

PROFILE

2023

An economic report on the
screen-based media production
industry in Canada

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Published by the Canadian Media Producers Association in collaboration with the Department of Canadian Heritage, the Canada Media Fund, Telefilm Canada and the Association québécoise de la production médiatique.

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Profile 2023 provides an analysis of economic activity in Canada's screen-based media production industry during the period of April 1, 2022 to March 31, 2023. It also provides comprehensive reviews of the historical trends in production activity between the fiscal years of 2013/14 and 2022/23.



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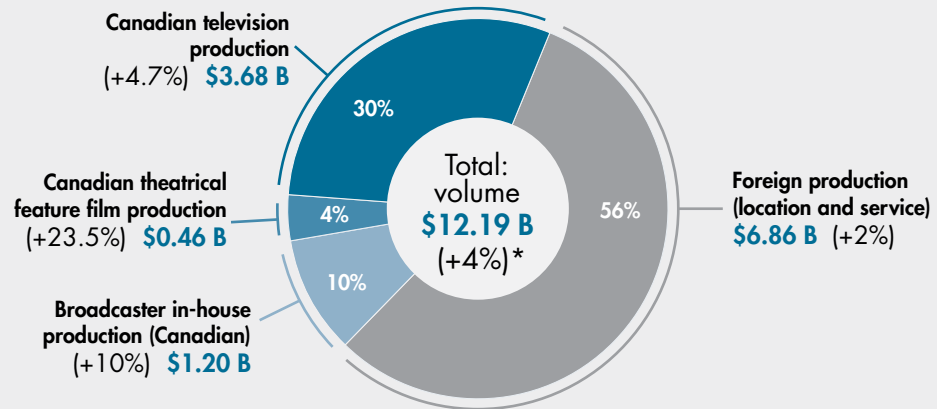
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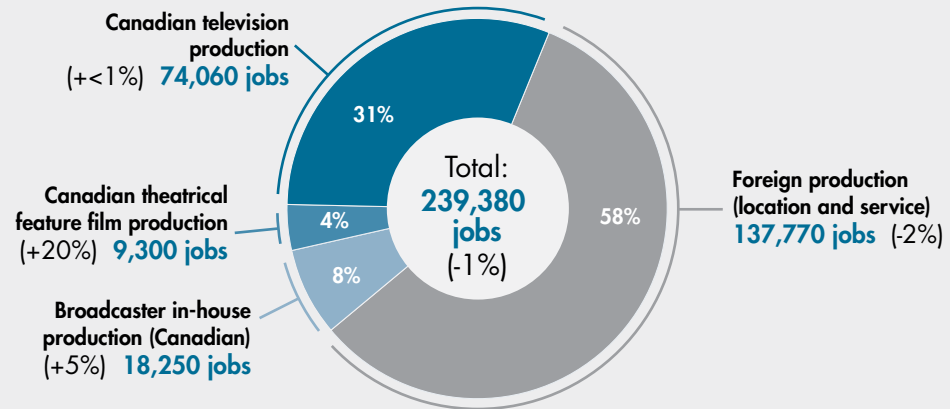
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AT A GLANCE

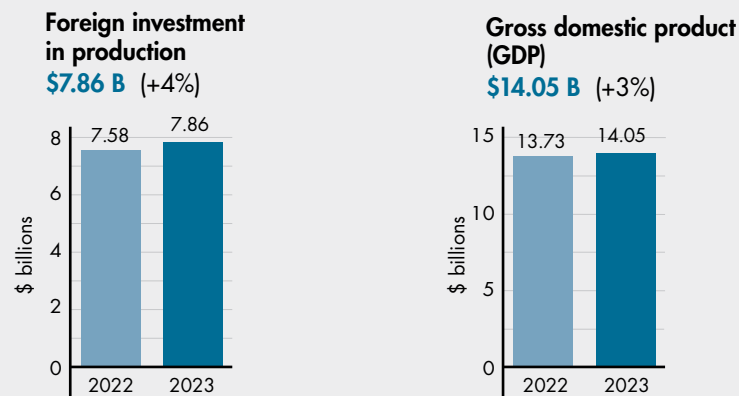
Total film and television production in Canada



Canadian jobs provided



Canadian economic impact



Sources: **Canadian television and theatrical feature film production:** Estimates based on data collected from the Canadian Audio-Visual Certification Office (CAVCO) and the Canadian Radio-television and Telecommunications Commission (CRTC). **Foreign production (location and service):** Association of Provincial Television and Film Agencies (APTFA). **Broadcaster in-house (Canadian):** Estimates based on data from CRTC and CBC/Radio-Canada.

