of the creative industries ecosystem including writers, visual artists, interactive media creators, musicians and other live performers.²⁴ Interviews with stakeholders revealed that some talented writers and directors are working on commercials or music videos for lack of other opportunities.

One producer pointed to untapped opportunities to promote northern storytellers. The Yukon's creative industries share stories, knowledge and traditions, shaping the identity of the Territory.²⁵ Through its award-winning artists, artisans and designers, and the creative industries that bring their work to markets, Yukon celebrates and shares its rich Indigenous and northern culture heritage. There are opportunities to exploit Yukon's untapped story potential. It was noted that the Yukon lacks a festival that is focused on northern films and stories. The existing festivals could be doing more to showcase and promote business opportunities for Yukon producers.

2.1.4 Creative Organizations That Nurture Emerging Talent

A strategy identified in *Creative Potential* is to accelerate the development of youth talent in the sector. Independent media art cooperatives and media festivals in Yukon are critical nodes in the production ecosystem, provide valuable opportunities to emerging and other filmmakers with opportunities to develop their craft and build their creative networks. Media art production cooperatives provide unique opportunities to build skills amongst youth. There are currently opportunities to support efforts to build skills amongst talented Indigenous youth, converging with strategies enunciated in *Creative Potential* to "promote involvement of youth in the sector, particularly in rural Yukon," through enhanced training opportunities, and to capitalize on diversity.²⁶

2.1.5 Flagship Organizations That Support Business Skills and Relationships

The Yukon Government is committed to support the growth of its creative industries through "relevant, accessible and affordable skill-based and business training."²⁷ By building strong audio-visual production companies, Yukon will provide additional opportunities for its creators to work and live in Yukon, encouraging and retaining a critical mass of talented individuals in every creative sector and enhancing the creative industries sector overall.

²³ Based on maximum available rebate each year of about \$350K.

²⁴ *Creative Potential: Advancing the Yukon's Creative and Cultural Industries*, Op. Cit.

²⁵ *Creative Potential: Advancing the Yukon's Creative and Cultural Industries*, Op. Cit.

²⁶ *Creative Potential: Advancing the Yukon's Creative and Cultural Industries*, Op. Cit.

²⁷ *Creative Potential: Advancing the Yukon's Creative and Cultural Industries*, Op. Cit.

Festivals and industry organizations provide opportunities to develop business skills at a basic level and as such are important to sustain current levels of production activity. These flagship organizations have a major role and impact in these endeavours. Screen Production Yukon Association, Yukon Film Society and Dawson City Media Cooperative serve as nurseries for new talent, meeting and training places, and are major levers of production. All provide essential skills training and career acceleration opportunities. The Yukon Film Society and SPYA are eligible to accelerate the careers of gifted filmmakers by recommending them for funding through its partnership with the Talent To Watch program of Telefilm Canada. Through this program, two projects recommended by the Yukon Film Society have gone forward to international success and acclaim.

2.1.6 Government Procurement and Commercial Productions

Government procurement and commercial work provide important revenue streams that help make Yukon production companies more sustainable.²⁸ Stakeholders interviewed noted the essential role of government procurement contracts in sustaining the operations of production companies. Some would like to see more government procurement.

Commercial work is also critical to sustaining some production companies and to promoting Yukon as a production destination. Yukon producers are building their companies on this revenue stream, honing their skills and attracting partners to the Yukon.

2.2 Collaborative Creative Spaces

2.2.1 Collaborative Spaces Support Creation and Innovation

A key recommendation of *Creative Potential*, intended to stimulate growth, is to invest in cultural infrastructure. This includes 1) supporting upgrades related to technology, capacity and universal accessibility in existing cultural facilities, and 2) exploring repurposing and/or development of new cultural infrastructure through partnerships (e.g., such as centralized hub spaces in communities, studio, production and creative spaces).

The deployment of spaces for creation and collaboration is recognized as a central element for the growth of creative industries. These places offer at least shared spaces and support services in order to reduce costs and encourage collaboration. In some cases pivotal infrastructures such as recording studios and training for entrepreneurs (such as in incubators) are also available.

Collaboration also supports innovation, as noted during consultations towards Yukon's Innovation Plan, "collaboration can create avenues for knowledge sharing and successful partnerships across sectors and businesses. Entrepreneurs supporting each other with experience and their services can help companies to grow at a faster rate. The government and ecosystem providers can support this through incentivizing partnerships and creating community spaces where sharing happens."²⁹

A number of such spaces exist in Yukon, providing essential tools and spaces for creators in an environment that favours knowledge sharing, collaboration and innovation. Yukonstruct offers a number of creative work spaces and shared workshops equipped with a range of toolsets to support woodworking, digital fabrication, sewing, metalworking, electronics, etc..

²⁸ *Economic Impact Analysis of the Media Production Industry in Yukon*, Op. Cit.

²⁹ Government of Yukon, *Yukon Innovation Plan: What We Heard Report*, June 2021.

The Yukon's new creative and cultural industries strategy, *Creative Potential*, provides the basis for ongoing discussions on how best to develop collaborative spaces that can support film and television production in the Yukon.

2.3 Yukon as a Destination for Location Production

2.3.1 Opportunity to Attract More Guest Productions

The Yukon's immense territory and vast landscapes provide a range of attractive locations for productions. Known for its sublime wilderness, Klondike heritage and Indigenous and northern culture, as a location for filming Yukon attracts attention from location managers and producers from around the world. Production companies travel north for first-class snow, wilderness and heritage settings. Over the past several years Yukon has been chosen as the setting for feature films, television series, commercials and documentaries.³⁰

One long-standing guest production, the television series *Gold Rush*, has provided jobs and creative opportunities to Yukoners over the ten years the producers, Raw TV, have been bringing their production to Yukon. Interviewees noted this production is now winding down.

Interviewees were of the view that the current Yukon industry could realistically support one or two lower budget feature films per year and that doing so would provide work opportunities for production staff and technicians. Such opportunities were put forward as necessary to build the industry. A couple of stakeholders pointed to the opportunities afforded by commercials with bigger budgets. For some, commercials were said to provide opportunities to hone skills and provide sustained work opportunities.

Stakeholders noted the territory shares the same time zone with two of its production neighbours to the south, British Columbia and California for six months of each year. Plane rides to either destination are relatively short and direct. It was noted by stakeholders interviewed that the Yukon has a number of key elements in place, including a smooth permitting system, and effective facilitation to liaise with local production companies through SPYA.

2.3.2 Opportunity to Support Ongoing Skills Development

The Yukon Government has recently launched its modernized rebate program for local and guest productions, which has a focus on supporting Yukoners to acquire specialized skills. The new rebate provides a greater incentive for all productions taking place in Yukon to provide meaningful work opportunities to Yukoners. This will have the effect of providing greater training opportunities to Yukoners and grow the crew base.

Through Yukon's Innovation Plan consultations, stakeholders put forward the view that developing local skills will generate a higher local value for the workforce and the economy as a whole.

³⁰ *Shared Vision: The Yukon Film Industry*, Yukon Film & Sound Commission, 2015.

3. Summary Conclusions

Figure 3 summarizes the strengths and challenges unique to the screen-based production sector in the Yukon.

Our analysis of the challenges shows that sweeping change is needed within the sector as a whole. The growth of the Yukon screen-based production sector is dependent on the success of interrelated factors that include: having sustainable production companies, generating a steady production volume, workforce capacity and production infrastructure. At the same time, the sector possesses a number of strengths that can be built on to further growth. It is timely to develop a new vision and strategic directions, ones that will be led by government and supported by all segments of the sector.

Figure 3: Strengths and Challenges in the Yukon Screen-based Production Sector

Yukon Strengths	Yukon Challenges
<ol style="list-style-type: none"> 1. <u>Elements of a Creative Ecosystem Exist</u> <ul style="list-style-type: none"> • Newly released creative and cultural industry strategy • Newly launched enhanced Production Rebate from Yukon Media Development • Talented creators and rich Indigenous and northern culture and heritage • Creative organizations that nurture emerging talent • Flagship organizations that support business skills and relationships • Government procurement and commercial productions help sustain production companies 2. <u>Collaborative Creative Spaces</u> <ul style="list-style-type: none"> • Collaborative spaces support creation and innovation 3. <u>Yukon as a Destination for Location Production</u> <ul style="list-style-type: none"> • Opportunity to attract more guest productions • Opportunity to support ongoing skills development 	<ol style="list-style-type: none"> 1. <u>Lack of Production Capacity</u> <ul style="list-style-type: none"> • Not enough production activity • Not enough experienced production companies • Lack of dramatic productions • Production financing is a challenge • Need to develop business relationships and skills • More Indigenous and diverse stories 2. <u>Lack of Infrastructure and Small Workforce</u> <ul style="list-style-type: none"> • Too few training opportunities • Unions and guilds are not active in the Territory • Lack of production and post production facilities • Lack of services • Small Number of Available Crew and need for greater inclusiveness 3. <u>Lack of Sectoral Cohesion</u>

III: The Global and National Context: A Time of Extraordinary Change

1. Increased Business Opportunities

1.1 Increased Demand for Screen-based Content

Global expenditures on acquiring and producing audio-visual content has increased significantly in recent years, and is forecast to continue in the same vein over the coming years. There is currently an unprecedented level of activity in the production of film and television globally. Underpinned by consumer demand and the uptake of connected devices and high-speed internet, well over \$100 billion is being invested annually into content production and licensing by a variety of players. These include the global streaming services, coupled with investments by established studios and broadcasters, who are increasing their own production and acquisition activity in order to remain competitive.³¹

Canadian TV series are popular around the world. Demand for Canadian programs ranks sixth out of over 80 markets internationally, accounting for 5.2% of total demand for all non-US content with global audiences.³² For the twelve-month period from November 1, 2020 to October 31, 2021, several Canadian series played a significant role in propping up the overall demand for Canadian content. During this period, *Vikings* was the 25th most in-demand show in the world, while *Schitt's Creek*, *Transplant*, and *Wynonna Earp* also had outstanding demand, placing them in the top 2.9% of all shows worldwide.³³

1.2 New Sales Opportunities to Online Platforms

The total volume of film and television production in Canada was \$9.32 billion in 2019-2020, generating employment for 244,500 Canadians and contributing \$12.24 billion to Canada's GDP. Independent Canadian television production was valued at \$2.63 billion, followed by broadcaster in-house production worth \$1.15 billion and Canadian theatrical feature film production of \$287 million. The lion's share of volume was expended by foreign location and service (FLS) production, valued \$5.25 billion in 2019-2020 in Canada.

Almost 90% of all Canadian content production is in television, with the balance, 10%, in feature film production. The largest component is dramatic production representing \$1.65 billion in Canadian expenditures. Programs in the lifestyle and human-interest genres trail at a distant second place with \$513 million in production expenditures. These are followed by children's and youth production with \$415 million. At \$213 million, documentary production represents the smallest slice of production expenditure nationally.

Average budgets for Canadian feature films are low in global terms. Canadian producers made 112 theatrical feature films in 2018-2019 with an average budget of \$2.9 million.

Production in Canada and other markets around the world was disrupted by the pandemic, with widespread and deep impacts felt in the sector in 2020-2021. Before COVID-19, there had been an enormous rise in the production of feature films and scripted television series, driven in part by the growth

31 Osberg SPI, *The Global Production Deluge: Evidence and Discussion Paper*, February 25th, 2020.

32 "Canada Media Fund renews partnership with Parrot Analytics to track domestic and international demand for Canadian content," Parrot Analytics, Press Release, December 1, 2021.

33 "Canada Media Fund renews partnership with Parrot Analytics to track domestic and international demand for Canadian content," Parrot Analytics, Press Release, December 1, 2021.

in direct-to-consumer streaming services and fierce global competition for audiences. However, indications point to a resilient sector that will rebound.

