



*A Production, Infrastructure
Capacity and Development
Analysis for the State of Maine*

Final Report to the State of Maine's
Department of Economic and
Community Development
by Olsberg•SPI

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OLSBERG•SPI

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GLOSSARY OF KEY TERMS

- **Above-the-line (“ATL”) cast and crew** – refers to roles responsible for the creative development, production, and direction of screen content (e.g. director, screenwriter, producer, principal cast)
- **Below-the-line (“BTL”) crew** – refers to technical roles that directly contribute to the physical production of the screen content (e.g. heads of department, line producer, cinematographer, camera operator, gaffer, grip)
- **Excess current capacity** – where the required resource (be it crew, equipment and/or production/post facilities) is readily available; where supply is outstripping demand. This could be due to demand being met by multiple providers and sources (such as a broad range of camera operators or multiple equipment rental facilities) and/or there is little current demand for that resource at this time
 - **No current capacity** – where there is no existing availability as that pool of resources (be it crew, equipment and/or production/post facilities) is entirely in use on existing productions or does not exist at this time
 - **Some immediate capacity available** – where there is limited availability of the required resource (be it crew, equipment and/or production/post facilities) as it is already partially in use on current productions or is a developing resource that does not have a larger scope of availability at this time
- **Screen production** – defined in this Study as primarily on the creation of film, television, commercials, and photo shoots

1. EXECUTIVE SUMMARY

1.1. Study Overview

In 2023, international screen sector consultancy Olsberg•SPI (“SPI”) was commissioned by the State of Maine’s Department of Economic and Community Development (“DECD”), on behalf of the Maine Film Office (“MFO”), to undertake an independent and in-depth analysis of the State of Maine’s screen production sector (the “Study”).

This analysis specifically looked at the Maine screen production sector’s current strengths, weaknesses, constraints, and capacity gaps in key areas of production,¹ as well as recommending opportunities and actions for future growth. This has been defined as a Production Infrastructure, Capacity, and Development Analysis (“PICDA”).

The findings and recommendations will benefit a range of stakeholders, including:

- **State government and policymakers** looking to develop policies and interventions that address capacity-related issues, including interventions to improve production infrastructure and services, as well as address skill gaps
- **Active and potential professionals** working in the Maine screen sector, enabling them to better understand the current and potential opportunities
- **Training and education providers**, enabling them to have an improved understanding of the key capacity gaps and skills shortages in state, including how they can design their programs to ensure that participants gain valuable and relevant skills.

1.2. Wider Context of the Study

This Study was undertaken against the backdrop of an extended worldwide surge in screen production. This has been chiefly driven by aggressive investment strategies of major Hollywood studios and streaming platforms to meet unprecedented consumer demand for screen content.

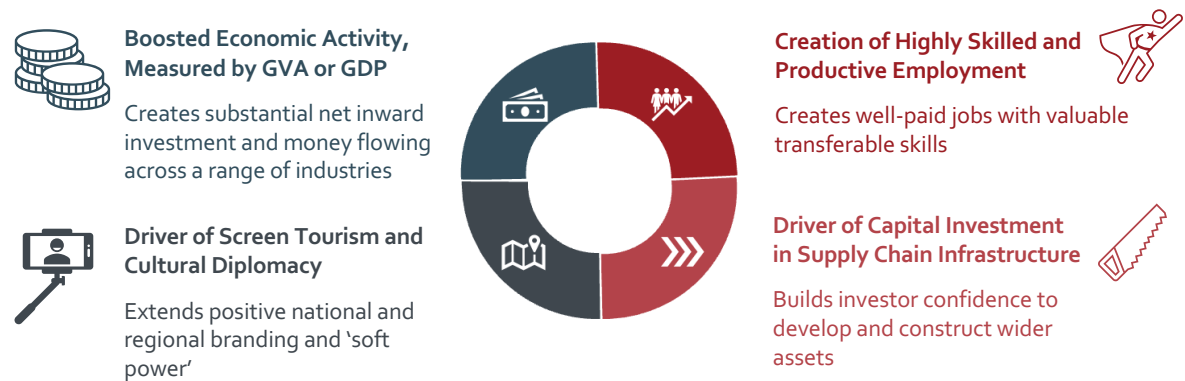
While the screen sector more recently faces some economic and industrial challenges – including some reduction in expenditure by content investors and, at time of writing, labor action in the US – the broader global entertainment and media space remains robust. Total global entertainment and media revenue rose 5.4% in 2022, to US\$2.32 trillion. Revenues in the broader global entertainment and media space are forecast to continue increasing, albeit at a slower rate of growth than between 2018 and 2022.²

Screen production provides a wide range of benefits and strategic value, across economic, social, and cultural outcomes (see Figure 1). A robust screen industry not only enhances economic activity, but also facilitates significant net inward investment across diverse industries. It provides high-paying jobs, including opportunities for well-paid work from adjacent sectors, such as manufacturing, logistics, and hospitality. This is especially key for economies looking to move away from declining ‘sunset’ industries. Further, it helps establish positive national and regional branding, and entices tourists to visit locations seen on screen. Screen production also provides a powerful tool for storytelling.

¹ Covering screen production facilities, equipment and services, as well as professional BTL technical crew and ATL cast and crew

² *Perspectives from the Global Entertainment & Media Outlook 2023–2027*. PwC, 21st June 2023. Accessible at: <https://www.pwc.com/gx/en/industries/entertainment-media/outlook/downloads/PwC-GEMO-2023-PDF.pdf>

Figure 1 – The Benefits of a Healthy Screen Sector



The surge in global screen production has caused significant capacity shortages in both established and emerging markets, across workforce and physical production infrastructure. To meet high demand, producers are grappling with issues such as procuring adequate crew, securing vendors, and ensuring sufficient infrastructure to support production levels. This has meant looking further afield, away from customary production hubs, providing new opportunities for smaller emerging markets, like Maine.

To tap into the significant opportunities, policymakers worldwide continue to implement measures to develop their screen production sectors. Such measures include funding training programs, marketing campaigns and development funding. Among these, film production incentives are particularly well-established tools for attracting productions, which in turn provide work and training opportunities to local cast, crew, and vendors. Maine is one of 37 US states with an automatic incentive (i.e. one driven by eligible expenditure rather than selective considerations) in place.

1.3. Our Approach

This Study is based on a mixed-method approach, drawing from both primary and secondary research over a five-month period, from January to May 2023. This included:

- Conducting an **extensive review of existing sector research and related policy reports**, including data collected by the state, membership organizations, and press
- Conducting **29 one-on-one confidential consultations** with stakeholders across industry, training, and policymaking, both within Maine and internationally
- **On-the-ground fieldwork**, visiting key production locations and facilities across Maine, to gain first hand insights into the state's current production infrastructure and activity
- Conducting an **online survey of 120 professionals** who are currently or have recently worked screen production across Maine, testing current capacity and suitability of 80+ workforce roles, facilities, equipment and services
- **Ongoing meetings with the DECD and MFO** to discuss findings as they emerged.

Section 2.2 provides further details on the approach taken.

1.4. Key Findings

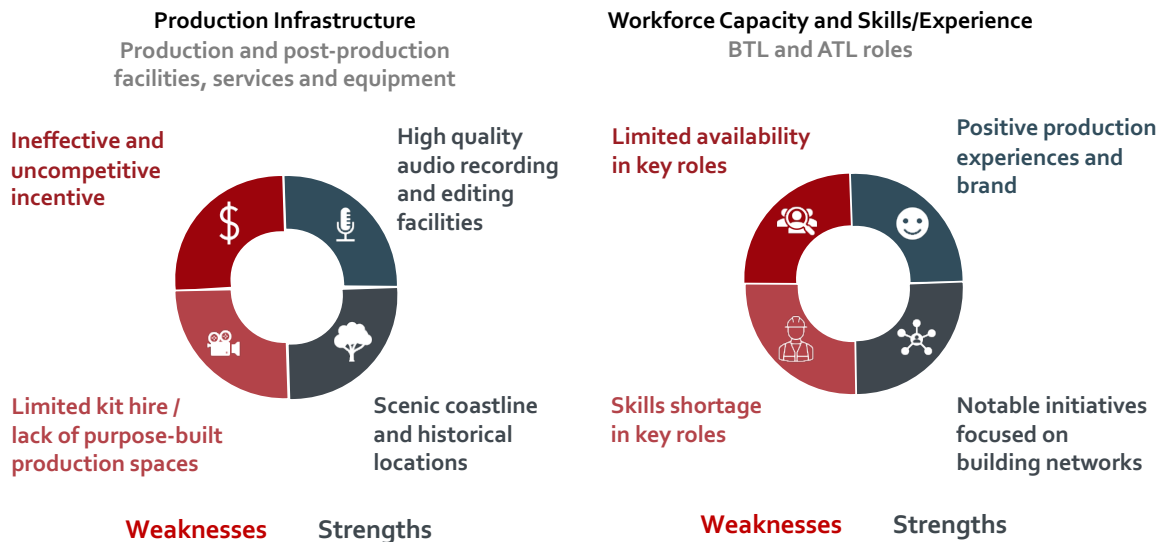
1.4.1. Overview

The Study found notable strengths and weaknesses in the capacity and suitability of Maine's existing workforce and infrastructure for multiple and increased levels of screen production.

Clear strengths included the state's locations offer, audio recording and editing facilities, positive production experiences, and initiatives looking to address industry connection issues.

Notable weaknesses included an ineffective and uncompetitive production incentive, unable to effectively drive inward and in-state production activity; insufficient production facilities and equipment hire services; industry connection issues; and critical production and workforce capacity issues. These demand supportive action to expand and strengthen the workforce pool and infrastructure base and ensure the state can move towards becoming more competitive.

Figure 2 – Summary of the Strengths and Weaknesses of Maine’s Production Infrastructure and Workforce



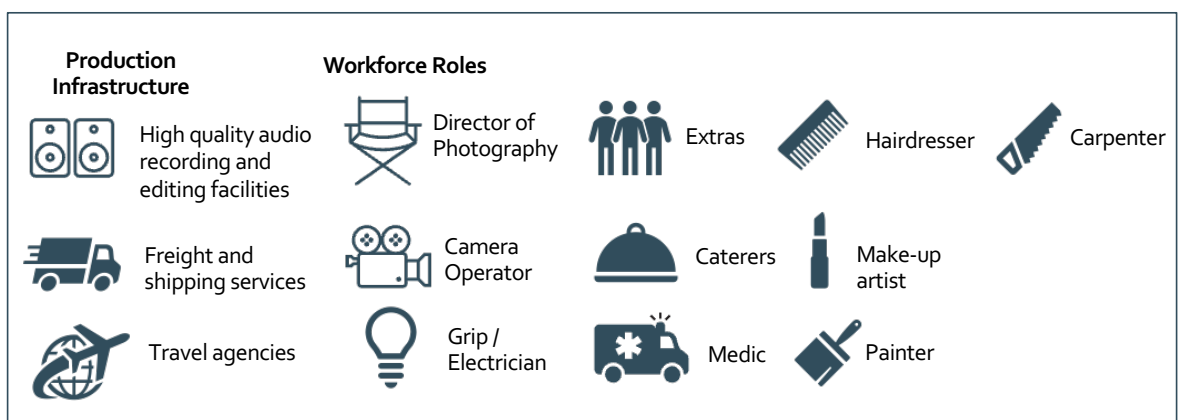
1.4.2. Strengths

- **Maine’s screen production sector is recognized as a valuable potential economic development opportunity** by the DECD and others, focusing on job creation and developing screen tourism — especially during the out of summer season ‘shoulder months’
- **Maine has a strong offer regarding audio recording and editing facilities**, where specialist sound engineers are available and able to provide high-quality dubbing in post-production. This reflects Maine’s wider heritage in music production. Maine also has good availability of hotels in the out of season winter months (Figure 3)
- **Maine has key strengths within the construction and hair/make-up departments** (e.g. painter, grip/electrician, carpenter, hairdresser), both in having professionals with immediate capacity to work on multiple productions, but also with experience on large-scale productions (Figure 3)
- **Maine has a wealth of available and experienced camera operators and extras**, roles largely filled with current students wishing to gain practical experience
- **COVID-19 lockdown measures attracted and drew back key talent to Maine**, chiefly in ATL roles, seeking a lifestyle change. Many of the returning “boomerangers” have remained, with some working on in-state productions. This has helped combat some of the skills shortages caused by the brain drain of the past decade – though there remains a net exit of key talent to other states and jurisdictions
- **Maine has a handful of experienced producers and directors who are passionate about growing the industry**, though this is from a small group who are often engaged with out of state projects. Further major talent also have second homes in Maine
- **Producers and content creators, both in and out of state, are motivated by strong positive experiences** while shooting in Maine, due to an enthusiastic, adaptive and supportive “can-do” local industry community. This is a strong pull for out of state

productions to return in the future, especially if other markets are not able to provide the same level of production support

- **Maine has a suite of trusted freight and shipping services, as well as connected travel agencies,** due to its rural locations and need to bring in workforce and equipment to meet production demands
- **Maine is a well-known state, with a strong existing brand.** A key part of Maine’s brand are its landscapes and locations, and rich culinary and literary heritage. Many of these have been largely untapped, offering an attractive fresh look and original stories for film-makers
- **Maine has a strong sense of industry community** through the efforts of organizations such as the MFO, Maine Film Association (MFA), Maine International Film Festival, Maine Outdoor Film Festival, and Maine Student Film and Video Festival, connecting and showcasing in-state productions to audiences.

Figure 3 – Summary of Key Strengths of Maine’s Infrastructure and Workforce Offer



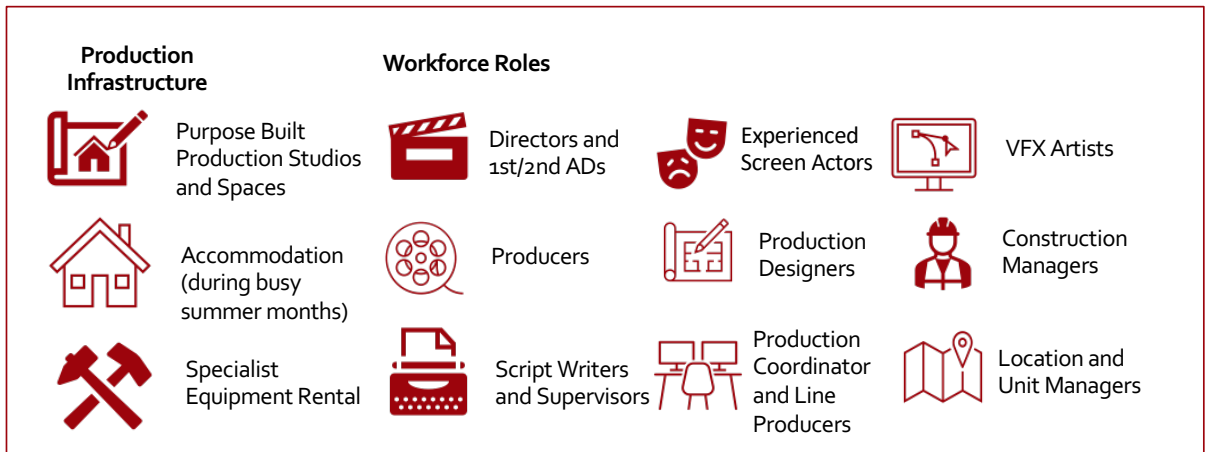
1.4.3. Weaknesses

- **Maine currently has an ineffective and uncompetitive production incentive,** which falls short both in attracting out of state productions and developing Maine’s domestic sector. A recent state review criticized the incentive’s lack of visibility and functionality, particularly in bridging financing gaps for in-state projects
- **Maine has notable production infrastructure capacity issues across critical production facilities, equipment, and services** (Figure 4). These need to be addressed in order to accommodate increased levels of screen production. The lack of specialist equipment rentals necessitates sourcing from out of state, resulting in additional fees and transportation time. Further, the absence of adequate studio space is limiting the state's offerings and opportunities to retain business. While other markets have seen the conversion of warehouses or other industrial spaces, short leases and competition from other sectors (like food and beverage) is discouraging landlords from retrofitting for screen content creation. This is exacerbated by lack of consistent production demand for such a facility
- **Maine has significant capacity and skills shortage issues across key workforce roles.** These are particularly in roles that require high levels of experience and specialized skills and knowledge, such as producers, directors, assistant directors, VFX artists and experienced screen actors (Figure 4)
- **Maine faces a persistent problem of talent leaving the state** due to limited and inconsistent work opportunities – the “Maine Brain Drain”. This further compounds existing shortage of qualified crew, especially in BTL roles and essential technical and interpersonal skillsets required for increased production levels. A more competitive

incentive that ensures a consistent work pipeline would offer valuable training opportunities for local crew and help retain talent

- **Maine is a rural state, with a largely dispersed and transient screen sector**, with lack of a formal hub and creative co-working spaces. This has meant there is not a critical mass to effectively attract and host more and multiple screen productions
- **Maine faces accommodation shortages during the tourist summer season when filming is mostly focused**. This means higher costs for spring and summer shoots.

Figure 4 – Summary of Key Weaknesses of Maine’s Infrastructure and Workforce Offer



1.5. Opportunities and Priority Action Points

In addition to mapping Maine’s production infrastructure and capacity, the Study also outlines five key strategic opportunities for growth in the state. These are:

1. Growing capacity through developing critical mass and connected clusters
2. Increasing production activity through a more competitive incentive
3. Addressing workforce capacity issues by utilizing and up-skilling existing skills base
4. Addressing production infrastructure capacity issues
5. Leveraging Maine’s rich cultural heritage.

These are summarized in this section in terms of context, opportunity, and priority actions.

1. Growing Capacity Through Developing Critical Mass and Connected Clusters
<p>Context: Maine is a rural state, with a largely dispersed and transient screen sector. This has meant there is not a critical mass to effectively attract and host multiple screen productions</p>
<p>Opportunity: For screen sector businesses (and contracted freelancers and casual workers) in Maine to grow and develop in a connected, sustainable way. This will enable greater workforce capacity to host a greater number and breadth of productions, both from in state and from out of state</p>
<p>Priorities</p> <ul style="list-style-type: none"> • The MFO to work with existing membership organizations, training organizations and community groups to advertise and connect businesses and freelancers with opportunities across Maine to build critical mass • The MFO to promote and provide initiatives and funding that support the growth and development of ambitious in-state screen businesses and freelancers, including small grants and mentoring to encourage investment readiness for companies and broader industry connections • Grow and strengthen state-wide supply chains through increased levels of inward productions, facilitated by a more competitive incentive (see below)

- Ensure MFO's public directory of available cast and crew is updated and promoted to in-state and out of state productions.

2. Increasing Production Activity Through a More Competitive Incentive

Context: Maine currently has an ineffective and uncompetitive incentive, limiting production throughput. The incentive is also not structured to drive strategic growth in Maine's screen sector

Opportunity: Growing and strengthening a state-wide supply chain through increased levels of production incentivized to produce in Maine

Priorities

- The state of Maine to undertake a full revision and modernization of the incentive to align with market opportunity and the needs of the Maine sector.³ This should be considered across two inter-related areas: i) increasing overall competitiveness; and ii) leveraging the incentive to ensure strategic outcomes for sector development in Maine
- The revision should consider harmonization of the incentive to one structure rather than the two currently offered, an improvement in incentive rate, and potential value uplifts for projects using state hires, filming outside of busy zones, and outside of busy times of year
- The MFO to provide clearer guidelines and process flow for applicants
- An expert independent audit should be required for all applicant projects, ensuring robustness and transparency
- The incentive revision process should be informed by a public consultation on the design and aims and objectives of the incentive, as well as by the key recommendations from this Study.

3. Addressing Workforce Capacity Issues by Utilizing and Up-skilling Existing Skills Base

Context: Maine has significant capacity and skills shortage issues across key workforce roles. Existing skill sets are suited for small scale commercials, advertising shoots (such as photography shoots and short campaigns), independent productions and documentaries, but not for larger budget film and television productions. This is limiting the sector's overall growth potential

Opportunity: Maine to train, attract and develop a highly skilled workforce to address the current capacity and skills gaps. This includes attracting (and learning from) workers in adjacent sectors (e.g. tech, theatre and manufacturing), who could transfer skills into screen production. Note that driving capacity increase must be underpinned by incentive improvements and increased production

Priorities

- The MFO to signpost training initiatives available to Maine's screen practitioners, including initiatives out of state
- The MFO to develop a skills plan based on the findings of this Study. This should highlight specific priority areas and roles, as well as where there are transferrable skills and roles from adjacent sectors (e.g. tech engineers moving into VFX)
- The MFO to work with existing training providers, such as the MFA, Salt Institute for Documentary Studies, Maine College of Art & Design, Southern Maine Community College, and Maine Media Workshops + College to provide bespoke and expert training in the key skills shortages highlighted in this Study and aligned with the skills plan

³ See sections 7.4 and 7.5 for further detail on SPI's incentive modification recommendations

- The MFO to maximize and reserve training opportunities for local crew and trainees to participate in incoming productions
- The MFO to work with training providers to establish mechanisms to link students to local industry and create more trainee placement schemes
- The MFO to support and establish networking opportunities for local industry, which will help enable career and workforce development and build relationships between industry, trainers, and careers services
- The MFO to establish a linked network of training providers across the state, who can target their efforts to ensure collective coverage for addressing key capacity and skill-related issues.

4. Addressing Production Infrastructure Capacity Issues

Context: Maine has notable production infrastructure capacity issues across production facilities, equipment and services. These need to be addressed for Maine to attract and host larger scale productions

Opportunity: The state to encourage an expanding industry, ultimately leading to increased private investment in infrastructure, which would in turn start to address key production infrastructure capacity issues

Priorities

- Encourage strong and stable growth in production and sectoral capacity to attract private infrastructure investment once the industry has expanded to make such investment viable
- The MFO to support exploration and demand testing for potential pop-up stages, purpose-built studio developments, equipment hire suppliers, and/or post-production VFX facilities. This should include the MFO working closely with landlords and developers to help them understand the benefits of investing in screen production facilities
- The MFO to support and establish networking opportunities for local workforce and industry, including those currently offering infrastructure or who could potentially offer infrastructure in the future.

5. Leveraging Maine's Rich Cultural Heritage

Context: Maine has a rich cultural heritage, fueled by expertise in literature, music, food, and the visual and performative arts. These collectively have created a strong brand for the state, but could be stronger leveraged for developing the screen sector

Opportunity: National and international audiences are increasingly responding to content focused on local stories, places, and communities. To meet this demand, Maine should more systematically tap into its unique cultural tapestry to ensure local content is able to be made, and that production based on local stories and settings can be retained by the state

Priorities

- The MFO to consider an incentive uplift for projects based on Maine-sourced or set material being filmed in state
- The MFO to work with existing training providers to signpost and support writing programs for aspiring screenwriters

- The MFO to work closely with the Maine Arts Commission and other arts and cultural organizations and events as part of a wider cultural marketing of Maine and links to the screen sector
- The MFO to support and establish networking opportunities for practitioners across the wider cultural and creative industries to meet and discuss potential collaborations.

Section 2: Introduction



Image courtesy of the Maine Film Office

2. INTRODUCTION

2.1. Research Brief

In 2023, the State of Maine's DECD commissioned SPI to undertake an independent study of Maine's screen production sector. This research primarily focused on activity related to the creation of film, television, commercials and photo shoots, but also considered wider audiovisual production sector, such as in post-production, VFX and music production.

The overall focus was in accessing Maine's screen production sector's existing strengths and weaknesses, limitations, capacity gaps, and proposed areas for expansion.

The PICDA study was structured around five elements:

1. **Current production capacity** – an in-depth review of the current production capacity across 80+ components of a comprehensive screen production sector, covering production facilities, equipment, services, crew, creative talent, and the current incentive program
2. **Capacity gaps** – based on the capacity review, highlight specific capacity gaps and challenges that need to be addressed to grow Maine's screen production sector
3. **Key opportunities** – the identification of opportunities to increase current levels of production based on current production capacity, as well as increase production capacity to attract and service more and larger productions
4. **Incentives** – analysis of the types and sizes of productions currently attracted by the state's film incentive, recommended improvements to the incentive that would attract more and a diverse range of productions, and the degree of production upturn likely to result from improved incentives
5. **Sector growth** – provide recommendations for increasing current production capacity to support increased levels of production, and recommendations for developing the production sector.

2.2. SPI's Approach

This Study is based on a mixed-method approach, drawing from both primary and secondary research over a five-month period, from January to May 2023.

SPI began with a **review of existing sector research, policy reports, and data** gathered by the state, membership organizations and the press. This covered a variety of sources, including various cast, crew, services and location databases managed by the MFO and MFA, reports related to the state's industry and incentive (including the MFA's sector mapping,⁴ MFO's annual incentive reports,⁵ and the state of Maine's OPEGA review of the state incentive⁶) and news articles describing the industry in state and national press. This review process continued throughout the Study as new data and reporting became available.

To fill in key data gaps and explore new avenues of enquiry, SPI then undertook a wide-ranging primary research program. This comprised **29 confidential consultations with industry stakeholders**, including state department partners, production companies, suppliers, vendors, post-production houses, financiers, union representatives, film schools, and international producers. These stakeholders were chosen for their insight, diverse knowledge, and unique viewpoints.

⁴ *Maine Film & Video Production Economic Impact Report*. Maine Film Association, May 2022. Accessible at: <https://www.maineilm.org/wp-content/uploads/2022/05/2022-MFA-Economic-Impact-Report-1.pdf>

⁵ *Maine Film Office Annual Report*. Maine Film Office, 2012-2022. Accessible at: <https://filminmaine.com/2613-2/>

⁶ *Visual Media Incentives: Maine's Visual Media Incentives Have Had Limited Effect and Have Not Been Adequately Administrated*, Office of Program Evaluation and Government Accountability (OPEGA), March 2023. Accessible at: <https://legislature.maine.gov/doc/9940>

In March 2023, SPI executives undertook **on-site fieldwork**, visiting key production locations and facilities in Maine, as well as undertaking further in-person consultations.

Next, to gain key quantitative evidence, SPI undertook **an online survey**, distributed via consultees, and the directories of the MFO and MFA. Over a two-week period, this survey was completed by 120 professionals who are currently or have recently worked across Maine's screen production sector.

Throughout the Study, SPI had **regular meetings with the DECD and MFO** to discuss emerging findings and new areas of focus. These discussions resulted in an interim report detailing the Study's key emerging findings, which contributed to the creation of this final report.

2.3. Calculating Capacity and Suitability

To provide a comprehensive assessment of Maine's screen production sector, SPI looked at three overarching areas:

1. Facilities, equipment, and services
2. Professional BTL technical crew
3. Professional ATL cast and crew.

Each of these areas were assessed via primary research from two perspectives:

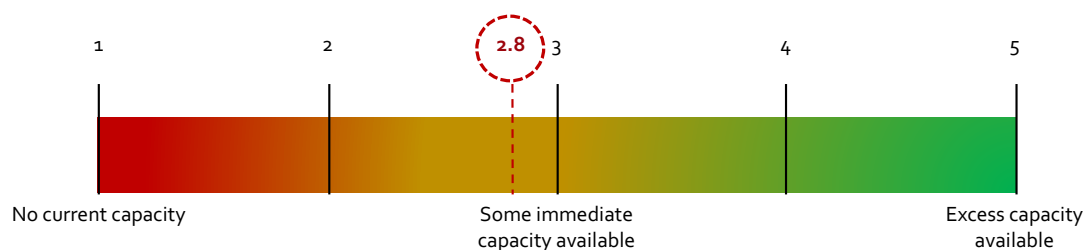
1. Current capacity to support multiple productions of various size
2. Experience/relevance for large-scale productions coming from outside of Maine.

The online survey asked active (and recently active) practitioners working in Maine to score 80+ components of the screen production sector (e.g. workshop facilities, grip and electrical equipment, camera operators, producers) on their current capacity to support multiple productions of various sizes. This was on a scale of 0-5, where:

- 5 = excess capacity available
- 4 = reasonable current capacity available
- 3 = some immediate capacity available
- 2 = limited current capacity available
- 1 = no current capacity available
- 0 = does not exist.

SPI then triangulated these scores with insights from consultations and desk research to create a final capacity score. Figure 5 shows an example for the final capacity score for Maine's workshops to host multiple productions.

Figure 5 – Current Capacity of Maine's Workshops for Hosting Multiple Productions



Further, surveyed practitioners then assessed each of the components on its experience/relevance for large-scale productions coming from outside of Maine, noting whether "All", "Some", or "None" where suitable. This was then also triangulated with consultations and desk research to provide an assessment of suitability.

For each of the 80+ components, respondents were given the option to select “Not known” if they were not able to comment. Further, each section of the survey included a text box where respondents provided further specifications and explanations for their response.

Sections 4-6 profile the most critical of the 80+ components, with supplementary gauges and charts included in Appendix 1.

Section 3:
Overview of the
Maine Screen
Sector



Image courtesy of the Maine Film Office

3. OVERVIEW OF THE MAINE SCREEN SECTOR

3.1. A Snapshot

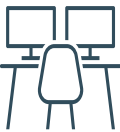
Maine has...
Beautiful and scenic coastline, natural scenery, and historical cities, including the Acadia National Park, Allagash Wilderness Waterway, Bigelow Preserve, Bath and Bar Harbor. These are a key pull for location shooting, acting as both the backdrop and inspiration for a wide range of commercials, photo shoots and film productions.



A production incentive for screen production, promoting industry development with 5%-17% tax credits. It incentivizes both resident/non-resident labor and in-state production spending, favoring larger productions with a \$75,000 minimum and no spending caps. Section 3.5 provides further specifics.



A range of active membership organizations, including the MFA, Portland Media Center, and Points North Institute, supporting the state's film and media sectors. The MFA promotes industry growth through networking, collaboration, and skills development opportunities for filmmakers. The Portland Media Center enables community-driven television content. Points North Institute, recognized for the Camden International Film Festival, focuses on nurturing non-fiction storytelling through artist development initiatives and exhibition events.



A dedicated film office. The MFO is responsible for marketing Maine as a filming location, connecting filmmakers with resources, and assisting incoming productions with enquiries. Furthermore, it co-manages the production incentive, along with the Maine Revenue Service, to attract external productions and stimulate the economy.



Respected training providers. Maine is home to diverse training providers for various screen formats, including the Salt Institute for Documentary Studies, offering immersive learning for storytelling; Southern Maine Community College, prepares students for media production careers, covering comprehensive filmmaking aspects; and the Maine Media Workshops + College, providing intensive programs in photography and filmmaking. Further, the MFA also provides additional training opportunities for aspiring filmmakers.

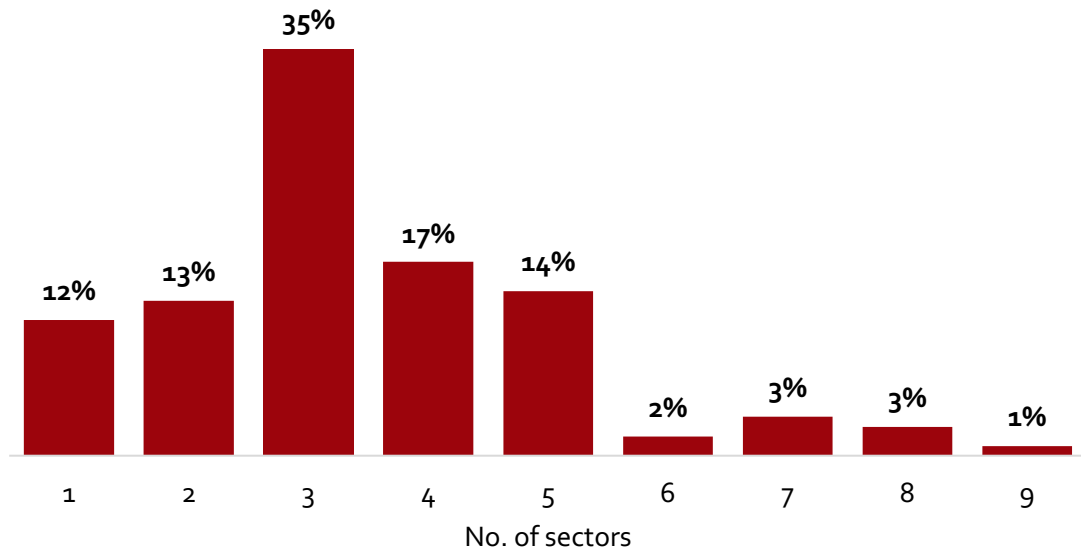


Popular running film festivals, including the Camden International Film Festival, showcasing non-fiction cinema to a global audience; the Maine International Film Festival, championing American independent and international films, offering audience interaction with filmmakers; and the Maine Outdoor Film Festival bringing together film and nature enthusiasts, exhibiting outdoor-themed films.

3.2 What Content is Being Created in Maine?

Maine's screen sector is characterized by its versatility and breadth, with professionals operating across a myriad of formats and types of content (Figure 6). Only one in 10 (12%) of surveyed practitioners worked in one sector only, with the highest proportion (35%) working across three sectors. This demonstrates the multifaceted skills of the industry's workforce, their adaptability to different production needs, and the diversity of current and potential opportunities available within screen production.

Figure 6 – Proportion of Practitioners Working Across Multiple Screen Sectors

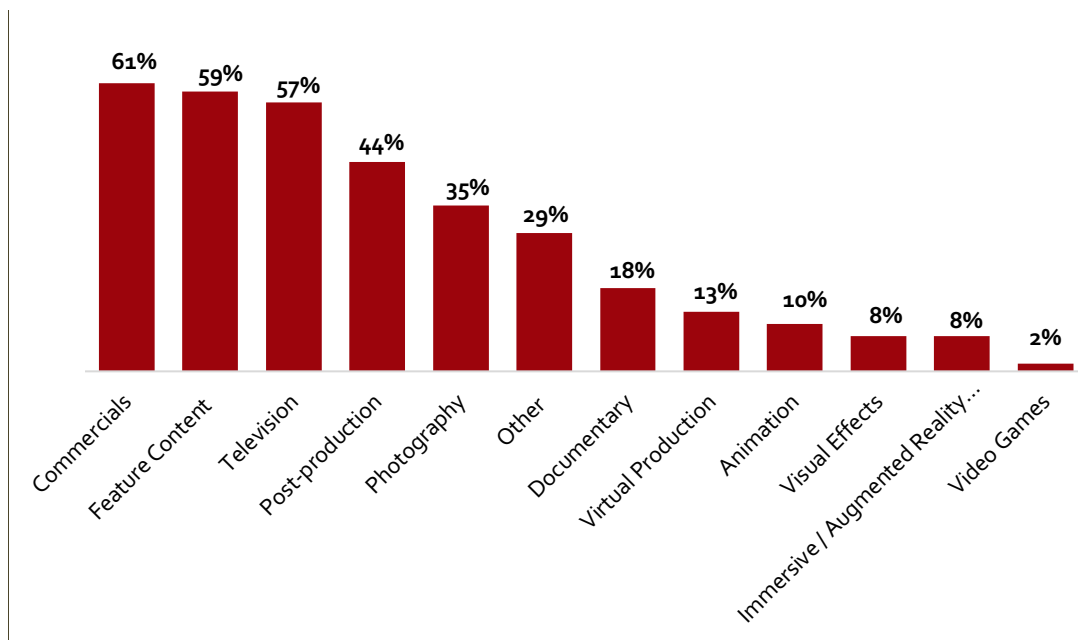


Source: SPI Industry Survey, % of respondents (n=120)

While practitioners working across multiple sectors is not uncommon across the world, consultees noted that is particularly common in Maine due to a lack of regular work available in any one type of content production, meaning that professionals need to be a 'Swiss army knife', able to pivot to where the work is for sustained income.

Commercials were the most common type of content being created in Maine, with 61% of surveyed practitioners reporting that they create content for advertisements (Figure 7). This is supported by consultations, with Maine's scenic natural and built landscapes regularly used as backdrops for promotion in fashion and lifestyle magazines and brochures. This is further supported by the third (35%) of surveyed practitioners who work in photography, able to provide still shots.