Note: Totals may not sum due to rounding.

* Throughout this report, "volume" or "total volume" refers to the sum of production budgets.

Introduction

Total production volume in the Canadian film and television industry increased by 4.4% to \$12.19 billion in 2022/23. Every segment of the production industry contributed to the growth, although a proportionately larger portion resulted from the production of Canadian content, which increased by 6.5% to \$4.14 billion. Factors affecting an increase in production volume included ongoing inflationary pricing, Canadian broadcasters continuing their required catch up on their underspend on Canadian programming during the pandemic period and higher spending on sports programming, in particular, the coverage of the 2022 Beijing Winter Olympics by CBC / Radio-Canada.¹

As is the case every year, *Profile 2023* provides a detailed overview of production activity with information compiled from federal and provincial agencies, as well as funding organizations like the Canada Media Fund. The financial information concords with the fiscal year of these agencies and organizations. As such, *Profile 2023* contains information from the start of April 2022 to the end of March 2023.

A financial summary like *Profile* is retrospective and includes information that may not reflect the state of the industry at the time of the publishing of the report. In most years, any concerns that may result are mitigated by the relative consistency of the information on a year-over-year basis. However, the current situation is unique, in that *Profile 2023* does not reflect the systemic shocks which impacted the industry in 2023.

While production activity grew in the 2022/23 fiscal year, significant parts of the industry came to a grinding halt in the subsequent months. Two lengthy labour strikes in the United States interrupted production activity in Canada and around the world. The Writers Guild of America (WGA) strike ran from May 2 to September 27, 2023, while the Screen Actors Guild – American Federation of Television and Radio Artists (SAG-AFTRA) strike ran from July 14 to November 8, 2023. That led to a significant decrease in production in Canada during the 2023/24 fiscal year. But that decrease and its impact on the Canadian production industry is not reflected in *Profile 2023*. The data reflecting the impact of the strikes will only form part of the financial results in *Profile 2024*, next year's report.

¹ The latest data available is provided from the CRTC annual returns filed for the 2022 broadcasting year (September 1, 2021 to August 31, 2022).

That said, recent reporting from other sources can provide some context as to the extent of the potential negative impact of the strikes on the industry. Ontario Creates provides summary production activity information on a calendar basis. Released on April 26, 2024,² the summary for the 2023 calendar year indicates that production activity in Ontario decreased by a total of 42%, reflecting decreases in both Canadian content 21% and foreign production (location and service) 55%. Decreases in production activity are also reflected in the most recent information released by Statistics Canada.

Last year, *Profile 2022* noted the potential challenges facing Canada's production industry and indicated that it was difficult to foresee whether the industry could continue to sustain production activity at those levels. At that time, the report expressed concerns about lingering inflation and economic headwinds in the general economy. It did not consider the potential negative impacts caused by the strikes, nor the overall changes in the commissioning of content permeating throughout the production industry.

To implement Bill C-11 (the *Online Streaming Act*), the Canadian Radio-television Communications Commission has initiated its multi-step review of a revised regulatory framework that will include contributions to Canadian programming from both online undertakings as well as traditional broadcasters. Step 1 focused on a base contribution requirement to production funding and was considered as part of a public hearing in November-December 2023. While completion of the entire framework will take several years, a decision on Step 1 is expected to be issued in 2024. Its implementation has the potential to increase activity in the production of Canadian content in the months ahead.

Seemingly consistent with reports of the last few years, *Profile 2023* is the story of balancing a growing and successful Canadian production industry with new, specific difficulties potentially affecting the prospects for continuing that momentum going forward. However, as has also been the case during that time, the long-term trends are pointing in the right direction and effectively demonstrate the ongoing potential for this industry to continue as an important contributor to the Canadian economy.