In recent years, increased demand for content around the globe has been a key driver for investment in Canadian production. This financing takes the form of “pre-sales” of distribution and broadcast rights to international buyers. Between 2010-2011 and 2018-2019, total foreign investment in production of Canadian content more than doubled – from \$421 million to \$864 million. Foreign investment accounted for 26% of the total financing for Canadian content production in 2020.³⁴

Foreign financing of Canadian theatrical feature film production accounted for 17% of total financing.

The evolution of new online platforms offering streaming, catch-up TV, video on demand and user-generated video has irrevocably changed the ways people consume screen content, how it is created and delivered and the sheer amount of content choice available for audiences. A small number of players have emerged as dominant global platforms by which consumers access cultural products. The rise of these platforms has presented new opportunities for creators to distribute and monetise their work.

Depending on the platform the content will be available on, creators need to juggle managing business strategies, sponsorship and advertising revenue, merchandising, branding and licensing to ensure the project is financially viable. If this can be done successfully content creators now have a world of opportunity to showcase their work and find ways to bring in revenue.

1.3 Record Levels of Foreign Location and Service Production in Canada

The Canadian film and television industry saw the highest ever level of foreign location and service (FLS) production in 2019-2020, amounting to \$5.25 billion.³⁵ The foreign location and service (FLS) production segment is primarily comprised of films and television programs filmed in Canada, mainly by foreign producers, with the involvement of Canadian-based service producers. This includes the visual effects (VFX) work done by Canadian VFX studios for foreign films and television programs.

Of the over \$5 billion in FLS production in 2019-2020, television production represented over half, at \$3.06 billion (for the production of 224 television series). Feature films accounted for 166 FLS productions. Canada has become a destination for the filming of many American series and mini-series for television and online streamers. Notable examples include *The Queen’s Gambit*, *The Umbrella Academy*, *Arrow*, *Titans*, *Riverdale*, *See*, *The Handmaid’s Tale*, *The Boys* and *Star Trek: Discovery*.

2. Increased Funding Opportunities

2.1 Attractive Tax Credits, Rebates and Direct Funding in Other Canadian Jurisdictions

Federal and provincial tax credits represent part of a Canadian production company’s contribution in film and television projects. Canadian production companies receive tax credits based on their eligible labour expenditures. In almost all cases the amount of tax credits received by the producer for a specific project is invested directly into that project in order to complete the financing for that project.

In Canada, provinces and territories offer attractive production tax credits and rebates intended to attract production to their region. Most of these programs do not cap contributions and provide relief

³⁴ Profile 2020: An Economic Report on the Screen-based Media Production Industry in Canada, Op. Cit.

³⁵ Profile 2020: An Economic Report on the Screen-based Media Production Industry in Canada, Op. Cit.

at rates comparable to, or better, than Yukon's Production Rebate. Most Canadian provinces and territories also provide direct funding on a competitive basis. Tax credits, rebates and direct funding programs in other Canadian jurisdictions can benefit Yukon-based interprovincial coproductions.

2.2 Northern Incentive, Francophone Minority and Indigenous Programs of the CMF

The national funding of screen-based production content in Canada relies on the stability and predictability of the following federal programs: most notably the Canada Media Fund (CMF) and the Canada Feature Film Fund administered by Telefilm Canada.

The CMF continues to be a major player in the Canadian television segment, disbursing \$276 million and thereby supporting \$1.31 billion in Canadian television production. In 2019-2020, CMF funded programs accounted for approximately 50% of all Canadian television production. Additionally, foreign pre-sale financing of Canadian television production totalled \$381 million, or 14% of total production financing. In Yukon producers are accessing the CMF's Northern Incentive and Francophone Minority Program. Opportunities afforded through the Indigenous program of the CMF are not yet being leveraged by Yukon producers.

The CMF plays and should continue to play a fundamental, unique role in the screen industries—to foster, finance and promote Canadian screen content made and owned by Canadians, and seen and experienced by Canadians—but expand how it achieves this mandate to reflect the multi-platform, global nature of the industry. Stakeholder consultations conducted by the CMF show that the industry supports extensive change in the CMF's funding model towards a more flexible, content-centric, platform agnostic approach that will help intellectual property creators succeed at home and in the global marketplace.

2.3 Talent to Watch and Indigenous Programs of Telefilm Canada

Telefilm Canada provided a total of \$102.2 million in financial support to Canada's audio-visual sector in 2019-2020. This included \$78.3 million in support for the development of the audio-visual industry (e.g., production, development, theatrical documentary programs, and other), and \$23.9 million in funding for promotional support.³⁶

Through the Talent to Watch Program, Telefilm's Talent Fund enables an innovative approach to national film funding. Over 60 industry partners from across the country, including the Yukon Film Society and the Screen Producers Yukon Association, facilitate access to the program.

2.4 Possibility for Increased Funding Resulting from the Modernization of the Broadcasting Act

The legislative and regulatory framework governing the broadcasting sector is under widespread review. At the end of January 2020, the Broadcasting and Telecommunications Legislative Review Panel released its full report, *Canada's Communications Future: Time to Act*,³⁷ which called for widespread regulatory reform. Among the recommendations that would most greatly impact the industry are proposed changes to the funding mechanisms that support the screen-based production sector. The government intends to regulate the foreign streaming services operating in Canada, to bring them within

³⁶ *Profile 2020: An Economic Report on the Screen-based Media Production Industry in Canada*, Op. Cit.

³⁷ *Canada's Communications Future: Time to Act*, Broadcasting and Telecommunications Legislative Review, Minister of Industry, 2020.

the purview of Canada's legislative and regulatory system. Given their ability to access domestic audiences and generate significant Canadian revenues, these services will be required to contribute to the production of Canadian programming. At the present time, streaming platforms are not required to contribute to Canadian programming despite becoming increasingly significant elements of Canada's broadcasting system.

2.5 Funding for Training and Professional Development from New Players

A number of major foreign companies have begun to support the Canadian independent production sector. Warner Media and Netflix are investing in production and professional development initiatives, notably with Indigenous and Black screen organizations in Canada. Netflix is also investing in a new production facility in BC. Yukon industry organizations may be eligible for such funding to expand their programming in support of industry development

3. The Challenges of a Highly Competitive and Changing Environment

3.1 Consolidation Among Canadian Broadcasters

The national and international screen-based production industry is highly competitive. There has been significant consolidation in the industry, of both broadcasters and production companies, some of whom have also built out impressive distribution arms. Consolidation amongst Canadian broadcasters has led to the narrowing of opportunities to sell content as buyers for multiple channels and services are represented by fewer and fewer people. As the Canadian Media Producers' industry report notes, "many producers also point to the emergence of a 'new normal' that sees production companies take on greater financial risks in developing film or television projects prior to obtaining production financing. In part, industry consolidation among Canadian broadcasters (i.e., the primary buyers of Canadian content), and a subsequent strengthening of their market power in the television content commissioning market has contributed to this new normal."³⁸ Having relationships with these important gatekeepers is of critical importance to develop sales and attract financing of productions.

3.2 Increased Costs for Producers

The term independent production company, originally alluding to a pool of very small and micro companies of fewer than five employees, has come to encompass very large producers formed through multi-national partnerships. In many instances, larger producers are vertically integrated, with distinct distribution arms that provide them with increased sources of revenues and market intelligence. In leading audio-visual markets, including the UK, France and the US, the production sector has seen significant consolidation with some of the largest producers now owned by global media companies. Larger producers are better positioned to take on risk when undertaking new productions and are better equipped to bring greater investment to their projects.

3.3 Theatrical Transformation

Theatrical exhibition has been on changing for some years, with extended theatrical viewing increasingly reserved for only larger budget films.

As a result of accelerating structural changes occasioned by the pandemic, the theatrical market worldwide is characterised as diminished and evolving. Cineplex, Canada's largest theatre chain, struck a

³⁸ *Profile 2020: An Economic Report on the Screen-based Media Production Industry in Canada*, Op. Cit.

deal with Universal Filmed Entertainment Group (UFEG) that preserves an exclusive theatrical window of up to five full weekends before a film moves to video-on-demand (VOD) platforms. With audience fragmentation accelerating due to the rise in digital, streaming and cord cutting, it was felt that giving consumers the flexibility to view content on their terms is more important than ever to help expand moviegoing.³⁹ At the same time pandemic closures created opportunities for innovation, such as the introduction of virtual cinema passes, providing audiences with at-home access to some films during the shortened theatrical window.

3.4 Significant Competition for Location and Service Productions

The number of foreign productions in Canada has grown 12.1% annually for the past five years. The total volume of foreign location and service production has risen by 180% over the past decade. Overall, 56% or \$5.25 billion of the \$9.3 billion production volume last year was foreign initiated.⁴⁰

Canadian provinces and territories compete with each to attract foreign location services productions. Tax credits and rebates are generous and, in most jurisdictions, are backed by an efficient and extensive production services industry. British Columbia is Canada's leading province for foreign location services production; followed by Ontario and Quebec. One recent initiative out of British Columbia has been the creation of a "one-stop-network" for U.S. and foreign film and television producers wishing to bring their projects to Canada.⁴¹

4. Summary Conclusions

Figure 4 presents a summary analysis identifying the strengths and challenges particular to the Yukon as well as the broader opportunities and challenges arising from global and national trends.

39 Barry Hertz, "Cineplex signs landmark deal with Universal, shortening the time it takes movies to hit home entertainment," *The Globe and Mail*, November 20, 2020.

40 Nick Krewen, "Film and TV Veterans Launch Service Production Network," in *Playback Online*, November 10, 2021.

41 Nick Krewen, Op. Cit.

Figure 4: Analysis of Wider Environmental Opportunities and Challenges

Wider Environment Opportunities	Wider Environment Challenges
<p>1. <u>Increased Business Opportunities</u></p> <ul style="list-style-type: none"> • Increased demand for Screen based content • New sales opportunities in Canada and abroad to online platforms • Record levels of foreign location production in Canada <p>2. <u>Funding Opportunities</u></p> <ul style="list-style-type: none"> • Attractive tax credits and rebates in other Canadian jurisdictions • Northern Incentive, Francophone Minority and Indigenous programs of the Canada Media Fund • Talent to Watch and Indigenous Programs of Telefilm Canada • Possibility for increased funding resulting from the modernization of the Broadcasting Act • New players providing new funding for training and professional development opportunities to Canadians 	<p>1. <u>Highly Competitive and Changing Environment</u></p> <ul style="list-style-type: none"> • Consolidation Amongst Canadian Broadcasters • Increased costs for producers • Theatrical transformation • Significant competition for location and service production

III: Roadmap for Growth: 2022-2023 to 2026-2027

1. Vision: A Thriving Production Ecosystem

Vision: A Thriving Production Ecosystem

The Yukon screen industry is a thriving ecosystem of creative talent, skilled technicians and successful businesses. This ecosystem generates significant local employment, and has a consistent and growing pipeline of screen production activity. The Yukon screen industry achieves increased inward investment and employs more Yukoners.

The screen production sector is an increasingly strategic priority for many governments worldwide. This is due to a range of factors, including that screen production is a powerful, proven driver for economic growth, job creation and the development of valuable skills. The benefits of a dynamic screen-based production sector are economic, social and cultural.

What follows is a Roadmap that will galvanize all segments of the industry to focus on its development and growth. The screen-based production sector is characterized by its unique ecosystem in which growth in one part of the sector requires growth in another; and as all parts develop, the industry itself expands and is strengthened. This strategy is timely, as it builds on *Creative Potential*, the Yukon’s creative and cultural industries strategy, by providing specific strategies and actions for the audio-visual sector.