Figure 7 – Types of Content Created by the Maine Screen Sector



Source: SPI Industry Survey, % of respondents (n=120)

Content for features and television where the next most common types of content being created in Maine, with 59% and 57% of surveyed practitioners respectively reporting they create this type of content. This highlights Maine's capability to produce long-format and episodic content. This said, SPI's wider research and consultations noted that these productions are irregular, typically small-scale independent productions and largely content for local news broadcast, rather than big blockbuster productions.

Post-production work was the subsequent most common, with 44% of surveyed practitioners respectively reporting they work in this part of the production process. For example, consultees and desk research highlighted how commonly music editors work across audiovisual post-production, assisting with music scoring, sound design and dubbing.

Comparatively few of surveyed practitioners noted they worked in documentary making, accounting for 18%. This said, consultees and desk research indicate that in reality documentary making is likely to make up a higher proportion of the overall screen sector in Maine. The key driver for this is the acclaimed Salt Institute for Documentary Studies, a graduate institution part of the Maine College of Art, and the Communication and Media Studies Department at the University of Southern Maine. Both are located in Portland.

Digital content production, covering animation, visual effects, immersive and augmented reality (AR, VR, XR) and video games, currently makes up a relatively minor part of Maine screen sector, accounting for 10%, 8%, 8% and 2% of surveyed practitioners, respectively. This is supported by desk research and consultations, who indicated that this is in part due to a lack of historical specialized training in-state for these sectors, as well as established funding for businesses wishing to create digital content. It is worth noting that the digital content production sectors are relatively new industries compared to live action, which are undergoing rapid technological changes and require very specific and specialized technical skills, knowledge, and equipment.

3.3 Where is Content Being Created in Maine?

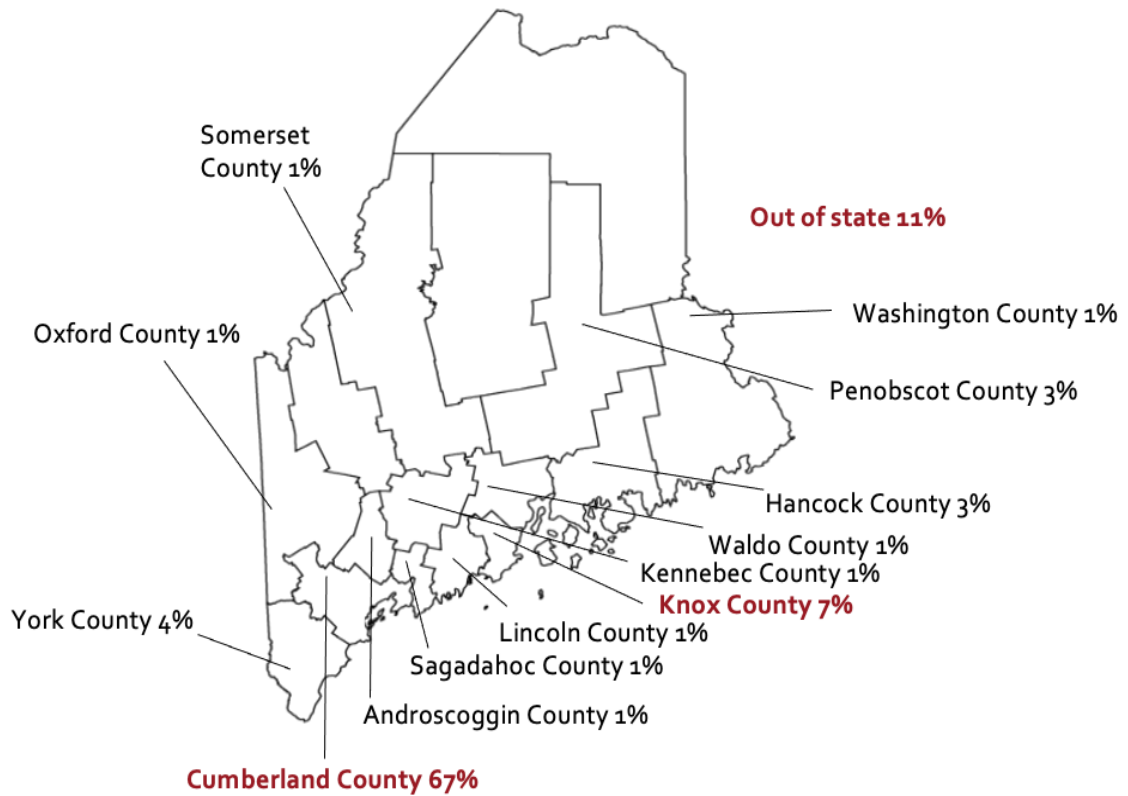
Screen production activity in Maine is centralized in a small number of clusters, with the vast majority of activity occurring in Cumberland County (67% of surveyed practitioners), followed by Knox County (7%) (Figure 8). This is chiefly due to the workforce and infrastructure present within these counties' key urban hubs – namely the cities of Portland and Rockland, respectively.

One in 10 Maine practitioners (11% of surveyed practitioners) primarily work out of state – namely in the states of Massachusetts or New York. This underlines the current lack of consistent opportunities and production throughout Maine. It is worth noting that this distribution of production activity also largely aligns with research undertaken by the MFA in 2022,⁷ which found that 65.9% of its membership worked in Cumberland County, 8.9% in York County, and 7.3% in Knox County.⁸

⁷ *Maine Film & Video Production Economic Impact Report*. Maine Film Association, May 2022. Accessible at: <https://www.maineilm.org/wp-content/uploads/2022/05/2022-MFA-Economic-Impact-Report-1.pdf>

⁸ MFA's survey sample size was 128 Maine-based film and production entities: 38 companies and 90 freelance production professionals/independent filmmakers

Figure 8 – Where Surveyed Practitioners Primarily Work

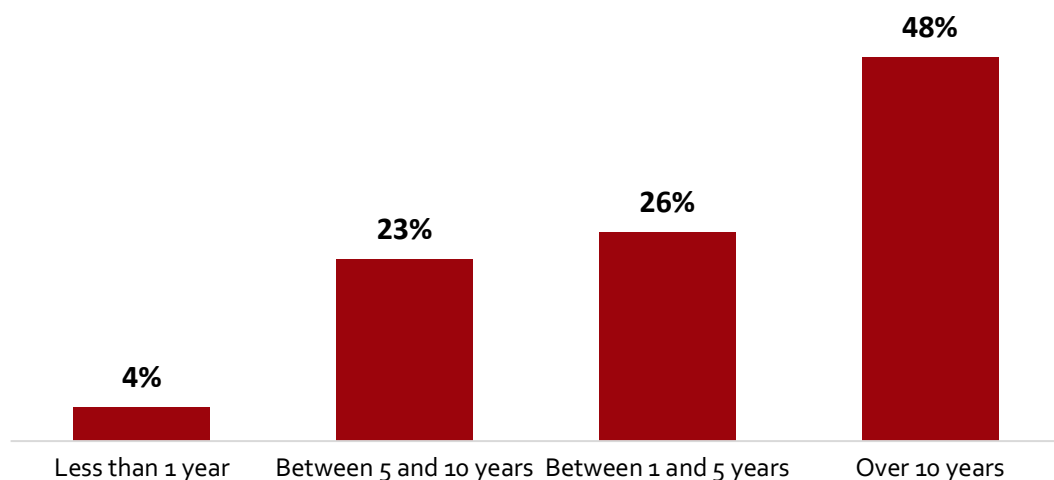


Source: SPI Industry Survey, % of respondents (n=120)

3.4 How Experienced Are Practitioners in Maine?

Half (48%) of those surveyed have been working in the Maine screen industry for over a decade (Figure 9), reflecting the fact that the sector in Maine includes some experienced professionals. This said, consultations highlighted that these experienced individuals often subsidize their (irregular) in-state work with commissions from out of state, where they are able to leverage their wider networks and experience across the industry.

Figure 9 – Time Practitioners Have Worked Professionally in Content Production in Maine



Source: SPI Industry Survey, % of respondents (n=120)

In contrast, a small proportion (4%) of surveyed practitioners have worked in the industry for less than one year. Consultees noted that this was for two key reasons. First and most prominently, that recent graduates, who lacked key industry connections, regularly leave Maine namely for Massachusetts and New York in search of more consistent work and training opportunities. Second, that COVID-19 lockdown measures have attracted new talent to the state or existing talent back to the state (known as 'boomerangers'), developing and working on productions in Maine for the first time.

3.5 The State of Maine's Production Incentive

Screen production is a notably competitive market, with significant levels of spend seen across the globe in the last few years. The production industry across the US is no exception, with legislators seeking to make their state more appealing to productions through leveraging the tool of production incentives.

There are over 100 automatic incentives active across the global industry.⁹ Such incentive systems provide a return to a production based on the eligible expenditure undertaken in that jurisdiction. In this way they do not function as selective funding systems, which would be based on subjective considerations, such as cultural representation, artistry, or audience appeal – but as an economic tool.

The Maine Attraction Film Incentive Plan was created in 2006 and is administered by the MFO on behalf of the Department of Economic and Community Development and Maine Revenue Service. The incentive offers a wage rebate and combines a production spend tax credit with a range of considerations and eligibility requirements (Figure 10).

Figure 10 – Overview of the Maine Attraction Film Incentive Plan

Incentive Fact Sheet	
Title	Maine Attraction Film Incentive Plan
Type	Rebate/Tax Credit
Value	10-12% Wage Rebate 5% Production Spend Tax Credit
Details	<p>Wage Rebate</p> <ul style="list-style-type: none"> • 12% resident and 10% non-resident for ATL and BTL workers • Cap of \$50,000 per employee. <p>Production Spend Tax Credit</p> <ul style="list-style-type: none"> • Minimum eligible Maine spend of \$75,000. <p>Accommodation tax exemption for continuous stay of 28 days or more.</p>
Limits/Restrictions/Considerations	<ul style="list-style-type: none"> • No annual program cap • No per project cap • No sunset date.

⁹ *Global Incentive Index 2023*, May 2023. Olsberg•SPI. Available at: <https://static1.squarespace.com/static/5f770807cf66e15c7de89ee/t/6464abe062ba7367905653a0/1684319214125/Global+Incentives+Index+May+2023.pdf>

Section 4:
Production
Infrastructure
and Services

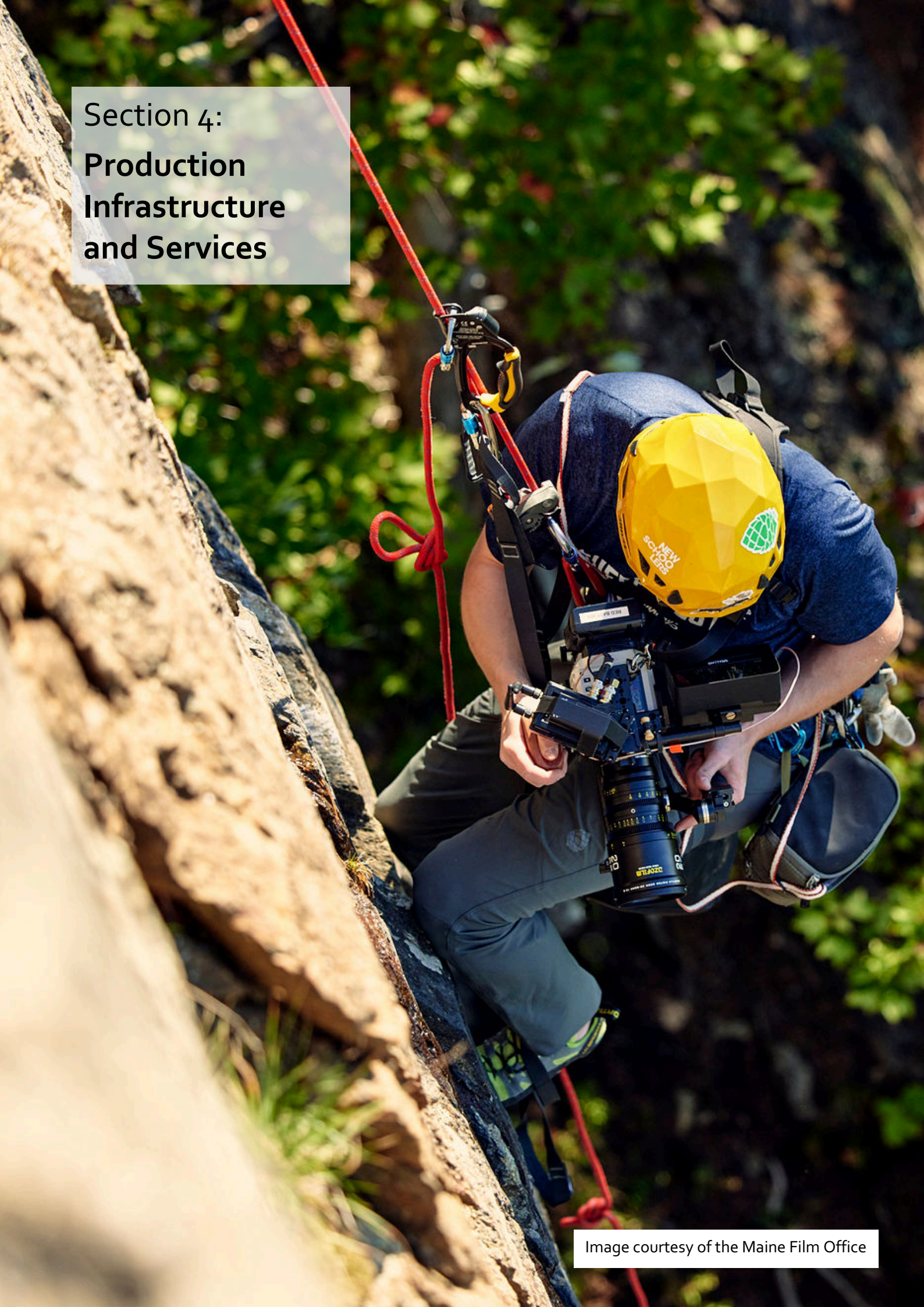


Image courtesy of the Maine Film Office

4 PRODUCTION INFRASTRUCTURE AND SERVICES

4.1 Introduction

The availability of high-quality production infrastructure, particularly studios, post-production facilities and production service companies, are critical parts of a healthy audiovisual industry. Production infrastructure attracts inward productions and helps retain valuable economic expenditure within in-state supply chains, as well as maximizing work and training opportunities for in-state cast and crew.

This section assesses the key features of Maine’s production infrastructure, evaluating the current capacity of these elements to service multiple productions at once, as well as suitability for large-scale productions coming from outside of Maine.

4.2 Production Facilities

4.2.1 Production Studios and Spaces

While there are a range of production studios and spaces in Maine available for the creation of screen content, such as those managed by Real Media Solutions, High Output, O’Maine Studios and others, there is limited overall current capacity for hosting multiple productions at once. Further, these are located largely within the Greater Portland area, with limited facilities in other locations – except for a few notable facilities, including the Maine Media Workshops + College in Rockport.

The lowest current capacity was in production studios and space / lots, green screens and purpose-built sound stages, with just under half (48%) of the Study’s surveyed practitioners noting that these three facilities had limited or no capacity, respectively. SPI’s wider research and consultations noted that a lack of supply was the prevailing driver for this low capacity, where Maine lacks a large-scale fully functional purpose-built sound stage, and with limited number of green screen facilities available for use.

Wider research also noted the absence of a fully functional water tank and virtual production facilities. It is worth noting that it is not uncommon for less developed screen sectors to not have such facilities, as they serve high levels of specialist and specific types of screen productions – especially in the case of virtual production facilities.

Comparatively, there was more reported capacity for multiple productions available to access workshops and temporary production facilities, with just over a third (31%) of surveyed practitioners noting reasonable or excess capacity, respectively.

Based on the survey results, consultations, and desk research into the count of production studios and spaces in Maine, SPI set the capacity gauges as follows:

- Workshops – 2.8, indicating some immediate capacity
- Temporary production facilities – 2.8, indicating some immediate capacity
- Green screens – 2.6, indicating some immediate capacity
- Production studio spaces/lots – 2.2, indicating limited current capacity
- Purpose-built sound stages – 1.9, indicating limited current capacity.

These are illustrated in Figures 11-15 below.

Figure 11 – Current Capacity of Maine’s Workshops for Hosting Multiple Productions

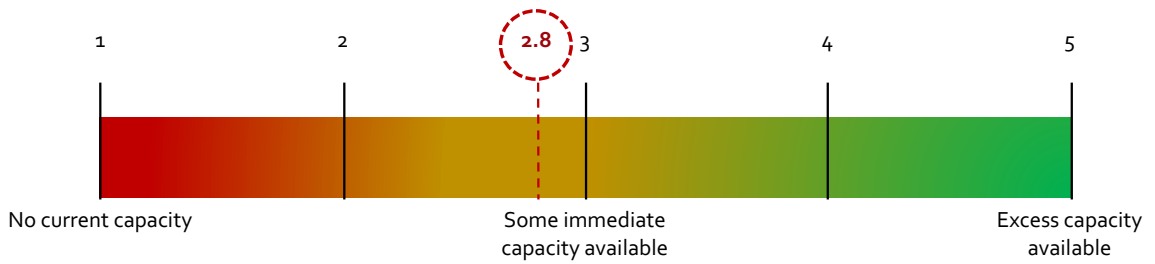


Figure 12 – Current Capacity of Maine’s Temporary Production Facilities for Hosting Multiple Productions

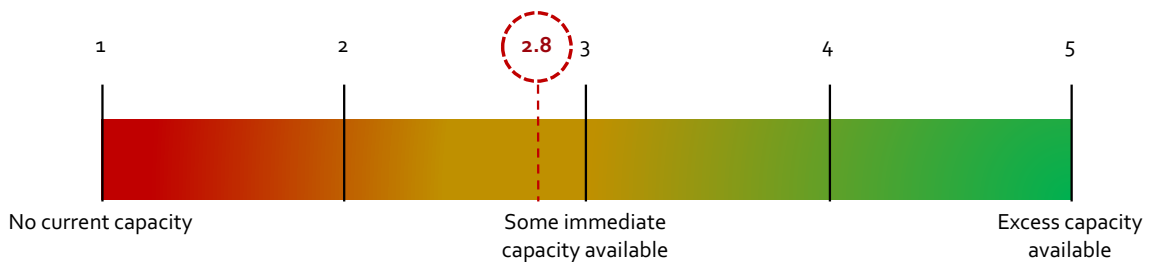


Figure 13 – Current Capacity of Maine’s Green Screens for Hosting Multiple Productions

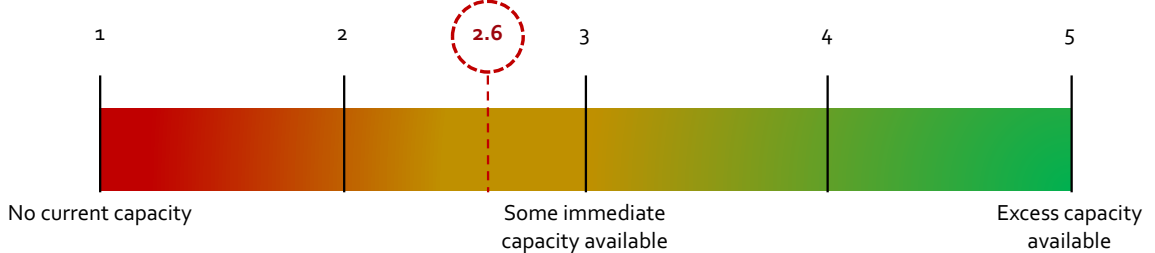


Figure 14 – Current Capacity of Maine’s Production Studio Space/Lots for Hosting Multiple Productions

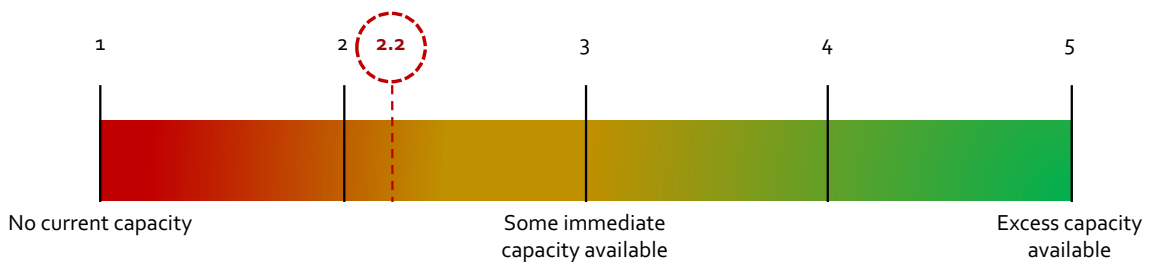
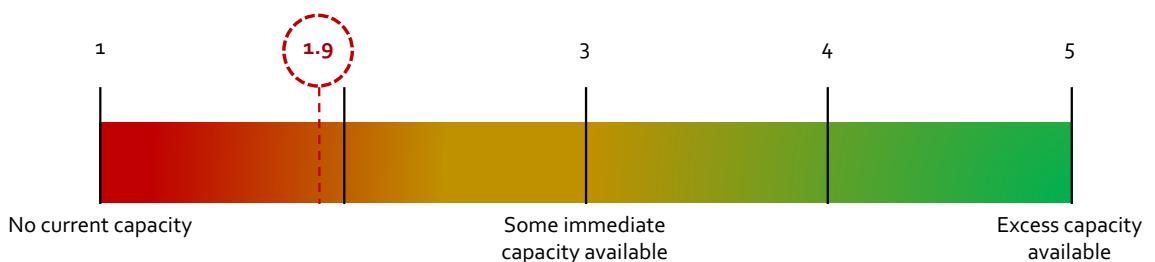
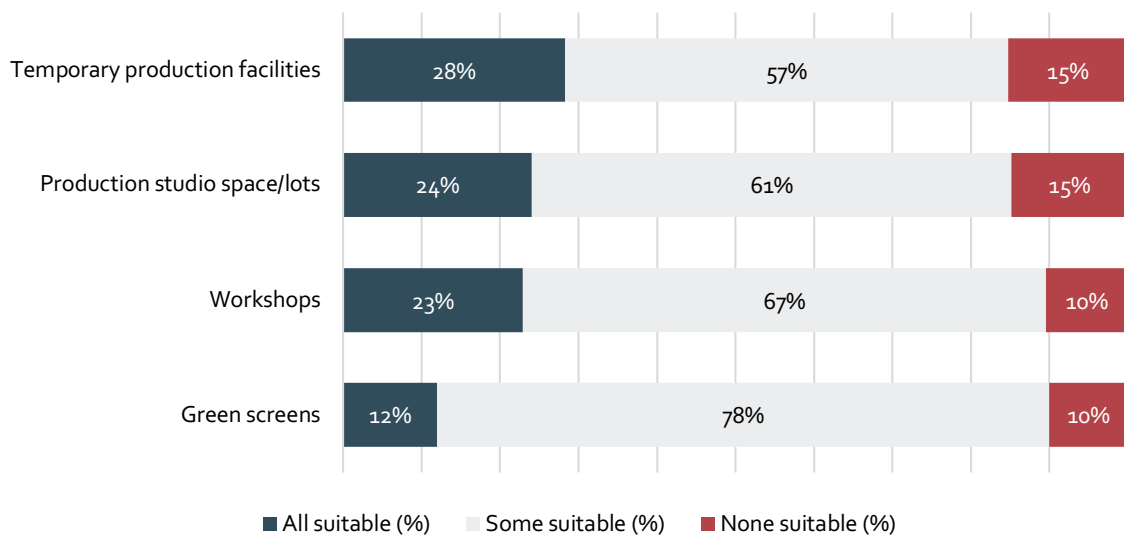


Figure 15 – Current Capacity of Maine’s Purpose-Built Sound Stages for Hosting Multiple Productions



Despite Maine’s production studios and spaces’ limited capacity and supply, SPI’s wider research found that all such facilities provided some suitability for large-scale productions coming from outside of Maine.¹⁰ As shown in Figure 16, the most notable of these was temporary production facilities, with 28% of surveyed practitioners reporting that all were suitable. This was a view partly shared by consultees who noted that Maine has many large industrial buildings that could be more readily used for the purposes of producing screen content, especially for short-term use, such as photo shoots and commercials. However, consultees noted that landlords typically favor longer term leasing of their buildings to be used as accommodation, cafes, and restaurants, especially in the Greater Portland area and in the summer months. The chief reason being that these are seen as lower risk ventures compared to investing in production studios and spaces, given the buoyant food and beverage market and currently limited housing in Maine.

Figure 16 – Suitability of Maine’s Green Screens, Workshops, Production Studio Spaces/Lots and Temporary Production Facilities for Large-scale Productions Coming from Out of State



Source: SPI survey (% responding)

4.2.2 Sound and Music Recording and Editing Facilities

Sound recording and dubbing facilities are essential services as part of an integrated post-production offer. They are among the services sought by regional, national, and international producers and typically include audio post-production, music mixing and mastering, reworking, music scoring and enhancing voice-based media, as well as basic dubbing services, if appropriate.

Maine has a strong history and reputation for music and sound production, producing a range of popular music artists, including Patty Griffiths and Clarence White. In some cases, such as with The Halo Studio, music recording studios are also used for audiovisual content production. Here, the sound engineers can use their transferrable skills and knowledge from music to audiovisual production.

There is reasonable current capacity for music recording and scoring and sound recording and dubbing facilities in Maine, with 38% and 29% of the Study’s surveyed practitioners noting that these facilities had reasonable or excess capacity, respectively. Noted examples by consultees

¹⁰ With over 85% of surveyed practitioners noting that all or some of the production studios and spaces in Maine were suitable for large-scale productions coming from out of state

included Flying Sound and The Halo Studio. SPI's wider research and consultations noted that a lack of supply was the prevailing driver for this low capacity, where these facilities are predominately occupied with music production. This said, consultees noted that they would invest in growing their facilities, and therefore capacity, should demand for audiovisual editing increase.

Based on the survey results, consultations, and desk research into the count of music recording and scoring and sound recording and dubbing facilities in Maine, SPI set the capacity gauges as follows:

- Music Recording and scoring facilities – 3.0, indicating some immediate capacity
- Sound recording and dubbing facilities – 2.9, indicating some immediate capacity.

These are illustrated in Figures 17 and 18 below.

Figure 17 – Current Capacity of Maine's Music Recording and Scoring Facilities for Hosting Multiple Productions

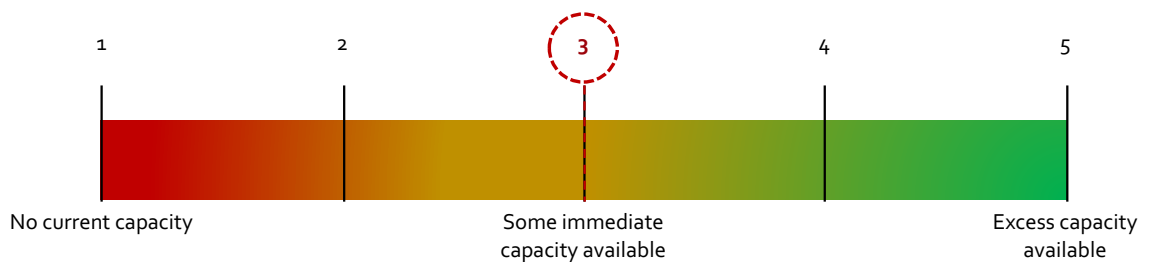
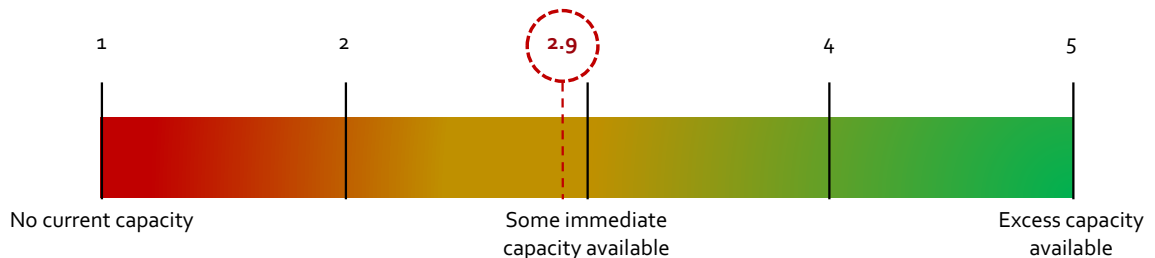
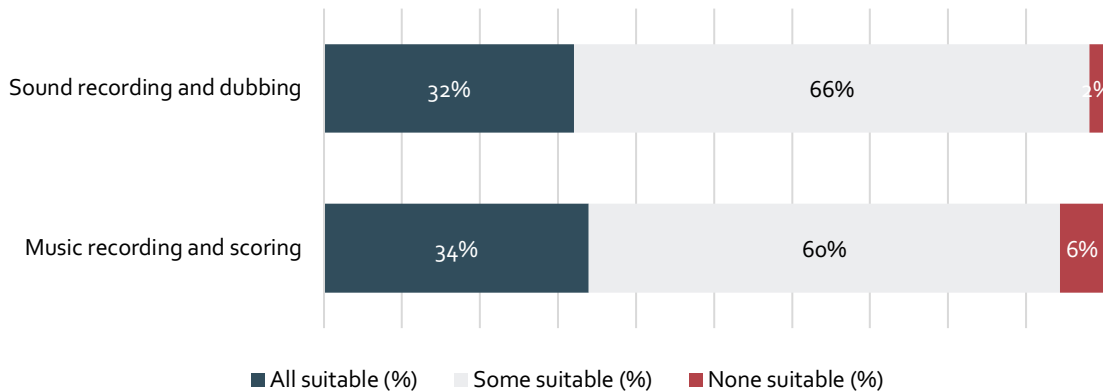


Figure 18 – Current Capacity of Maine's Sound Recording and Dubbing Facilities for Hosting Multiple Productions



Further to having reasonable current capacity for multiple productions, Maine's sound recording and dubbing and music recording and scoring facilities also have strong suitability for large-scale productions coming from outside of Maine. As shown in Figure 19, nearly all (98%) of surveyed practitioners reported that either all or some of Maine's sound recording and dubbing facilities were suitable for large-scale productions coming from outside of Maine. Meanwhile, 94% reported that Maine's music recording and scoring facilities were either all or some suitable. This was a view shared by consultees who recognized huge potential for larger screen productions, both in and out of state, to undertake their audio post-production in Maine, enabled by suitable facilities and skilled sound engineers. In the case of out of state productions, this would help extend the expenditure of screen productions, beyond the more common location shooting and related industries.

Figure 19 – Suitability of Maine’s Sound Recording and Dubbing and Music Recording and Scoring Facilities for Large-scale Productions Coming from Out of State



Source: SPI survey (% responding)

4.3 Production Equipment

Maine has very limited suppliers for high-quality production equipment. High Output is arguably the state’s only camera house of scale providing production equipment to in-state and out of state productions. Maine’s colleges and training providers have their own equipment, but these are principally reserved for current students’ projects – though in some instances students are permitted to use college equipment as part of work placements.

A limited number of equipment vendors is a key barrier for larger-scale film, television, and commercial productions. Currently, such productions largely rely on crew to bring their own (often outdated) equipment or renting from vendors based in Boston, five hours away. Renting out of state incurs additional time delays, especially in cases when equipment becomes faulty, as well as costs associated with insurance and transportation. The upshot of this is that Maine has current capacity for basic camera and grip and electric gear (chiefly through using crews’ personal equipment) but limited capacity for more specialist equipment (e.g. aerial drones, specialist grips, special effects equipment) that are typically rented for a production.

To this end, consultees were with a shared view that Maine would benefit from more equipment rental vendors in-state, both for ease and cost-saving, but also for Maine’s workforce (and their productions) to benefit from using the latest equipment technology, with one noting:

"If there was more equipment circulating in Maine, it would make a big impact. There are lots of talented camera people, but they just don't have the experience of working with camera houses, so they're not able to learn the newest thing."

Several production companies spoke of long-term plans to build up their own rental services as part of their own formal offer, but this would first require reassurance of a steadier pipeline of productions they could market to, or public seed funding.

Based on the survey results, consultations, and desk research, SPI set the capacity gauges as follows:

- Grip and electrical equipment – 3.1, indicating some immediate capacity
- Camera equipment – 2.6, indicating some immediate capacity
- Camera accessories – 2, indicating limited capacity
- Aerial equipment – 1.9, indicating limited capacity

These are illustrated in Figures 20 to 23 below.

Figure 20 – Current Capacity of Maine’s Grip and Electric Equipment for Hosting Multiple Productions

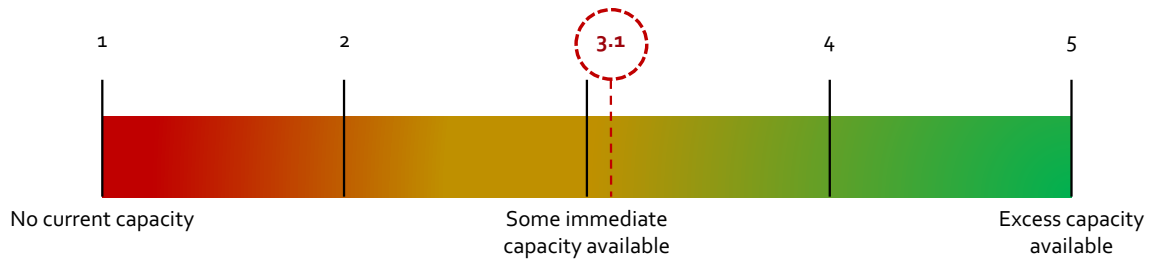


Figure 21 – Current Capacity of Maine’s Camera Equipment for Hosting Multiple Productions

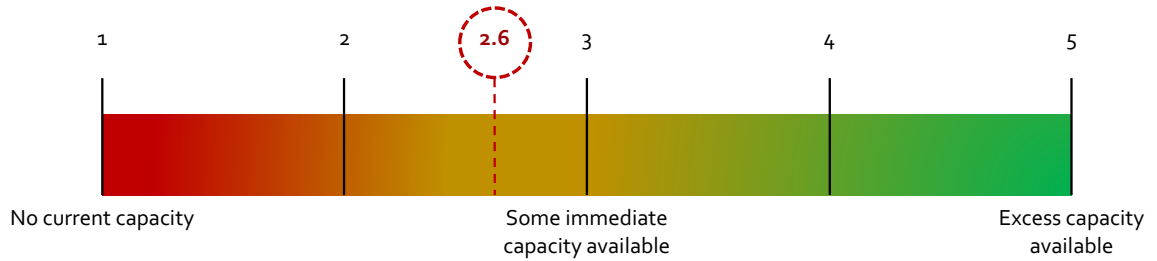


Figure 22 – Current Capacity of Maine’s Camera Accessories for Hosting Multiple Productions

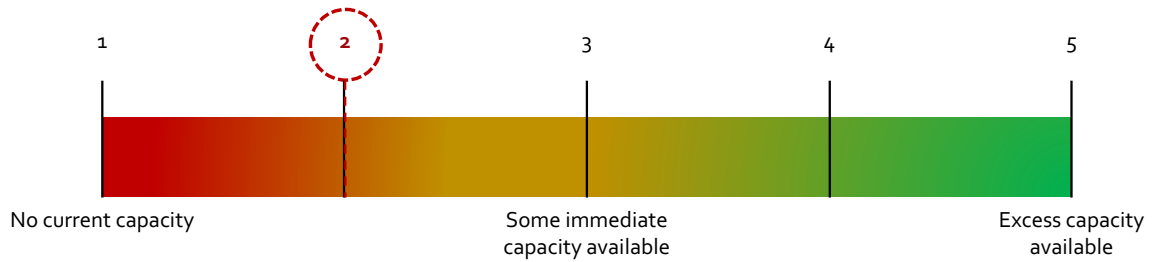
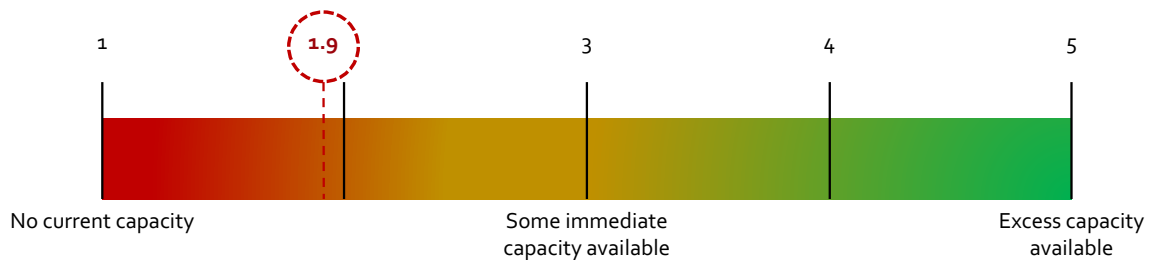


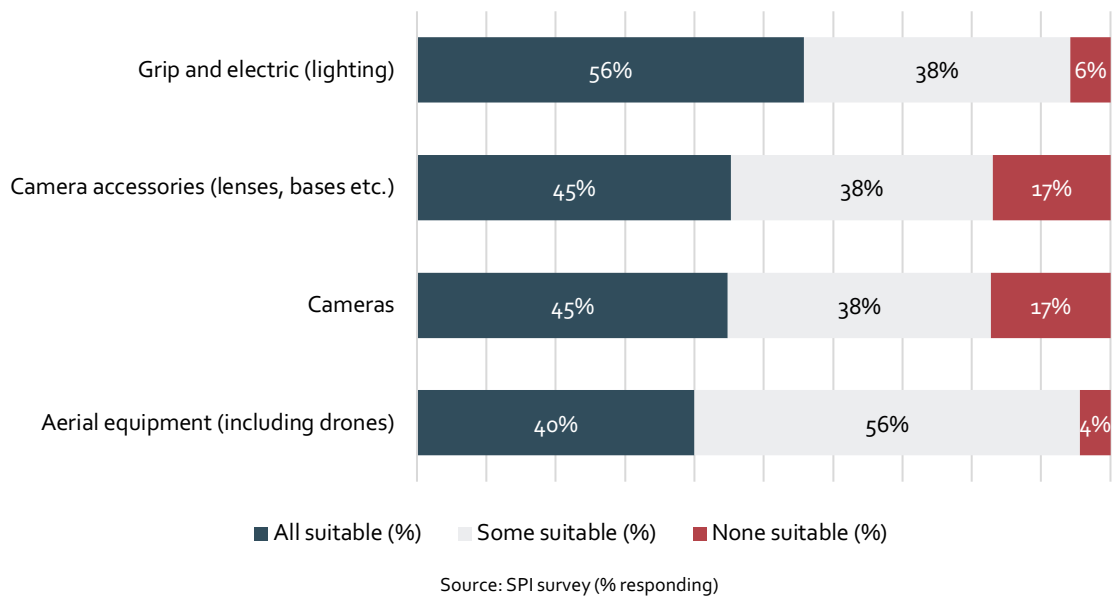
Figure 23 – Current Capacity of Maine’s Aerial Equipment for Hosting Multiple Productions



It is worth noting that having limited equipment rental services is less of an issue for creating content for documentaries and photo shoots, which typically require limited amount of equipment with lower tech requirements.