² Ontario Creates (2024). *2023 Film and Television Productions Statistics by Format*. P. 1.

1. Overview of the screen sector in Canada

The film and television production industry in Canada consists of four key segments:

1. **Canadian television production** includes television programs made largely by independent production companies, but also television programs made by production companies affiliated with Canadian broadcasters. All of these television programs are certified as Canadian content by the Canadian Audio-Visual Certification Office (CAVCO) of the Department of Canadian Heritage, or the Canadian Radio-television and Telecommunications Commission (CRTC).³
2. **Canadian theatrical feature film production** includes feature-length films made by independent production companies that were certified as Canadian content by CAVCO.
3. **Foreign production (location and service) (FLS)** largely consists of feature films and television programs filmed in Canada by foreign producers or by Canadian service producers.⁴ For the vast majority of FLS projects, the copyright is held by non-Canadian producers.
4. **Broadcaster in-house production** includes television programs made by Canadian television broadcasters in their own facilities as opposed to being made by an external production company that is either independent or affiliated with the broadcaster. Broadcaster in-house production primarily comprises news, sports and current affairs programs.

Highlights from 2022/23



- The total volume⁵ of film and television production in Canada increased by 4.4% to \$12.19 billion in 2022/23.
- Canadian content production (i.e. television and theatrical feature film production) increased by 6.5% to \$4.14 billion.
- Canadian television production increased by 4.7% to \$3.68 billion.
- Canadian theatrical feature film production increased by 23.5% to \$458 million.
- FLS production increased by 2.3% to \$6.86 billion.
- Broadcaster in-house production increased by 10.3% to \$1.20 billion.
- The value of foreign investment in production (FIIP) in Canada increased by 3.5% to \$7.86 billion.
- The total gross domestic product (GDP) impact of film and television production in Canada increased by 2.5% – from \$13.71 billion to \$14.05 billion in 2022/23.
- The entire screen sector value chain (including film and television production, distribution, exhibition, television broadcasting and broadcasting distribution) generated employment for an estimated 336,120 jobs, \$17.04 billion in labour income and \$23.02 billion in GDP for the Canadian economy (both direct and spin-off impacts).



- Film and television production in Canada generated employment for 239,380 Canadians in 2022/23 (including direct and spin-off impacts), a decline of 0.4% compared to 2021/22.

³ Given the limited number of fiscal years of data for Canadian *online-first* and *online-only* production, statistics for both these production segments have been added to Canadian television production data. Online-first production includes linear audiovisual content that was made primarily for an online service but is also shown on more traditional platforms such as broadcast television, movie theatres or on Blu-ray/DVD. Online-first production includes 'online only' production, which consists of audiovisual content that, within two years of its completion, is only released on an online service appearing on CAVCO's list of acceptable online services pursuant to [CAVCO Public Notice 2017-01](#). CAVCO reports that the total volume of online-first production was \$181.3 million in 2018/19, \$118.9 million in 2019/20, \$193.4 million in 2020/21, \$97.2 million in 2021/22 and \$94.6 million in 2022/23. For more information, see Box 2.

⁴ Canadian service producers are producers who provide production and/or post-production services in Canada on behalf of non-Canadian producers.

⁵ "Volume" or "total volume" refers to the sum of production budgets.

Canada's film and television production industry experienced further growth in 2022/23, following a robust rebound in 2021/22 from the impacts of the COVID-19 pandemic. The **total volume of film and television production** increased by 4.4% in 2022/23 to reach \$12.19 billion (Exhibit 1 - 1). Every segment of Canada's film and television production industry contributed to this growth. However, in contrast to 2021/22, the largest increases were in Canadian content production, rather than FLS production.