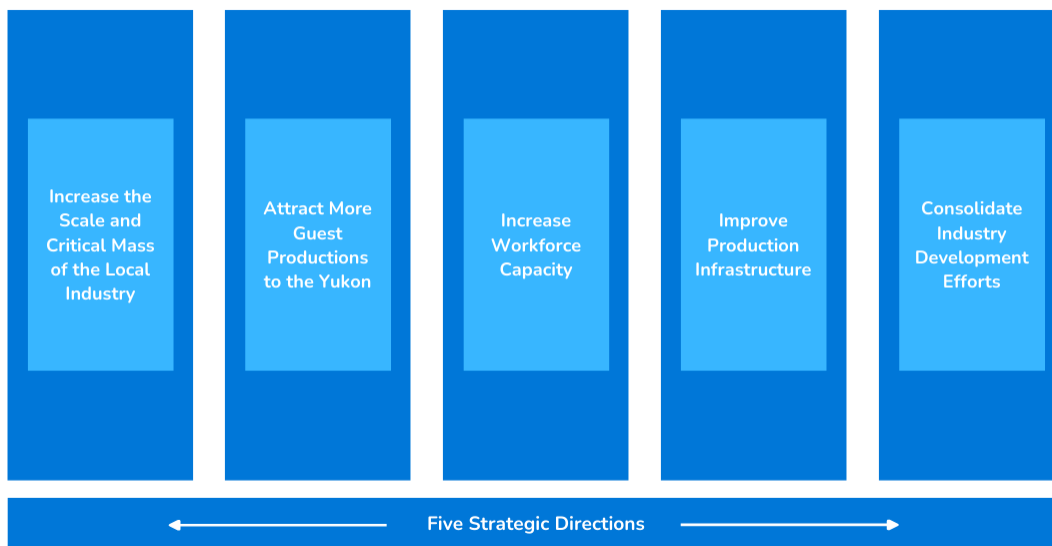
As we have seen in this report, the growth of the sector in the Yukon is currently hampered as a result of various factors that, in combination, have led to a production ecosystem characterized by a low level

of production activity relative to its potential, small workforce capacity and absence of critical infrastructure. However, the Yukon does possess all the components for growth and has developed strategies to support its creative and cultural industries, as well as innovation more broadly, which together with this strategy can help drive growth in the Yukon’s audio-visual production sector. Together with this Roadmap, these strategies can address the significant crossover of artistic and economic characteristics on which this sector is built.

The following strategic directions and associated actions have been developed to support the achievement of the proposed vision. They take into account the current state of Yukon’s production ecosystem, stakeholder perspectives from the consultations and best practices from jurisdictions that have successful production sectors.

As can be seen in Figure 5, this proposed Roadmap for growth has been developed around five key strategies.

Figure 5: The Five Strategies of the Yukon Roadmap for Growth



2: Strategic Direction: Increase the Scale and Critical Mass of the Local Industry

This strategic direction, to build the scale and critical mass of Yukon’s local industry, entails the concurrent implementation of several actions. The actions that follow are meant to scale-up the skills of producers, boost development and production activity and diversify the current local production slate by supporting the production of scripted content.

2.1 Recommended Actions

2.1.1 Strengthen Production Companies

In order for the Yukon to have a stable and growing production ecology, what is needed is greater professionalization of business and financing practices in independent production. Strong production companies are needed with the capacity to invest in people, facilities and the development of intellectual property.

Producers are the cornerstone of the screen-based production industry – they are the builders in the production process. They bring together all of the elements of the production process including the financial capital, creative elements, performing talent, production facilities and distribution channels. In most cases, producers assume all the financial liabilities and responsibilities associated with financing a production. They play a vital role in the screen-based production sector as they help translate the visions of writers and directors into viable projects, partner with others for financing and provide employment for local crews.

The sector has a small pool of established producers. There are no large production companies or established producers with the capacity to finance and produce a diverse range of screen content. This study finds that the Yukon would benefit from stronger production companies that can develop and produce a diversified slate of screen content. Producers themselves must be prepared to shift gears. To create more sustainable companies, producers must diversify their income streams (television drama, corporate, commercial work, new distribution methods, etc.).

To build critical mass in Yukon production companies, talented producers must develop their business skills and relationships and accelerate their careers. The priority is to build the business skills and capacity of local production companies through the actions described here.

Build Business Skills of Producers Through Specialized Training

It is recommended that Yukon Media Development move forward to co-launch the Northern Canada Producer Accelerator, providing support to Yukon production companies to accelerate the business skills of producers. Going forward it is recommended that such training opportunities continue to be made available to producers on a regular basis.

Training that has a focus on honing producers' commercial, business, personal and production acumen, culminating in pitches and business meetings provide the greatest opportunities to build stronger skills within production companies.

In delivering future training initiatives Yukon Media Development should develop and host industry development initiatives and look to opportunities to work with partners, such as local industry associations and industry development events in Yukon or other relevant jurisdictions, such as those hosted by festivals.

Assess Needs and Develop Initiatives to Support Development of Indigenous and Other Diverse Producers

There should be dedicated resources to support the emergence and skills building of Indigenous emerging producers. Our consultations reveal that there exists a small community of Indigenous emerging producers in the Yukon. As part of the Yukon's roll out of the creative and cultural industries

strategy, the government should assess the needs Indigenous and other diverse film and television producers and ensure that relevant initiatives are developed.

The long-term objective of producer training is to help develop the next generation of producers in the Yukon and ensure they are ready to meet the ever-changing demands of producing Canadian film, television and digital media.

Support for Producers to Build Business Networks and Relationships

Through its programs Yukon Media Development should continue to provide support to Yukon producers to build their professional networks. This includes:

- funding for producer travel to markets and festivals to promote their work and attract buyers; and
- missions organized by Yukon Media Development that can facilitate introductions and encourage better outcomes for producers.

To reach wider markets, producers need to travel to more distant events. Support available through Yukon Media Development enables producers to travel to more distant events or training programs, providing vital opportunities to build skills and networks necessary to increase production in Yukon.

Best practices point to repeated participation at markets and festivals as being most conducive to developing trust-based business relationships. Business relationships need to be built on trust, which takes time and repeated opportunities to meet. It has also been noted that online participation at markets is not as conducive to building new relationships as in-person attendance, which can lead to more serendipitous networking. As travel restrictions introduced during the pandemic are lifted, Yukon Media Development should continue to provide assistance to producers to travel to non-Yukon markets and festivals, and facilitate relationship building.

Strategic Direction: Increase the Scale and Critical Mass of the Local Industry		
Action: Strengthen Production Companies		
Actions - Detail	Outcomes	Timeframe
Build Producer Business Skills through Specialized Training	<ul style="list-style-type: none"> • Yukon production companies take part in the Northern Canada Producer Accelerator Program 	Year one
Assess needs and ensure training for Indigenous and diverse producers as part of the Creative Potential Strategy roll-out	<ul style="list-style-type: none"> • Yukon producers who are Indigenous or members of other diverse groups have access to high quality training opportunities to develop their producer skills 	Year two and ongoing
YMD Funding for Producer Travel and Organized Missions to Build Business Networks	<ul style="list-style-type: none"> • Yukon-based producers build their networking and business relationships through repeated participation in industry markets and festivals, are successful in promoting their work and attracting sales. 	Year two and ongoing

2.1.2 Boost Levels of Dramatic Development and Production Activity

It is recommended that Yukon Media Development introduce a series of initiatives to support dramatic content development and production. Best practices show that a key strategy employed in other jurisdictions to invigorate the local screen ecosystem is boosting production volume.⁴² Drama productions are made with higher budgets, employ more people and provide opportunities to develop a wide range of skills. The goal of providing support for dramatic production is to contribute to a momentum and critical mass that could eventually generate a more robust level of production through series and feature films. In the best circumstances a successful dramatic series could anchor the development of the local industry.

Stakeholders identify scripted content as a top priority. As one respondent surveyed noted: “Let’s be strategic and work towards a series that like Corner Gas did for Saskatchewan, can lift the whole industry in the Yukon.” The series Corner Gas is said to have enhanced Saskatchewan’s international profile and recognition for Saskatchewan and its capability for quality production.⁴³

Partner with a Canadian Training Institution to Strengthen Storytelling Skills

It is proposed that Yukon Media Development partner with a Canadian training institution, such as the NSI, to provide training opportunities to talented Yukon writers to develop dramatic concepts, scripts and series for film, television and digital media. This could include storytelling for web series, short films, for alternative platforms like Tik Tok, or feature films.

Allocate YMD Funds to Drama Content

It is recommended that all of YMD’s development and production programs should allocate a portion of their resources to support dramatic projects. The goal is to increase the number of dramatic projects from the Yukon, while also building dramatic storytelling experience.

In implementing Yukon Media Development’s (YMD) new funding programs, every effort should be made to ensure that a range of genres, including drama, children’s programs, documentary and unscripted programs are supported. This will ensure that productions of all sizes are produced, providing the greatest number of opportunities for Yukoners to work on local productions. It may be necessary for YMD to stimulate the development of projects in some genres.

Yukon Media Development should ensure that through its new programs, producers are able to close their financing at suitable levels to encourage work opportunities and growth.

Partnership to Fund a Dramatic Web Series

It is proposed that Yukon Media Development partner with the Canada Media Fund and a Canadian broadcaster to fully fund one Yukon-led dramatic web series that provides training opportunities for above- and below-the-line crew.

Encourage One Northern Feature Film Production

It is proposed that Yukon Media Development work with industry partners to create a Northern Production Forum to promote and facilitate a feature film production by Yukon producers. The goal of the

⁴² *Best Practice in Screen Sector Development*, Op. Cit.

⁴³ *Saskatchewan Film/TV Production Sector Plan*, prepared by Nordicity Group Ltd. for the Saskatchewan Motion Picture Industry Association (SMPIA) and the Saskatchewan Film Producers Association (SFPA), May 2009.

event would be to promote Yukon projects that are in development to potential buyers and other partners, such as other producers in Canada, who can bring resources and expertise to a project through co-production. The Forum would be developed and hosted by Yukon Media Development in partnership with an appropriate venue.

Fund the Production of Music Videos

The Yukon Government should provide funding for the production of professional quality music videos. These will serve two purposes: to support the promotional efforts of Yukon music artists, and encourage the sustainability and honing of creative skills amongst Yukon production companies.

Yukon Government Procurement of Commercial, Corporate Production

To strengthen Yukon production companies, it is recommended that the Government of Yukon adopt a policy to hire Yukon companies and talent when procuring production services for commercial or corporate audio-visual production. As has been noted above, and in an economic impact study commissioned by Yukon Media Development in 2018, procurement by the Government of Yukon is a significant support to sustaining Yukon production companies.

Strategic Direction: Increase the Scale and Critical Mass of the Local Industry		
Action: Boost Levels of Development and Production Activity		
Actions - Detail	Outcomes	Timeframe
Partner with a Canadian training institution to strengthen storytelling skills	<ul style="list-style-type: none"> Yukon production-ready dramatic web series, short films, features, etc. 	Year three
Allocate YMD funds to develop and produce drama content	<ul style="list-style-type: none"> Yukon-led dramatic projects are developed and produced 	Year one and ongoing
Partnership to fund a dramatic web series	<ul style="list-style-type: none"> One Yukon-led dramatic web series is produced 	Year three
Encourage one Northern feature film production	<ul style="list-style-type: none"> Yukon Media Development hosts a Northern production forum in partnership with an appropriate venue in the Yukon or another province 	Year three
Fund the production of music videos	<ul style="list-style-type: none"> Yukon production companies are better able to sustain themselves through contracts to produce music videos 	Year one
Yukon Government procurement of commercial, corporate productions	<ul style="list-style-type: none"> Yukon production companies are better able to sustain themselves through contracts to produce commercials and corporate videos for the Yukon Government 	Year two and ongoing

3. Strategic Direction: Attract More Guest Productions to the Yukon

This strategic direction to attract more guest production to the Yukon is aimed at providing more, and more reliable, opportunities for skilled Yukoners to find jobs in the film and television industry. Best practices show that guest productions act as an incubator for up-and-coming producers and crew.