While Figure 24 indicates that Maine's production equipment is largely suitable for large-scale productions originating from outside the state, as specified, SPI's wider research disputes this. Rather, as outlined, Maine is able to supply basic camera and grip gear to inward productions but has limited capacity and availability for more specialist equipment, which are commonly required for inward large-scale productions looking to kit out a production.

Figure 24 – Suitability of Maine’s Production Equipment for Large-scale Productions Coming from Out of State



4.4 Production Services

4.4.1 Production Logistics

Effective and connected production logistic services are key for linking productions with suitable cast and crew, locations and facilities, especially for inward productions relying on local expertise, knowledge and connections. This is particularly key in a rural state like Maine where the sector is relatively spread out (aside from a few urban clusters) and largely hidden / unknown from those outside the region and state. Sector gatekeepers are critical.

Consultees reported key transportation issues, especially for productions taking place in the northern, more rural parts of Maine. Here, productions are sometimes over two hours from the nearest airport to fly workers and equipment in, as well limited access to taxis and public transportation. This provides a level of inflexibility and unpredictability, which will deter some productions, especially those with limited time and busy schedules, without effective production logistic services.

The production service company (“PSC”) plays a crucial role in the screen production process, providing logistical, administrative, and technical support to production companies, filmmakers, and directors. The specific brief varies depending on the needs of the production, but common services include location scouting, crew and talent hiring, production coordination, permitting and legal services, and insurance and risk management. Currently, there is a limited number of PSCs in Maine, and therefore limited current capacity, with just a fifth (22%) of surveyed practitioners reporting that the state’s PSCs have reasonable capacity to service multiple productions.

On the other hand, due to the rural nature of the state, Maine is well served for wider, more logistical services. For example, two-thirds (63%) of survey practitioners reported that Maine’s freight and shipping agencies had either reasonable or excess capacity to service multiple productions. Further, 43% reported that Maine’s travel agencies had either reasonable or excess capacity.

Based on the survey results, consultations, and desk research into the count and offer of relevant service companies in Maine, SPI set the capacity gauges as follows:

- Production service companies – 1.9, indicating limited current capacity
- Freight and shipping agencies – 3.6, indicating approaching reasonable current capacity
- Travel agencies – 3.2, indicating some immediate capacity.

These are illustrated in Figures 25 to 27 below.

Figure 25 – Current Capacity of Maine’s Production Service Companies for Serving Multiple Productions

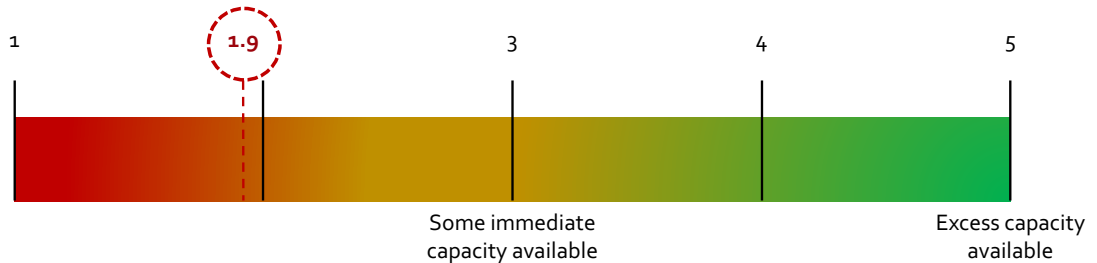


Figure 26 – Current Capacity of Maine’s Freight and Shipping Agencies for Serving Multiple Productions

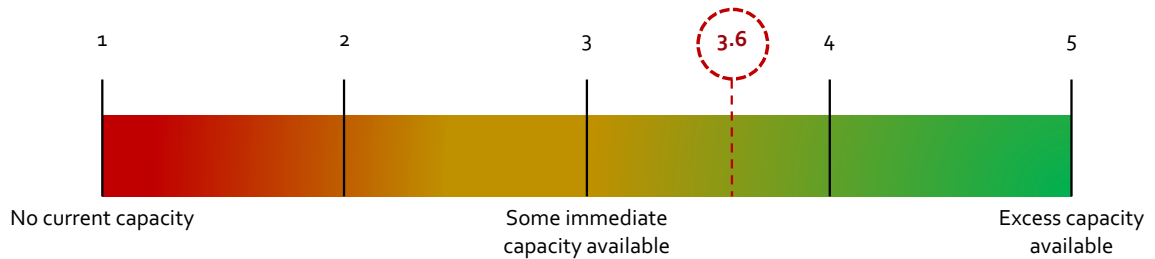
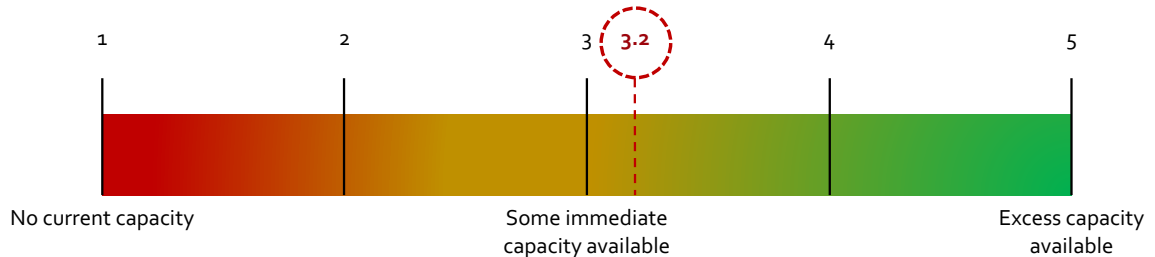


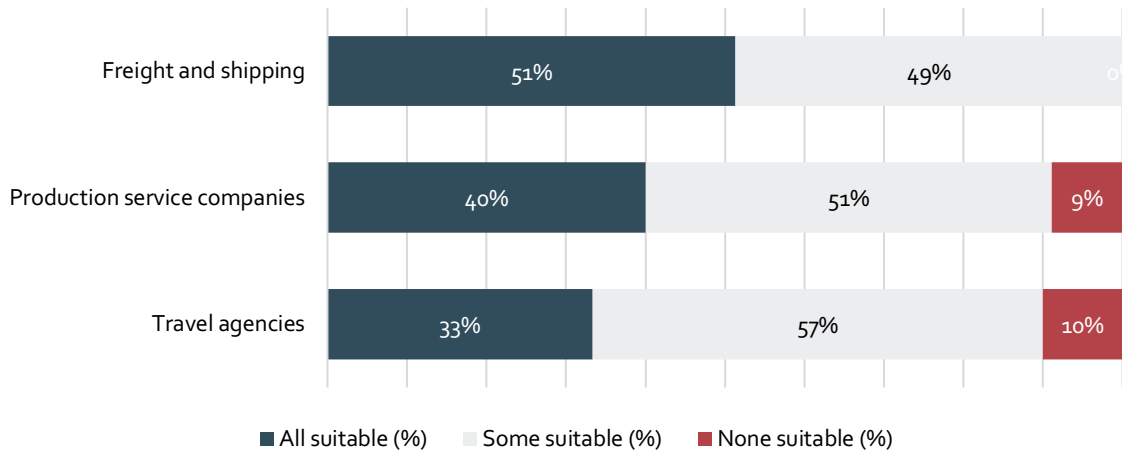
Figure 27 – Current Capacity of Maine’s Travel Agencies for Serving Multiple Productions



It is worth noting that having production logistics services is less of an issue for creating content for commercials and photo shoots, which typically are shot in a small number of locations and require a comparatively smaller amount of equipment and cast and crew than larger features or television.

Maine’s freight and shipping services were seen as having reasonable current capacity for multiple productions, as well as strong suitability for large-scale productions coming from outside of Maine. As shown in Figure 28, all (100%) of surveyed practitioners reported that either all or some of these services were suitable. Of these, half (51%) reported all were suitable. Meanwhile, 40% reported that Maine’s PSCs were all suitable for large-scale productions coming from outside of Maine, indicating that of the few active they can provide quality support. Further, a third (33%) reported that Maine’s travel agencies were all suitable for large-scale productions coming from outside of Maine.

Figure 28 – Suitability of Maine’s Production Logistic Agencies for Large-scale Productions Coming from Out of State



Source: SPI survey (% responding)

4.4.2 Food and Accommodation

Maine is well known for its culinary scene and expertise. Over the years, there have been many popular cooking shows and documentaries about the state’s fishing industry and highly rated restaurants. *The Lost Kitchen* (2021-) is a recently popular cooking show, following Maine-native chef Erin French research and serve up dishes at a historic mill turned restaurant in Freedom, Maine.

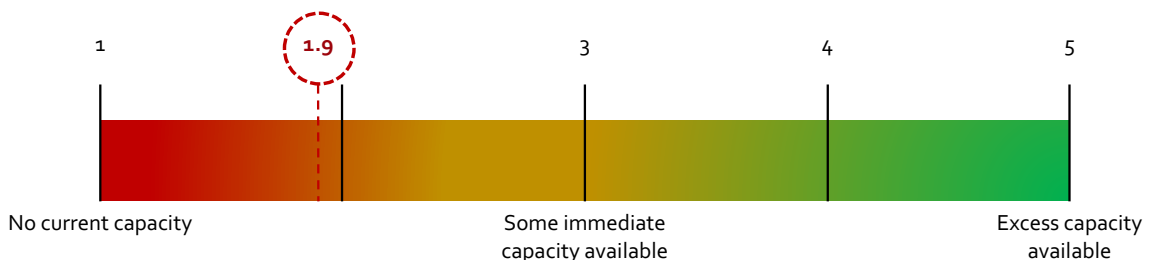
However, consultees noted that there is currently limited capacity in large-scale catering for multiple screen productions at once. This was particularly true in more remote parts of the state and during busy tourist summer seasons, where chefs and food supplies are largely reserved for the restaurant trade:

“There is plenty of food, but there is room for growth regarding food catering. There aren’t people who could walk onto set and be able to handle catering for a large production company.”

This said, consultees noted that there is a real opportunity for screen production to provide valuable food trade in the quieter winter months, with restaurants happy to open for productions, pending there being sufficient activity.

Based on the survey results, consultations, and desk research, SPI set the capacity gauge for mobile catering and dining services as 1.9, indicating limited capacity available in peak tourist season, when screen production largely takes place (Figure 29). This would be set around three in the winter, non-tourist season, indicating some immediate capacity available.

Figure 29 – Current Capacity of Maine’s Mobile Catering and Dining Services for Serving Multiple Productions in Peak Tourist Summer Season



Accommodation is another key consideration for producers choosing where to locate a production. Such facilities need to be located within reasonable distance to where the shoot is taking place, as well as provide suitable facilities for potentially large numbers of cast and crew. This is particularly key for a rural state like Maine where overnighting during production is likely, given the time required for commuting.

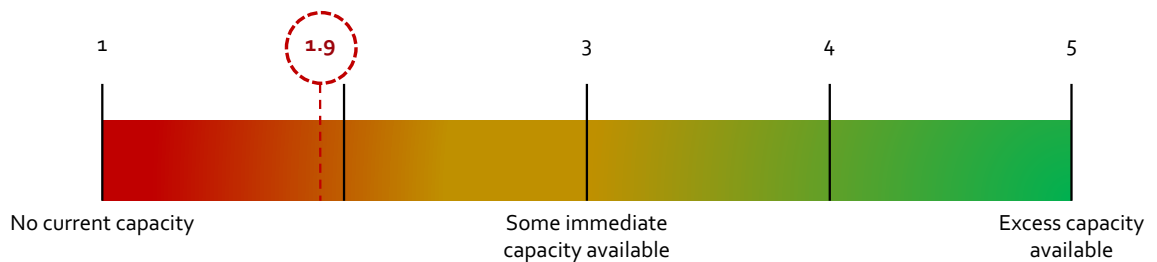
Consultees noted that Maine’s popular port towns have very high rent costs. This is driven by a mixture of house shortages and large numbers of second homes. Further, it is common for owners to rent out their homes in the summer to tourists for high rates. This means that accommodation is a premium for productions during the summer months, when filming mostly takes place, including those of bad quality:

“In the past we’ve had to pay \$300 per night for a bad motel room because there was so much demand. This can be exclusionary for smaller budget projects.”

These additional costs will deter smaller budget productions.

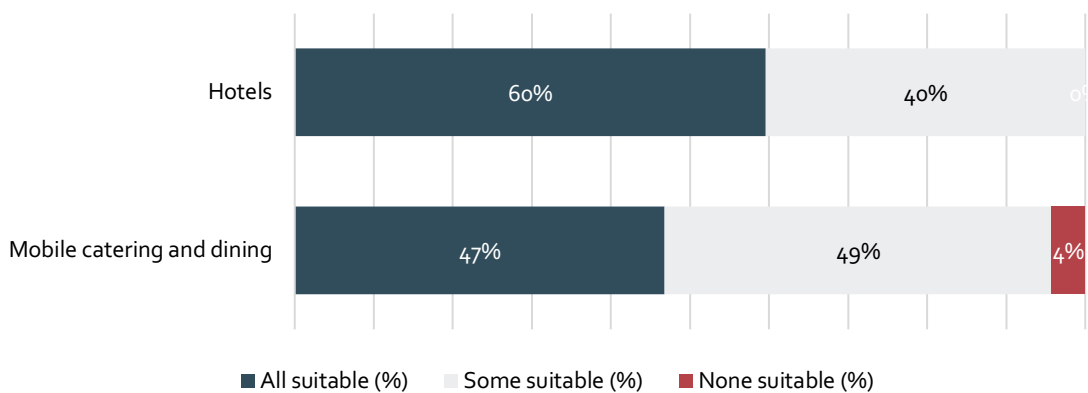
Based on the survey results, consultations, and desk research, SPI set the capacity gauge for hotel services as 1.9, indicating limited capacity available in peak tourist season (Figure 30). This would be set around three in the winter, non-tourist season, indicating some immediate capacity available.

Figure 30 – Current Capacity of Maine’s Hotels for Hosting Multiple Productions



Despite having variable capacity for multiple productions depending on the time of the year, surveyed practitioners reported that Maine’s hotels, mobile catering and dining services were largely suitable large-scale productions coming from outside of Maine (Figure 31).

Figure 31 – Suitability of Maine’s Food and Accommodation Services for Large-scale Productions Coming from Out of State



Source: SPI survey (% responding)

4.4.3 Production Accounting and Legal

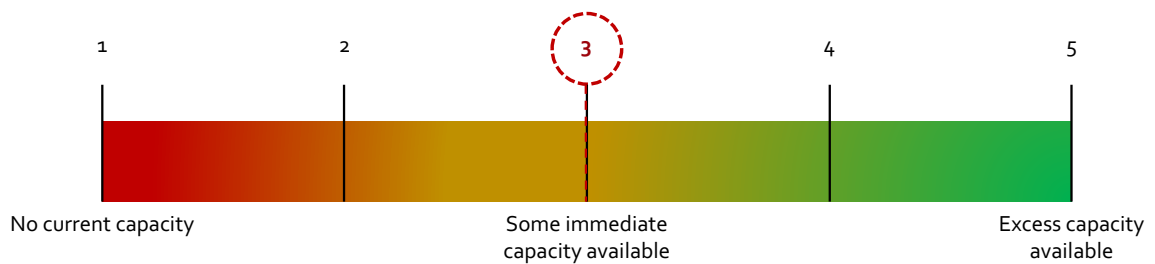
Production accounting and auditing services track costs and budgets throughout principal photography and post-production for all formats of screen content. These services include payroll accounting, budgeting, cash flows, petty cash, and are especially important with budgets spread over multiple productions for various platforms, as is the case for many producers. They are also key when productions are accessing a production incentive, as detailed auditing can be required to successfully secure payment.

While many PSCs have become accustomed to strict accounting procedures for national productions, they must also conform to international accounting standards when working with international producers.

Maine currently has some immediate capacity in relevant accounting and payroll services, with 40% of survey practitioners reporting this. This was reinforced by consultees and desk research, providing a capacity gauge score of 3 (Figure 32). Of these accounting and payroll services, there is reasonable suitability for large-scale productions from outside Maine (Figure 34).

It is worth noting that given the small scale of productions taking place in Maine, production accounting and payroll services are typically done in-house, with little current need for external services.

Figure 32 – Current Capacity of Maine’s Accounting and Payroll Services for Servicing Multiple Productions



Large-scale productions, especially those coming from out of state, will likely arrange legal counsel as part of their production. Such services will review legal contracts with vendors and landowners, as well as reviewing key documentation relating to the financing of the production.

Maine currently has some limited capacity in relevant auditing and legal services, with half (49%) of survey practitioners reporting this. This was reinforced by consultees and desk research, providing a capacity gauge score of 3 (Figure 33). Of these auditing and legal services, there is reasonable suitability for large-scale productions from outside Maine (Figure 34).

Figure 33 – Current Capacity of Maine’s Auditors and Legal Services for Servicing Multiple Productions

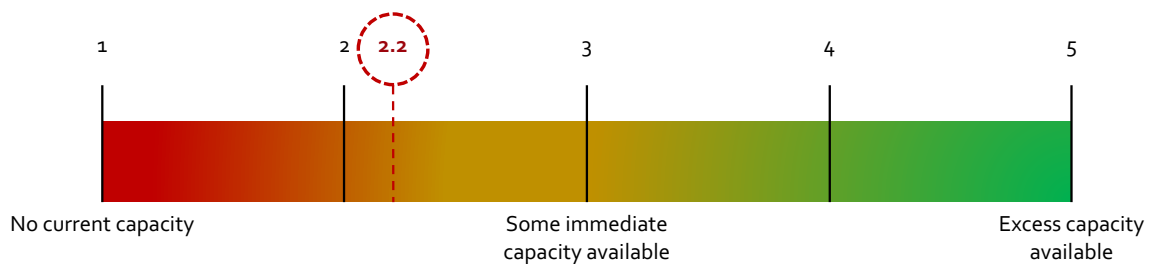
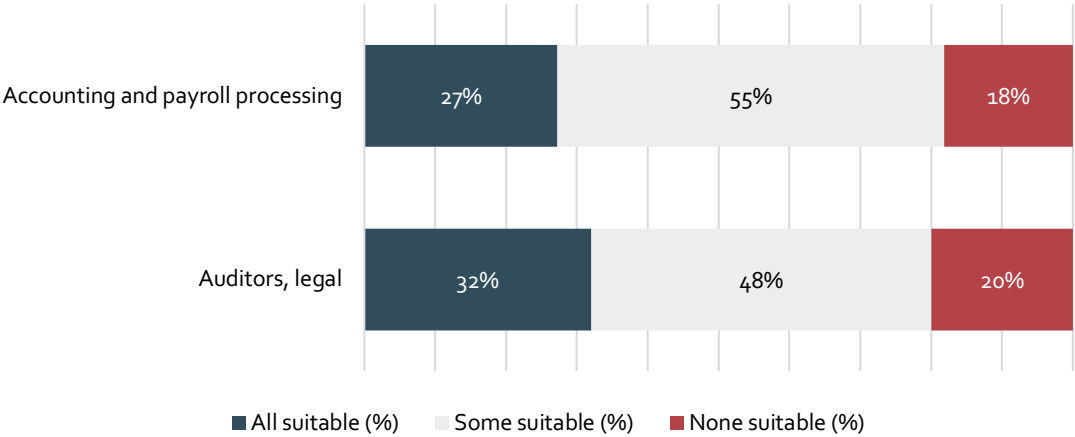


Figure 34 – Suitability of Maine’s Production Accounting and Legal Services for Large-scale Productions Coming from Out of State



Source: SPI survey (% responding)

Chapter 5:
**Below-the-line
Workforce Capacity**



Image courtesy of the Maine Film Office

5 BELOW-THE-LINE WORKFORCE CAPACITY

5.1 Introduction

BTL positions refer to the technical roles that directly contribute to the physical production of screen content (e.g. heads of department, line producer, cinematographer, camera operator, gaffer, grip). They are responsible for keeping operations on schedule, ensuring the equipment is fully functional, and making sure that the lights, set, props, and all other production elements are ready for action and will fulfil the creative team’s vision.

This section assesses Maine’s BTL crew, evaluating the current capacity of key roles to service multiple productions at once, as well as suitability for large-scale productions coming from outside of Maine.

5.2 Director and Script Department

5.2.1 First and Second Assistant Director

In the production stage of a project, the first assistant director (“**first AD**”) is responsible for determining and managing a project’s filming schedule and working with the director, director of photography, and heads of department to ensure filming is on schedule and efficient.

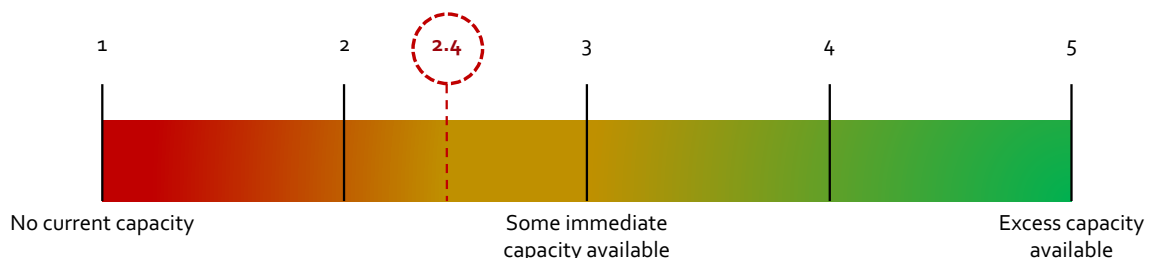
The first AD is also responsible, in the pre-production stage of a project, for studying the script and determining what is needed in terms of cast, locations, equipment and crew and then surveying filming locations to assure their suitability for the project. This is how they determine the shooting schedule and establish how long each scene will take to film; this enables the project’s director to focus on actors’ performances and framing the shots. While most common on film and television productions, first ADs are also occasionally used for shooting commercials and documentaries.

Overall, consultees and surveyed practitioners reported a limited current capacity among directors working in Maine to work on multiple productions, with over half (56%) of surveyed practitioners reporting that Maine had limited or no current capacity.

SPI’s wider research and consultations noted that the reason for these capacity issues is due to a very limited pool of first ADs available, given the level of specialist knowledge and wide skill set required for this role. There was marginally greater capacity of second assistant directors (“**second AD**”),¹¹ who work closely with the first AD, acting as a key point of contact for cast and on-site logistics.

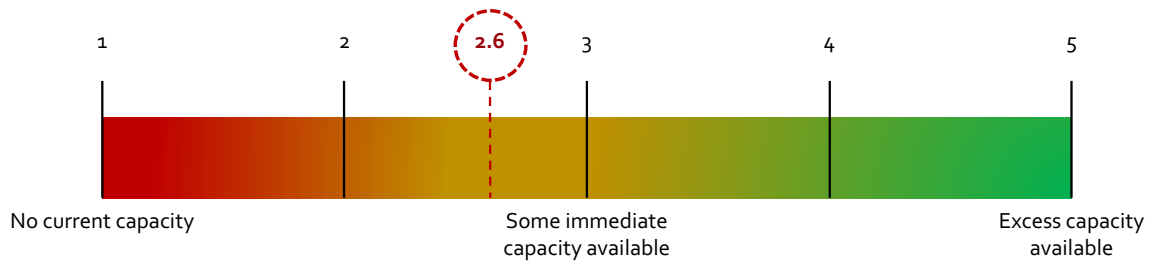
Based on the survey results, consultations, and desk research into the count of first and second ADs in Maine, SPI set the capacity gauges at 2.4 and 2.6, respectively, indicating limited current capacity (Figure 35 and 36).

Figure 35 – Current Capacity of Maine Based First Assistant Directors to Work on Multiple Productions



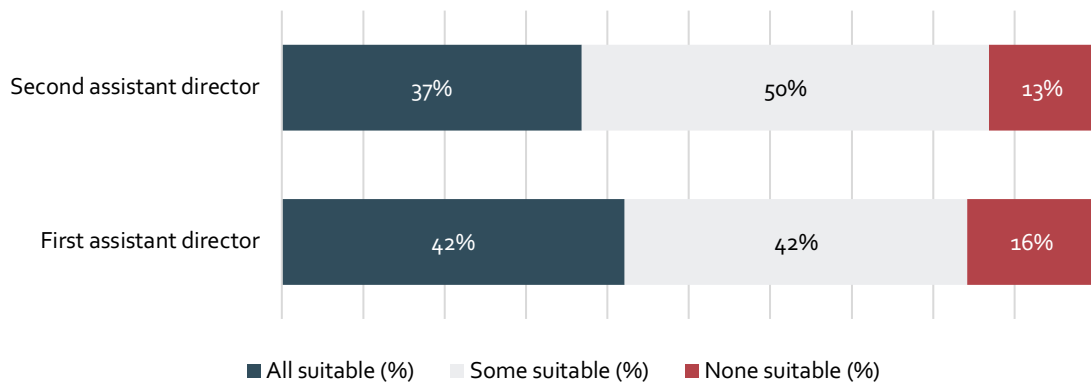
¹¹ 60% of surveyed practitioners reporting that Maine had limited or no current capacity

Figure 36 – Current Capacity of Maine Based Second Assistant Directors to Work on Multiple Productions



As shown in Figure 37, of the first and second ADs active in Maine, these were largely suitable for large-scale productions coming from out of the state, with 84% and 87% reporting these some or all these roles are suitable.

Figure 37 – Suitability of Maine Based First and Second Assistant Directors for Large-scale Productions Coming from Out of State



Source: SPI survey (% responding)

5.2.2 Script Supervisor

Screen content productions are usually filmed out of sequence and because of this there is a need for a dedicated professional to oversee the continuity of scenes and ensure that, when filming wraps, the footage is edited into a cohesive whole. This is important for narrative developed in documentary making, as well as film and television.

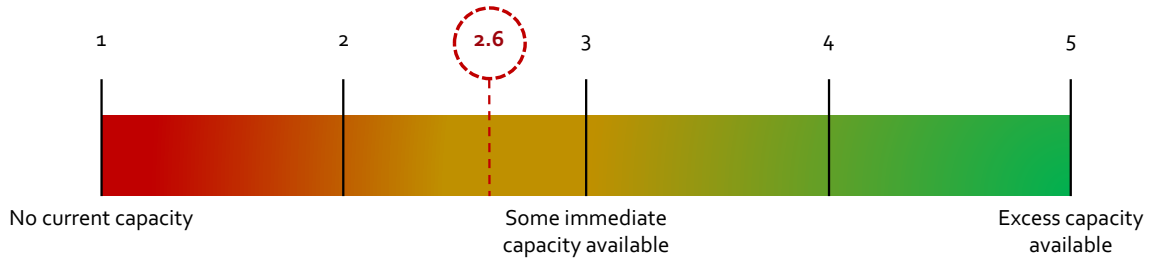
The professional responsible for overseeing continuity is the script supervisor and the process begins in the pre-production stage, when they analyze the script in terms of actor, action, wardrobe, and props in scene and determine a timeline (termed 'story days' in the industry). During filming, the script supervisor monitors the dialogue and actions, to ensure nothing is overlooked, and checks that the actor's eyelines match.

Overall, consultees and surveyed practitioners reported a limited current capacity among script supervisors working in Maine to work on multiple productions, with nearly half (48%) of surveyed practitioners reporting that Maine had limited or no current capacity.

SPI's wider research and consultations noted the capacity challenges arise from a scarce supply of script supervisors, attributed to the role's specialized knowledge and broad skills required. Moreover, the screen sector's high demand for these professionals results in many relocating from Maine to predominantly Los Angeles, Boston and New York for job opportunities.

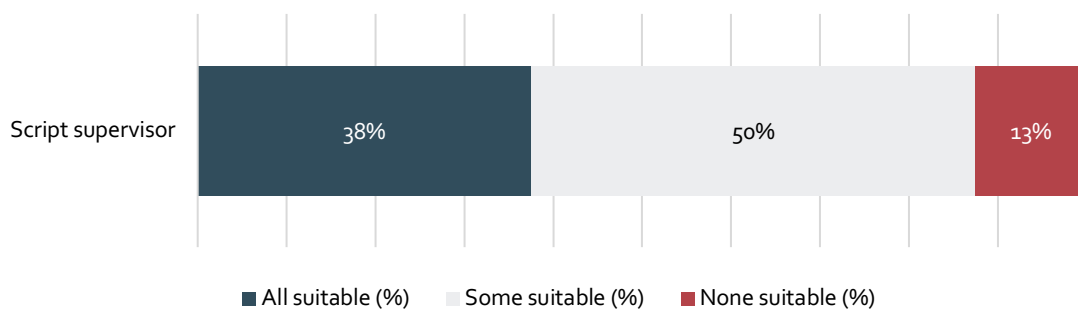
Based on the survey results, consultations, and desk research into the count of script supervisors in Maine, SPI set the capacity gauge at 2.6, indicating limited current capacity (Figure 38).

Figure 38 – Current Capacity of Maine Based Script Supervisors to Work on Multiple Productions



As shown in Figure 39, of the script supervisors active in Maine, these were largely suitable for large-scale productions coming from outside of the state, with 88% reporting that some or all these roles are suitable.

Figure 39 – Suitability of Maine Based Script Supervisors for Large-scale Productions Coming from Out of State



Source: SPI survey (% responding)

5.3 Art and Production Design Department

5.3.1 Director of Photography

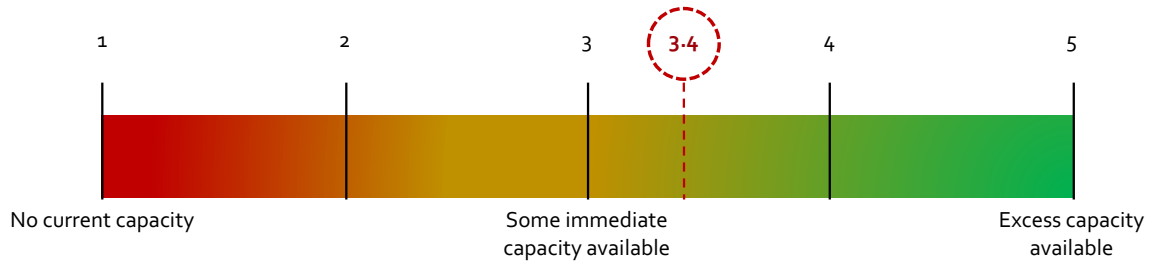
The director of photography, also known as the DoP or cinematographer, is ultimately responsible for creating the “look” of a film. Their role extends beyond merely shooting, encompassing visual storytelling and a thorough comprehension of the narrative. They collaborate closely with the director to determine how to interpret the script and communicate the story to the audience best visually.

The director of photography decides on the appropriate camera, lens, lighting, and composition for each scene, and is directly involved in making artistic and technical decisions related to color palette, light quality, shot selection, and camera movement. This role also involves managing a team of camera operators, gaffers, grips, and other members of the camera department to ensure that the director's vision is perfectly encapsulated.

Overall, consultees and surveyed practitioners reported a solid current capacity among directors of photography working in Maine to work on multiple productions, with nearly half (46%) of surveyed practitioners reporting that Maine had excess or reasonable capacity. This is the highest current capacity score across all the art and production design workforce, and a key role in orchestrating increasing levels of screen production.

Based on the survey results, consultations, and desk research into the directors of photography in Maine, SPI set the capacity gauges at 3.4, indicating some immediate current capacity available (Figure 40).

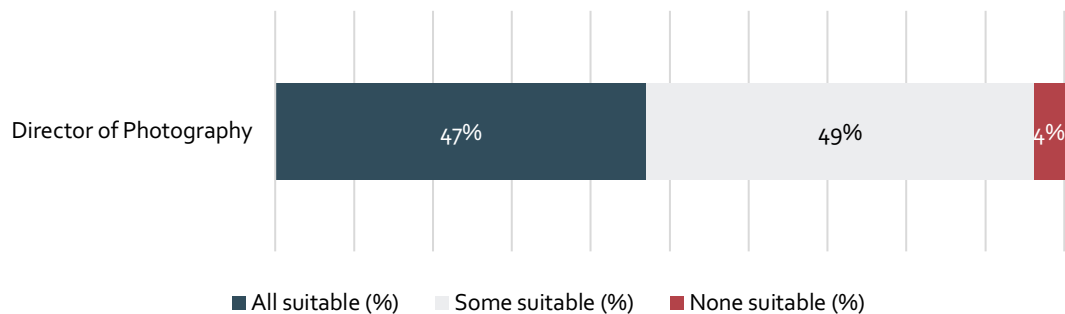
Figure 40 – Current Capacity of Maine Based Directors of Photography to Work on Multiple Productions



In addition to having capacity, surveyed practitioners also reported that directors of photography active in Maine were largely suitable for large-scale productions coming from outside of the state (Figure 41). This was indicated by one consultee:

"There are some newer young directors of photography, as well as producers and directors staying here, bringing their camera crew."