Production-cost inflation as well as general wage and price inflation across the Canadian economy continued to contribute, in part, to the increased production volume. Other significant factors affecting production included the continuing efforts by Canadian broadcasters to catch up on their Canadian programming expenditures (CPE) under-spend during the pandemic, additional funding support for the Canada Media Fund and Telefilm Canada, increased investments in Canadian content production from Canadian distributors as well as higher in-house sports programming spend at the CBC for its coverage of the 2022 Winter Olympics in Beijing.⁶

The statistics for FLS production in 2022/23 included in this report relate specifically to production activity in the fiscal-year period of April 1, 2022 to March 31, 2023. However, in the months that followed, the production industry in the United States experienced two major, multi-month strikes.⁷ During that time, most existing FLS production was paused, and new projects were shelved. These strikes led to a significant decrease in FLS production in Canada during the 2023/24 fiscal year. But that decrease and its impact on the Canadian production industry is not reflected in *Profile 2023*. The data is not yet available and will only form part of the financial results in *Profile 2024*.

Recent reporting from other sources can provide some context as to the extent of the potential negative impact of the strikes on the industry. Ontario Creates provides summary production activity information on a calendar basis. Released on April 26, 2024, the summary for 2023 identifies that production activity in Ontario decreased by a total of 42%, reflecting decreases in both Canadian content 21% and foreign production (location and service) 55%. Decreases in production activity are also reflected in the most recent information released by Statistics Canada.

Canadian television production increased by 4.7% to \$3.68 billion in 2022/23 (Exhibit 1 - 1). A combination of cost inflation and Canadian broadcasters' resumption of commissioning helped underpin the growth in 2022/23. In fact, the CRTC required large private Canadian broadcaster ownership groups to catch up on their Canadian programming expenditures (CPE) under-spend during the pandemic by the end of the 2022/23 broadcast year (August 31, 2023).⁸ Other factors such as additional government funding support, increased broadcaster spending on sports and significantly more financing from Canadian distributors contributed to the growth in Canadian television production in 2022/23.

Canadian theatrical feature film production experienced a strong year of post-pandemic growth, with volume increasing by 23.5% to \$458 million (Exhibit 4 - 1). All of this growth was concentrated in the English-language market, as French-language theatrical feature film production experienced a decline in 2022/23.

FLS production grew by 2.3% to \$6.86 billion in 2022/23 (Exhibit 6 - 1). Most of this increase in 2022/23 was linked to the continued growth of FLS television series production in Canada. In 2022/23, the number of FLS television series shot in Canada jumped from 258 to 384 and lifted volume to \$4.67 billion.

Broadcaster in-house production increased by 10.3% to \$1.20 billion in 2022 (Exhibit 1 - 1). This growth was almost entirely due to higher spending by both discretionary and conventional television services on the in-house production of sports programming, particularly CBC/Radio-Canada's coverage of the 2022 Beijing Winter Olympics (Exhibits 7 - 1 and 7 - 2).

⁶ The latest data available is provided from the CRTC annual returns filed for the 2022 broadcasting year (September 1, 2021 to August 31, 2022).