There is an opportunity for growing the proportion of non-Yukon location services-oriented productions within Yukon's industry production activity. This type of production hasn't increased as quickly in the Yukon as in other jurisdictions. In fact, it would appear that Yukon is at risk of being left behind as the rest of the country substantially increases its location services production activity.

In a competitive global market where film and television production spend has reached unprecedented levels, tax incentives have become increasingly recognized by governments as an efficient and strategic policy tool to attract and strengthen local production sectors and build skills, employment, and infrastructure in a future-facing global industry, as well as attract high-value inward investment.

The rebate is the most important incentive available in the Yukon and is a powerful selling feature when considering the Yukon as a production destination. Its main benefit is to stimulate an increase in the level of production activity and if this reaches a suitable, sustainable critical mass then more productions will be made with more chances of meeting audience and critical success (and hence with a greater likelihood of returning for subsequent iterations). At the same time, the skills base will expand and producers will gain more experience in how to create a successful product.

As demand for locations has fallen due to the evolution of green screen and other technologies, jurisdictions must increase their efforts to attract guest productions.

3.1 Recommended Actions

Clarify the Production Rebate to be Competitive with Other Jurisdictions

In order to successfully attract guest productions, the Yukon production rebate must be adjusted to provide greater certainty, and in a more timely manner, to producers wishing to shoot in the Territory. It was noted that without this assurance producers may turn to other jurisdictions where rebates are automatic and amounts available are known in advance.

Market the Yukon as a Production Location

Yukon Media Development, as the territory's Film Commission should target its marketing efforts to attract at least one new non-Yukon production each year. This will require participation at key markets where producers could be found interested in shooting in Yukon. As resources in the rebate program are increased, the target would increase to reflect a higher overall volume of production.

Increase Resources Available Through the Production Rebate

In addition, greater resources will be needed to leverage more production in the Yukon. It was noted that the current level of funding will support about \$1 million worth of guest production each year. An increase of two productions a year would yield multiple benefits. Guest, or non-Yukon, productions would offer opportunities for ongoing work and skills development. These productions would draw people to work in the Yukon, which in turn would increase the experience of Yukoners to experiment and innovate.

Stakeholders interviewed pointed out that the Yukon must embrace a strategy of increasing production volume through attracting commercial productions and series, as well as films, originating outside Yukon. As one interviewee noted, the focus should be on increasing production that allows Yukoners to work in meaningful positions. Due to the lack of available crew, stakeholders suggested that efforts be targeted to companies shooting commercials, and to secondary or "b" shoots of larger films, until capacity is increased.

Strategic Direction: Attract More Guest Productions to the Yukon		
Actions	Outcomes	Timeframe
Clarify production rebate to be competitive with other jurisdictions	<ul style="list-style-type: none"> The rebate program is clarified to be automatic, with information on amount of funding available through this program publicly available to producers Yukon Media Development is able to promote and provide sureties that attract guest productions in the Yukon 	Year two and ongoing
Market the Yukon as a production location	<ul style="list-style-type: none"> Yukon Media Development attracts one new guest production each year 	Year two and ongoing
Increase resources available through the production rebate	<ul style="list-style-type: none"> Resources in the rebate program are increased and the Yukon hosts a greater volume of production activity each year 	Year three and ongoing

4. Strategic Direction: Increase Workforce Capacity

This strategic direction to increase the Yukon’s audio-visual workforce capacity is targeted at both above-the-line and below-the-line talent.

The film and television industry is built on creative excellence. Recognizing this, jurisdictions around the world provide opportunities for above-the-line talent to continually hone their creative skills. These efforts result in better scripts and story ideas, better pitches and increased investment and ability to reach markets. Stakeholders interviewed for this report identified the need to be inclusive in providing training opportunities. It was pointed out that there are many talented Indigenous and other diverse Yukoners interested in having opportunities to develop their skills to work in this industry.

The Yukon faces a critical challenge with crew capacity. The shortage of skilled labour and difficulty in retaining skilled technicians, are significant barriers to growth, both in terms of local production and international productions. The need for growing skills locally and for having opportunities for ongoing skills development was expressed by stakeholders during Yukon’s Innovation Plan consultations.

4.1 Recommended Actions

Develop Partnerships to Ensure Ongoing Creative Training Opportunities for Above-the-Line Talent

Yukon Media Development should partner with leading Canadian training institutions to support the ongoing development of above-the-line through high-quality training initiatives. Supporting the development of writers and directors is critically important for the Yukon, as the audio-visual sector is a hits-driven business that competes on creative quality. Nothing can guarantee success, but the more time spent developing a strong script, with the input of talented writers, directors and producers, the better the chances are that projects will be produced with sufficient financing to compete in the market.

The program could support both fiction and nonfiction writers and directors, as well as producers. Ongoing support through labs, fellowships, intensives, grants, and other creative development opportunities, writers, directors and producers can hone their creative skills, and develop strategies for developing, pitching and financing their projects.

Develop Partnerships to Ensure Ongoing Skills Development and Accreditation for Below-the-Line Professionals

It is recommended that Yukon Media Development, in partnership with industry unions, guilds and associations, provide credentialed on-the-job training opportunities, primarily for technical industry positions. Production growth is such that it can be challenging for producers to find crew in many positions. Yukon Media Development’s new Production Rebate program provides critical incentives to ensure that Yukoners have access to opportunities to develop their skills in key positions. Yukon Media Development can play an essential role in facilitating access to these on-the-job training opportunities.

Strategic Direction: Increase Workforce Capacity		
Action	Outcome	Timeframe
Partnerships to ensure ongoing training opportunities for Above-the-line talent	<ul style="list-style-type: none"> • Yukon above-the-line talent have access to training opportunities provided by leading Canadian training institutions • Yukon producers develop and pitch more competitive projects • Yukon productions attract higher levels of investment 	Year three and ongoing
Partnerships to ensure ongoing credentialed training opportunities for below-the-line positions.	<ul style="list-style-type: none"> • Yukon below-the-line professionals have ongoing opportunities to develop their skills and qualify for union or guild membership 	Year three and ongoing

5. Strategic Direction: Improve Production Infrastructure

This strategic direction to improve the Yukon’s production infrastructure is aimed at addressing the gap in the production ecosystem, namely, the absence of a production studio.

Availability of high-quality production space is a common challenge across all sizes of production. However, the situation in the Yukon is unique in that there is not currently any production studio that could support dramatic production, or other productions requiring indoor shoots. Collaborative and creative spaces are critical infrastructure for the film and television sector, existing collaborative spaces in Yukon are not well adapted to the need for a production studio that could support local productions.

Access to a production studio would provide an additional incentive to attract non-Yukon productions. One of the recommendations of *Creative Potential* was to explore the repurposing and/or development of new cultural infrastructure such as studios and centralized hubs through partnerships. This recommendation should be extended to the creation of a shared facility specifically purposed for film and television production.

Participate in the Development of a Partnership that Leads to the Creation of a Shared Production Studio

It is recommended that Yukon Media Development participate in the development of potential partnerships to make a production studio available to Yukon-based and guest productions. For example, there may be interest from Yukon University, Northwestel Community TV, and others to group their assets to create a shared space. There may be opportunities to glean best practices from Yukonstruct.

The industry could explore partnerships with existing organizations and institutions to develop a local production facility that could be shared by all partners to increase the volume of Yukon production while also providing enhanced skills training opportunities.

Strategic Direction: Improve the Production Infrastructure		
Action	Outcome	Timeframe
Participate in developing a partnership that leads to the creation of a shared production studio	<ul style="list-style-type: none"> • A partnership is formed and a shared production facility is created • Yukon-based productions have access to a production studio • The production studio provides an added incentive to non-Yukon productions to shoot in Yukon 	Year three

6. Strategic Direction: Consolidate Industry Development Efforts

This strategic direction to consolidate efforts to support industry development is aimed at responding to the urgent need to support the industry with special initiatives that will elevate industry skills and capacity in order to grow the sector. It is unrealistic to leave such an important role to the industry in its current state of under development.

6.1 Recommended Actions

Create the Position of Industry Development Officer Within Yukon Media Development to Design and Deliver Initiatives

This position would be tasked with developing and delivering specialized initiatives that support industry growth and development. These would include training and professional development initiatives, developed in partnership with specialized training entities: unions, guilds, industry associations, national training institutes, etc. Activities of this position would also include the development of industry fora at festivals and markets and organized missions to other international festivals and markets to support producers to network, build their business relationships, and pitch their projects to investors and buyers, etc.

There is a need for a dedicated resource that can work within Yukon Media Development, and in partnership with Yukon industry to design and deliver initiatives that will support the growth and development of the Yukon screen-based industry. A number of initiatives proposed above could be led by the Industry Development Officer. These include:

- Specialized training to build producer business skills
- Producer travel and organized missions to industry markets and festivals
- Specialized training to hone creative skills of storytellers
- Partnership to fund one dramatic web series
- Creation of a Northern Coproduction Forum and targeted support and collaborations with Yukon festivals and markets
- Ongoing skills development for below-the-line positions

Strategic Direction: Consolidate Industry Development Efforts		
Actions	Outcome	Timeframe
Create the position of Industry Development Officer to design and deliver initiatives	<ul style="list-style-type: none"> • Yukon production companies and industry professionals have access to ongoing opportunities to develop their business skills • Storytellers enhance their creative skills, leading to more competitive projects • Yukon production companies build their business relationships and networks, and grow their business activity through increased investment and sales • Below-the-line industry professionals have ongoing opportunities to develop their skills and the pool of available crew expands 	<p>Year two, the position is approved and funded</p> <p>Year three and ongoing, the position is filled and events are organized and delivered</p>

7. Summary of Strategies, Actions, Outcomes and Timeframe for Implementation

Figure 6 provides a summary of the actions and outcomes for each strategic direction as well as a timeline for implementation.

Figure 6: Summary Table of Strategies, Actions and Timeframe for Implementation

Strategic Direction: Increase the Scale and Critical Mass of the Local Industry		
Action: Strengthen Production Companies		
Actions - Detail	Outcomes	Timeframe
Build producer business skills through specialized training	<ul style="list-style-type: none"> Yukon production companies take part in the Northern Canada Producer Accelerator Program 	Year one
Assess needs and ensure producer training for Indigenous and diverse producers as part of the Creative Potential Strategy roll-out	<ul style="list-style-type: none"> Yukon producers who are Indigenous or members of other diverse groups have access to high quality training opportunities to develop their producer skills 	Year two and ongoing
YMD Funding for producer travel and organized missions to build business networks	<ul style="list-style-type: none"> Yukon-based producers build their networking and business relationships through repeated participation in industry markets and festivals, are successful in promoting their work and attracting sales. 	Year two and ongoing
Strategic Direction: Increase the Scale and Critical Mass of the Local Industry		
Action: Boost Levels of Development and Production Activity		
Actions - Detail	Outcomes	Timeframe
Partner with a Canadian training institution to strengthen storytelling skills	<ul style="list-style-type: none"> Yukon production-ready dramatic web series, short films, features, etc. 	Year three
Allocate YMD Funds to develop and produce drama content	<ul style="list-style-type: none"> Yukon-led dramatic projects are developed and produced 	Year one and ongoing
Partnership to fund a dramatic web series	<ul style="list-style-type: none"> One Yukon-led dramatic web series is produced 	Year three
Encourage one Northern feature film production	<ul style="list-style-type: none"> Yukon Media Development hosts a Northern production forum in partnership with a Yukon festival or industry event in another province 	Year three
Fund the production of music videos	<ul style="list-style-type: none"> Yukon production companies are better able to sustain themselves through contracts to produce music videos 	Year one
Yukon Government procurement of commercial, corporate productions	<ul style="list-style-type: none"> Yukon production companies are better able to sustain themselves through contracts to produce commercials and corporate videos for the Yukon Government 	Year two and ongoing
Strategic Direction: Attract More Guest Productions to the Yukon		
Actions	Outcomes	Timeframe