Figure 41 – Suitability of Maine Based Directors of Photography for Large-scale Productions Coming from Out of State



Source: SPI survey (% responding)

5.3.2 Production Designer

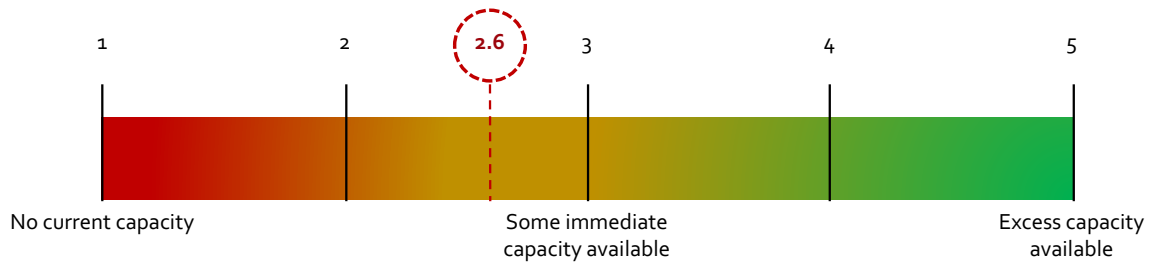
Production designers are responsible for the visual concept of a film, television or any other screen format production. They identify a design style for sets, locations, graphics, props, lighting, camera angles and costumes, while working closely with the director and producer.

Overall, consultees and surveyed practitioners reported a very limited current capacity among production designers working in Maine to work on multiple productions, with nearly half (48%) of surveyed practitioners reporting that Maine had limited or no current capacity.

A lack of production designers in-state will likely mean that out of state productions will need to source from other jurisdictions. This provides a missed opportunity for a Maine embedded production designer to champion and leverage distinctive parts of Maine's landscape and buildings to be promoted within the production.

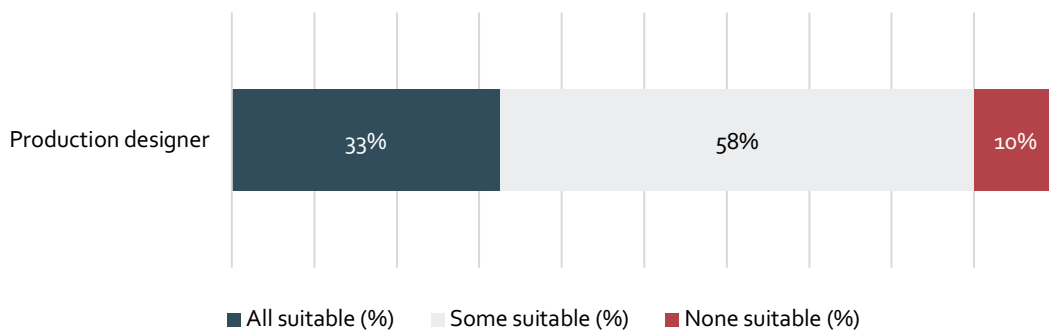
Based on the survey results, consultations, and desk research into the count of production designers in Maine, SPI set the capacity gauges at 2.6, indicating some immediate current capacity available (Figure 42).

Figure 42 – Current Capacity of Maine Based Production Designers to Work on Multiple Productions



While Figure 43 indicates that production designers in Maine are largely suitable for large-scale productions coming from outside of the state, SPI’s wider research disputes this. Rather, as outlined, there is an evidenced shortage of production designers in Maine, both in finding a sufficiently large pool of such professionals, as well as those with suitable practical experience for larger productions.

Figure 43 – Suitability of Maine Based Production Designers for Large-scale Productions Coming from Out of State



Source: SPI survey (% responding)

5.4 Camera, Grip and Electric Department

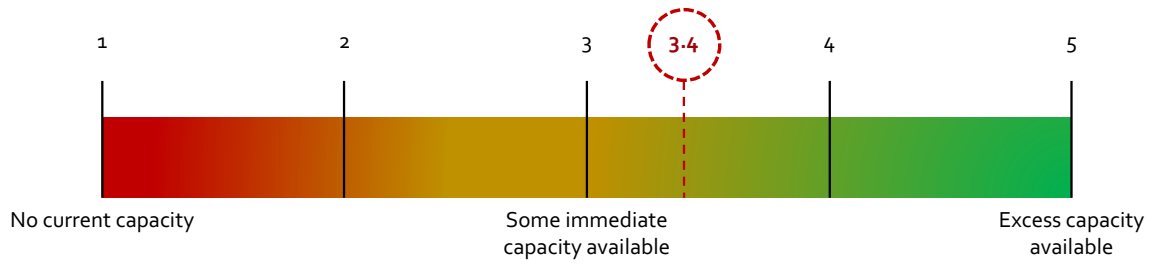
5.4.1 Camera Operator

Camera operators are responsible for operating a variety of technical equipment including single and multiple portable cameras, remote-control and electronic cameras, cranes, and mobile mountings.

Overall, consultees and surveyed practitioners reported a solid current capacity among camera operators working in Maine to work on multiple productions, with almost half (49%) of surveyed practitioners reporting that Maine had excess or reasonable capacity. This is the highest current capacity score across all the camera, grip and electric workforce. An abundance of camera operators is valuable for large scale productions. The camera operator role is also a valuable entry level position, where aspiring tech crew are able to learn the essentials before progressing to more skilled positions.

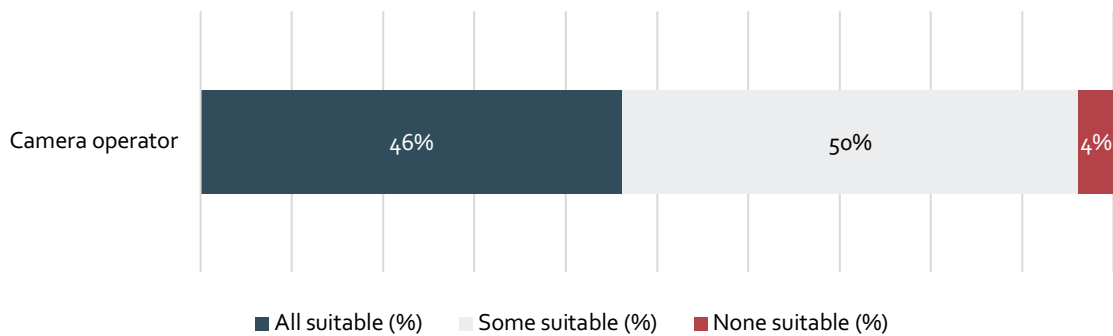
Based on the survey results, consultations, and desk research into the count of camera operators in Maine, SPI set the capacity gauges at 3.4, indicating some immediate current capacity available (Figure 44).

Figure 44 – Current Capacity of Maine Based Camera Operators to Work on Multiple Productions



As shown in Figure 45, camera operators in Maine, were largely suitable for large-scale productions coming from outside of the state. This high suitability and standard capacity score indicate that the operators in Maine have the necessary expertise and experience to handle more complex and demanding productions, potentially leading to higher production value and efficiency.

Figure 45 – Suitability of Maine Based Camera Operators for Large-scale Productions Coming from Out of State



Source: SPI survey (% responding)

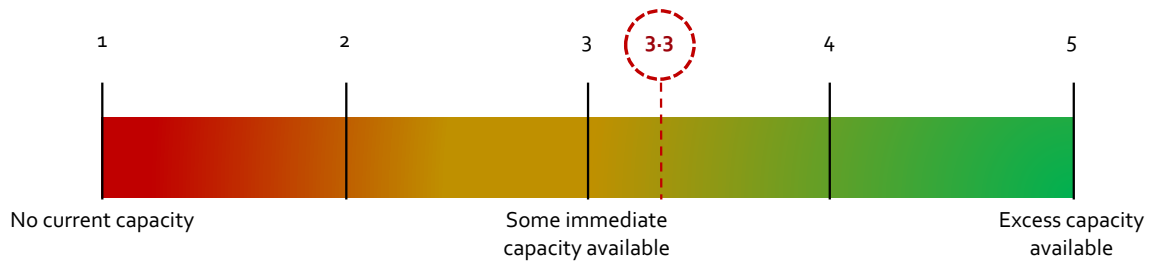
5.4.2 Grip

The grip is responsible for setting up, rigging, and striking lighting equipment on set. They are also responsible for keeping equipment organized, and sometimes equipment maintenance.

Overall, consultees and surveyed practitioners reported a reasonable current capacity among grips working in Maine to work on multiple productions, with 41 % of surveyed practitioners reporting that Maine had excess or reasonable capacity. This was supported by a reasonable supply of grip equipment.

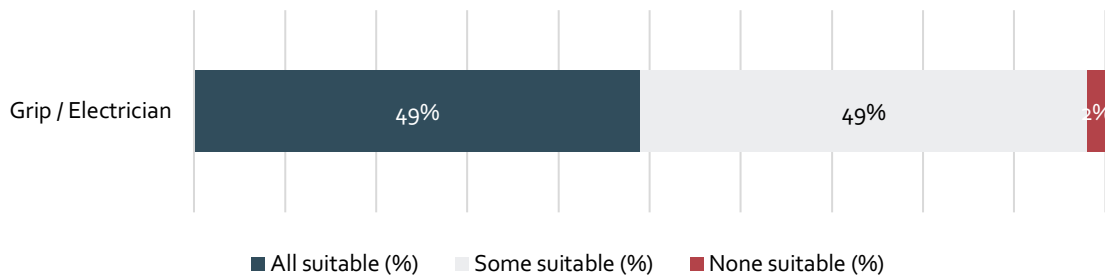
Based on the survey results, consultations, and desk research into the count of grips in Maine, SPI set the capacity gauges at 3.3, indicating some immediate current capacity available (Figure 46).

Figure 46 – Current Capacity of Maine Based Grips to Work on Multiple Productions



Further, as shown in Figure 47, grips active in Maine were largely seen suitable for large-scale productions coming from outside of the state.

Figure 47 – Suitability of Maine Based Grips for Large-scale Productions Coming from Out of State



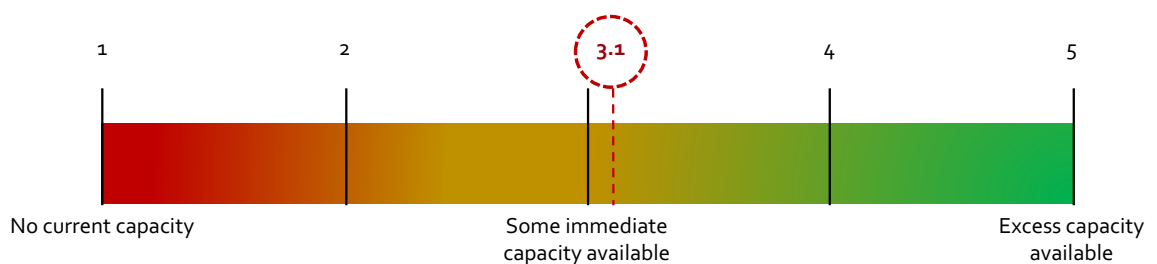
Source: SPI survey (% responding)

5.4.3 Gaffer

The gaffer or chief lighting technician is the head electrician, responsible for the execution, and sometimes the design, of the lighting plan for a production.

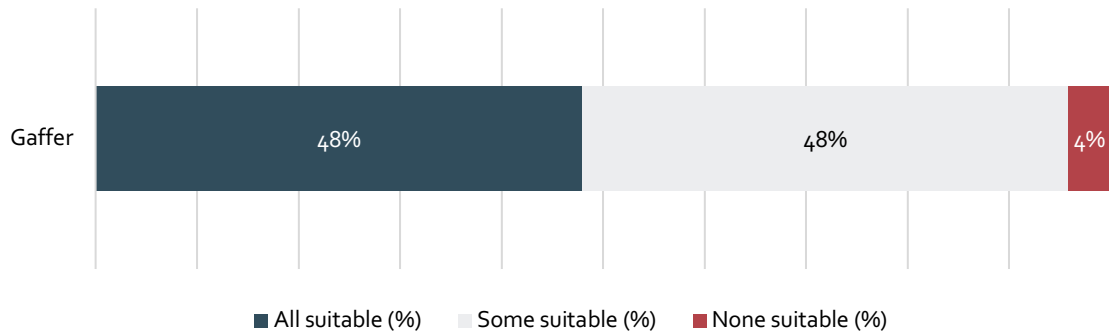
Overall, consultees and surveyed practitioners reported some immediate current capacity among gaffers working in Maine to work on multiple production. Based on the survey results, consultations, and desk research into the count of gaffers in Maine, SPI set the capacity gauges at 3.1, indicating some immediate current capacity available (Figure 48)

Figure 48 – Current Capacity of Maine Based Gaffers to Work on Multiple Productions



As shown in Figure 49, gaffers active in Maine were largely suitable for large-scale productions coming from outside of the state, with nearly half (48%).

Figure 49 – Suitability of Maine Based Gaffers for Large-scale Productions Coming from Out of State



Source: SPI survey (% responding)

5.5 Construction Department

5.5.1 Painter and Carpenter

In screen content production, a painter is responsible for painting and finishing the sets and props, ensuring they match the art director's vision and enhancing the visual storytelling. A carpenter, on the other hand, constructs and dismantles set pieces, using their skills in woodworking to bring the production designer's concepts to tangible life.

Maine's proficient craftspeople, such as carpenters and painters, typically found in traditional sectors, can increase their earnings in the dynamic screen sector. It is a pragmatic shift, leveraging existing skills for better pay in film and television production.

Overall, consultees and surveyed practitioners reported a strong current capacity among painters and carpenters in Maine to work on multiple productions, with approaching half (44%) of surveyed practitioners reporting that Maine had excess or reasonable capacity.

Based on the survey results, consultations, and desk research into the count of painters and carpenters in Maine, SPI set the capacity gauges at 3.3, indicating some immediate current capacity available (Figures 50 and 51).

Figure 50 – Current Capacity of Maine Based Painters to Work on Multiple Productions

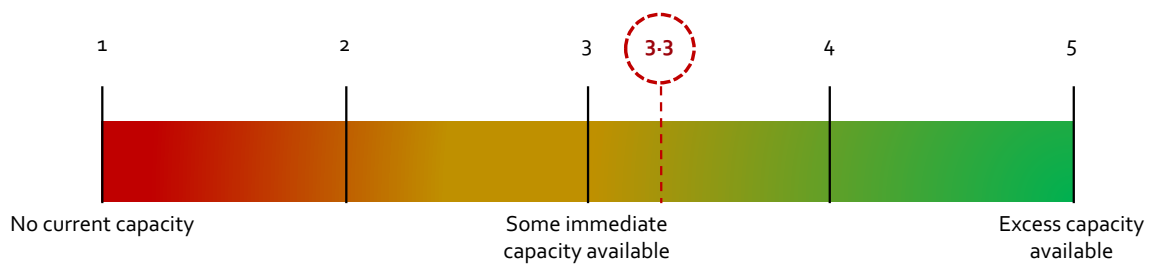
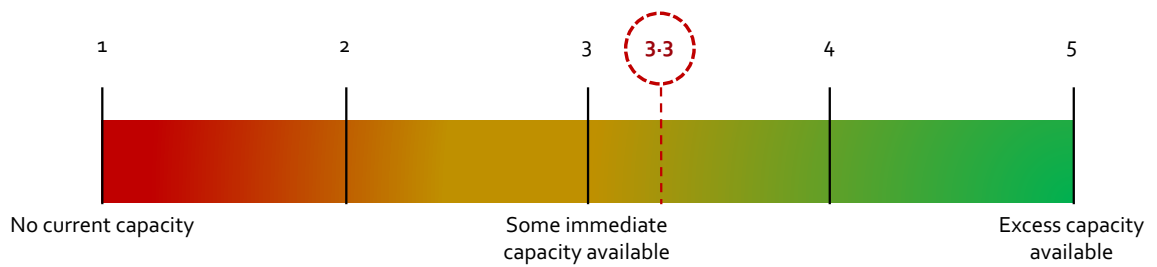
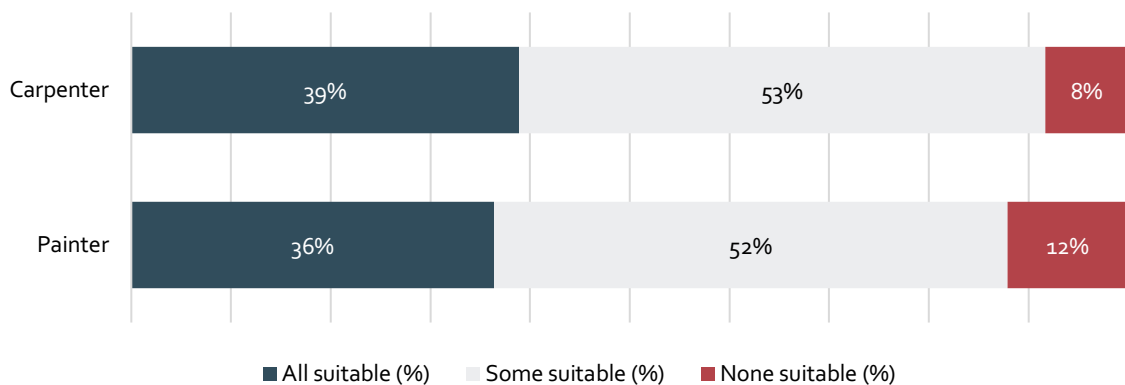


Figure 51 – Current Capacity of Maine Based Carpenters to Work on Multiple Productions



Further, as shown in Figure 52, painters, and carpenters active in Maine were largely suitable for large-scale productions coming from outside of the state. An out of state production would not find issues finding competent painters and carpenters, due to Maine’s crafts heritage.¹² Further, craftspeople are able to work in screen production with limited training required due to multiple transferable skills.

Figure 52 – Suitability of Maine Based Painters and Carpenters for Large-scale Productions Coming from Out of State



Source: SPI survey (% responding)

5.5.2 Construction Manager

Construction managers look after the building of sets. They make sure that sets look as realistic or otherwise as desired. They interpret the drawings of the production designer, art directors and draughts persons and work out how to build them in ways that are safe and environmentally friendly.

Overall, consultees and surveyed practitioners reported a limited current capacity among construction managers working in Maine to work on multiple productions, with over a third (37%) of surveyed practitioners reporting that Maine had limited or no current capacity.

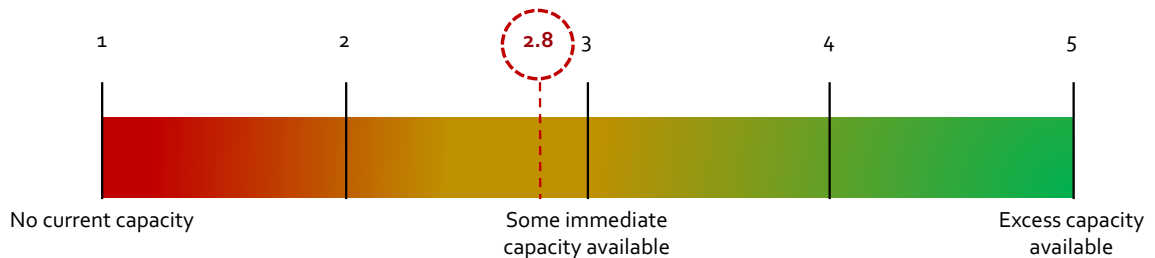
Consultees suggested that while Maine boasts excellent outdoor sites and available warehouses, it lacks skilled personnel, like construction managers, capable of managing sets in these locations. This shortfall could potentially discourage out of state productions from choosing the state as their filming location. This said, as with craftsmen, consultees also noted that there are easily transferrable skills from more general construction sectors, where

¹² *Maine Crafts Association*. Accessible at: <https://mainecrafts.org/about/maines-rich-tradition/>

managers overseeing real estate developments could easily begin to work on screen productions with initial training and guidance.

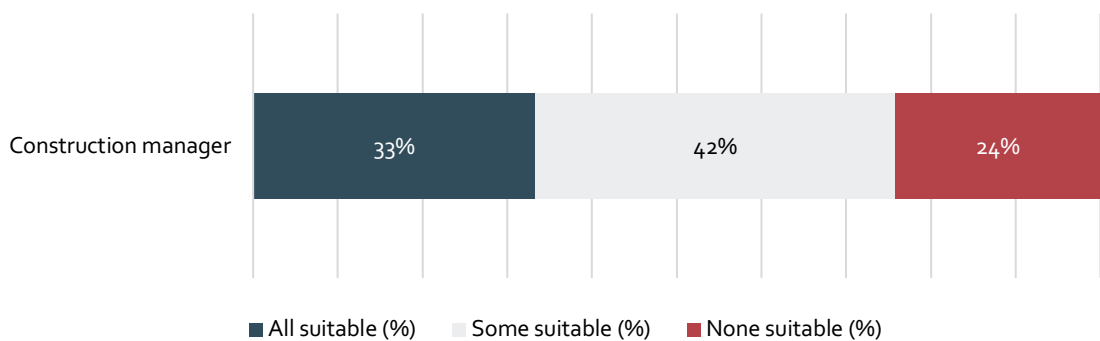
Based on the survey results, consultations, and desk research into the count of construction managers in Maine, SPI set the capacity gauges at 2.8, indicating some immediate current capacity available (Figure 53).

Figure 53 – Current Capacity of Maine Based Construction Managers to Work on Multiple Productions



As shown in Figure 54, there was a reasonable split of opinion on the suitability of construction managers active in Maine to work on large-scale productions coming from outside of the state.

Figure 54 – Suitability of Maine Based Construction Managers for Large-scale Productions Coming from Out of State



Source: SPI survey (% responding)

5.6 Health and Safety Department

5.6.1 Medic

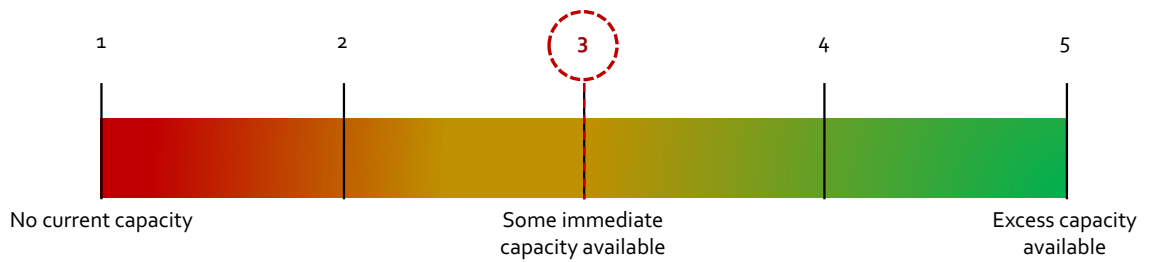
A medic in screen content production is responsible for ensuring the health and safety of all individuals on the set, providing first aid treatment during emergencies, and advising on health precautions during content creation. They also have a duty to coordinate medical evacuations if necessary and educate cast and crew members about potential health and safety risks.

Maine's medics, serving in conventional healthcare settings, could easily capitalize on their pre-existing medical expertise for further remuneration in film and television production.

Overall, consultees and surveyed practitioners reported a limited current capacity among medics working in Maine to work on multiple productions, with under half (42%) of surveyed practitioners reporting that Maine had limited or no current capacity.

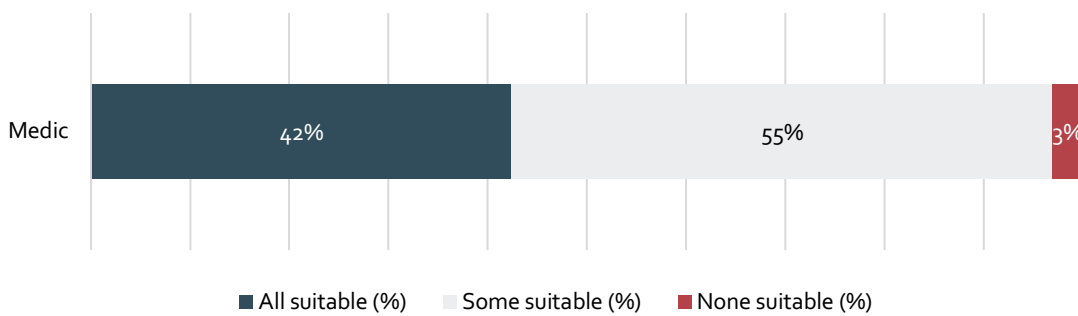
Based on the survey results, consultations, and desk research into the count of medics in Maine, SPI set the capacity gauges at 3, indicating some immediate current capacity available (Figure 55).

Figure 55 – Current Capacity of Maine Based Medics to Work on Multiple Productions



As shown in Figure 56, medics active in Maine, were largely suitable for large-scale productions coming from outside of the state.

Figure 56 – Suitability of Maine Based Medics for Large-scale Productions Coming from Out of State



Source: SPI survey (% responding)

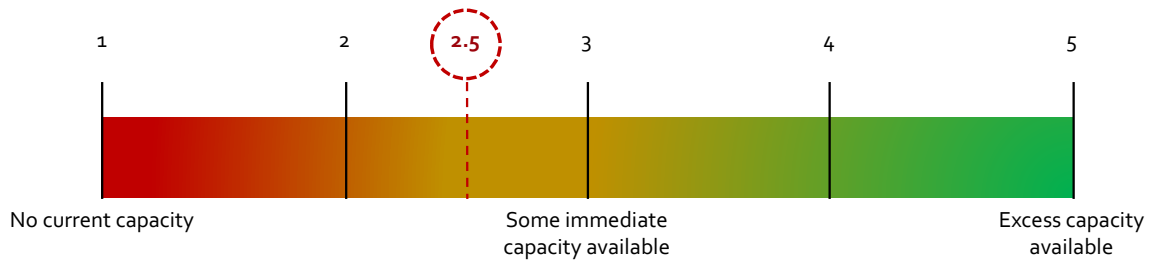
5.6.2 Safety Supervisor

The safety supervisor is responsible for evaluating risks and ensuring that in every situation on a set, the health and safety of the cast and crew is prioritized.

Overall, consultees and surveyed practitioners reported a very limited current capacity among safety supervisors working in Maine to work on multiple productions, with just over half (52%) of surveyed practitioners reporting that Maine had limited or no current capacity. The lack of established infrastructure and workforce is likely to explain the current limited capacity among safety supervisors to handle multiple productions concurrently, as the necessary training and experience is not as prevalent in the state.

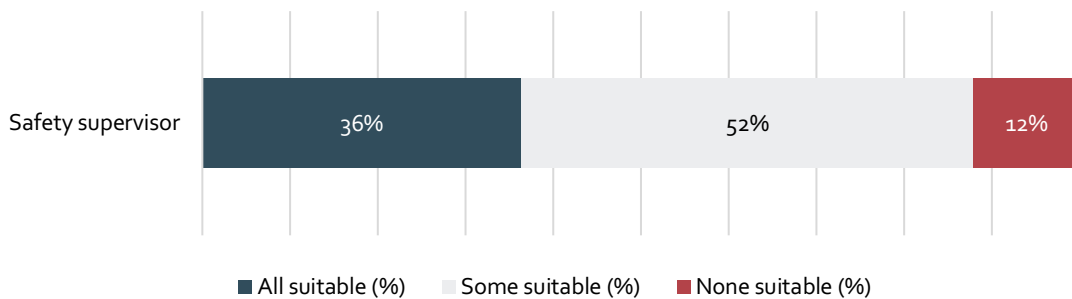
Based on the survey results and consultations, into the count of safety supervisors in Maine, SPI set the capacity gauges at 2.5, indicating some immediate current capacity available (Figure 57).

Figure 57 – Current Capacity of Maine Based Safety Supervisors to Work on Multiple Productions



As shown in Figure 58, of those active, safety supervisors in Maine were seen as largely suitable for large-scale productions coming from outside of the state.

Figure 58 – Suitability of Maine Based Safety Supervisors for Large-scale Productions Coming from Out of State



Source: SPI survey (% responding)

5.7 VFX Department

5.7.1 VFX Technician and VFX Supervisor

Visual effects (“VFX”) technicians work with a range of digital editing technology that allow them to manipulate analogue film or digital video. They work with directors and visual effects supervisors to bring storyboards to life using special effects. VFX allows filmmakers to create environments, objects, creatures, and even people that would otherwise be impractical or impossible to film in the context of a live action shot.

Overall, consultees and surveyed practitioners reported a very limited current capacity among VFX technicians and VFX supervisors working in Maine to work on multiple productions, with 50% (VFX technician) and 53% (VFX supervisors) of surveyed practitioners reporting that Maine had limited or no current capacity.

This said, SPI’s wider research and consultations reveal the viability of remote work in the VFX industry post-COVID-19, with Maine emerging as a favored location. Here, VFX work opportunities are proving appealing to those seeking a more rural lifestyle while maintaining their ability to work online.

Based on the survey results, consultations, and desk research into the count of VFX technicians in Maine, SPI set the capacity gauges at 2.5, indicating some immediate current capacity available (Figure 59). This is a similar result to VFX supervisors, achieving a slightly lower capacity gauge at 2.2 (Figure 60).

Figure 59 – Current Capacity of Maine Based VFX Technicians to Work on Multiple Productions

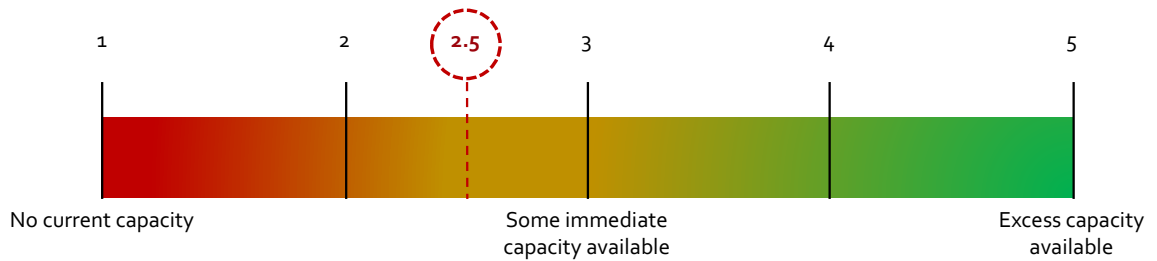
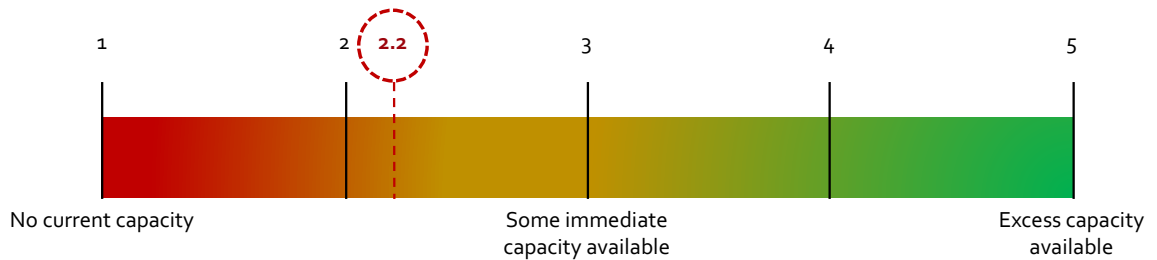
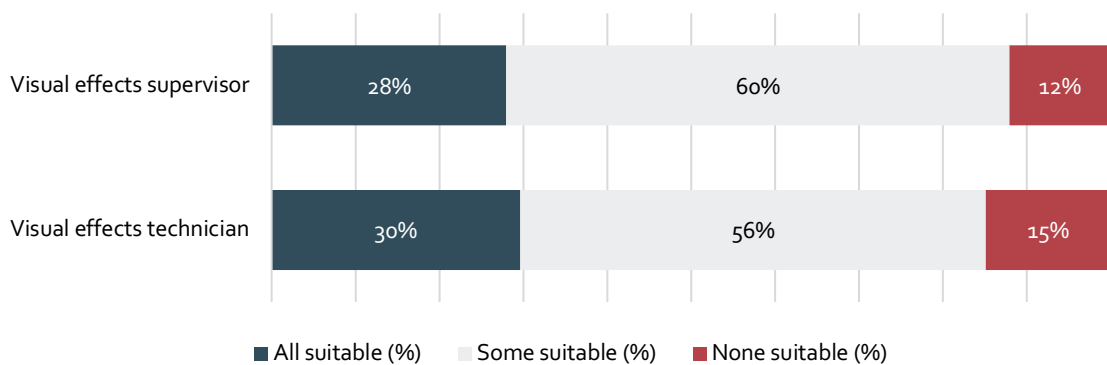


Figure 60 – Current Capacity of Maine Based VFX Supervisors to Work on Multiple Productions



As shown in Figure 61, VFX technicians and VFX supervisors in Maine were largely suitable for large-scale productions coming from outside of the state. However, the lower capacity scores suggest a current deficiency in readily available or sufficiently skilled VFX technicians and VFX supervisors in Maine to handle large-scale productions. As such, out of state productions are likely to rely on VFX technicians and VFX supervisors from their home states, as this type of work can often be done remotely. However, given Maine's growing popularity as a destination for remote workers, the prospects for the state's VFX industry appear promising.

Figure 61 – Suitability of Maine Based VFX Technician and Supervisors for Large-scale Productions Coming from Out of State



Source: SPI survey (% responding)

5.8 Location, Unit and Transport Department

5.8.1 Location Manager

The location of a live action shoot has a huge impact on its look, feel and story. It is the job of location managers to locate suitable spots that are accessible, safe, as well as align with the production's theme and budget.

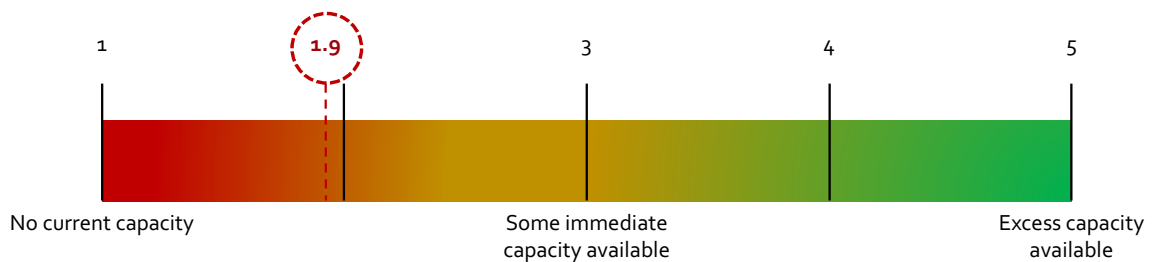
Based on scripts and discussions with the director, production designers and other department heads, location managers start their research. They might be looking for deserts, stately homes, or shady underpasses. They arrange visits to the locations, take photographs, detailed notes, start discussions with the location owners and work out costs.

Once filming has started, location managers manage the location. They make sure everyone in the cast and crew knows how to get there. They negotiate parking, noise reduction, power sources, catering requirements and any official permissions that may be needed with the site's management or owner. After the shoot, they make sure that the location is cleaned and locked up, before returning it to its owners in a satisfactory condition. Any damage must be reported to the production office and any insurance claims dealt with.

Overall, consultees and surveyed practitioners reported a very limited current capacity among location managers working in Maine to work on multiple productions, with nearly half (46%) of surveyed practitioners reporting that Maine had limited or no current capacity. This was reflected in consultations, where multiple consultees noted that a lack of location managers was an issue and the few available tending to focus primarily on commercials rather than films, where the current activity is focused. A greater number of location managers will invite a wider coverage of possible – and currently untapped – filming locations.

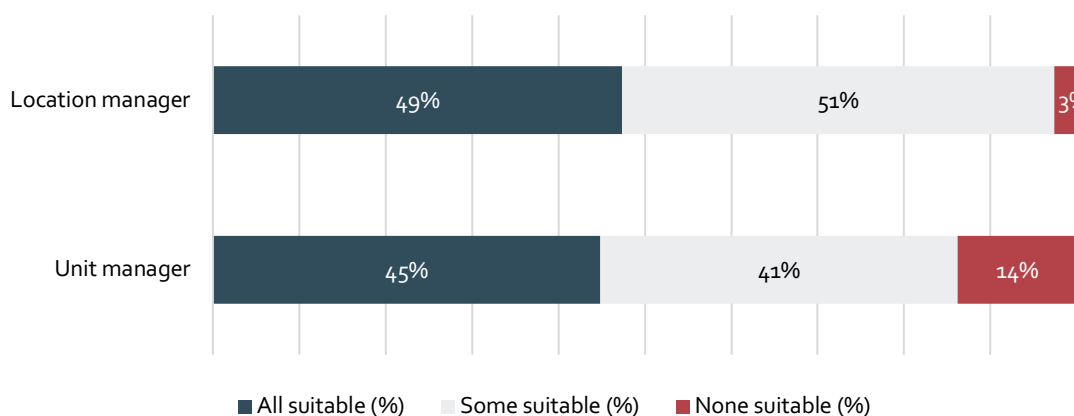
Based on the survey results and consultations, into the count of location managers in Maine, SPI set the capacity gauges at 1.9, indicating limited current capacity available (Figure 62).