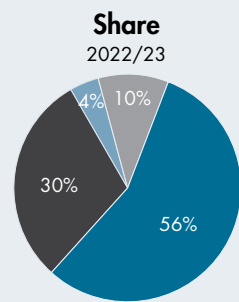
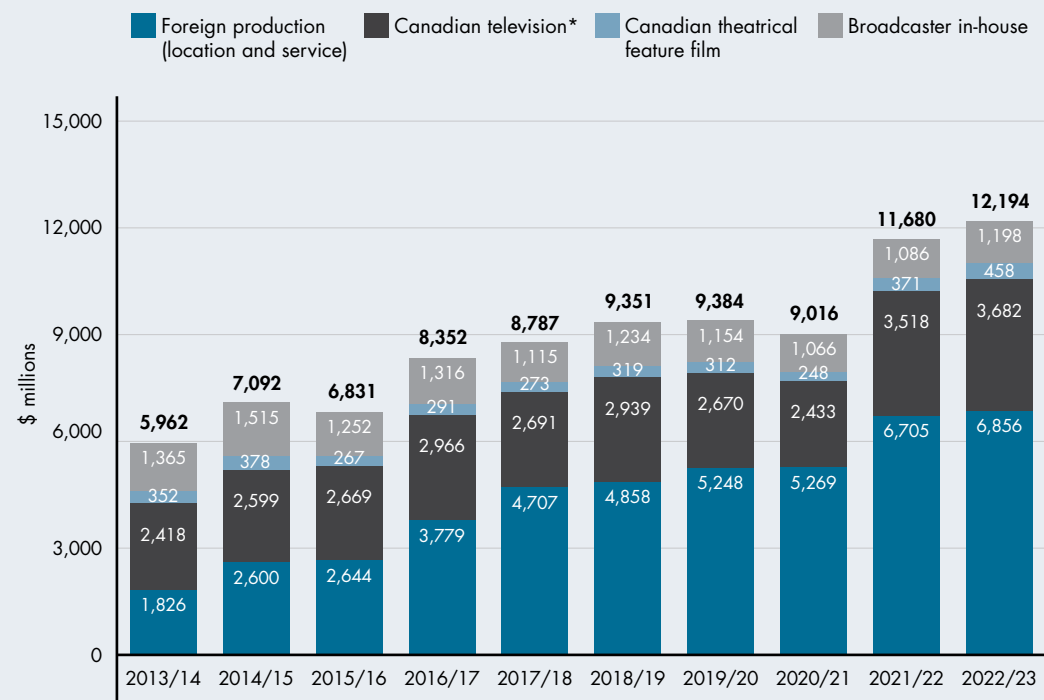
⁷ Between May 2 and September 27, 2023, the Writers Guild of America (WGA) was on strike, and between July 14 and November 8, 2023, the Screen Actors Guild - American Federation of Television and Radio Artists (SAG-AFTRA) was on strike.

⁸ CRTC (2021a). "Broadcasting Decision CRTC 2021-274: Regulatory relief for private Canadian broadcasters in the context of the COVID-19 pandemic." August 12, 2021.

Canada’s screen sector value chain continued to be a major source of employment and economic activity in 2022/23. Including both direct and spin-off impacts, the screen sector value chain generated an estimated 336,120 jobs, \$17.04 billion in labour income and \$23.02 billion in gross domestic product (GDP) for the Canadian economy in 2022/23 (Exhibit 1 - 8). Out of this total impact, film and television production generated 239,380 jobs, \$11.53 billion in labour income and \$14.05 billion in GDP. With higher levels of production volume in 2022/23, the film and television production industry’s labour income and GDP impacts increased (Exhibit 1 - 7). However, because of higher average wages and production costs, the employment generated by this higher production volume actually declined slightly in 2022/23 – albeit by less than one percent (Exhibit 1 - 6).

FILM AND TELEVISION PRODUCTION IN CANADA

Exhibit 1-1 Total volume of film and television production in Canada



Annual average growth rate

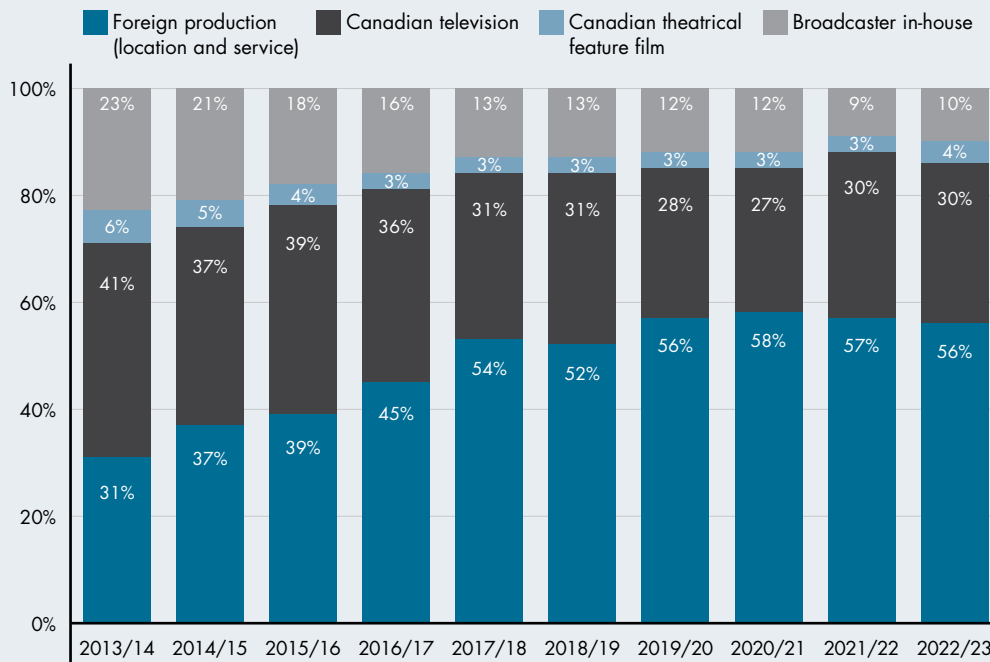
Sector	2022/23	2013/14–2022/23
Foreign production (location and service)	2.3%	15.8%
Canadian television*	4.7%	4.8%
Canadian theatrical feature film	23.5%	3.0%
Broadcaster in-house	10.3%	(1.4%)
Average: all segments	4.4%	8.3%