Clarify Production Rebate to be competitive with other jurisdictions	<ul style="list-style-type: none"> The rebate program is clarified to be automatic, with information on amount of funding available through this program publicly available to producers Yukon Media Development is able to promote and provide sureties that attract guest productions in the Yukon 	Year two and ongoing
Market the Yukon as a production location	<ul style="list-style-type: none"> Yukon Media Development attracts one new guest production each year 	Year two and ongoing
Increase resources available through the production rebate	<ul style="list-style-type: none"> Resources in the rebate program are increased and the Yukon hosts a greater volume of production activity each year 	Year three and ongoing
Strategic Direction: Increase Workforce Capacity		
Action	Outcome	Timeframe
Partnerships to ensure ongoing training opportunities for above-the-line talent	<ul style="list-style-type: none"> Yukon above-the-line talent have access to training opportunities provided by leading Canadian training institutions Yukon producers develop and pitch more competitive projects Yukon productions attract higher levels of investment 	Year three and ongoing
Partnerships to ensure ongoing credentialed training opportunities for below-the-line positions.	<ul style="list-style-type: none"> Yukon below-the-line professionals have ongoing opportunities to develop their skills and qualify for union or guild membership 	Year three and ongoing
Strategic Direction: Improve the Production Infrastructure		
Action	Outcome	Timeframe
Participate in developing a partnership that leads to the creation of a shared production studio	<ul style="list-style-type: none"> A partnership is formed and a shared production facility is created Yukon-based productions have access to a production studio The production studio provides an added incentive to non-Yukon productions to shoot in Yukon 	Year three
Strategic Direction: Consolidate Industry Development Efforts		
Actions	Outcome	Timeframe
Create the position of Industry Development Officer to design and deliver initiatives	<ul style="list-style-type: none"> Yukon production companies and industry professionals have access to ongoing opportunities to develop their business skills Storytellers enhance their creative skills, leading to more competitive projects Yukon production companies build their business relationships and networks, and grow their business activity through increased investment and sales 	Year two, the position is approved and funded Year three and ongoing, the position is filled and events are organized and delivered

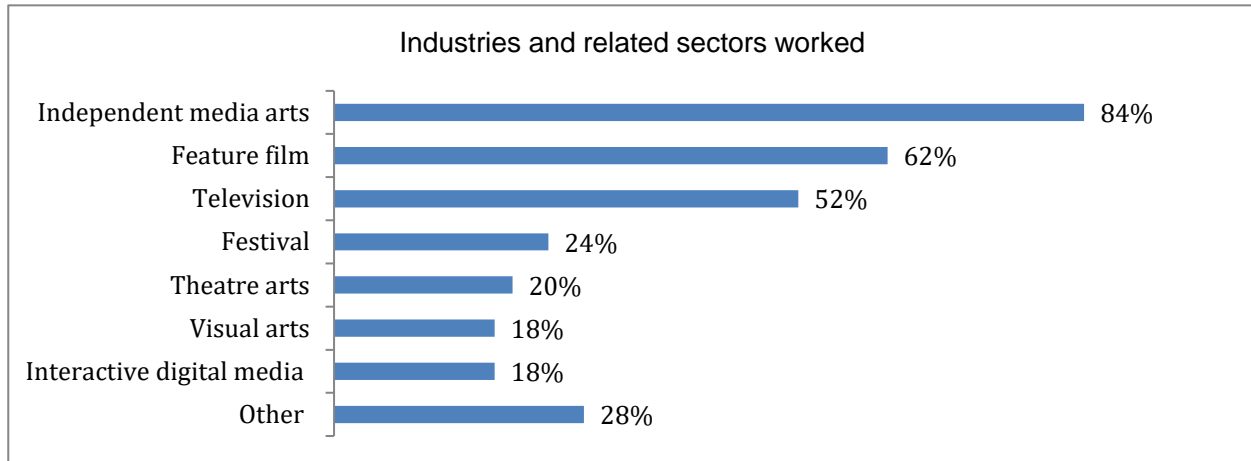
	<ul style="list-style-type: none">• Below-the-line industry professionals have ongoing opportunities to develop their skills and the pool of available crew expands	
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Annex I: Summary Analysis of Strengths, Challenges and Opportunities

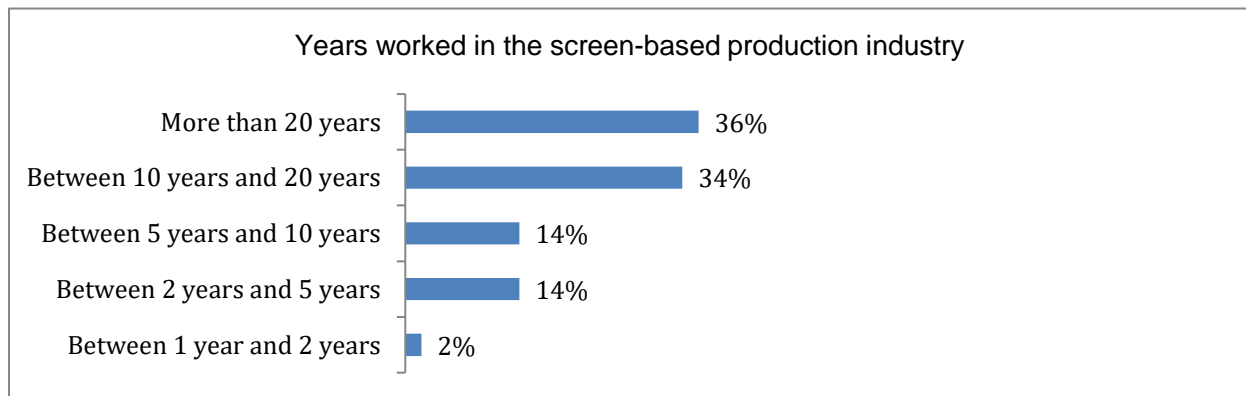
Yukon Strengths	Yukon Challenges
<ol style="list-style-type: none"> 1. <u>Elements of a Creative Ecosystem Exist</u> <ul style="list-style-type: none"> • Newly released creative and cultural industry strategy • Newly launched enhanced Production Rebate from Yukon Media Development • Talented creators • Rich Indigenous and northern culture and heritage • Creative organizations that nurture emerging talent • Flagship organizations that support business skills and relationships • Government procurement and commercial productions help sustain production companies 2. <u>Collaborative Creative Spaces</u> <ul style="list-style-type: none"> • Collaborative spaces support creation and innovation 3. <u>Yukon as a Destination for Location Production</u> <ul style="list-style-type: none"> • Opportunity to attract more guest productions • Opportunity to support ongoing skills development 	<ol style="list-style-type: none"> 1. <u>Lack of Production Capacity</u> <ul style="list-style-type: none"> • Not enough production activity • Not enough experienced production companies • Lack of dramatic productions • Production financing is a challenge • Need to develop business relationships and skills • More Indigenous and diverse stories 2. <u>Lack of Infrastructure and Small Workforce</u> <ul style="list-style-type: none"> • Too few training opportunities • Unions and guilds are not active in the Territory • Lack of production and post production facilities • Lack of Services • Small number of available crew and need for greater inclusiveness 3. <u>Lack of Sectoral Cohesion</u>
Wider Environment Opportunities	Wider Environment Challenges
<ol style="list-style-type: none"> 3. <u>Increased Business Opportunities</u> <ul style="list-style-type: none"> • Increased demand for Screen based content • New sales opportunities in Canada and abroad to online platforms • Record levels of foreign location production in Canada 4. <u>Funding Opportunities</u> <ul style="list-style-type: none"> • Attractive tax credits and rebates in other Canadian jurisdictions • Northern Incentive, Francophone Minority and Indigenous programs of the Canada Media Fund • Talent to Watch and Indigenous Programs of Telefilm Canada • Possibility for increased funding resulting from the modernization of the Broadcasting Act • New players providing new funding for training and professional development opportunities to Canadians 	<ol style="list-style-type: none"> 2. <u>Highly Competitive and Changing Environment</u> <ul style="list-style-type: none"> • Consolidation Amongst Canadian Broadcasters • Increased costs for producers • Theatrical transformation • Significant competition for location and service production

Annex II: Survey Results

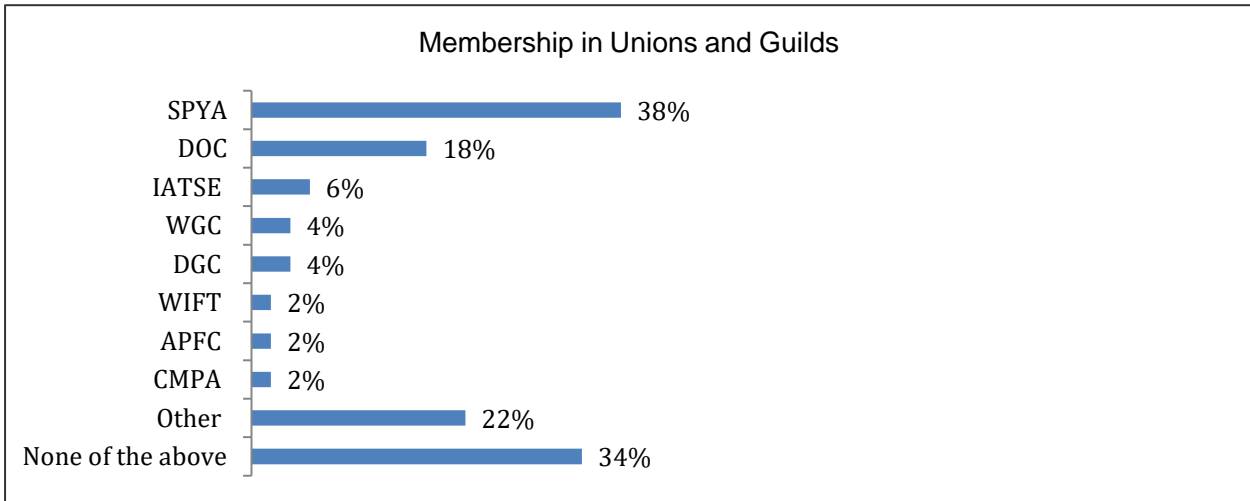
1. Respondents work in a range of creative industries. The majority of “other” responses specified that they produce commercial or corporate work. A few indicated they work in music production.



2. Respondents are very experienced, with most having worked in the screen-based production industry for at least 10 years.