Figure 62 – Current Capacity of Location Managers to Work on Multiple Productions



While Figure 63 indicates that location managers in Maine are largely suitable for large-scale productions coming from outside of the state, SPI's wider research disputes this. Rather, as outlined, there is an evidenced shortage of location managers in Maine, both in finding a sufficiently large pool of such professionals, as well as those with suitable practical experience for larger productions, in addition to smaller scale commercials.

Figure 63 – Suitability of Maine Based Location Managers and Unit Managers for Large-scale Productions Coming from Out of State



Source: SPI survey (% responding)

5.8.2 Unit Manager

Unit Managers are tasked with coordinating the logistical aspects related to location, unit, and transportation. Working in conjunction with location managers, they assist in securing permissions for selected locations, ensuring both legal and budgetary considerations are met. Their duties extend to managing the unit or base, which is a temporary setup at the filming location. They are responsible for the efficient functioning of this unit, ensuring all required resources are readily available for the cast and crew. This includes coordinating the provision of food, utilities, restrooms, and other amenities required for a smooth operation.

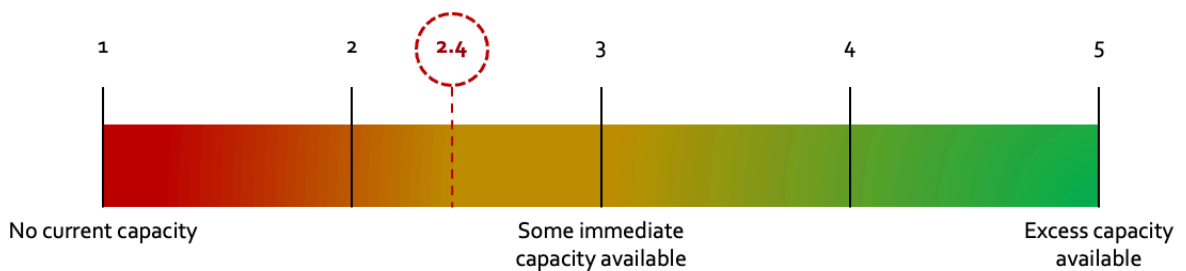
The transportation of both personnel and equipment also falls under unit manager's purview. They oversee designing and executing transport schedules, ensuring all cast, crew, and equipment arrive at the correct location, on time. They also manage the parking arrangements and negotiate any related issues. Lastly, the unit manager is responsible for ensuring the location is restored to its pre-shoot condition, managing any required clean-up, repairs, and lock-up procedures. They handle any issues related to damage, liaising with the production office and insurance companies as needed.

Overall, according to consultees and surveyed practitioners, there is a significantly limited current capacity among unit managers in Maine to handle multiple productions simultaneously. Over half (54%) of the surveyed practitioners reported limited to no current capacity. This scarcity can have substantial implications on production, particularly as unit managers play a crucial role in setting up unit bases, which include managing technical and crew parking requirements.

A deficiency in the number of unit managers is likely to lead to challenges in on-site coordination and could necessitate productions to bring in their own personnel, who may not be as familiar with local contexts or suppliers. This could in turn introduce inefficiencies and reduce familiarity with local protocols, complicating coordination efforts on site.

Based on the survey results and consultations, as well as desk research into the count of unit managers in Maine, SPI set the capacity gauges at 2.4, indicating some limited current capacity available (Figure 64).

Figure 64 – Current Capacity of Maine Based Unit Managers to Work on Multiple Productions



This said, according to survey practitioners, unit managers active in Maine, were largely suitable for large-scale productions coming from outside of the state, again indicating the few readily available unit managers could manage out of state productions.

5.9 Production Office

5.9.1 Line Producer

Line producers manage the budget and ensure that the financial resources of the film are utilized efficiently. The line producer scrutinizes the script and breaks it down into a costed schedule, considering every potential expense from talent wages to location permits, and from prop acquisition to food service. They are responsible for engaging key members of the production crew and making sure all contracts and agreements are in place. The line producer

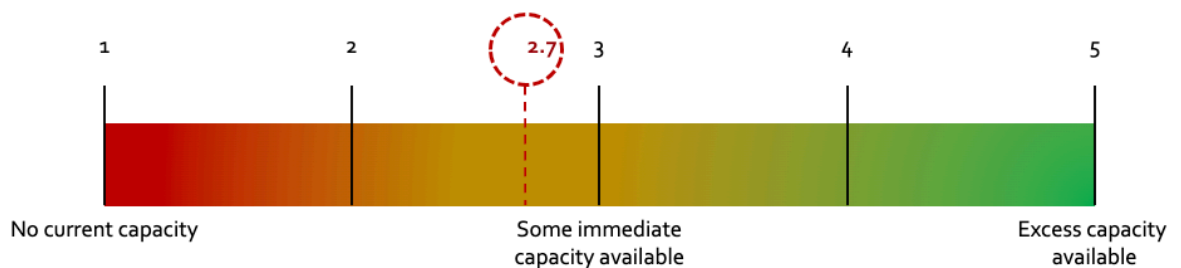
works together with department heads, equipping them with the necessary resources while making certain they operate within their budgetary limits.

During the production phase, they keep a watchful eye on the budget and schedule, adjusting and recalibrating as needed. The line producer acts as a problem solver, handling any unexpected expenses or schedule changes that might threaten the production's timeline or financial health. Once filming wraps up, the line producer's duties continue into post-production, overseeing the budgetary aspect of editing, sound mixing, and other post-production tasks. They ensure all bills are paid and all expenditures are recorded accurately, especially in cases where productions are applying for production incentives and need clear records.

Overall, consultees and surveyed practitioners reported a very limited current capacity among line producers working in Maine to work on multiple productions, with over half (53%) of surveyed practitioners reporting that Maine had limited or no current capacity. Given the key role and range of responsibilities, this will become an increasingly critical skill shortage if Maine's screen sector grows, given they provide continuity throughout the production process, as well as address problems as they arise.

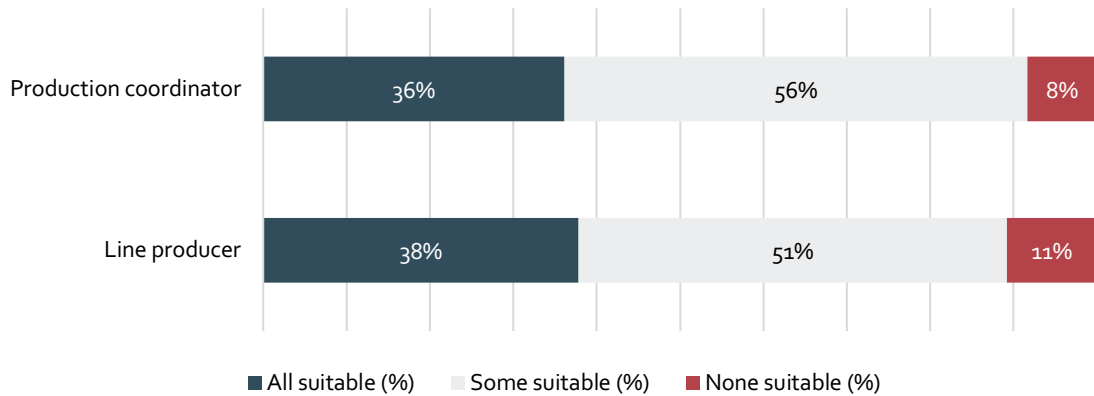
Based on the survey results and consultations, into the count of line producers in Maine, SPI set the capacity gauges at 2.7, indicating some immediate current capacity available (Figure 65)

Figure 65 – Current Capacity of Maine Based Line Producers to Work on Multiple Productions



As shown in Figure 66, line producers active in Maine were largely suitable for large-scale productions coming from outside of the state. This shows a need for Maine to expand its pool of line producers to enhance its capacity to host multiple productions concurrently. However, the demonstrated competence of Maine's line producers in managing large-scale external productions offers an optimistic outlook.

Figure 66 – Suitability of Maine Based Production Coordinators and Line Producers for Large-scale Productions Coming from Out of State



Source: SPI survey (% responding)

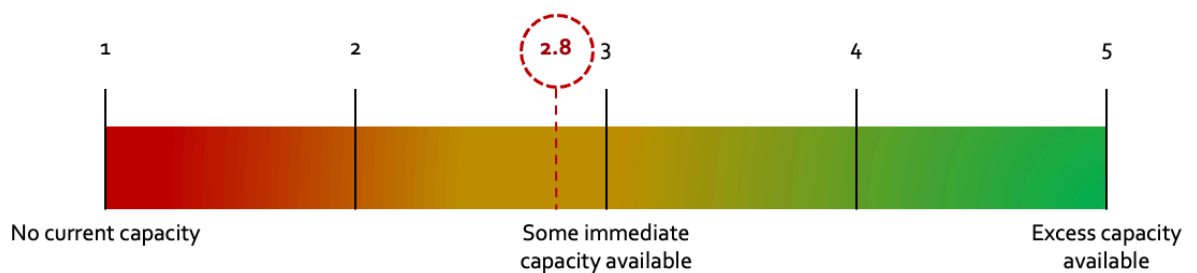
5.9.2 Production Coordinator

A production coordinator is responsible for administration and coordination. Operating from the production office, they ensure smooth communication between various departments, effectively acting as a hub for information flow. They handle the logistics, from scheduling meetings and coordinating travel plans to managing paperwork and overseeing the distribution of scripts and call sheets. They might also track expenditures and assist in maintaining the budget, always ensuring cost-effectiveness. Once filming starts, they help coordinate logistics, ensuring that cast and crew know when and where they need to be, and that the necessary equipment is available and ready to use. They also ensure everyone is aware of any changes or updates to the schedule.

Overall, consultees and surveyed practitioners reported a limited current capacity among production coordinators working in Maine to work on multiple productions, with just under half (45%) of surveyed practitioners reporting that Maine had limited or no current capacity.

Based on the survey results and consultations, as well as desk research into the count of production coordinators in Maine, SPI set the capacity gauges at 2.8, indicating some immediate current capacity available (Figure 67)

Figure 67 – Current Capacity of Maine Based Production Coordinators to Work on Multiple Productions



Production coordinators active in Maine were largely suitable for large-scale productions coming from outside of the state. This indicates a resilience and adaptability among the small pool of production coordinators in Maine. Further, that while their numbers might be limited, their skill sets and ability to handle larger productions are not compromised.

Chapter 6:

Above-the-line Workforce Capacity

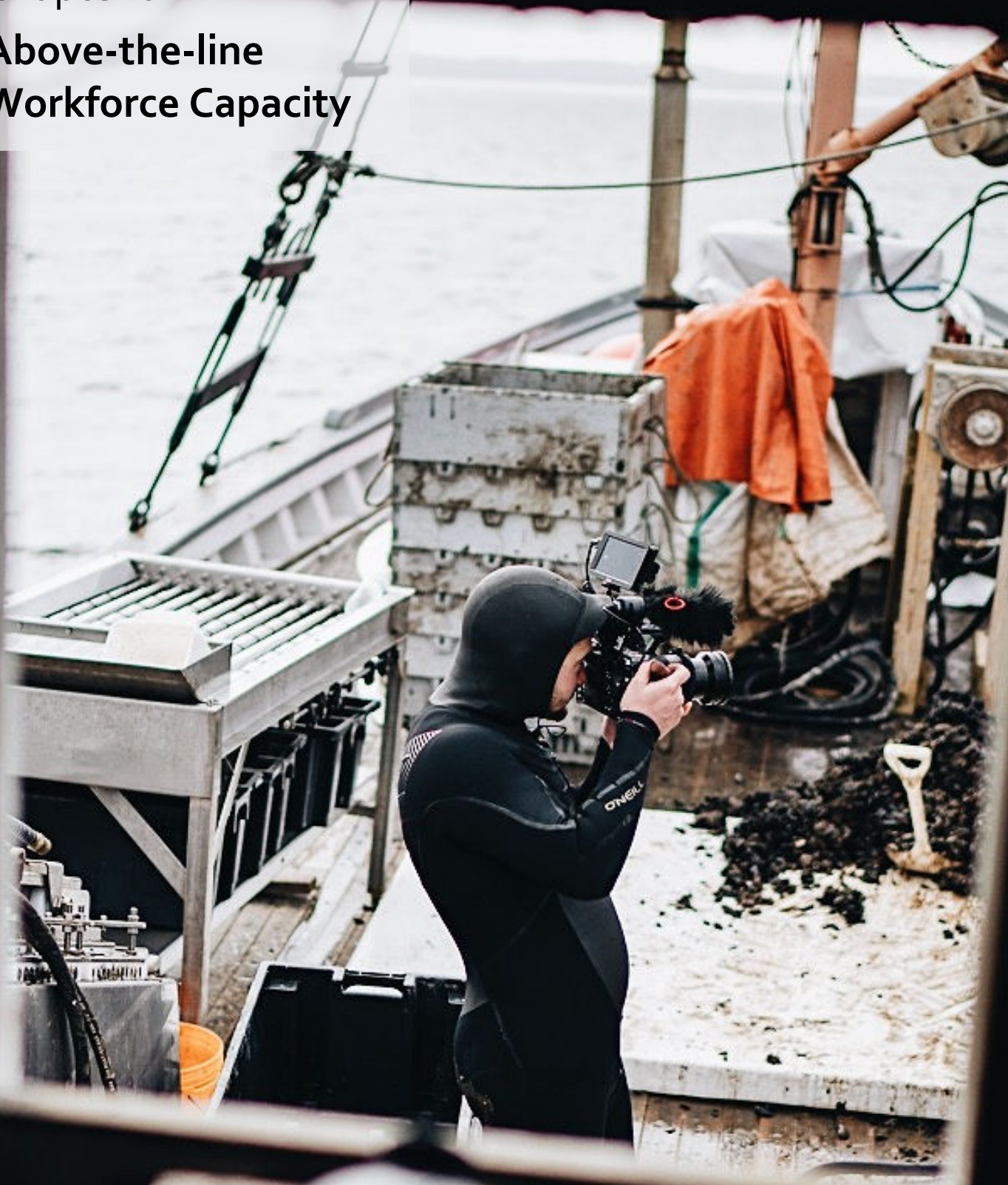


Image courtesy of the Maine Film Office

6 ABOVE-THE-LINE WORKFORCE CAPACITY

6.1 Introduction

ATL positions refer to those responsible for the creative development, production, and direction of a screen production. ATL cast and crew are responsible for guiding a project from idea to screen and ensuring its successful production and delivery. These are the individuals that make decisions about the look, feel, financing, and location(s) of a production and are therefore essential targets for markets, like Maine, wishing to grow its industry.

This section assesses Maine’s ATL cast and crew, evaluating the current capacity of key roles to service multiple productions at once, as well as suitability for large-scale productions coming from outside of Maine.

6.2 Director

Directors are key for a production as they are responsible for holding the creative vision throughout the filmmaking process, from pre-production through to the final edit. Notable mentions of active directors in Maine include David Conover (Compass Light), who creates documentary television and film such as *Behold the Earth* (2017), and Emma Gregg Brego, who creates animations, documentaries and scripted television and film, as well as working as director of production for the Maine-based production company p3.

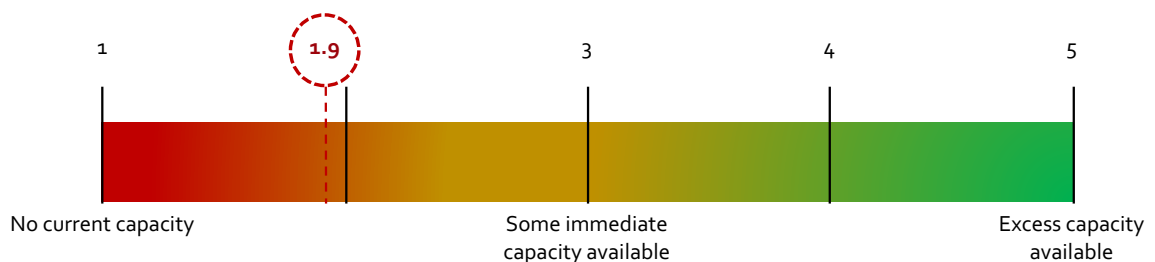
Overall, consultees and surveyed practitioners reported a limited current capacity among directors working in Maine to work on multiple productions, with over a third (38%) of surveyed practitioners reporting that Maine had limited or no current capacity.

SPI’s wider research and consultations noted that the reason for these capacity issues is chiefly due to a limited pool of directors available. Further, those directors based in Maine are regularly already employed on projects outside of Maine, notably in New York, Boston, and Los Angeles. Consultees further noted that this was the case for aspiring graduate directors – i.e. having to leave Maine to gain initial contacts and directing experience.

This said, a handful of consultees noted that Maine’s buoyant theater scene has in the past provided talent theater directors who have later moved into directing films, television, and commercials.

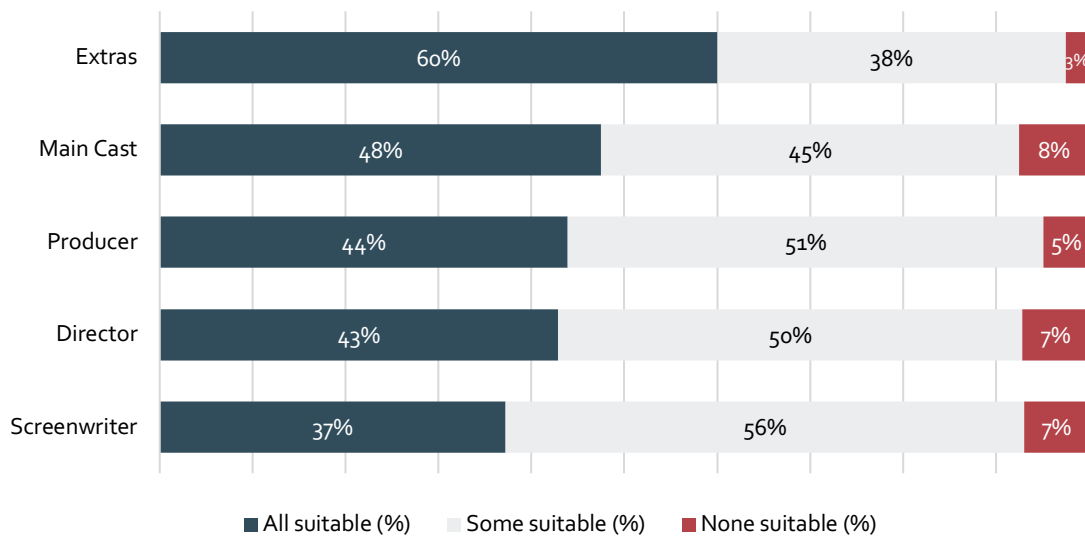
Based on the survey results, consultations, and desk research into the count of directors in Maine, SPI set the capacity gauge at 1.9, indicating limited current capacity (Figure 68).

Figure 68 – Current Capacity of Maine Based Directors to Work on Multiple Productions



As shown in Figure 69, of those directors active in Maine, they were largely suitable for large-scale productions coming from outside of the state. This was reinforced by consultees who noted that Maine had “a high caliber of directors with the necessary skills and networks to execute, but just a relatively small group”.

Figure 69 – Suitability of Maine Based Extras, Maine Cast, Producers, Directors and Screenwriters for Large-scale Productions Coming from Out of State



Source: SPI survey (% responding)

6.3 Producer

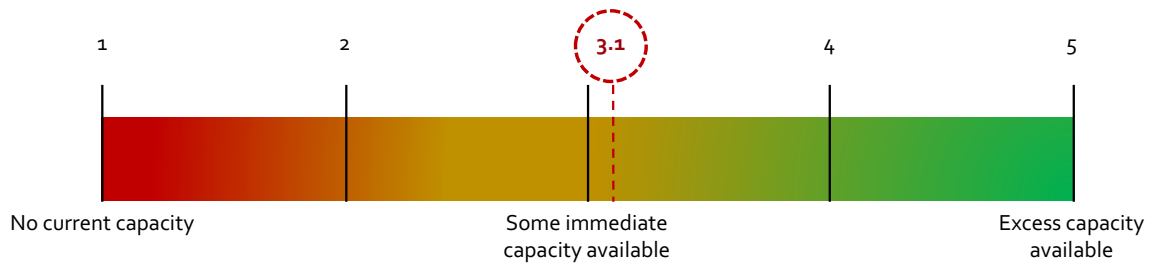
Producers are key for a production as they are responsible for making strategic decisions related to funding, scheduling, hiring and location. Notable active producers based in Maine include Molly Conners (Phippen Pictures), working in television and film; Devon Platte who specializes in wildlife non-fiction shows; Eric Mofford who has been involved in over 150 film, television, numerous commercials and music videos; and Erik Van Wyck, working in film and television. It is worth noting that all these producers have recently (re)located to Maine, wishing to support the growth of the sector.

Overall, consultees and surveyed practitioners reported a limited current capacity among producers working in Maine to work on multiple productions, with just over a third (33%) of surveyed practitioners reporting that Maine had limited or no current capacity.

SPI’s wider research and consultations noted that the reason for these capacity issues is due to the shortage of local opportunities, leading professionals based in Maine to undertake projects in states with higher demand, such as California, Massachusetts, and New York. Moreover, these consultees, have had to rely heavily on personal networks to bring projects to Maine, emphasizing the significance of social capital and established connections, and the limited competitiveness of Maine’s incentive. This said, consultees also noted that post COVID-19, there had been an increase in producers moving to Maine, in search of a slower more rural life, with expectations this number will continue to rise.

Based on the survey results, consultations, as well as desk research into the count of producers in Maine, SPI set the capacity gauges at 3.1, indicating some immediate current capacity available (Figure 70).

Figure 70 – Current Capacity of Maine Based Producers to Work on Multiple Productions



As shown in Figure 69, of those producers active in Maine, were largely suitable for large-scale productions coming from outside of the state.

6.4 Screenwriter

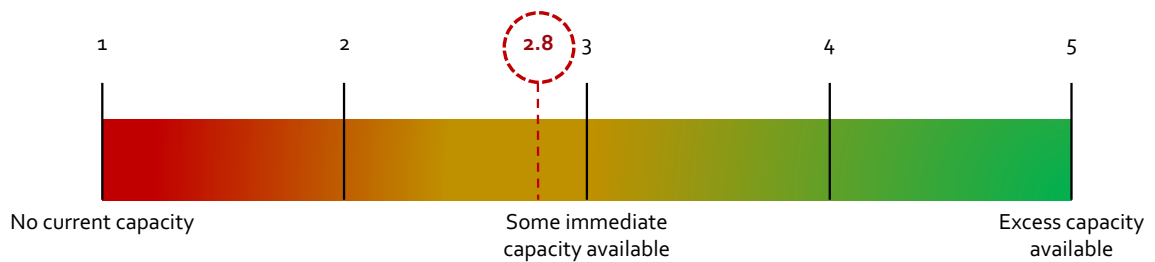
Screenwriters are key for production as they focus on plot development, character arcs, and dialogue.

Overall, consultees and surveyed practitioners reported a very limited current capacity among screenwriters working in Maine to work on multiple productions, with nearly half (45%) of surveyed practitioners reporting that Maine had limited or no current capacity.

This low capacity is at odds with Maine's rich literary heritage, exemplified by the contributions of renowned authors such as Stephen King. Consultees noted that while there are many active fiction and non-fiction writers, this literary wealth has not yet been noticeably transferred into screenwriting. This provides a clear missed opportunity for growing the creative side of Maine's screen production sector.

Based on the survey results, consultations, as well as desk research into the count of screenwriters in Maine, SPI set the capacity gauges at 2.8, indicating some immediate current capacity available (Figure 71).

Figure 71 – Current Capacity of Maine Based Screenwriters to Work on Multiple Productions



As shown in Figure 69, of those professional screenwriters active in Maine, they were largely suitable for large-scale productions coming from outside of the state.

6.5 Main Cast

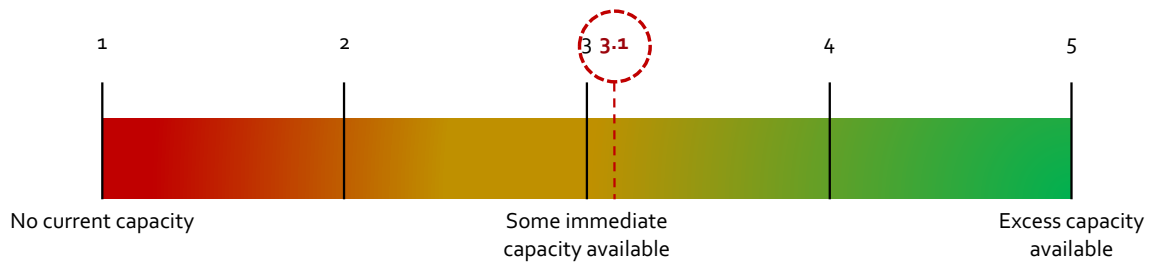
Main cast are defined as primary actors – i.e. the characters central to the storyline, and the individuals who receive top billing. Prominent actors native to Maine include Anna Kendrick, known for her work in films like *Pitch Perfect* (2012) and her Oscar-nominated role in *Up in the Air* (2009); Patrick Dempsey, famed for his role in *Grey's Anatomy* (2005-) and Timothy Simons, recognized for his work in the acclaimed series *Veep* (2012-19).

Overall, consultees and surveyed practitioners reported a limited current capacity among professional main cast actors working in Maine to work on multiple productions, with over a third (37%) of surveyed practitioners reporting that Maine had limited or no current capacity.

This said, SPI's wider research and consultations indicated a stronger presence of acting talent of varying levels of experience and availability. Experienced actors have often moved to Maine part-time and therefore may not be available for regular work locally. Further, while there is a wider pool of actors available, they have had limited experience in screen productions, and largely trained in stage acting.

Based on the survey results, consultations, as well as desk research into the count of main cast actors in Maine, SPI set the capacity gauges at 3.1, indicating some immediate current capacity available (Figure 72)

Figure 72 – Current Capacity of Maine Based Cast to Work on Multiple Productions



While Figure 69 indicates that Maine's main cast actors are largely suitable for large-scale productions originating from outside the state, SPI's wider research disputes this. As outlined, Maine has a strong theater community and actors experienced in small commercials and modelling photoshoots, but their exposure to and opportunities within larger scale film and television productions remain limited.

6.6 Extras

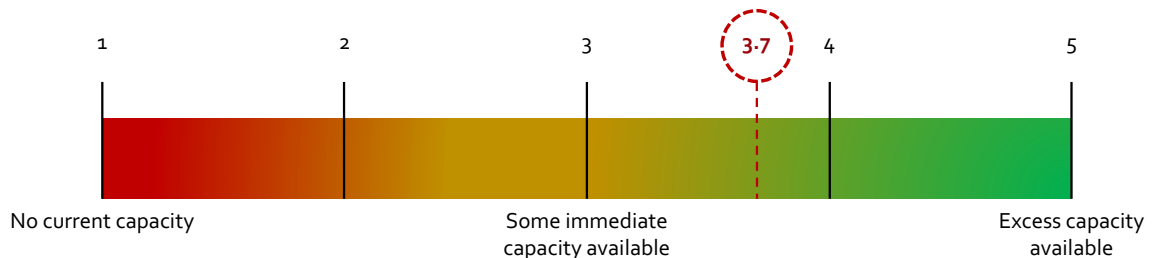
Extras are defined as non-speaking roles, background characters, and minor roles that typically do not have character names.

Overall, consultees and surveyed practitioners reported a strong current capacity among extras working in Maine to work on multiple productions, with over half (53%) of surveyed practitioners reporting that Maine had excess or reasonable capacity.

SPI's wider research and consultations found that many Maine locals are interested in working as extras on film shoots. As previously mentioned, a considerable number of actors reside in Maine who, in the absence of local acting opportunities, often engage in roles as extras.


Based on the survey results, consultations, and desk research into the count of extras in Maine, SPI set the capacity gauges at 3.7, indicating a strong current capacity available (Figure 73)

Figure 73 – Current Capacity of Maine Based Extras to Work on Multiple Productions



As shown in Figure 69, of those extras active in Maine, these were very suitable for large-scale productions coming from outside of the state. This was reinforced by one consultee who noted,

that “shooting in Maine was a delightful experience for me because the local community was enthusiastic and supportive, even helping us on set and serving as extras.”

A man with a beard and a dark baseball cap with a logo is adjusting a complex professional camera rig. The rig is mounted on a large black metal structure, possibly a crane or dolly, and features a camera with a lens and various attachments. The background shows a grassy field and trees under a bright sky.

Chapter 7: Review of Maine's Screen Production Incentive

Image courtesy of the Maine Film Office

7 REVIEW OF MAINE'S SCREEN PRODUCTION INCENTIVE

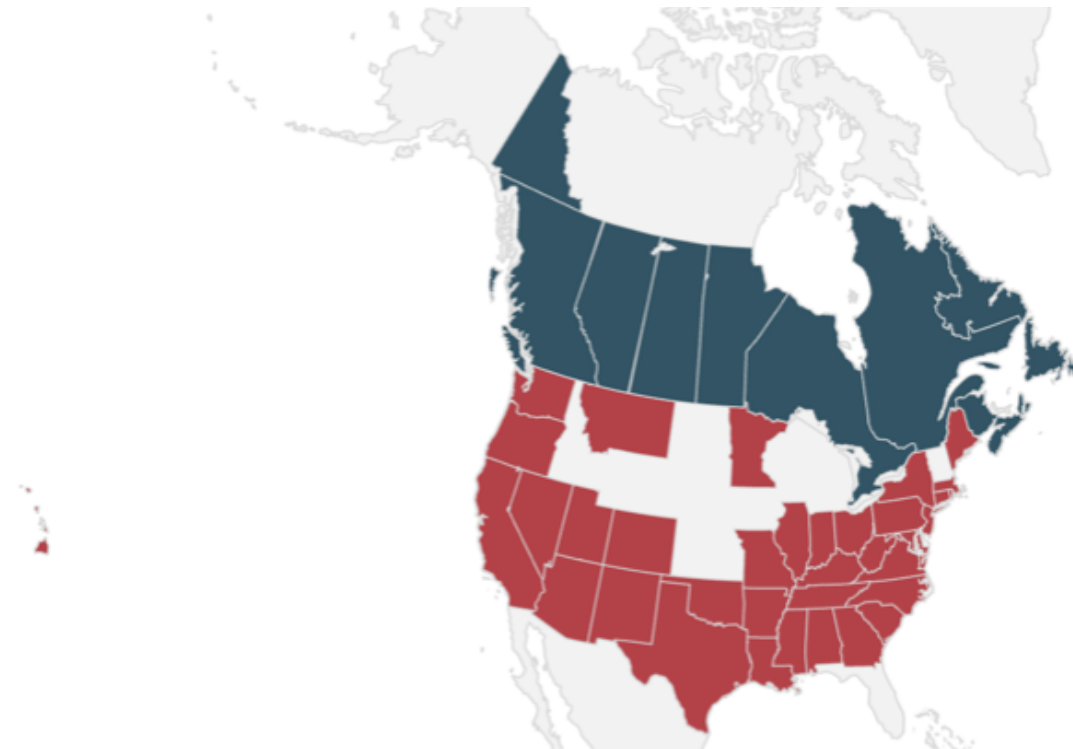
With production incentives a key policy lever in achieving production growth and strategic sectoral development, this section outlines the current status of the Maine incentive. It also examines potential improvements that could be considered and the possible impacts these could have.

7.1 Introduction

As a sector, screen content production is highly sensitive to incentives. This is because of the high cost of individual film and television productions as well as the inherent financial risk involved. In recent years, constraints in the provision of global talent and infrastructure, as well as increased demand for talent, have led to production cost inflation – further increasing investor focus on incentives.

As of September 2023, Maine is one of 37 US States offering a total of 39 automatic incentives. Of the six New England states, only Vermont and New Hampshire do not offer a screen production incentive. All major Canadian markets also offer incentives, including some that compete with Maine for locations offer due to being located nearby and sharing similar filming location choices. These include Atlantic Canadian provinces Nova Scotia and Newfoundland and Labrador. Canada also offers a federal production incentive.

Figure 74 – Map of the North American Incentive Landscape¹³

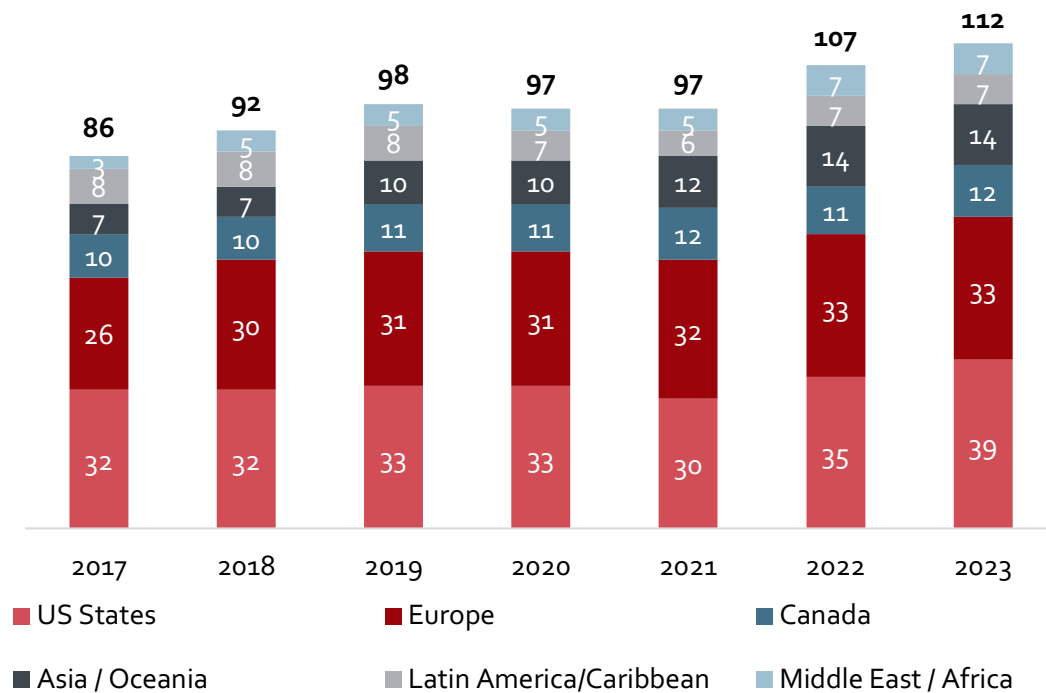


Source: SPI analysis (2023)

Globally, Maine's incentive is one of 112 automatic systems offered by countries, states, and provinces – i.e. an incentive which is triggered by eligible expenditure rather than selective considerations (see Figure 75).

¹³ Missouri and West Virginia have legislated incentives but as of July 2023 these programs have not been fully launched. Please note that in addition to the Canadian province-level incentives shown above, a federal production incentive applies to the entire Canadian market

Figure 75 – Automatic Incentives Globally, 2017-2023¹⁴



Source: SPI analysis (2023)

7.2 The Production Location Decision

Producers decide where to locate a production based on a complex and inter-related set of factors, covering creative, financial, and logistical considerations. As noted, the costs and financial risk inherent in screen production means that producers are closely focused on incentives. Components typically considered by producers include¹⁵:

1. Creative specifics
2. Initial budgeted costs
3. The effect of incentives on reducing costs
4. The availability of dedicated shooting spaces (i.e. studios)
5. The availability and experience of crew and workforce
6. The variety and availability of external locations (if needed)
7. Safety and security
8. Perceived ease of filming and support from local agencies
9. Communications and transport infrastructure
10. Lifestyle offer and key talent and creatives.