Sources: Estimates based on data collected from the Canadian Audio-Visual Certification Office (CAVCO), the Canadian Radio-television and Telecommunications Commission (CRTC), CBC/Radio-Canada and the Association of Provincial Television and Film Agencies.

Note: Some totals may not sum due to rounding.

* Includes ‘online-first’ audiovisual content that was first released on an online service, which in turn also includes ‘online-only’ audiovisual content that, in the two years after completion, was only released in Canada on an acceptable online service pursuant to CAVCO Public Notice 2017-01. CAVCO reports that the total volume of online-first production was \$181.3 million in 2018/19, \$118.9 million in 2019/20, \$193.4 million in 2020/21, \$97.2 million in 2021/22 and \$94.6 million in 2022/23.

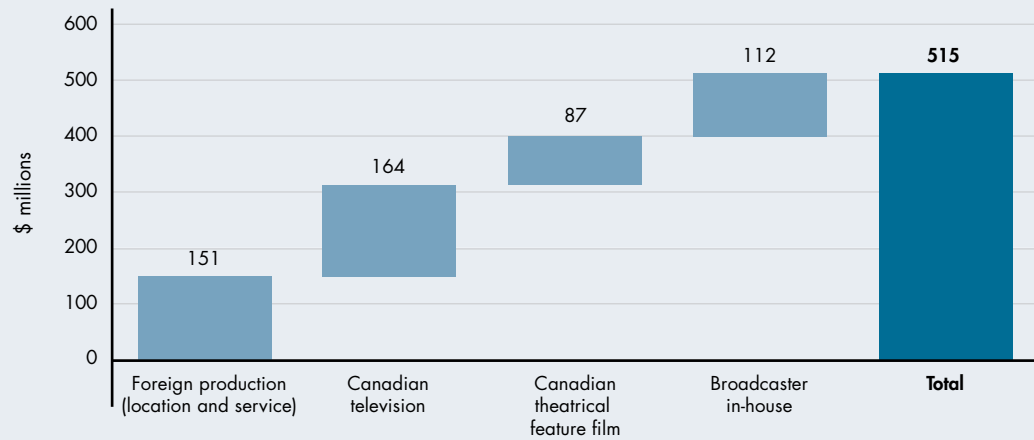
Exhibit 1-2 Total volume of film and television production in Canada, share by segment