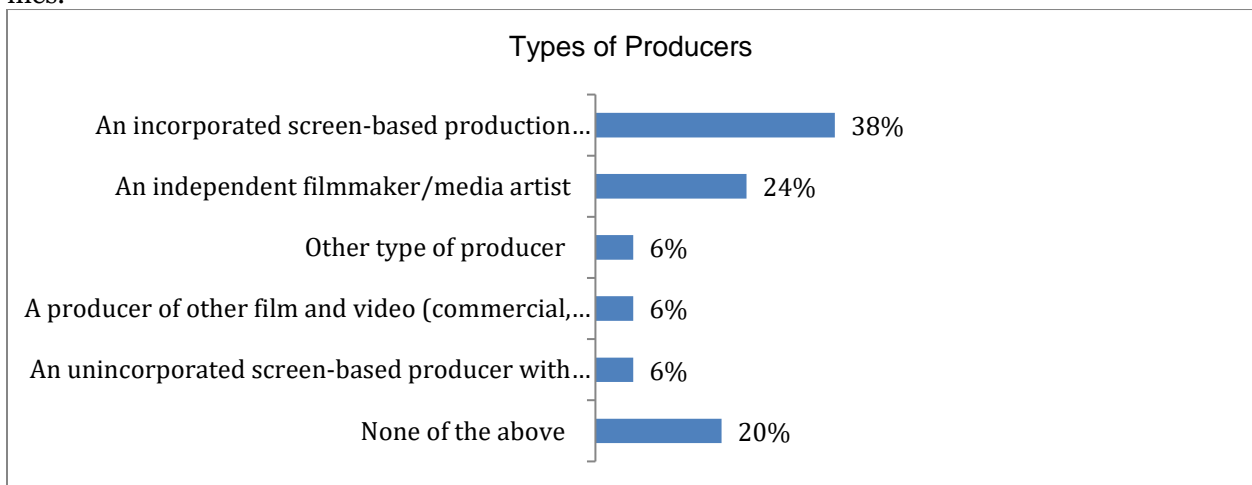
3. Respondents are members of an array of industry associations. However, very few are members of unions and guilds, such as IATSE, the DGC and WGC. The majority of “other” responses were for the Yukon Film Society.



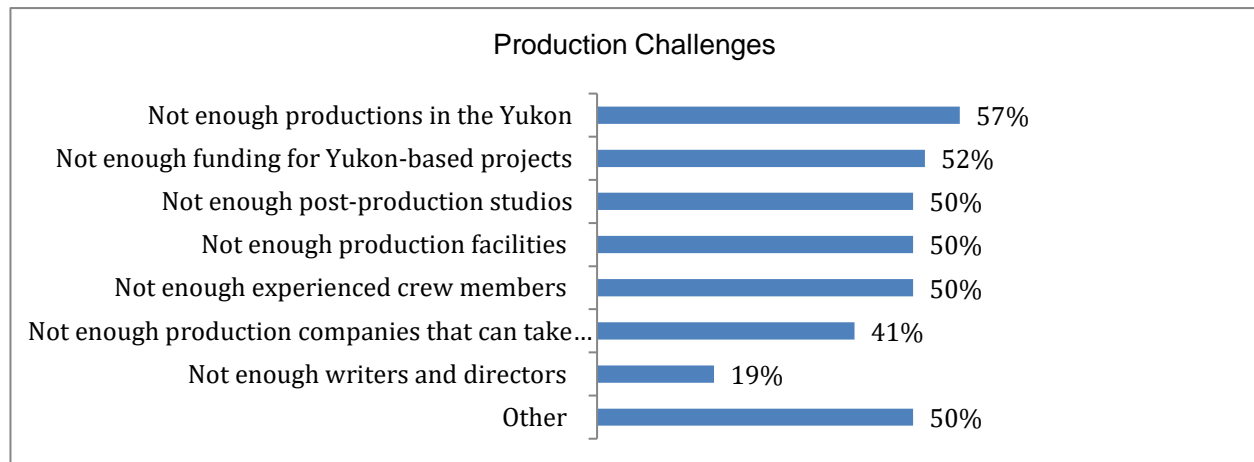
Legend:

- DOC (Documentary Organization of Canada)
- IATSE (International Alliance of Theatrical Stage Employees, Moving Picture Technicians, Artists and Allied Crafts)
- DGC (Directors Guild of Canada)
- WGC (Writers Guild of Canada)
- CMPA (Canadian Media Producers Association)
- APFC (Alliance des producteurs francophones du Canada)
- WIFT (Women in Film and Television)
- SCGC (Screen Composers Guild of Canada)

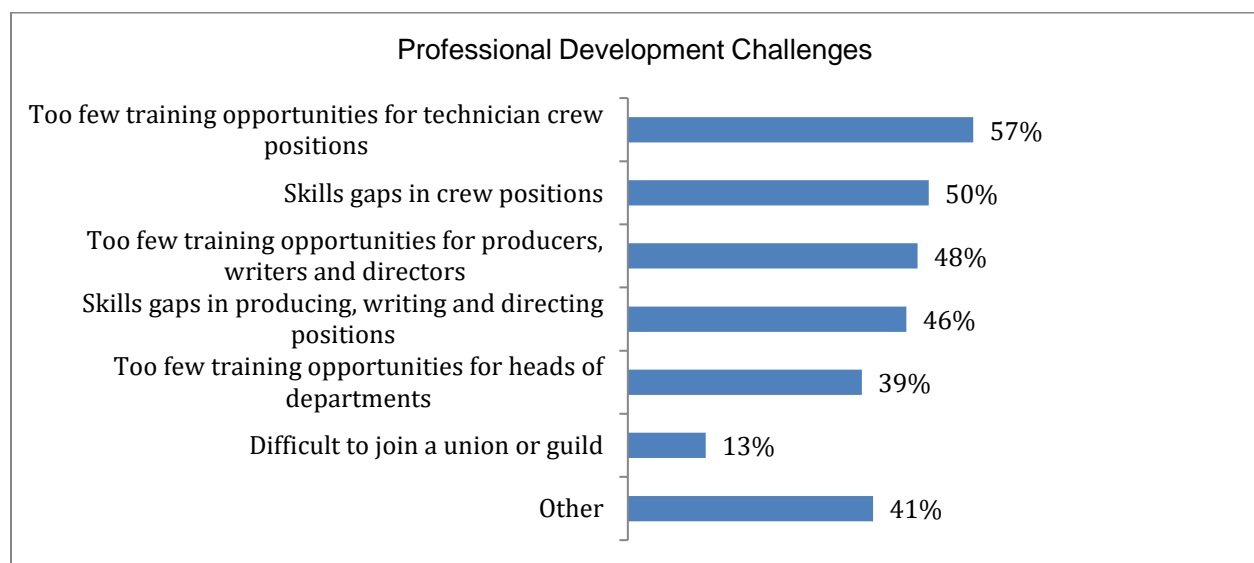
4. Less than half of respondents who said they are producers are incorporated as production companies.



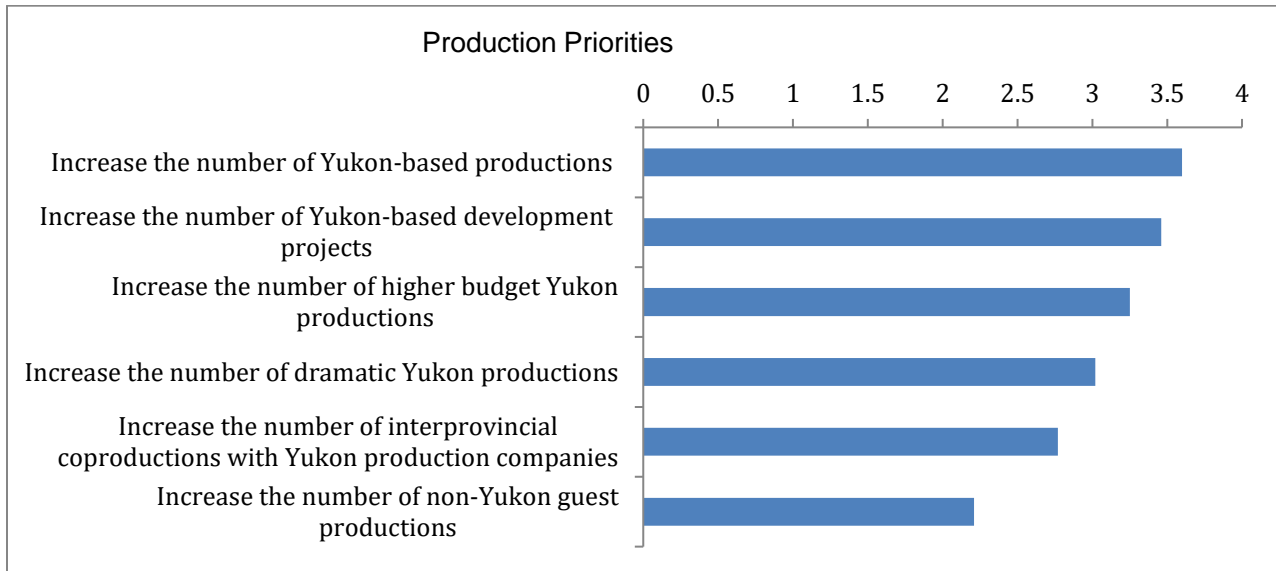
5. Respondents pointed to a number of production challenges. “Other” responses expanded on the skills gap and capacity issues in production companies. In particular, respondents pointed to a lack of production volume as negatively impacting their ability to access relevant on-the-job training. Respondents also pointed out the need to attract more non-Yukon productions and to support Indigenous production. Some mentioned that producers lack experience. The lack of a production studio and uncompetitive incentives were identified as barriers to production. Some pointed out the need for more support for projects that are not broadcaster oriented. These issues were said to be more problematic in remote locations.



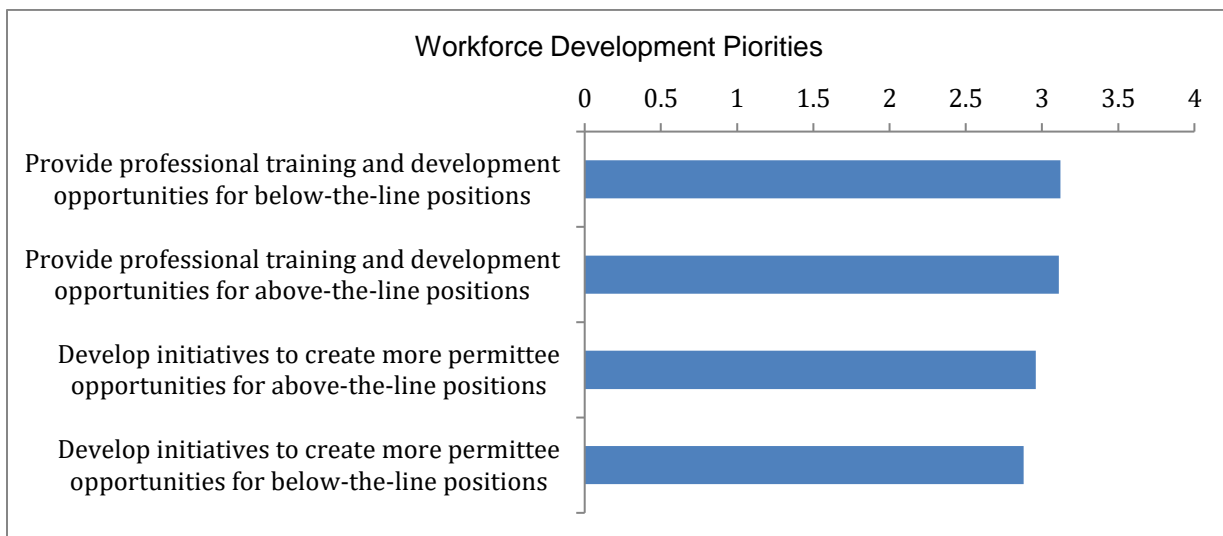
6. Respondents were of the view that there are many professional development challenges. “Other” responses included the need for culturally informed training opportunities, and more opportunities to do “high-level” work. It was pointed out that there seem to be a lot of above-the-line talent and too few crew. Respondents also indicated that there are too few writers in the Yukon and no opportunities to train as a show runner. There is a need to provide work experience for professionals in senior technical positions on crews and in key creative positions. Some pointed to the need to support training for software programming and for positions in game design.