Priorities assigned to these factors change over time. For example, health and safety became a major consideration during the global COVID-19 pandemic.

¹⁴ Where relevant, includes multiple incentives for individual markets (e.g. Ontario which offers a separate incentive for visual effects). N.B. The US has 39 incentive systems in 37 states

¹⁵ Adapted from *Global Screen Production – The Impact of Film and Television Production on Economic Recovery from COVID-19*. SPI, 25th June 2020. Accessible at: <https://static1.squarespace.com/static/5f7708077cf66e15c7de89ee/t/60282af90267734564e0fedd/1613245181073/Global-Screen-Production-and-COVID-19-Economic-Recovery-Final-2020-06-25.pdf>

Incentives play a cornerstone role in the flow of production investment to different jurisdiction – with investor focus on incentives only increasing in line with production costs.¹⁶ As outlined, the global increase in production and related cost inflation has increased focus on incentives, as well as the availability of workforce and shooting spaces.

Finally, the factors contributing to the production location decision can also differ by production type. Larger budget film and television projects are closely focused on incentives given the scale of production investment involved. Conversely, commercials can be more driven by required locations.

7.3 Productions Attracted by Maine's Incentive

7.3.1 Incentive Overview

First introduced in 2006, Maine's production incentive is administered jointly by the MFO and the Maine Revenue Service. The state's incentive offers rebate and tax credit components which can both be claimed by individual productions. The rebate offers 10% reimbursement on non-resident wages and 12% on resident wages, while the tax credit offers 5% on other eligible non-wage spend.

These incentive values are not competitive – particularly in a high-cost market where a significant amount of workforce and equipment need to be brought in from out of state, as highlighted in the preceding sections. As outlined in Table 1, some developed markets offer more than double this amount without some of the limitations inherent in Maine's system.

To be eligible for the incentive, productions must undertake a minimum of \$75,000 in expenditure.¹⁷ While not significantly out of range when compared with other key competitors in Table 1, the reality of the Maine market means that the incentive is out of reach for some lower budget local projects, as well as some marketing shoots and commercials that are under the spend threshold but that could play a role in developing the sector's workforce skill level and capacity. In this way, the minimum spend is slowing development – a fact underlined by the fact commercials have a low usage rate of the Maine incentive.

In its formulation, Maine is an outlier in terms of offering two types of incentive for a single production. Where other dual systems exist, they tend to offer different types of incentives depending on the total spend of a project. These dual elements add complexity to the Maine incentive – both in terms of potential users calculating likely value and in terms of claiming the incentive using different mechanisms at different rates. Simplicity of incentives is a key marketing point utilized by other jurisdictions.

There are also some concerns about the speed of the application process, and the fact that there is a lack of flexibility. This was raised during a recent internal review of the incentive by the State of Maine's OPEGA team.¹⁸ For example, while some projects need to start production with very little notice once finance is finalized, the Maine incentive requires producers to first secure certification before production, including the provision of documents about the production, proof of insurance, and information demonstrating full financing. Such documents

¹⁶ For examples, SPI's 2021 study in New Mexico showed that 70% of survey respondents indicated that the state's tax credits were the most important factor for producing in New Mexico. The incentive was the top decision-making factor – ahead of cost base, crew, facilities and infrastructure, cast, locations and exchange rate. Source: *Economic Impact of the New Mexico Film Production Tax Credit*. SPI, 19th November 2021. Accessible at: https://nmfilm.com/assets/uploads/migrated/2021/11/NMFO_EconomicImpactStudy_NMFilmProductionIncentiveProgram_2021.pdf

¹⁷ Minimum expenditure was previously \$250,000, and was reduced to \$75,000 in 2009

¹⁸ *Visual Media Incentives: Maine's Visual Media Incentives Have Had Limited Effect and Have Not Been Adequately Administrated*. Ibid

may only be finalized closely to production, and the need to certify can delay the production and add costs.

While it is important for any incentive system that it is robustly managed, making sure that quick turnaround times are in place to assist productions will significantly help development of the sector in state, especially when competing with other neighboring states' incentives – chiefly Massachusetts.

In terms of controls, productions are also not required to be audited before payment. This is a significant risk and should be amended in a revised system.

Table 1 outlines key elements of Maine's incentive, and compares with selected competitors.

Table 1 - Incentives in Selected Comparison Markets¹⁹

	UNITED STATES						CANADA
	Maine	Connecticut	Massachusetts	Rhode Island	New Jersey	New York	Nova Scotia
Type	Rebate / Tax Credit	Transferable Tax Credit	Refundable/Transferable Tax Credit Credits can be cashed out with the Commonwealth of Massachusetts at 90% of face value after satisfying tax liabilities, or can be transferred at market rate. Credits can be used for up to five tax years	Transferable Tax Credit	Transferable Tax Credit	Refundable Tax Credit	Cash Rebate
Value	Rebate: –10% on non-resident wages –12% on resident wages Tax credit: –5% on other eligible spend	10% on production costs between \$100,000 and \$500,000 15% on projects with eligible spend of more than \$500,000 Projects of more than \$1m qualifying spend get 30%	–25% payroll tax credit –25% production tax credit + sales tax exemption: spending more than 75% of total budget or filming at least 75% of the principal photography days in Massachusetts makes the project eligible for a 25% production credit and a sales tax exemption, in addition to the 25% payroll tax credit	30%	–35% for cast and crew salaries throughout the state –30% for qualified film production expenses incurred for services performed and tangible personal property purchased for use at a soundstage or other location that is located in the State within a 30-mile	30%	25%-32% for all-spend inclusive

¹⁹ Correct as of May 2023. Source: *Global Incentives Index 2023*, SPI, May 2023. Accessible at: <https://static1.squarespace.com/static/5f7708077cf66e15c7de89ee/t/6464abe062ba7367905653a0/1684319214125/Global+Incentives+Index+May+2023.pdf>

Production Infrastructure, Capacity, and Development Analysis for Maine

	UNITED STATES						CANADA
	Maine	Connecticut	Massachusetts	Rhode Island	New Jersey	New York	Nova Scotia
					radius of the intersection of Eighth Avenue/Central Park West, Broadway, and West 59th Street/Central Park South, New York, New York		
Uplift	N/A	N/A	N/A	N/A	<p>–35% for qualified film production expenses incurred outside a 30-mile radius of the intersection of Eighth Avenue/Central Park West, Broadway, and West 59th Street/Central Park South, New York, New York</p> <p>–Additional 2% or 4% if diversity plan is submitted and achieved</p>	Additional 10% credit available on qualified labor expenses (direct hires only) in most Upstate counties. For those productions which film a majority of principal photography in Upstate counties, qualified production costs are also eligible for the 10% additional credit	Screen-based productions are classified into two streams based on the percentage of ownership, with various uplifts offered
Minimum Spend	\$75,000	\$100,000	\$50,000 in Massachusetts during a consecutive 12-month qualifying period	Minimum total production budget of \$100,000	–60% of the total film production expenses (exclusive of post-production	Minimum budget for project shooting majority downstate is \$1 million; for project	C\$25,000

Production Infrastructure, Capacity, and Development Analysis for Maine

	UNITED STATES						CANADA
	Maine	Connecticut	Massachusetts	Rhode Island	New Jersey	New York	Nova Scotia
					costs) must be incurred for services and goods purchased through vendors authorized to do business in New Jersey Or –Qualified film production expenses (expenses incurred in New Jersey for the production of a film) must exceed \$1 million per production	shooting majority upstate, this is \$250,000	
Annual Budget	N/A	N/A	No cap	\$40 million annual cap for 2023 and 2024 only	\$100 million	\$700 million	C\$41.4 million for the fiscal year 2022-23
Per-Project Cap	N/A	\$20 million for all star salaries	N/A	\$7 million cap per project which can be waived for qualifying feature-length film and television series productions	N/A	N/A	C\$10 million
Other thresholds	N/A	Projects must spend a minimum	Qualifying payroll and production: At least 75%	51% of principal photography	N/A	Pilots are exempted from the 10% principal	Different streams require different levels of heads

Production Infrastructure, Capacity, and Development Analysis for Maine

	UNITED STATES						CANADA
	Maine	Connecticut	Massachusetts	Rhode Island	New Jersey	New York	Nova Scotia
		of 50% of principal photography days in Connecticut, or 50% of post-production budget, or at least \$1 million in post-production in the state.	of the production company's total principal photography days, exclusive of pre- or post-production, must take place in Massachusetts OR Massachusetts payroll and production expenses during a consecutive 12-month period must exceed 75% of the total project budget. Payroll tax credit applies to above- and below-the-line costs, and provided the 75% tests are met, there are no caps on individuals regardless of residency.	must take place in RI. Productions incurring and paying a minimum \$10 million in qualifying expenditures over a 12-month period are allowed to waive the 51% of principal photography requirement. Documentaries that do not film their principal photography in Rhode Island are eligible for up to \$5 million in tax credits if they spend 51% of their final production budget and employ five individuals in the State OR 51% of their total production days,		photography day requirement. Pilots must shoot a minimum of one day of principal photography day at a qualifying production facility, and at least 75% of the total of all expenses related to work (excluding post-production) done at all facilities utilized by the pilot must be related to work done at the qualifying production facility.	of department positions to be held by Nova Scotia residents to receive the full base incentive.

Production Infrastructure, Capacity, and Development Analysis for Maine

	UNITED STATES						CANADA
	Maine	Connecticut	Massachusetts	Rhode Island	New Jersey	New York	Nova Scotia
				including pre- and post-production, take place in Rhode Island. Impact analysis and periodic reporting is also required			

7.3.2 Usage of Maine's Incentive

Maine's incentive is not competitive, and is not formulated in a strategic way that aims to address current sectoral weaknesses or to develop strategic priorities that are specific to the state. For example, the lack of capacity in workforce and equipment means that productions will likely need to source a significant amount of crew and equipment from out of state. However, the incentive is not currently competitive in offsetting this reality – which is exacerbated by the fact that Maine is a market with generally high costs, particularly during the busy summer tourist season.

This lack of competitiveness is starkly underlined by the usage of the incentive, while the lack of sectoral development since the introduction of the incentive underlines that the incentive is not adequately addressing Maine's strategic development needs.

The rebate element has been significantly more used than the tax credit, with the benefits of the latter seen by consultees being outbalanced by the time and effort involved. The tax credit component is complex and only available to companies with a Maine tax liability – limiting its use. Moreover, as a non-transferable and non-refundable credit, there are limitations in its value even for state-based companies and those eligible do not always utilize it.

This is highlighted by data in the OPEGA review showing that only nine tax credit claims – totaling \$37,875 – have been made since enactment. The wage reimbursement component has been used more frequently – with 95 wage reimbursements, totaling \$2.2 million since enactment. There is evidence from SPI's research that the rebate has incentivized some local companies and enabled them to offer longer-term contracts and healthcare.

The incentive is mainly accessed by television, film and documentary production. As noted by the OPEGA review, commercials and web marketing videos have the lowest number of completed productions – likely related to the minimum spend requirement.

7.4 Potential Improvements to the Current Incentive

A central challenge to the development of the screen sector in Maine is the fact that the state's incentive is uncompetitive. The incentive is not effective in offsetting the state's high costs, or the need to bring in workforce and equipment from out of state.

The state of Maine should therefore prioritize full revision and modernization of the incentive to align with market opportunity and the needs of the Maine sector. This should be considered across two inter-related areas:

1. Increasing overall competitiveness
2. Leveraging the incentive to ensure strategic outcomes for sector development in Maine.

While a detailed incentive redesign and associated costing is outside of the scope of this Study, key initial recommendations are outlined below.

7.4.1 Increasing Competitiveness

Given the potency of incentives in driving screen sector development in the US and globally, the state of Maine should undertake a full redesign the Maine incentive. This should include:

- **Undertaking a public consultation** on the design and aims and objectives of the incentive. Building on the primary research undertaken as part of this Study, this should include in and out of state producers to determine the balance and priorities between attracting inward productions and supporting in-state industry development. This will also be a chance to get further feedback on the effectiveness and procedure of the current incentive, as well as test some suggested design change ideas with

industry before implementing. Further, this will be an opportunity to educate the industry on the terms and benefits of having an incentive for the industry

- **Harmonization of the incentive to one model.** Currently, the system is structured with both rebate and tax credit elements across each production. A single model would simplify the incentive and remove complexity (and confusion) for applicants. From a producer perspective, rebate models are generally preferred for their simplicity; tax credit models are used widely in the US market and are also well understood by producers. Any shift should be fully costed and developed in relation to the potential budgetary and financial realities in Maine – including the credit market in state, which is currently uncertain
- **Improvement in incentive rate.** Currently, Maine’s incentive offers different rates across different types of expenditure. Taken individually, these rates are not competitive in the incentive marketplace, which is exacerbated by the complexity of offering different credit and rebate structures. Ideally one headline rate of around 25% would be offered. Given Maine’s lack of in-state capacity, this would ideally incentivize out of state workers and equipment used in Maine – though as outlined below this could be linked with strategic uplifts for local hires and the state of Maine could stipulate the requirement of knowledge transfer and training for Maine crew
- Given the current status of the market in Maine, **a large initial increase in incentive rate and budget is not immediately recommended.** Instead, the state of Maine should consider a staged expansion to support industry growth. In the short term it should focus on smaller projects – i.e. with budgets likely to be below US\$5 million – and medium sized productions – likely below \$35 million. These will relate to commercials, documentaries and other non-scripted productions – the latter a notable opportunity for Maine, given its locations and culture – and some independent scripted productions. Such projects would help to build Maine’s crew and equipment base. Over time the incentive could be expanded to target larger productions, with the budget range of targeted projects related to the base that has been developed
- **New guidelines and process flow.** A new incentive should be made very clear for applicants. Clear guidelines and a visual process flow would explain key elements and clarify likely timeframes. The state of Maine should also ensure adequate resources are assigned to support applicants, as well as guidance and training for the local industry in the incentive process; best practice in using the incentive, and open discussion around using the incentive
- Given the competition Maine is facing, a full marketing plan announcing the new terms and timeline, via mailing lists, networks and sectoral events should also be established.

As noted, the Maine incentive does not have an **audit provision**. To ensure robust control and management of the system, a compulsory audit provision should be introduced. This will help protect the system and ensure there is no misuse. Audits should be undertaken by companies or individuals with specialist knowledge of screen production and time expectations should be made clear to producers in system guidelines and process flow.

7.4.2 Leveraging the Incentive to Ensure Strategic Outcomes for Industrial Development in Maine

In addition to an overall incentive improvement package, the state of Maine should also ensure that the Maine incentive becomes more strategic and more closely linked to ensuring industry development objectives in Maine.

A central consideration for Maine is **capacity building**. As outlined elsewhere in this Study, building workforce, equipment, and infrastructure is critical. The incentive can be utilized to achieve this – for example, by continuing to offer an uplift on state hires. However, given the

capacity challenges, it would **not be recommended for the incentive to only be eligible for in-state hires.**

Experienced incoming crew could also be required by any new incentive guidelines to engage with **knowledge transfer and training** – albeit in a way that would not act as a disincentive. Training will be critical, and the incentive development should be linked to a broader state-wide Skills Plan.

Ultimately, **an uplift** for Maine residents in a newly competitive incentive is likely to positively encourage repatriation of those with necessary skills who have left the state for production work, or encourage those from elsewhere to move to the state. Both trends were noted during the COVID-19 pandemic, and an incentive could further encourage this.

Given the challenges for screen production during Maine’s tourist season, a **geographical uplift** for projects being made outside of tourist hotspots, or a **calendar uplift** for projects being made outside of the peak and shoulder summer season should be considered. Such an intervention would also help ensure that production benefits are spread throughout the state, and would also link to state hubs such as Portland and Rockland.

Finally, an **uplift for projects based on Maine-sourced or set material** being filmed in state should be considered. The loss of production of Maine stories to other states – particularly those of Stephen King – is well noted by consultees, and an additional uplift for productions being retained in state would be a statement of intent. Maine has a unique storytelling culture, and retention of this would ensure that any subsequent tourism benefits are retained by Maine. Additionally, Maine should consider a staged expansion to support industry growth. In the short term, the focus should be on small and medium-sized productions, including popular non-scripted content, commercials, and documentaries. This would contribute to building Maine’s crew and equipment base.

7.5 Potential Uplift Following Incentive Changes

As noted, Maine is currently at a low base in terms of production. This will have declined further since SPI’s primary research in Spring 2023, as a result of the strike action by the Writers Guild of America (WGA) and the Screen Actors Guild - American Federation of Television and Radio Artists (SAG-AFTRA). Assuming the incentive could be improved, Maine is likely to see a rapid increase in interest. Notwithstanding current production challenges related to industrial action in the US and some economic headwinds for the sector, screen production remains robust and investors are looking for production options in states such as Maine that have not been over-used. The profile of Maine, and the wide knowledge of its location and creative base will accelerate this.

Forecasting impact is challenging, however, given that Maine has a natural ceiling on activity given its critical capacity limitations, as outlined in this Study.

It would also lead to a more consistent pipeline of work for Maine’s industry – which would then encourage further crew, infrastructure, and equipment development. This would be extended further if an out-of-season filming uplift was introduced.

This is underlined by the growth seen in other states that have introduced or improved incentives. For example, when New Mexico first implemented its film tax credit in 2003 direct spend in state was \$26.4 million in fiscal year 2003. By fiscal year 2022, this had increased to \$855.4 million, with a positive growth trend throughout this timeframe.²⁰

²⁰ *Economic Impact of The New Mexico Film Production Tax Credit*. SPI, 19th December 2022. Accessible at: <https://nmfilm.com/assets/uploads/NM-Film-Study-Update-2022-2.pdf>

Chapter 8: Appendices



Image courtesy of the Maine Film Office

8 APPENDIX 1 – REMAINING PICDA CAPACITY GAUGES AND CHARTS ILLUSTRATING THE SUITABILITY FOR LARGE-SCALE OUT OF STATE PRODUCTIONS

8.1 Suitability Charts

8.1.1 Production Facilities

Figure 76 – Suitability of Maine’s Water Tanks, Virtual Production Facilities and Purpose-Built Soundstages for Large-scale Productions Coming from Out of State

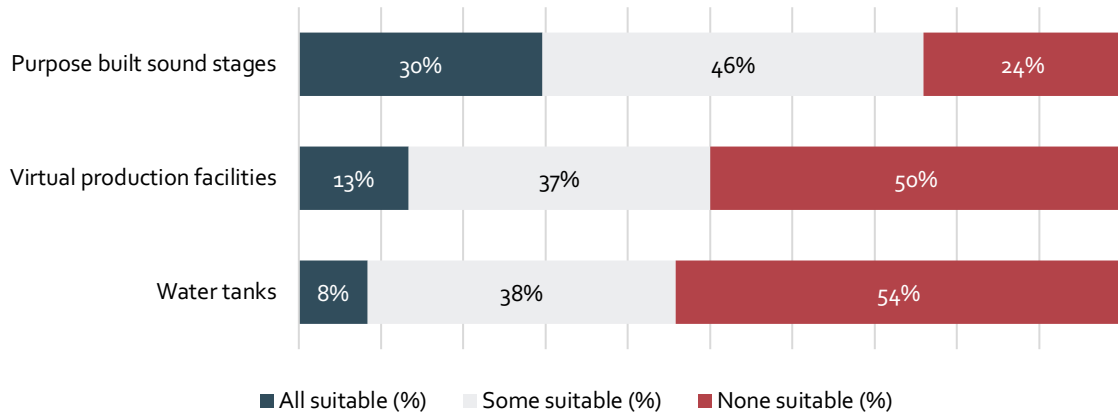
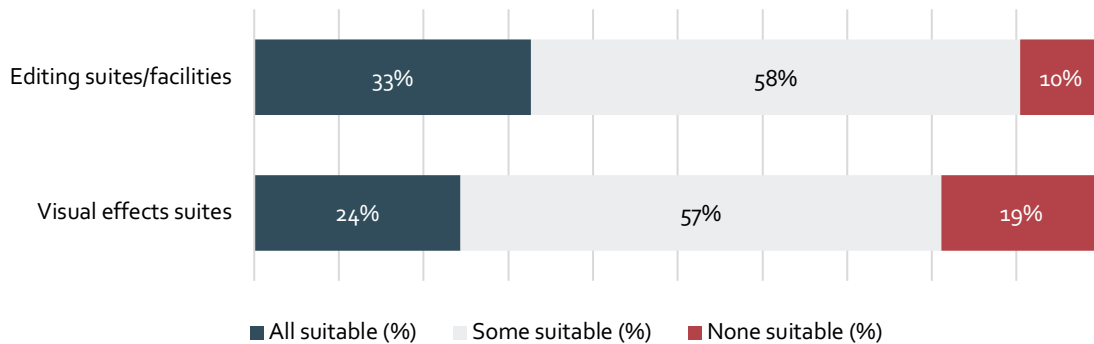


Figure 77 – Suitability of Maine’s Editing Suites and Visual Effects Facilities for Large-scale Productions Coming from Out of State



Source: SPI survey (% responding)

8.1.2 Production Equipment

Figure 78 – Suitability of Maine’s DIT/Archiving Equipment, On-set Viewing and Playback Equipment and Production Vehicles for Large-scale Productions Coming from Out of State

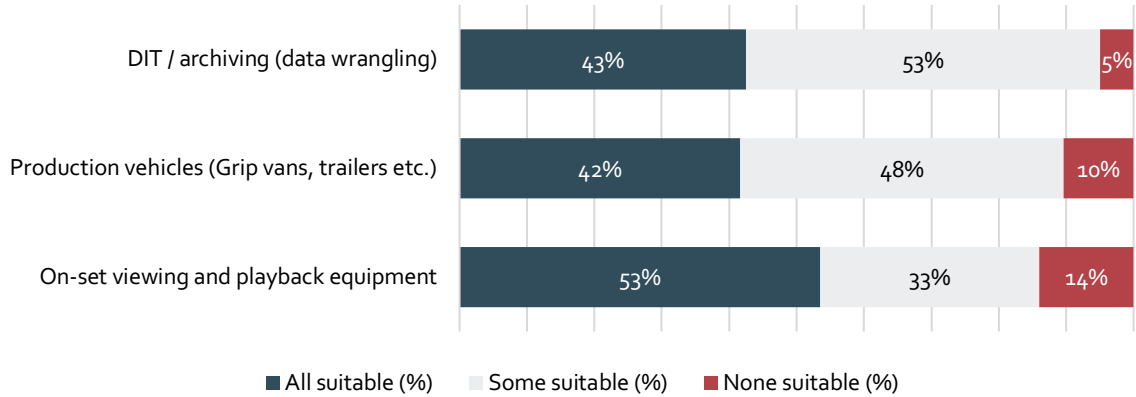
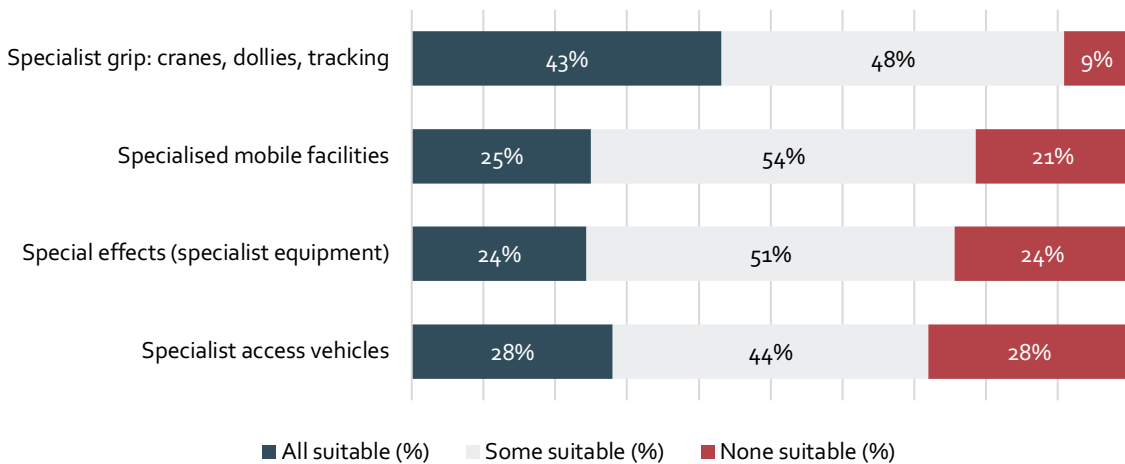
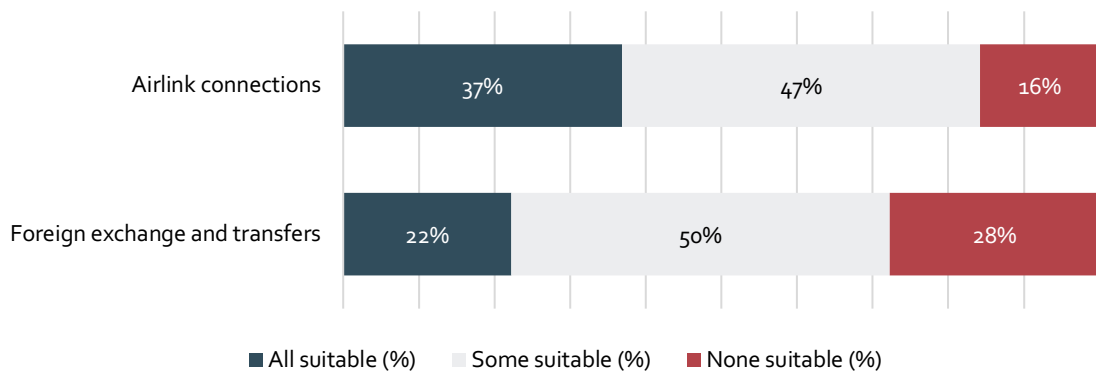


Figure 79 – Suitability of Maine’s Specialist Effects and Specialist Equipment for Large-scale Productions Coming from Out of State



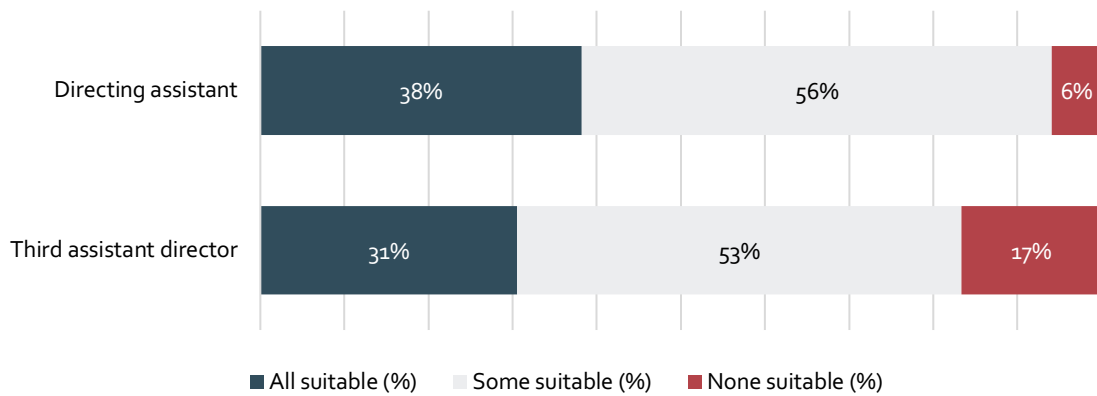
8.1.3 Production Services

Figure 80 – Suitability of Maine’s Airlink Connections and Foreign Exchange and Transfers Services for Large-scale Productions Coming from Out of State



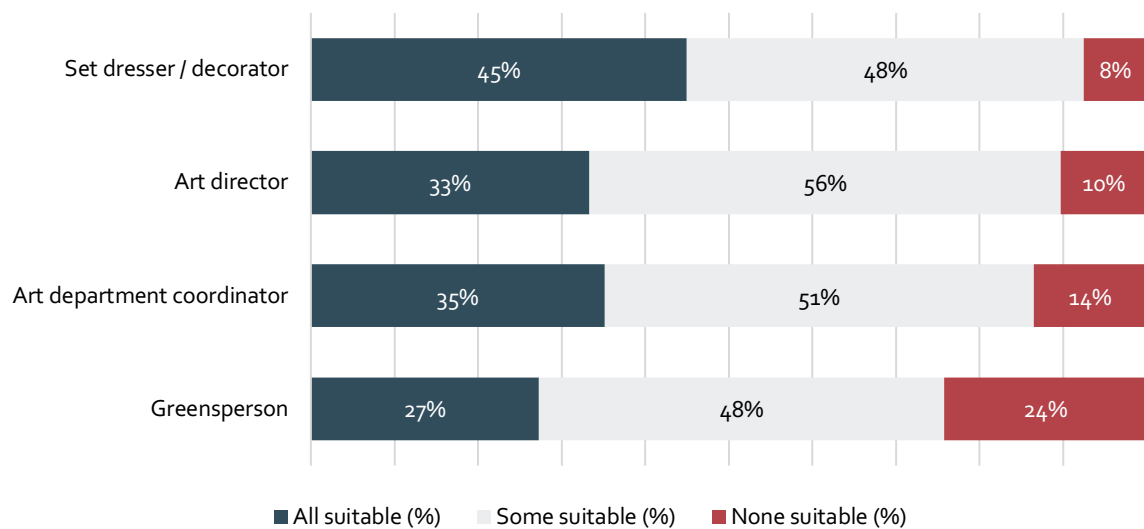
8.1.4 Assistant Director and Script Department

Figure 81 – Suitability of Maine’s Directing Assistants, Script Supervisors and Third Assistant Directors for Large-scale Productions Coming from Out of State



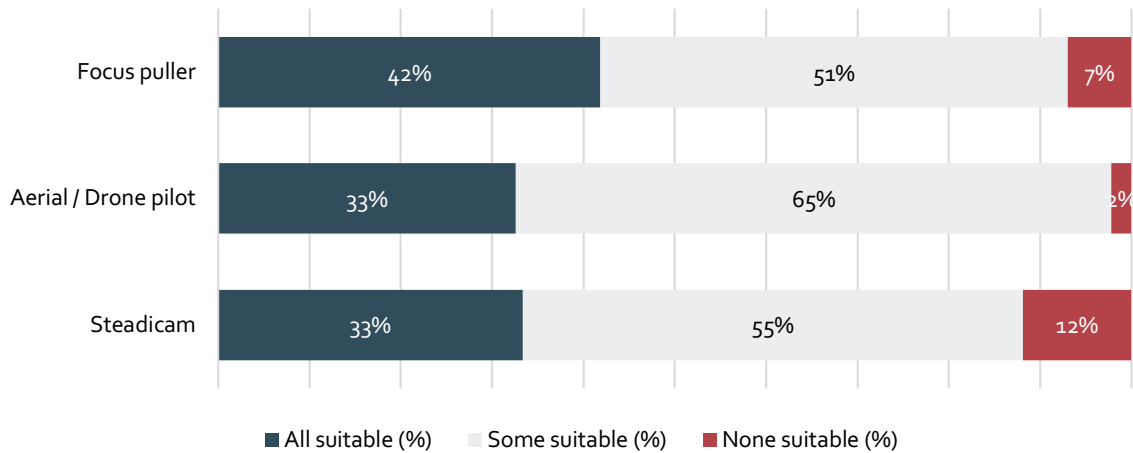
8.1.5 Art and Production Design Department

Figure 82 – Suitability of Maine’s Set Dresser/Decorators, Art Directors, Art Department Coordinators and Greenspersons for Large-scale Productions Coming from Out of State



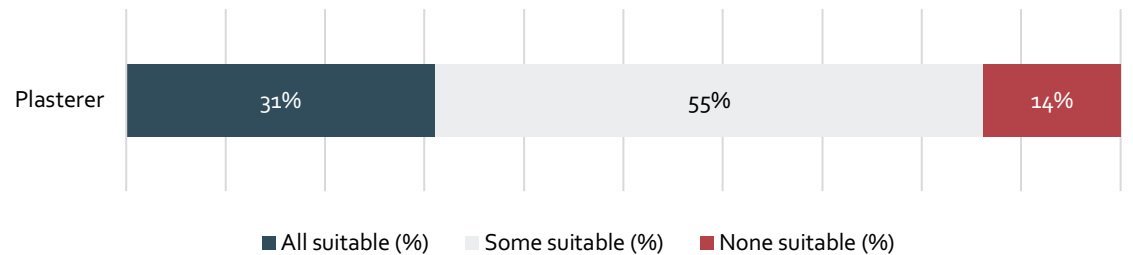
8.1.6 Camera, Grip and Electrical Department

Figure 83 – Suitability of Maine’s Focus Pullers, Steadicams and Aerial/Drone Pilots for Large-scale Productions Coming from Out of State



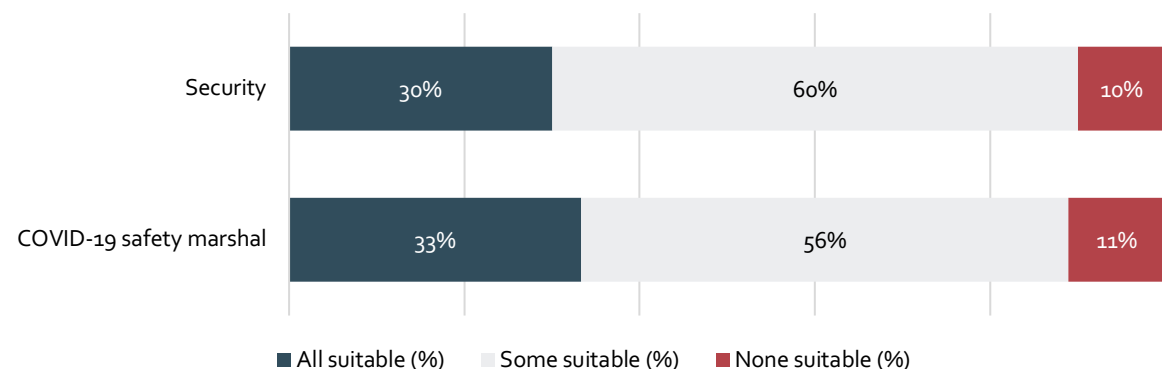
8.1.7 Construction Department

Figure 84 – Suitability of Maine’s Plasterers for Large-scale Productions Coming from Out of State



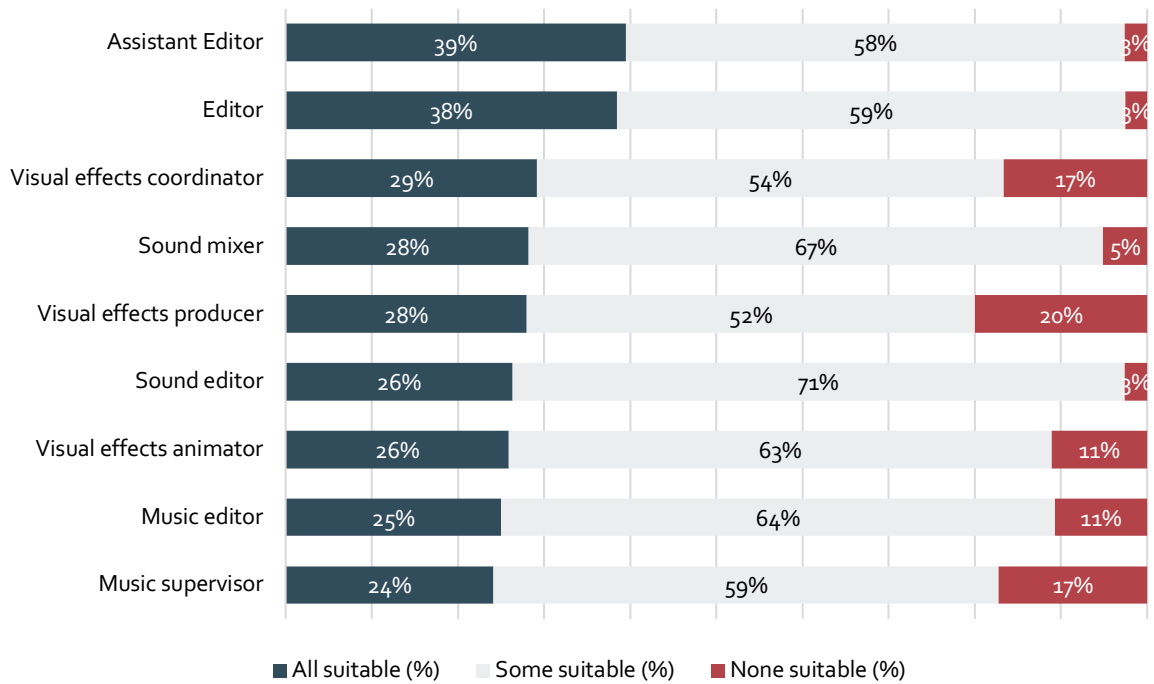
8.1.8 Health and Safety Department

Figure 85 – Suitability of Maine’s Security and COVID-19 Safety Marshals for Large-scale Productions Coming from Out of State