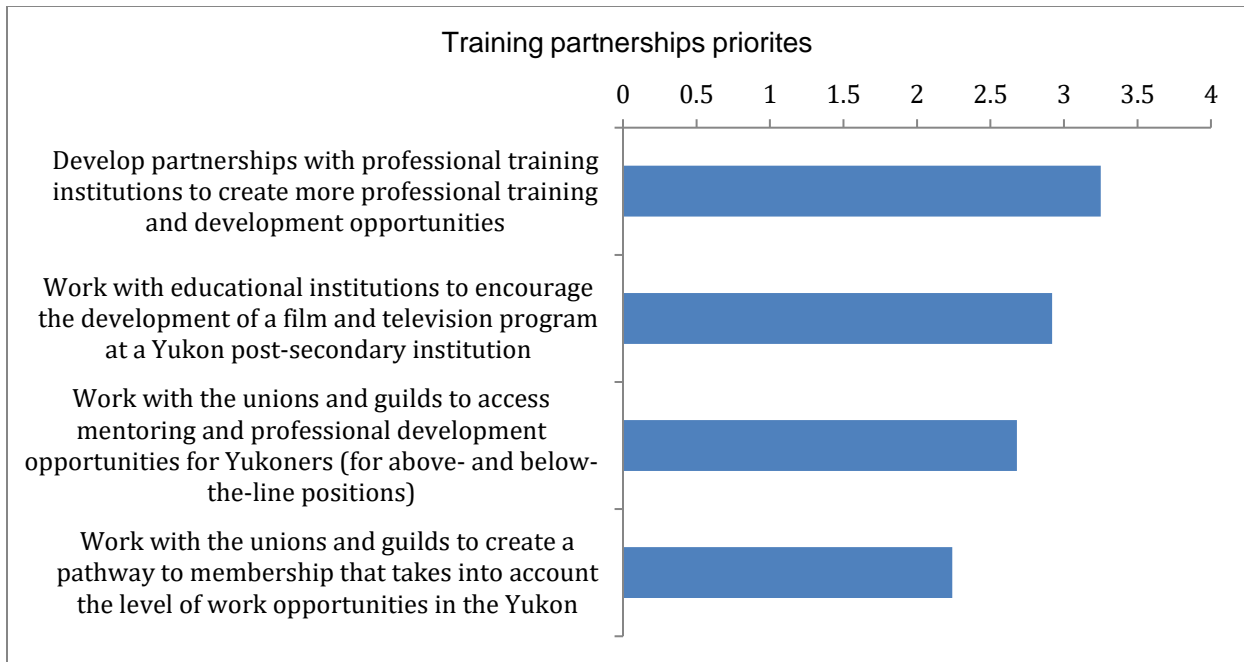
7. Amongst priorities for production, respondents ranked more Yukon-based productions and development project as their highest priorities, followed by higher budgets for Yukon productions. Amongst the “other” responses it was pointed out that Yukon producers need to build capacity. was to increase the number of Indigenous-led productions. Larger, non-Yukon productions were described as important training and work opportunities for Yukoners.



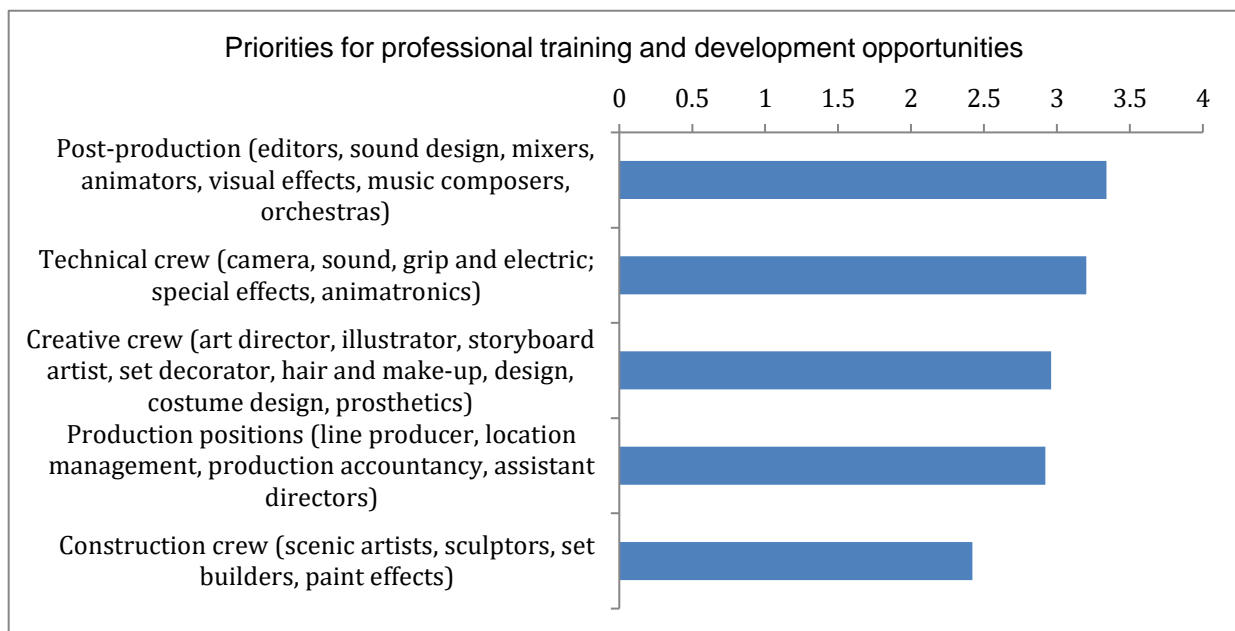
8. Respondents ranked all professional development and training opportunities highly. There were a number of respondents who indicated not being familiar with the term “permittee” which is used by the unions and guilds as a stepping stone toward full membership. Also mentioned was the need for more training opportunities for youth and Indigenous people.



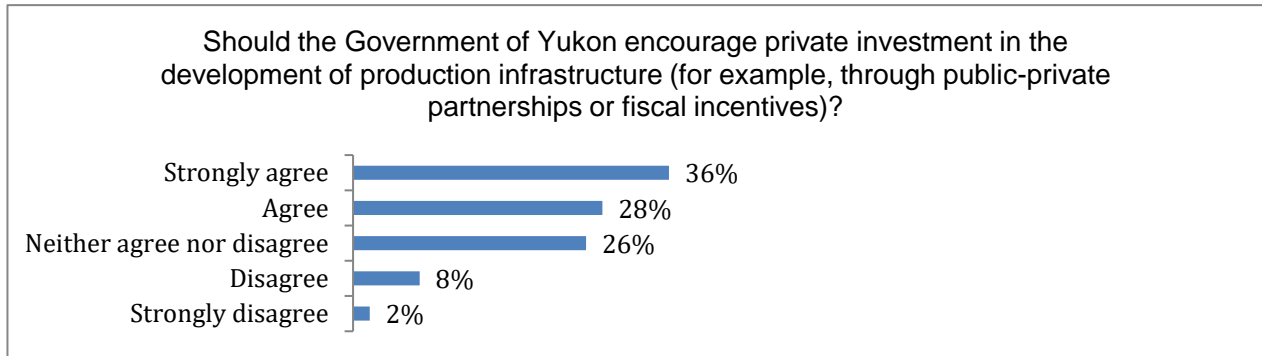
9. There was strong support amongst respondents to develop partnerships with professional training institutions. A few respondents suggested providing training opportunities in adjacent industries such as VR/XR and games technologies, as well as developing an interactive and media arts program at Yukon University. One respondent noted there are fewer skilled crew in Yukon to support drama production than there were in 2008.



10. Respondents ranked opportunities for training in post-production positions technical crew most highly.



11. A majority of respondents strongly agreed or agreed that the Yukon Government should encourage private investment in the development of production infrastructure. Respondents also pointed to examples like Yukonstruct and Northlight as good examples of an organization that provides workshops and creative spaces for artists and craft tradesmen. Any new production facilities should prioritize Yukon productions.



12. Amongst the training initiatives that respondents participated in, the following were said to have had the greatest impact: production experience, mentorship programs, workshops and longer-term training initiatives provided by universities and training institutions. Specifically mentioned were Yukon training initiatives, training provided by unions and guilds, that provided by Canadian training institutions, university programs, and other training initiatives provided by industry associations and festivals. Overall, training took place more often in the Yukon (38% of respondents), while a sizable proportion took place outside the Yukon (30% of respondents).

Training initiatives referred to included:

- Production experience: long term production projects, coproducing with the NFB
- Yukon training initiative: SPYA, Mise en Scene program, The Yukonic web series, YFS workshop on new media production, Yukon government on the job training incentives
- Other industry training initiatives: CMPA producer training, Reelword Emerging 20 program, Indigenous Filmmaker Fellowship at the Whistler Film Festival, mentorship at the Vancouver International Film Festival, the Below Zero documentary film mentorship and pitch form in Tromso Norway, a mentorship at the Banff World Television Festival, DOC BC initiative, Baff Adventure Filmmakers’ Workshop
- Unions and guilds training: DGC directing workshops
- Canadian training Institutions: the Summer Institute for Film and TV in Ottawa, the NSI programs Indigidocs, Total Television Program and Features First
- University programs: UBC Film Production program, Humber College Film & Television Production Diploma

Annex III: List of Stakeholders Interviewed

Hailey Birney, Extreme Productions

Gabriel Bullen, Bullen Brothers Films

Thomas Bullen, Bullen Brothers Films

Andrew Connors, Yukon Film Society and Jack Leg Films

Suzanne Crocker, Drift Productions Inc.

Simon D'Amours, Simon D'Amours Productions

Teresa Earle, Sagafish Media Inc.

Max Fraser, Hootalinqua Motion Pictures Inc.

Mike Gravitis, Manager, Community TV, Northwestel

Neil MacDonald, While Hole Productions

Colin MacKenzie, Showshoot Productions

Naomi Mark, Midnight Light Media Inc.

Iris Merritt, Yukon Media Development, Government of Yukon

Kelly Milner, Shot in the Dark Film Productions Inc.

Marty O'Brien, Midnight Light Media Inc.

Dan Sokolowski, Dawson City International Short Film Festival

Shirley Veracrucse, BC and Yukon Studio, National Film Board

Suki Wellman, Tourism and Culture, Government of Yukon

Andrew Williamson, Cedar Island Films Inc.

Shaunoh Wilson, The Solidary Union North

Annex IV: Profile of Production in the Yukon

1. Production Trends 2016-2017 to 2020-2021

1.1 Overall Production Trend

It is estimated that in the years from 2016-2017 to 2020-2021, the screen-based production sector expended \$25,843,825 in production costs in the Yukon Territory. This included non-Yukon based productions shooting in the Yukon, which expended \$8,236,222 in the Yukon, and \$17,607,603 in production expenditures by non-Yukon-based productions and commercial productions. Overall, these expenditures created an estimated 316 full-time equivalent (FTE) jobs.⁴⁴

There are approximately 30 screen-based production companies operating in Whitehorse.⁴⁵ The vast majority are sole proprietorships or micro-companies (employing fewer than 5 people on a full-time basis). Only a few are incorporated as commercial companies.⁴⁶ Many work as independent filmmakers.

There are a number of seasoned production companies in the territory, i.e., those that have been in business for several years or more and have significant productions to their credit in a range of genres.

Original Content Production

Yukon-based production companies produced a total of 28 productions between 2016 and 2021 funded through the Yukon Film Production Fund. These productions had total budgets of \$13,134,107, of which, \$8,236,222 (63%) was expended in the Yukon.⁴⁷

In terms of production genres, by far the most common production genre for domestic content is documentary. The Canada Media Fund provides data on the genres of funded projects. The Fund supported twenty documentary projects, 2 drama projects and 2 children's and youth projects from 2016-2017 to 2020-2021.

Genres of CMF Funded Production Projects, from 2016-2017 to 2020-2021

	# Projects	Total Commitments
Documentary	20	\$2,447,254
Drama	2	\$212,227
Children's & Youth	2	\$350,000
Total	24	\$3,009,481

Source: Canada Media Fund

⁴⁴ The number of FTEs was calculated based on the estimated annual industry salary of \$81,700 in 2017, as reported in *Economic Impact Analysis of the Media Production Industry in Yukon*, Op. Cit.

⁴⁵ Source: SPYA.

⁴⁶ *Economic Impact Analysis of the Media Production Industry in Yukon*, Op. Cit.

⁴⁷ Source: Yukon Media Development.

Yukon producers create content in English and French. In the years from 2016-2017 to 2020-2021, sixteen Yukon projects were produced in English, and 8 were produced in French. There were no Yukon-based Indigenous language projects.

Language of CMF Funded Production Projects, from 2016-2017 to 2020-2021

	# Projects	Total Commitments
English-language	16	\$2,159,878
French-language	8	\$849,603

Source: Canada Media Fund

Commercial, Corporate and Music Videos Production

Commercial video content production in the Yukon contributes to the sustainability of Yukon-based production companies. Production companies may produce commercial advertisements, corporate work and music videos.

Commercial production has in the past generated significant production activity. According to the study of the economic impact of the Yukon screen-based industry undertaken in 2018, commercial production doubled from 2015 to 2017, increasing from \$527K to \$1,115K. This included the production of television commercials as well as other screen media content not necessarily eligible for support from Yukon Media Development. For example, in 2018 Sequoia Content Ltd. undertook production of a television commercial for BMW.⁴⁸

The Yukon Tourism department of the YT government is an important commissioner of commercial productions each year, contributing to the sustainability of Yukon production companies. On average, Yukon Tourism commissions between \$350,000 and \$500,000 of commercial content annually (i.e., video content, still photography, written content, etc.), for which 85-90% of spending occurs in Yukon. Yukon Tourism has also produced a small number of its own spots using local crew.⁴⁹

Location and Services Production

Many production companies provide a range of production services, including production management, location shooting, casting, equipment rental and post-production services.⁵⁰

Location production by non-Yukon companies accounts for a significant volume of production activity each year. The Yukon Film Location Incentive provides a production rebate to non-Yukon based production companies for Yukon production expenditures and Yukon labour. In the period from 2016-2017 to 2020-2021, the Incentive supported 16 projects with rebates totalling \$4,168,322. These rebates attracted a total of \$17,607,603 in production spending in the Yukon. Each dollar of rebate leveraged an additional \$4.25 in local production spending.

48 “Spotlight on Exhibitor Yukon Media Development: FOCUS talks to Iris Merritt, manager of Yukon Media Development, Government of Yukon, Canada,” *The Location Guide*, 2018.

49 *Economic Impact Analysis of the Media Production Industry in Yukon*, Op. Cit.

50 Source: SPYA.

Yukon Film Location Incentive, 2016-2017 to 2020-2021

	Number of Projects	Total Amount of Rebate	Total Yukon Spend
2020-2021	2	\$523,500	\$2,831,185
2019-2020	2	\$1,138,750	\$2,786,969
2018-2019	4	\$1,119,000	\$4,752,660
2017-2018	4	\$635,350	\$4,871,906
2016-2017	7	\$751,722	\$2,364,883
Total	19	\$4,168,322	\$17,607,603

Source: Yukon Media Development

One multi-season television program, *Gold Rush* produced by UK production company Raw TV, is responsible for the lion's share of Yukon Location Incentive Fund rebates each year. Between 2016-2017 and 2020-2021, this series accounted for 87% of the total amount of rebates provided to productions.

Economic Impact of Production

It is estimated that in the years from 2016-2017 to 2020-2021, the screen-based production sector expended \$25,843,825 in production costs in the Yukon Territory. This included non-Yukon based productions shooting in the Yukon, which expended \$8,236,222 in the Yukon, and \$17,607,603 in production expenditures by non-Yukon-based productions and commercial productions. Overall, these expenditures created an estimated 316 full-time equivalent (FTE) jobs.⁵¹

Productions Funded through the programs of the YMD, 2016-2017 to 2020-2021

	Number	Yukon Spend	Total Budget
YFPF	28	\$ 8,236,222	\$ 13,134,107
YLIF	16	\$ 17,607,603	\$ 68,658,901
Total	44	\$ 25,843,825	\$ 81,793,008

Source: Yukon Media Development

2. Financing Sources for Yukon Original Content Productions

An analysis of the financial structures of Yukon productions supported by the YMF reveals a number of trends with respect to how Yukon producers are financing their productions.

⁵¹ The number of FTEs was calculated based on the estimated annual industry salary of \$81,700 in 2017, as reported in *Economic Impact Analysis of the Media Production Industry in Yukon*, Op. Cit.

2.1 The Canada Media Fund, Yukon Media Development, and Telefilm Canada are Key Sources of Production Funding

The Canada Media Fund is the single most important funder of Yukon production, primarily through its Northern Incentive Program and its Francophone Minority Program. The Canada Media Fund accounted for 24% of all financing in Yukon-based productions funded by the YMD in the years from 2016-2017 to 2020-2021.⁵²

From 2016-2017 to 2020-2021, the Canada Media Fund supported 24 projects with \$3,009,481 in production financing.⁵³ For its part, Telefilm Canada provided a total of \$1,007,500 in financing to 4 projects.⁵⁴

Yukon Media Development is the second most important funder, accounting for 19% of all financing in the five-year period. This is significantly higher than other provincial/territorial funders, who accounted for 4% nationally of all funding to Canadian productions, in the years from 2015-2016 to 2019-2020.⁵⁵

Between the years from 2016-2017 to 2020-2021, the Yukon Film Production Fund supported a total of 28 projects with \$2,417,611 in production financing. Yukon-based production expenditures in Yukon total \$8,236,222. This means that every dollar in production financing provided by the YMD leveraged \$3.00 in additional local production spending.⁵⁶ Most projects also obtained federal funding.

For its part, Telefilm Canada provided just over \$1 million in financing to four Yukon based feature film projects in the same five-year period. Its contributions to projects were highest on a per-project basis.

The table below provides an analysis of funding to Yukon productions by major funder.

Funded Canadian Content Projects Produced in the Yukon from 2016-2017 to 2020-2021

Funder	Number of Productions	Total Amount of Funding	Average Amount of Funding
Canada Media Fund	24	\$ 3,009,481	\$ 125,395
Yukon Production Fund	28	\$ 2,417,611	\$ 86,343
Telefilm Canada	4	\$ 1,077,500	\$ 269,375

Sources: Canada Media Fund, Yukon Media Development, Telefilm Canada.

Analysis of Financial Structures of Yukon Productions

Data obtained from the Yukon Media Fund for productions that it funded in the years from 2016-2017 to 2020-2021, provide additional information on how Yukon producers are financing their projects. Canadian broadcasters represented 11% of all funding in the period. Public broadcasters provided 7% of overall funding, while private broadcasters accounted for 4% overall. When looked at nationally, we

⁵² Source: Yukon Media Development.

⁵³ Canada Media Fund website: <https://cmf-fmc.ca/funded-projects/>. Two productions received separate project funding through two programs: the Performance Envelope Program and the Northern Incentive Program.

⁵⁴ Telefilm Canada website: <https://telefilm.ca/en/transparency/proactive-disclosure/grant-contribution>. One production received funding through two separate production project applications.

⁵⁵ *Profile 2020: An Economic Report on the Screen-based Media Production Industry in Canada*, Op. Cit., page 28.

⁵⁶ Estimate based on funding allocated by Yukon Production Fund, at a rate of 30%.

note that private broadcasters accounted for 14% of all funding in the years 2015-2016 to 2019-2020 in all Canadian productions, while public broadcasters contributed 10% of all funding in the same period.⁵⁷

The French-language public broadcasters TFO and Radio Canada contributed the greatest amount of funding to Yukon productions, accounting for 3% and 2% of all funding, respectively. TV5, UnisTV, Knowledge Network and Explora also provided funding. Private broadcasters that contributed to Yukon productions were Blue Ant Media, Crave TV and Northwestel. Blue Ant Media accounted for 2% of all funding, while Crave TV and Northwestel each respectively accounted for 1% of all funding.⁵⁸

It is interesting to note that producers contributed 8% of all funding to their projects. This is a higher proportion than in Canada overall, where producer contributions accounted for 6% of all funding in the years from 2015-2016 to 2019-2020.⁵⁹

Federal tax credits are also an important source of funding, accounting for 6% of all funding. However, this is lower than can be seen nationally, where federal tax credits have accounted for 10% of all funding in the years from 2015-2016 to 2019-2020.⁶⁰

Interprovincial coproductions provide access to provincial tax credits and direct funding from provincial governments. In the years 2016-2017 to 2020-2021, producers accessed tax credits from Manitoba, Ontario and Quebec. Direct funding was obtained from Ontario, Quebec and the NWT. Could there be other reasons they accessed this funding? Do we know what the co-pros were? Are these “service” productions?

International pre-sales to distributors and broadcasters outside Canada yielded an additional 2% of all financing.

The following table provides an analysis of all sources of financing for Yukon productions funded from 2016-2017 to 2020-2021.

Analysis of Financing for Yukon Productions Funded by Yukon Media Development, 2016-2017 to 2020-2021

Funding Source	Percentage
Canada Media Fund	24%
YMF	19%
Canadian Broadcasters	11%
Producers	8%
Other (undisclosed)	7%
Federal Tax Credits	6%
Telefilm Canada	5%
Sponsorships	5%
Provincial Tax Credits	4%
Provincial/Territorial Funds	3%
National Film Board	3%
Canadian Distributors	2%
International Distributors	1%

⁵⁷ Profile 2020: An Economic Report on the Screen-based Media Production Industry in Canada, Op. Cit., page 28.

⁵⁸ Source : Yukon Media Development.

⁵⁹ Profile 2020: An Economic Report on the Screen-based Media Production Industry in Canada, Op. Cit., page 28.

⁶⁰ Profile 2020: An Economic Report on the Screen-based Media Production Industry in Canada, Op. Cit., page 28.

Rogers Documentary Fund	1%
International Broadcasters	1%
Total	100%

Source: Yukon Media Development

3. The Wider Creative Ecosystem

As generally understood, creative industries are those that have their origin in individual creativity, skill and talent and which have a potential for wealth and job creation through the generation and exploitation of intellectual property. The creative industries are the most intensive in creative capital, resulting from a strong interaction between the arts and commerce, involving the production and exploitation of original intellectual property, or “content.” As noted in *Creative Potential*, the creative and cultural industries play a vital role in the lives of Yukoners.

The creative ecosystem is characterized by its broad and diverse scope, made up of multiple creative industries: film and television, interactive media, the arts, architecture and design, fashion and advertising.

At the centre of the ecosystem are talented individuals – artists, writers, designers, filmmakers, craftspeople and other creators, whose original ideas provide the foundation for the conception, production, distribution and dissemination of creative content and products. These creators work within companies or as self-employed workers. Around this creative core are the different creative industries: television, film, multimedia and game development, advertising, sound recording, music publishing, book publishing, fashion, design, architecture, crafts and visual arts, as well as performing arts and circus. All of the industries within the creative industries ecosystem can play a significant role in supporting film and television production.

Creative industries share several characteristics: they are very labour-intensive, with a high proportion of self-employed workers/freelancers, and they are high-risk industries where success is very difficult to predict. They are a major employer of skilled labour, because they are part of the knowledge economy. Locally, they also have an important role to play in social cohesion. Their influence extends beyond economic spinoffs, to enhancing the local quality of life, and contributing to the territory’s international image, positively impacting the region’s attractiveness to tourists, workers and investors.

On the periphery of the creative industries are the organizations that support the ecosystem: educational and training institutions, creative work spaces, incubators and accelerators, funding agencies and investors, associations and other sector organizations, distributors and broadcasters, venues, festivals, conferences and other events.

One of the defining features of the creative industries ecosystem is the networking and interaction that takes place between creators and businesses, and between creative sectors. In addition to this interaction, each creative industry has its own dynamics.