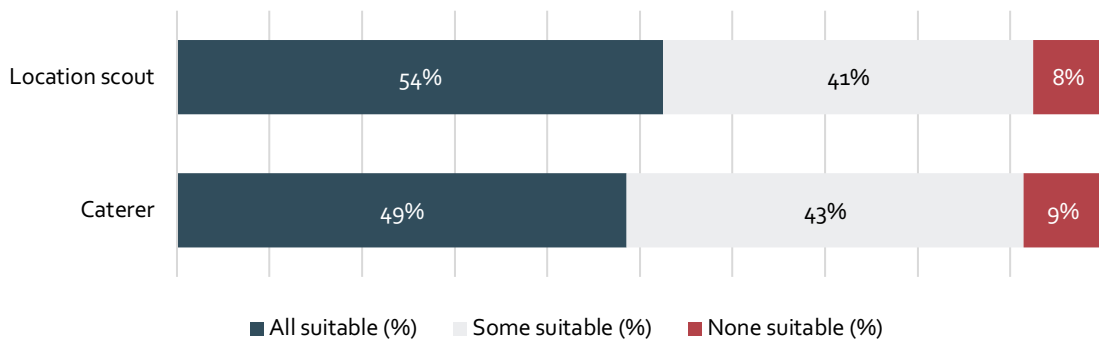
8.1.9 Post-production and VFX Department

Figure 86 – Suitability of Maine’s Post-Production and VFX Department Executives for Large-scale Productions Coming from Out of State



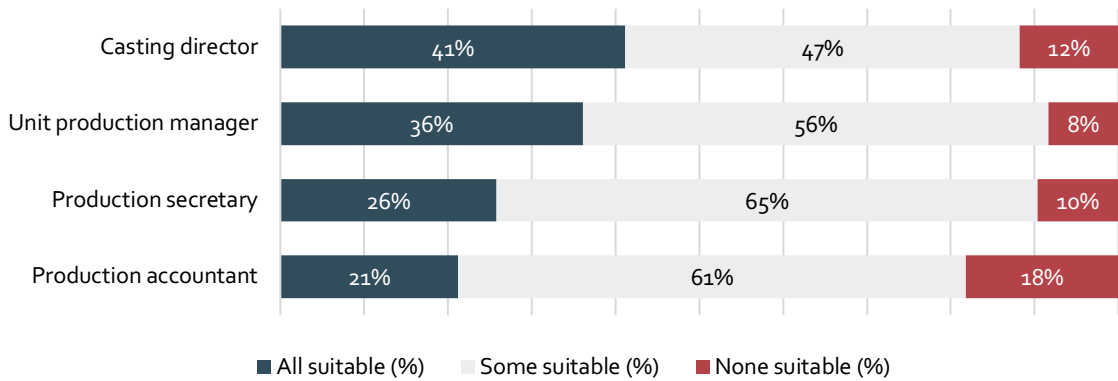
8.1.10 Location, Unit and Transport Department

Figure 87 – Suitability of Maine’s Location Scouts and Caterers for Large-scale Productions Coming from Out of State



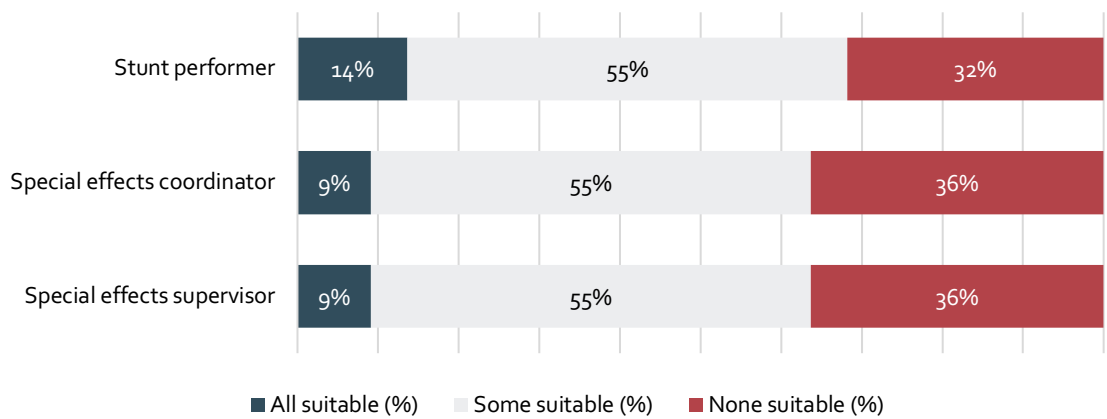
8.1.11 Production Office Department

Figure 88 – Suitability of Maine’s Production Office Executives for Large-scale Productions Coming from Out of State



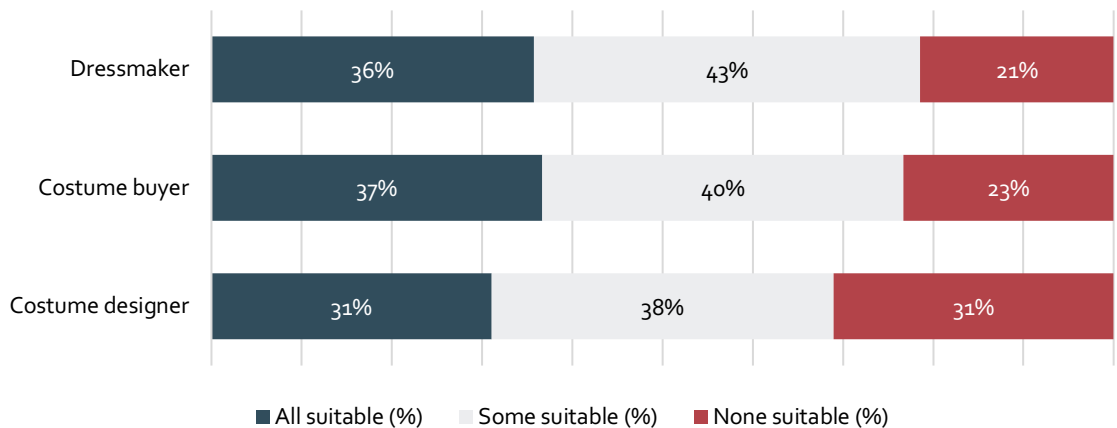
8.1.12 Stunt and Armorer Department

Figure 89 – Suitability of Maine’s Stunt Performers, Special Effects Coordinators and Special Effects Supervisors for Large-scale Productions Coming from Out of State



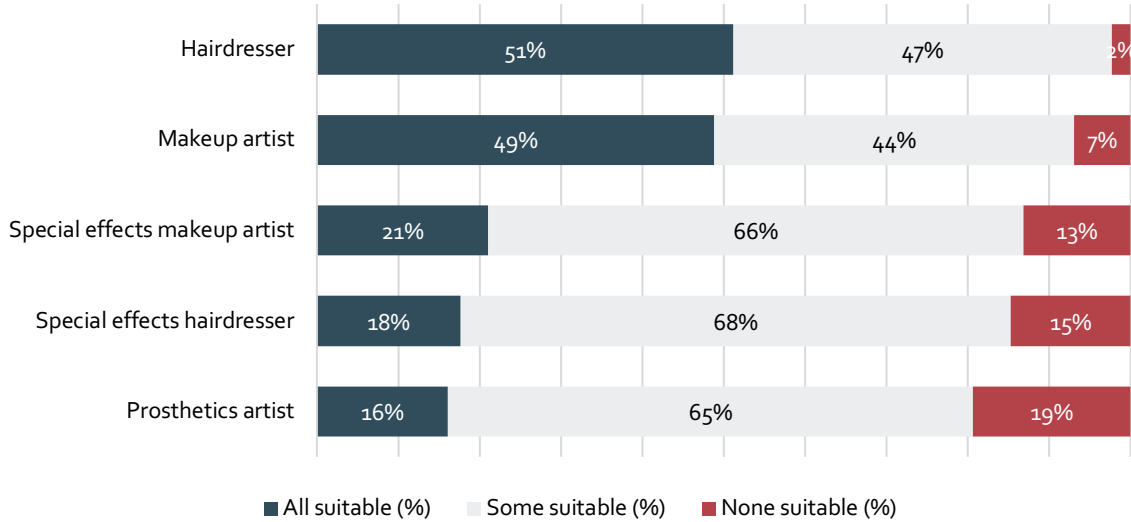
8.1.13 Costume and Wardrobe Department

Figure 90 – Suitability of Maine’s Dressmakers, Costume Buyers and Costume Designers for Large-scale Productions Coming from Out of State



8.1.14 Hair and Make-up Department

Figure 91 – Suitability of Maine’s Hairdressers, Makeup Artists, Special Effects Makeup Artists, Special Effects Hairdressers and Prosthetics Artists for Large-scale Productions



8.2 PICDA Capacity Gauges

8.2.1 Production Facilities

Figure 92 – Current Capacity of Maine’s Water Tanks for Hosting Multiple Productions

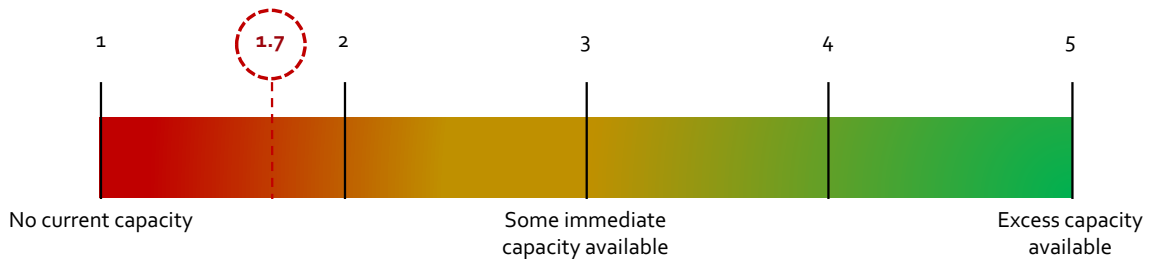


Figure 93 – Current Capacity of Maine’s Virtual Production Facilities for Hosting Multiple Productions

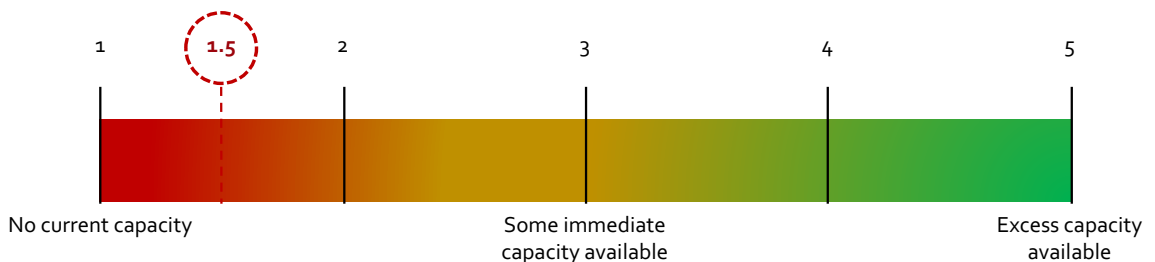


Figure 94 – Current Capacity of Maine’s Editing Suites/Facilities for Hosting Multiple Productions

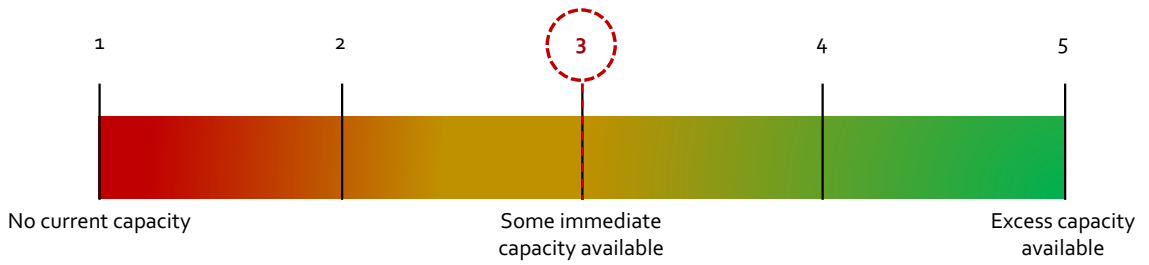
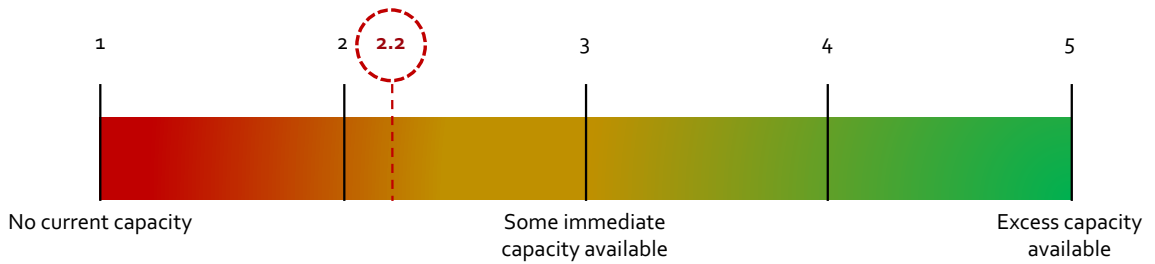


Figure 95 – Current Capacity of Maine’s Visual Effects Facilities for Hosting Multiple Productions



8.2.2 Production Equipment

Figure 96 – Current Capacity of Maine’s DIT / Archiving Equipment for Hosting Multiple Productions

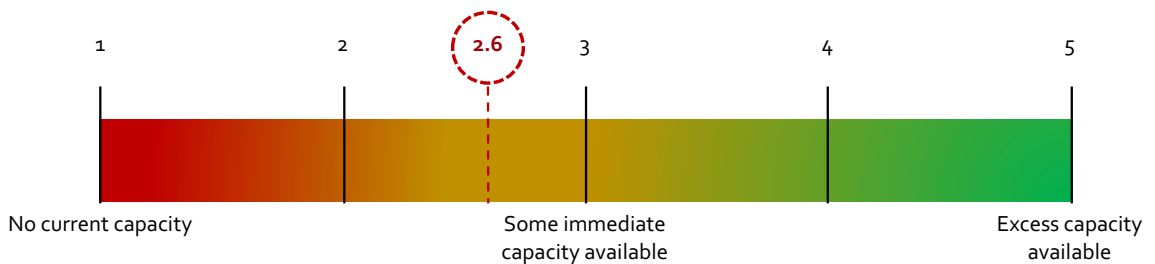


Figure 97 – Current Capacity of Maine’s On-set Viewing and Playback for Hosting Multiple Productions

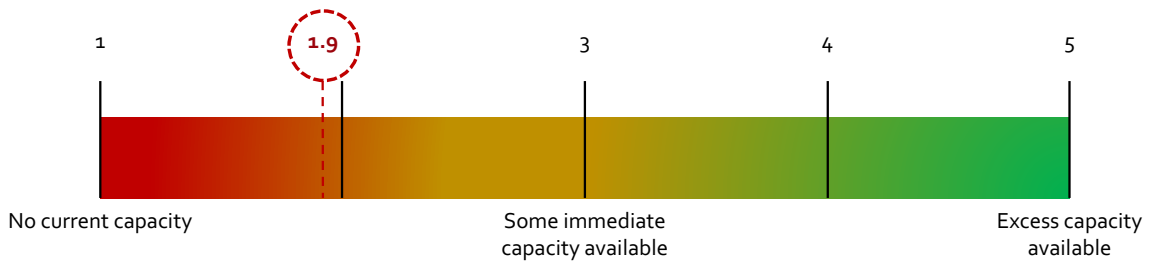


Figure 98 – Current Capacity of Maine’s Production Vehicles’ (e.g. Grip Vans, Trailers) for Hosting Multiple Productions

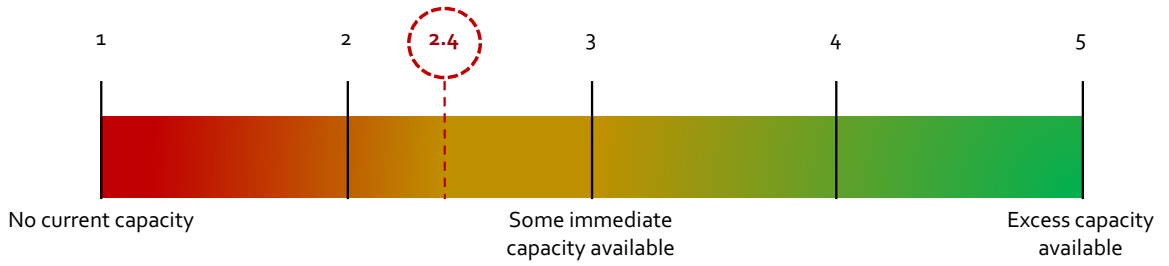


Figure 99 – Current Capacity of Maine’s Specialist Mobile Facilities for Hosting Multiple Productions

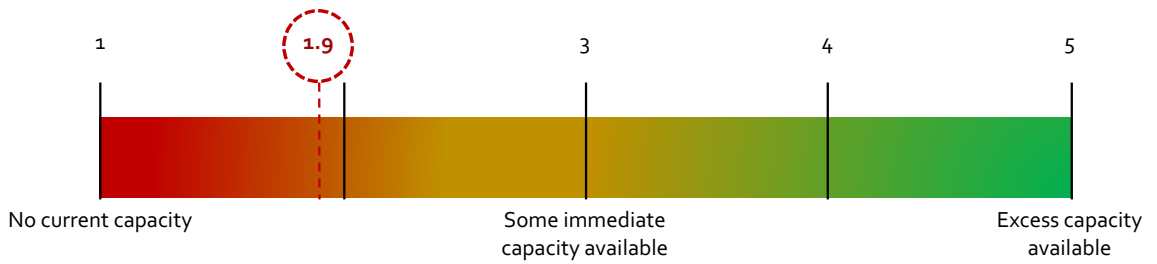


Figure 100 – Current Capacity of Maine’s Specialist Grips for Hosting Multiple Productions

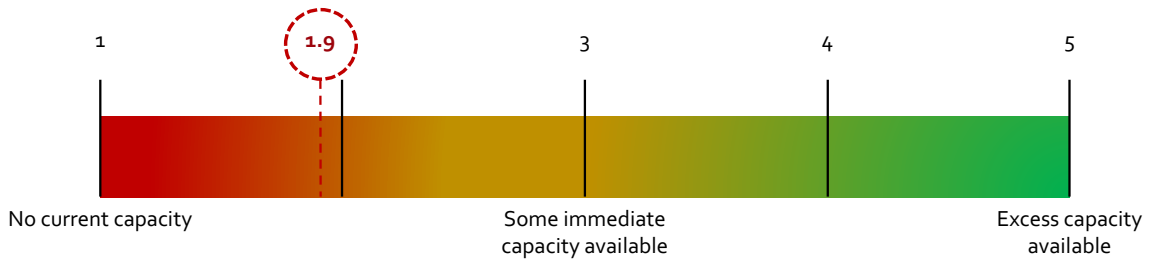


Figure 101 – Current Capacity of Maine’s Specialist Access Vehicles for Hosting Multiple Productions

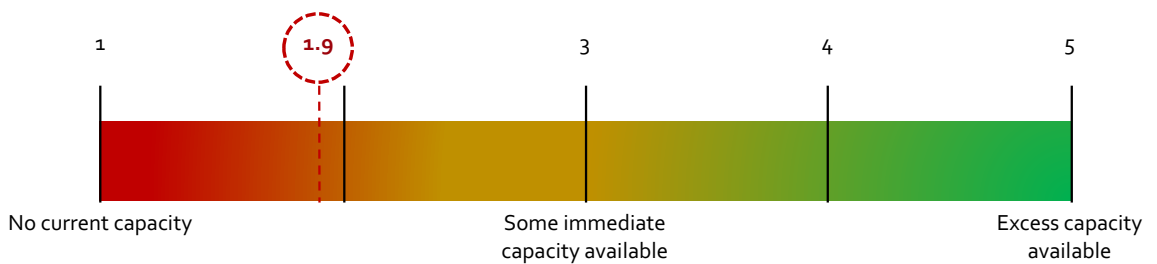
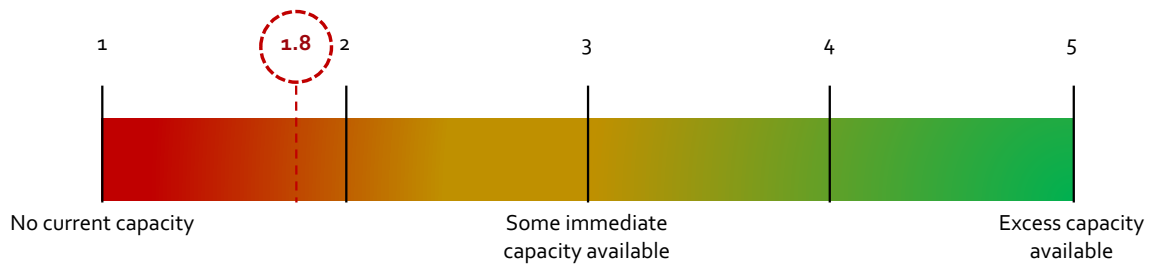


Figure 102 – Current Capacity of Maine’s Specialist Effects Equipment for Hosting Multiple Productions



8.2.3 Production Services

Figure 103 – Current Capacity of Maine’s Airlink Connection Services for Hosting Multiple Productions

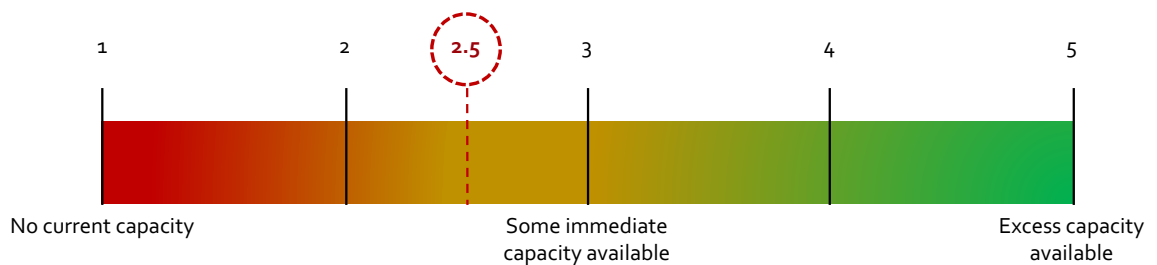
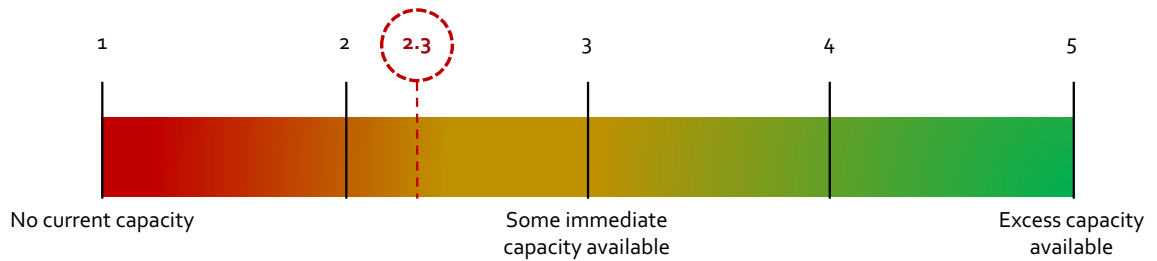


Figure 104 – Current Capacity of Maine’s Foreign Exchange and Transfers for Hosting Multiple Productions



8.2.4 Director and Assistant Director Department

Figure 105 – Current Capacity of Maine Based Third Assistant Directors to Work on Multiple Productions

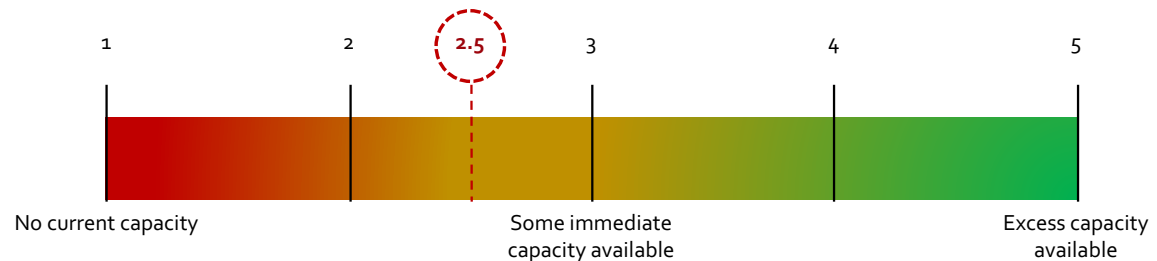
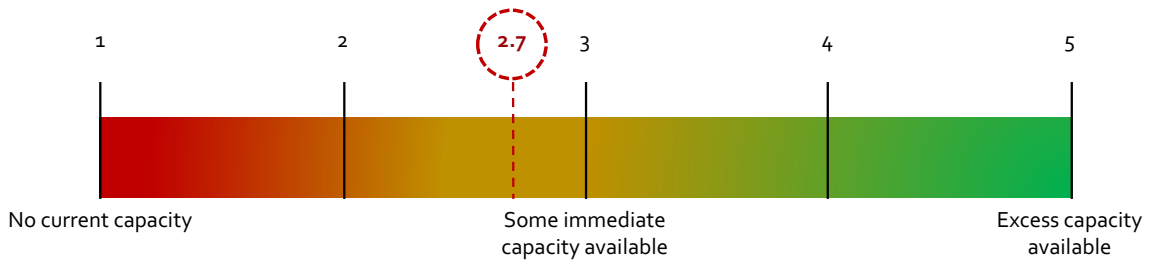


Figure 106 – Current Capacity of Maine Based Directing Assistants to Work on Multiple Productions



8.2.5 Art and Production Design Department

Figure 107 – Current Capacity of Maine Based Set Dressers / Decorators to Work on Multiple Productions

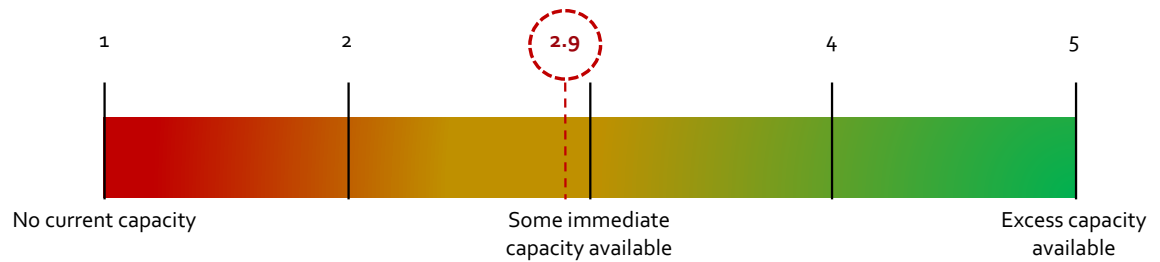


Figure 108 – Current Capacity of Maine Based Art Directors to Work on Multiple Productions

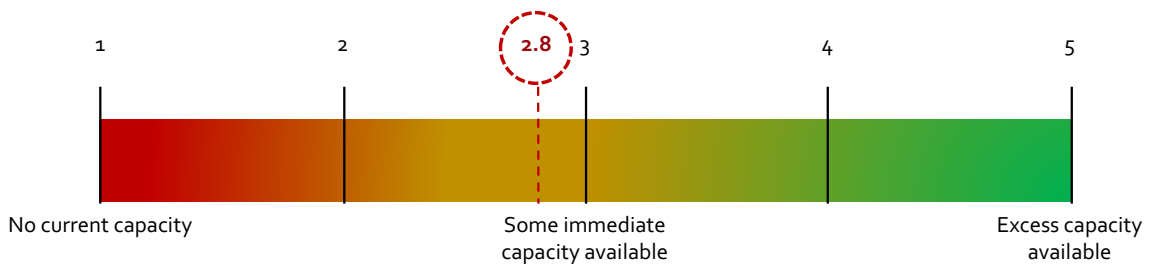


Figure 109 – Current Capacity of Maine Art Department Coordinators to Work on Multiple Productions

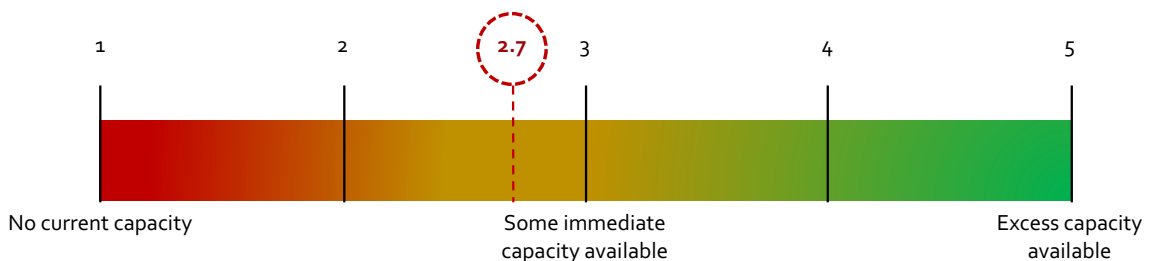
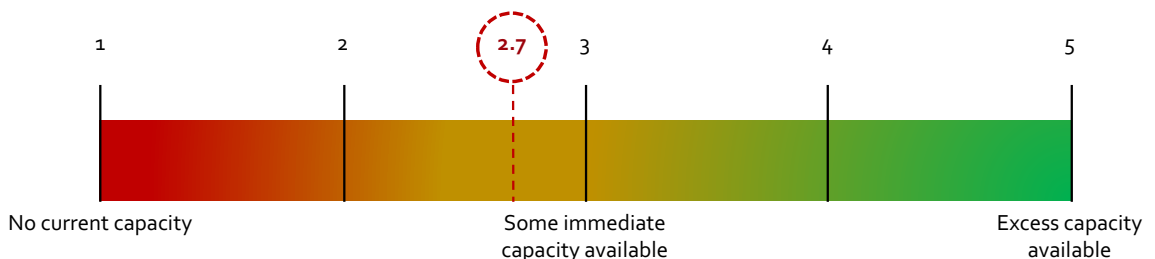


Figure 110 – Current Capacity of Maine's Greenspersons to Work on Multiple Productions



8.2.6 Camera, Grip and Electrical Department

Figure 111 – Current Capacity of Maine’s Aerial / Drone Pilots to Work on Multiple Productions

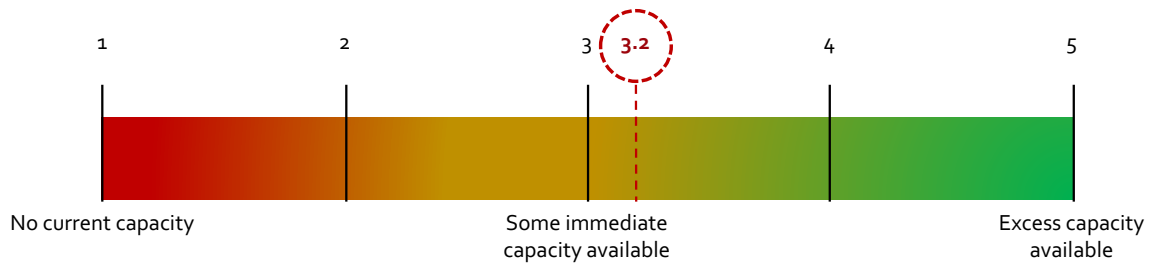


Figure 112 – Current Capacity of Maine’s Focus Pullers to Work on Multiple Productions

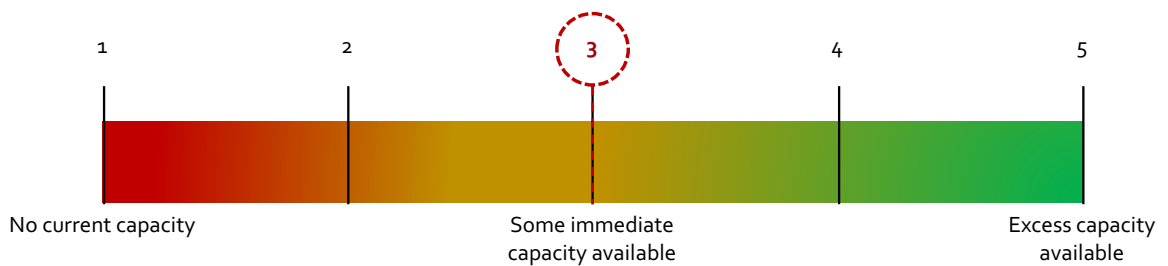
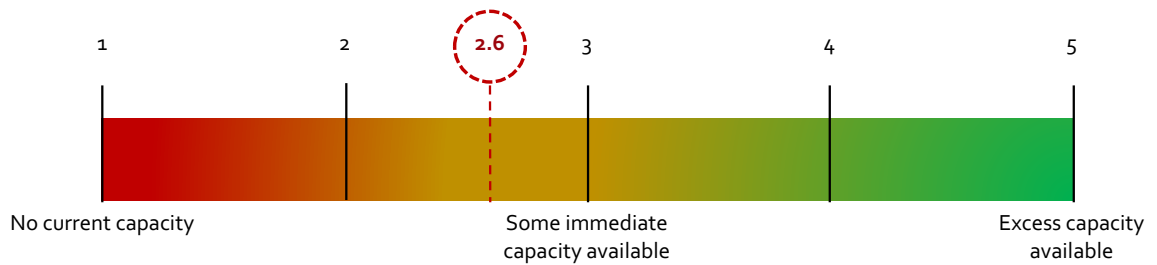
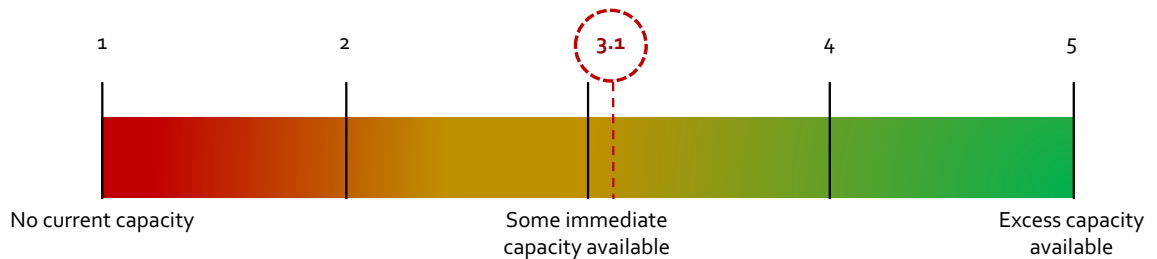


Figure 113 – Current Capacity of Maine’s Steadicams to Work on Multiple Productions



8.2.7 Construction Department

Figure 114 – Current Capacity of Maine’s Plasterers to Work on Multiple Productions



8.2.8 Health and Safety Department

Figure 115 – Current Capacity of Maine’s Security to Work on Multiple Productions

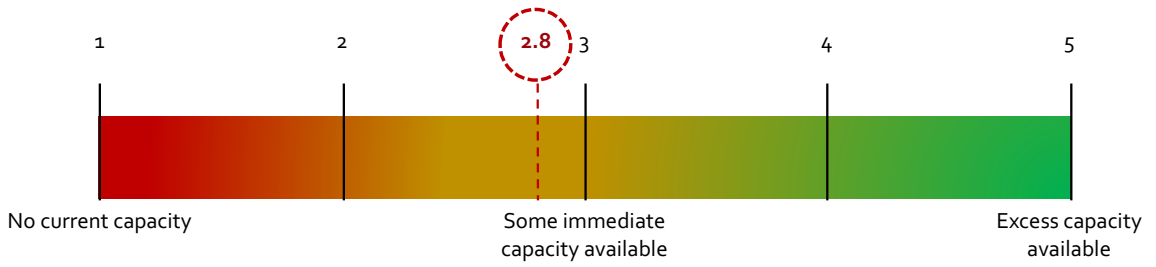
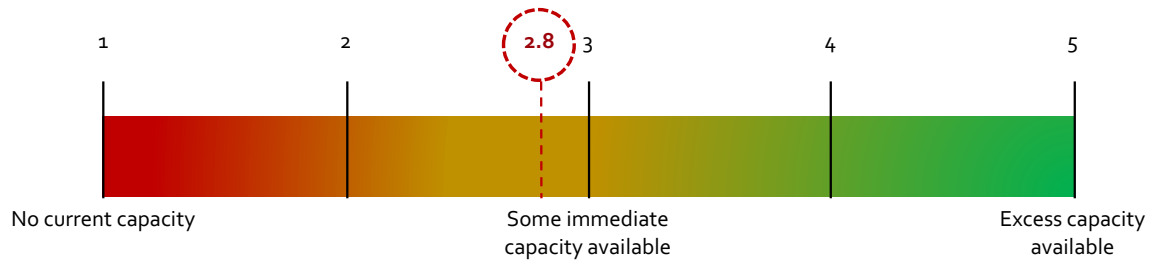


Figure 116 – Current Capacity of Maine’s COVID-19 Safety Marshalls to Work on Multiple Productions



8.2.9 Post-production and VFX Department

Figure 117 – Current Capacity of Maine’s Editors to Work on Multiple Productions

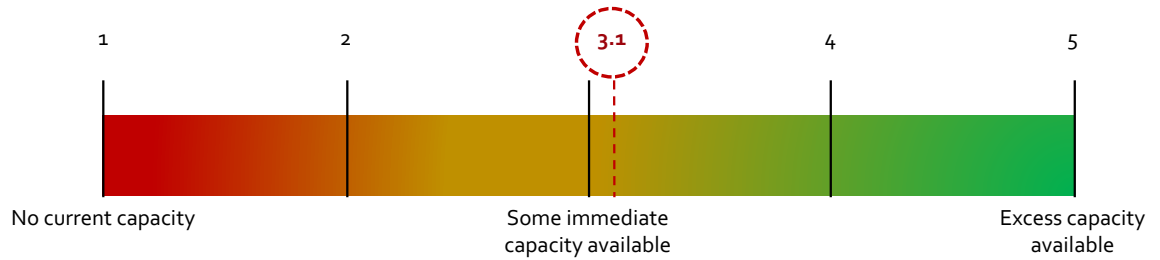


Figure 118 – Current Capacity of Maine’s Assistant Editors to Work on Multiple Productions

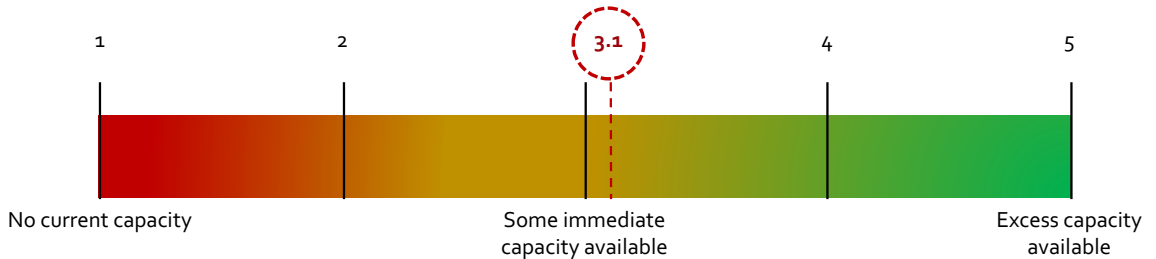


Figure 119 – Current Capacity of Maine’s Sound Mixers to Work on Multiple Productions

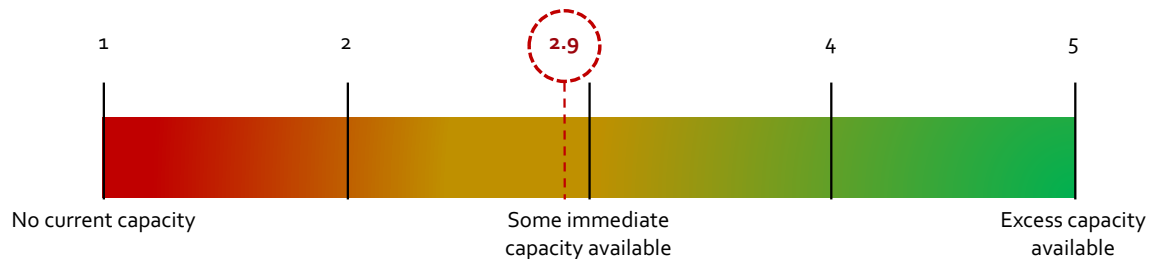


Figure 120 – Current Capacity of Maine’s Music Editors to Work on Multiple Productions

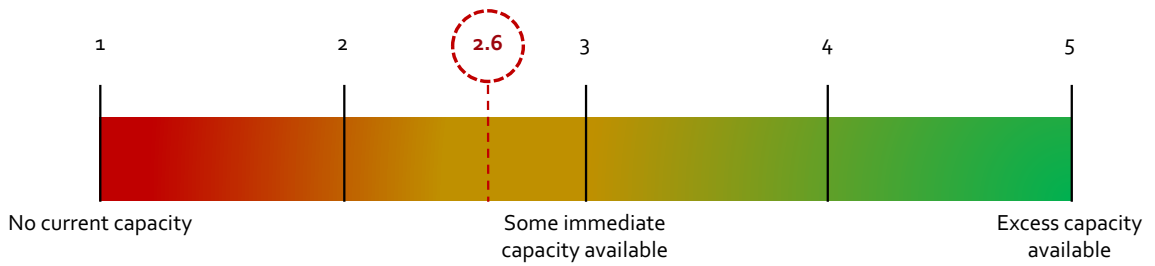


Figure 121 – Current Capacity of Maine’s Music Supervisors to Work on Multiple Productions

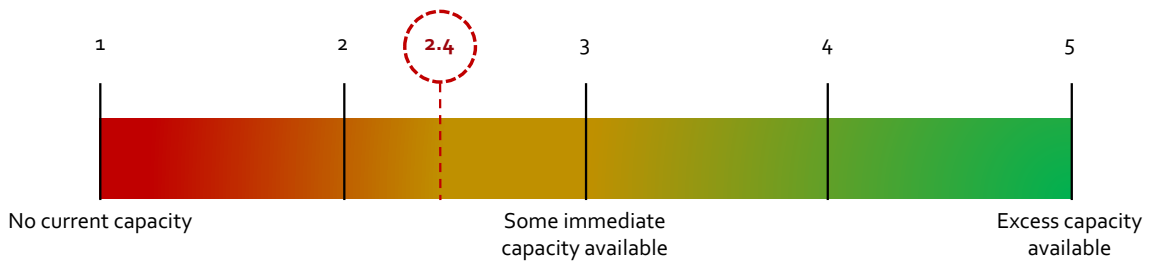


Figure 122 – Current Capacity of Maine’s Visual Effects Animators to Work on Multiple Productions

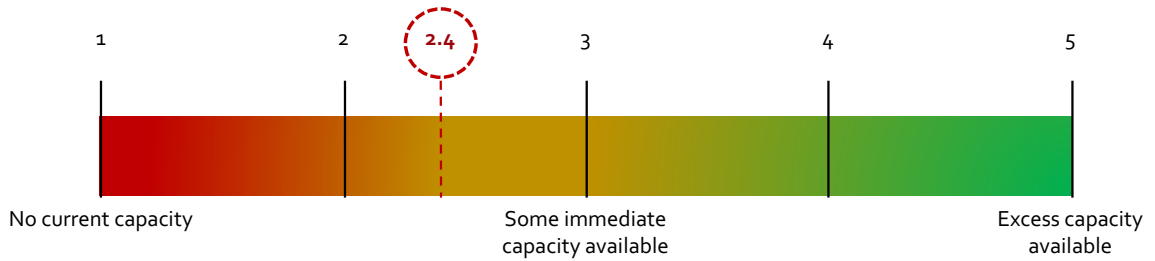


Figure 123 – Current Capacity of Maine’s Visual Effects Coordinators to Work on Multiple Productions

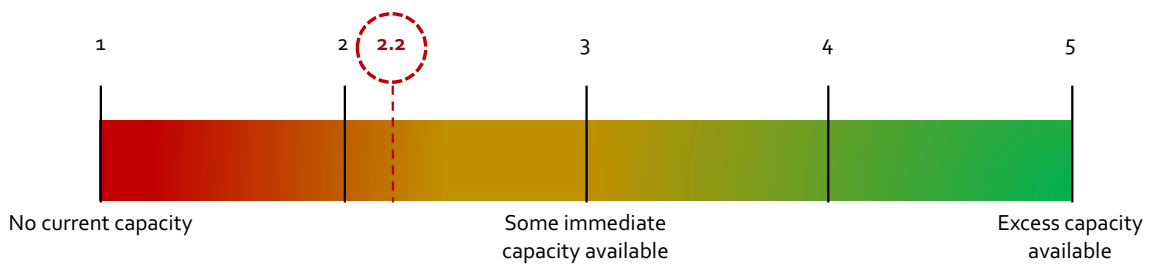
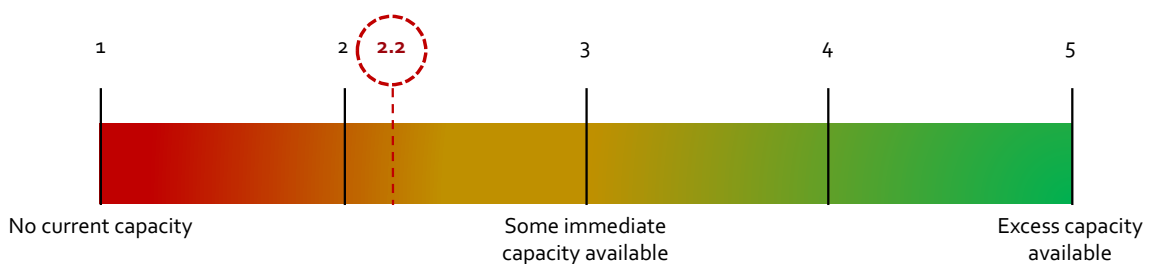


Figure 124 – Current Capacity of Maine’s Visual Effects Producers to Work on Multiple Productions



8.2.10 Location, Unit and Transport Department

Figure 125 – Current Capacity of Maine’s Caterers to Work on Multiple Productions in Non-Peak Tourist Season

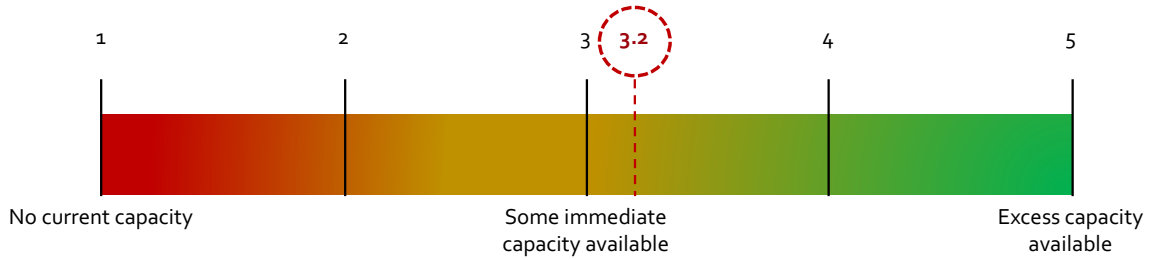
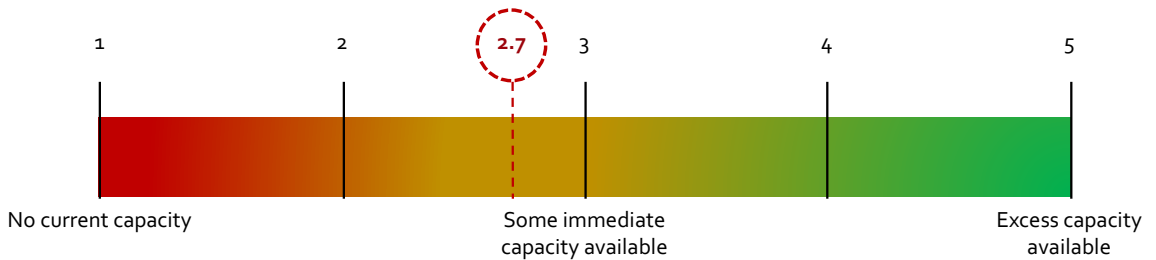


Figure 126 – Current Capacity of Maine’s Location Scouts to Work on Multiple Productions



8.2.11 Production Office Department

Figure 127 – Current Capacity of Maine’s Unit Production Managers to Work on Multiple Productions

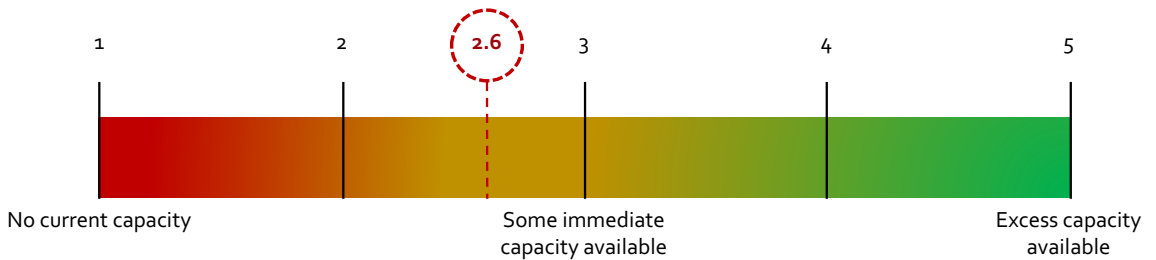


Figure 128 – Current Capacity of Maine’s Casting Directors to Work on Multiple Productions

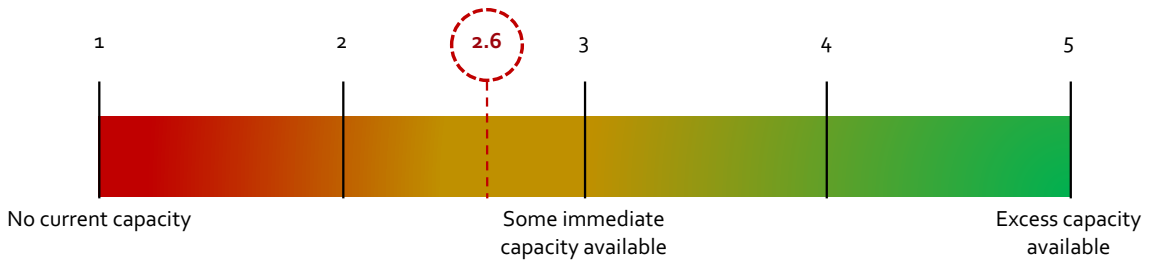


Figure 129 – Current Capacity of Maine’s Production Secretaries to Work on Multiple Productions

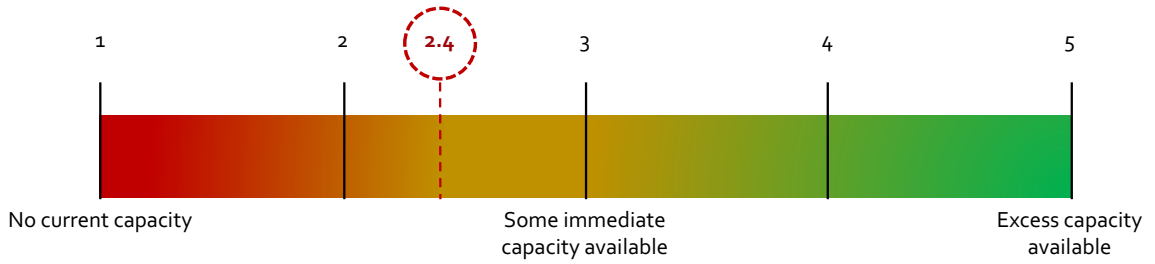
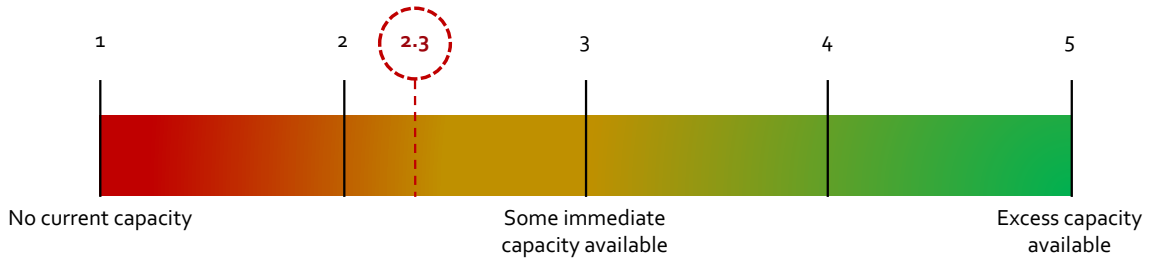


Figure 130 – Current Capacity of Maine’s Production Accountants to Work on Multiple Productions



8.2.12 Stunts and Armorer Department

Figure 131 – Current Capacity of Maine’s Stunt Performers to Work on Multiple Productions

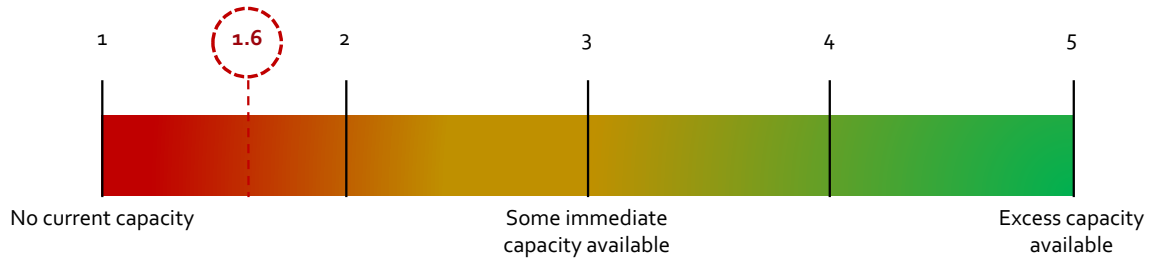


Figure 132 – Current Capacity of Maine’s Stunt Coordinators to Work on Multiple Productions

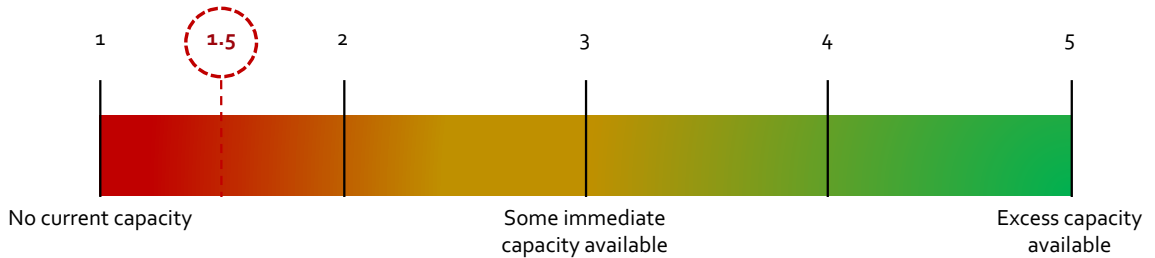


Figure 133 – Current Capacity of Maine’s Special Effects Coordinators to Work on Multiple Productions

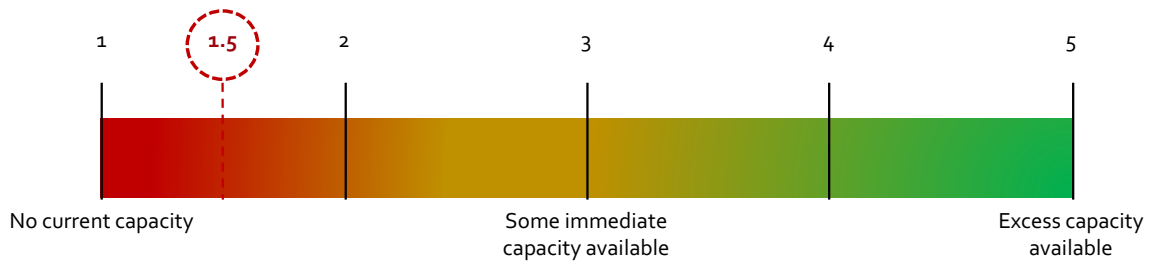


Figure 134 – Current Capacity of Maine’s Special Effects Supervisors to Work on Multiple Productions

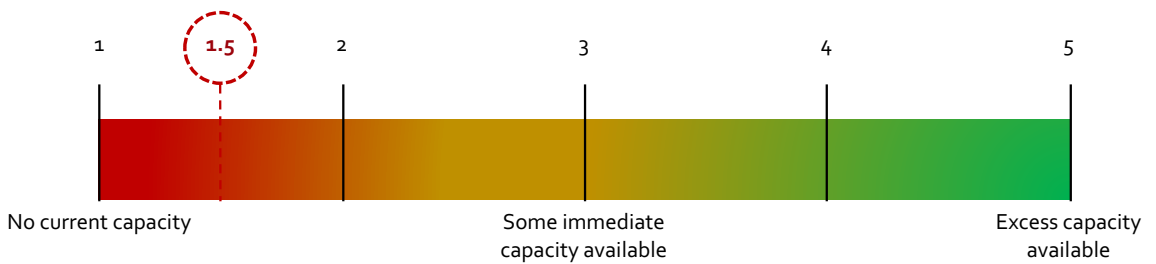
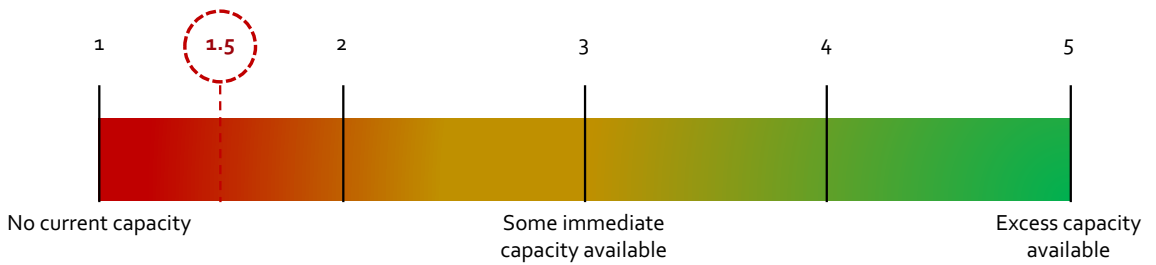


Figure 135 – Current Capacity of Maine’s Armorers to Work on Multiple Productions



8.2.13 Costume and Wardrobe Department

Figure 136 – Current Capacity of Maine’s Costume Buyers to Work on Multiple Productions

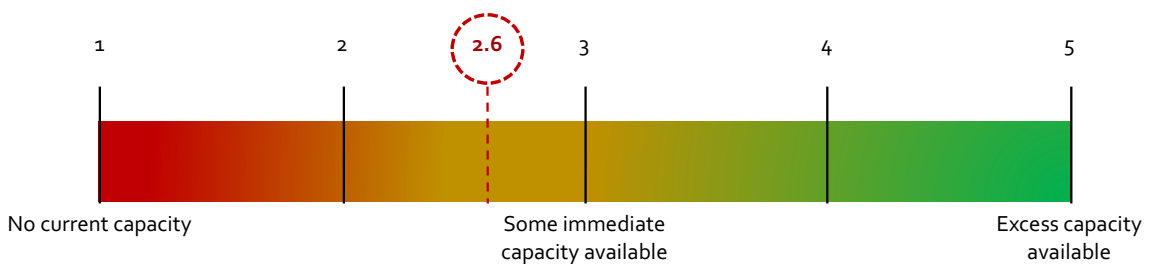


Figure 137 – Current Capacity of Maine’s Dressmakers to Work on Multiple Productions

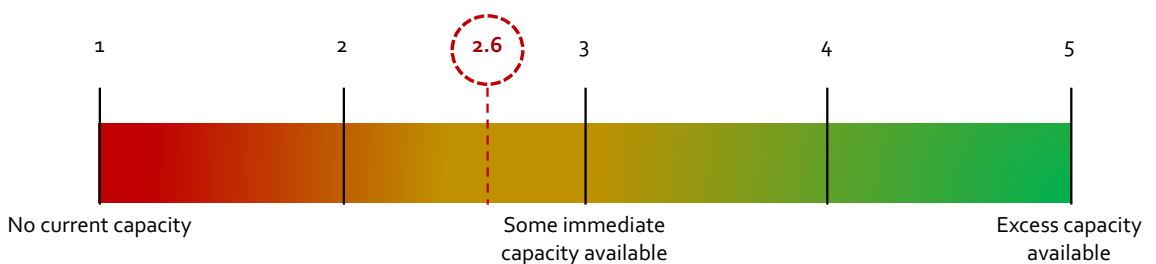


Figure 138 – Current Capacity of Maine’s Costume Designers to Work on Multiple Productions

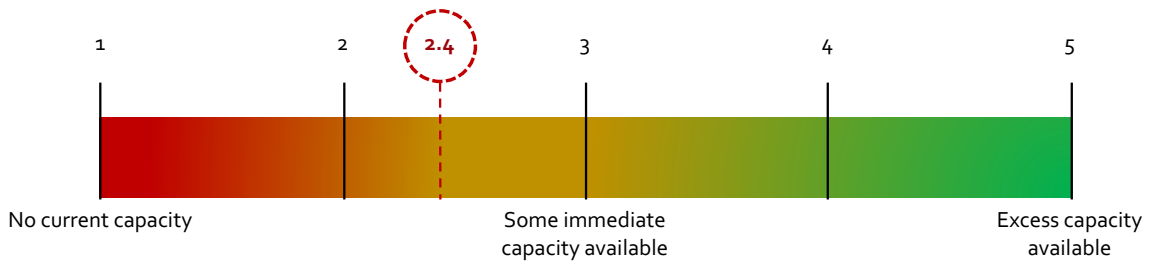
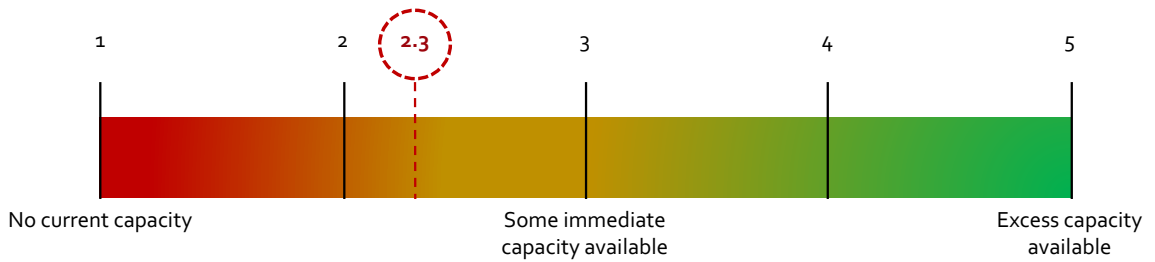


Figure 139 – Current Capacity Maine’s Costume Supervisors to Work on Multiple Productions



8.2.14 Hair and Make-up Department

Figure 140 – Current Capacity of Maine’s Hairdressers to Work on Multiple Productions

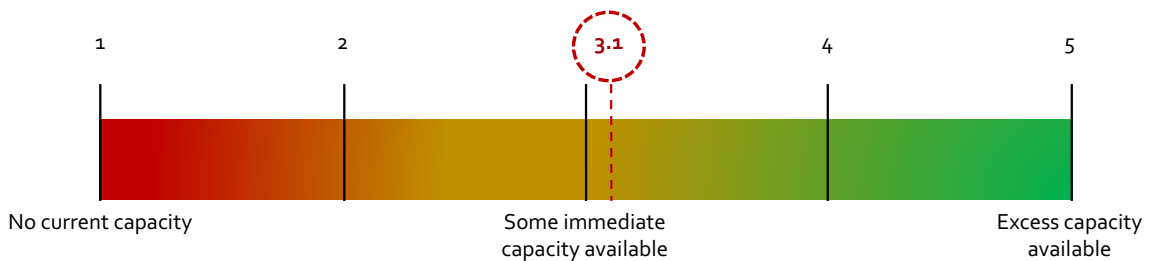


Figure 141 – Current Capacity of Maine’s Make-up Artists to Work on Multiple Productions

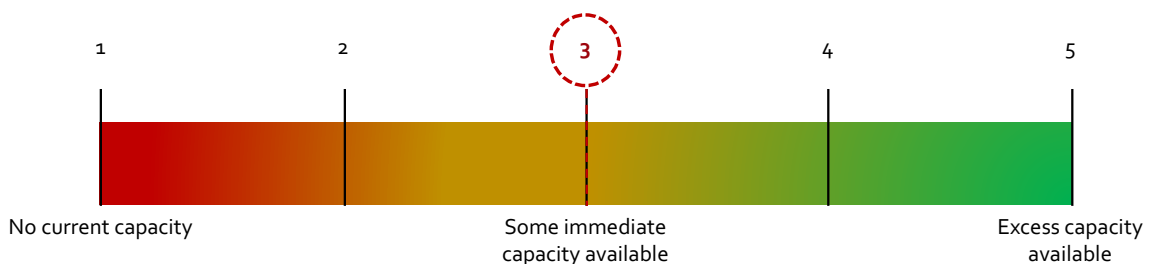


Figure 142 – Current Capacity of Maine’s Special Effects Make-up Artists to Work on Multiple Productions

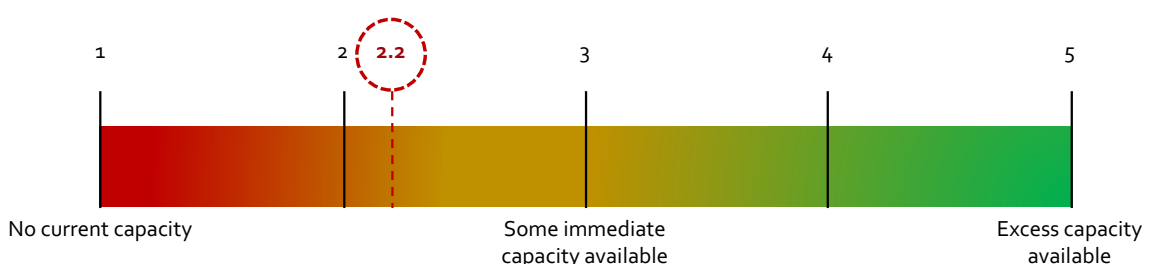


Figure 143 – Current Capacity of Maine’s Special Effects Hairdressers to Work on Multiple Productions

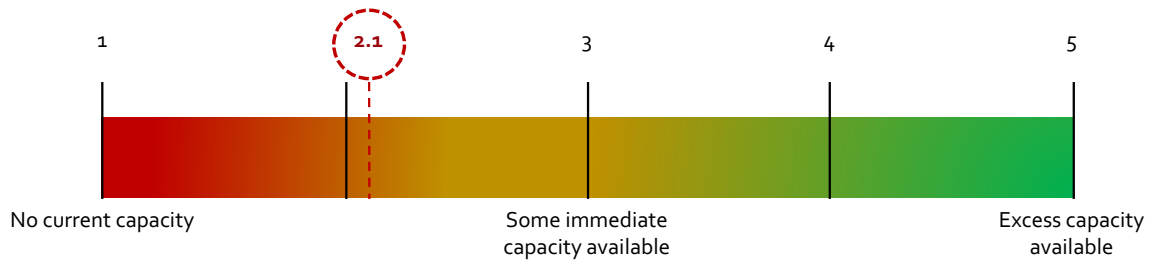
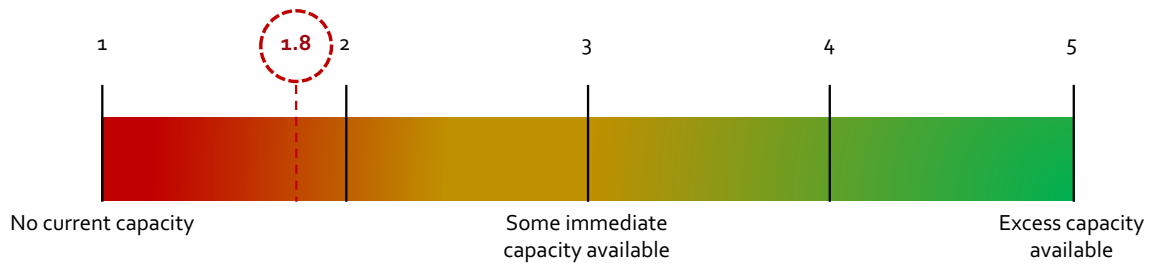


Figure 144 – Current Capacity of Maine’s Prosthetics Artists to Work on Multiple Productions



9 APPENDIX 2 – ABOUT STATE OF MAINE’S DEPARTMENT OF ECONOMIC AND COMMUNITY DEVELOPMENT

The Maine Department of Economic and Community Development (DECD), consists of more than two dozen experts who work to help communities and businesses prosper through a variety of programs providing everything from targeted tax relief to community block grants to tourism marketing. Whether your business wants to make a film here, bring a Maine-made product to market, expand an aquaculture project, or explore financing when moving a business to our state, DECD’s experienced staff can help.

The MFO is strategically located within the Maine Office of Tourism, which itself falls within the DECD.

Contact: Steve Lyons, Director of the Maine Office of Tourism – steve.lyons@maine.gov.

10 APPENDIX 3 – ABOUT OLSBERG•SPI

Olsberg•SPI (“SPI”) is an international creative industries consultancy, specializing in the global screen sector.

SPI provides a range of expert consultancy and strategic advisory services to public and private sector clients in the worlds of film, television, video games and digital media. Formed in 1992, it has become one of the leading international consultancies in these dynamic creative screen industries.

The firm’s expert advice, trusted vision and proven track record create high levels of new and repeat business from a diverse group of companies and organizations, including:

- National governments, including culture and economics ministries
- National film institutes and screen agencies | Regional and city development agencies and local authorities
- Multi-national cultural funds and authorities
- National and regional tourism agencies
- Established studios and streamers
- Independent companies at all points of the screen business value chain
- National and international broadcasters
- Trade associations and guilds
- Training and skills development organizations
- Publishers and conference organizers.

With expertise in all areas of the fast-moving global creative sector, SPI offers a wide range of services, including:

- Analysis and strategic advice for building healthy and sustainable national and regional industries, and recommendations for public policies to support this
- Mapping and assessment of physical infrastructure, services and workforce
- Delivering economic impact studies of whole sector activity or of incentives
- Advice on the creation of fiscal incentives for screen productions
- Helping businesses and governments interpret the strategic implications of digital media innovations
- Business development strategies for content companies
- Feasibility studies, marketing and business strategies for small and large-scale studio facilities
- Evaluations of publicly-funded investment schemes
- Acquisition and divestment advice for owners or managers of SMEs
- International cost comparisons for small and large film and television productions
- Strategic advice on inward investment and exports for national and regional public bodies
- Analyzing and explaining the links between growth in tourism and a nation’s film and television output
- Providing strategic advice for screen commissions, including business and marketing plans
- Keynote speakers at industry events.

Further information on SPI’s work can be found at www.o-spi.com and within the [SPI Company Brochure](#).

Please **contact Joshua Dedman** on joshua@o-spi.com for further information about this study.