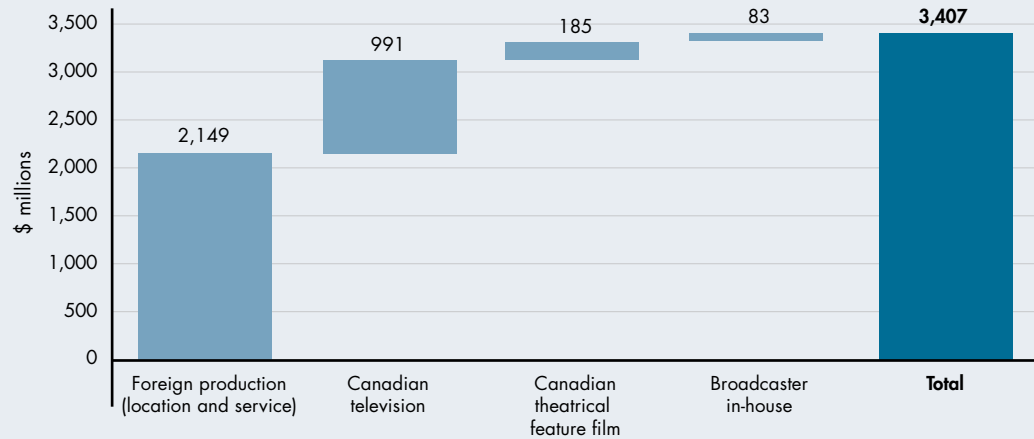
Sources: Estimates based on data collected from CAVCO, CRTC, CBC/Radio-Canada and the Association of Provincial Television and Film Agencies.
 Note: Some totals may not sum due to rounding.

Exhibit 1-3 Sources of growth in the total volume of film and television production in Canada

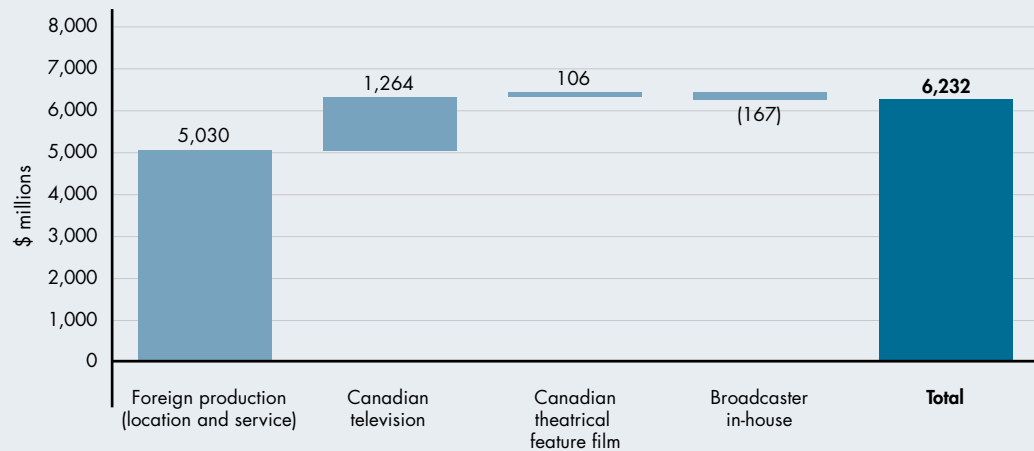
2022/23



2017/18 to 2022/23



2013/14 to 2022/23



Sources: Estimates based on data collected from CAVCO, CRTC, CBC/Radio-Canada and the Association of Provincial Television and Film Agencies.
 Note: Some totals may not sum due to rounding.

REGION

Exhibit 1-4 Total volume of film and television production in Canada, by region

(\$ millions)	2013/14	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	2022/23 share of total
Ontario	2,439	2,769	2,750	3,016	2,891	3,229	3,599	3,185	3,934	4,353	36%
British Columbia	1,618	2,243	2,133	2,957	3,556	3,452	2,820	3,211	3,657	3,750	31%
Quebec	1,280	1,582	1,429	1,759	1,761	2,003	2,281	2,062	2,967	3,113	26%
Prairie Provinces and Territories*	429	377	361	429	395	525	531	411	881	661	5%
Atlantic Canada**	196	120	157	193	183	141	153	147	241	319	3%
Total	5,962	7,092	6,831	8,352	8,787	9,351	9,384	9,016	11,680	12,194	100%

Sources: Estimates based on data collected from CAVCO, CRTC, CBC/Radio-Canada and the Association of Provincial Television and Film Agencies.

Note: Statistics published by provincial funding agencies may differ from those in *Profile 2023*. Due to the low number of projects (particularly theatrical feature film projects) in certain provinces and territories, production volume statistics are grouped by region to avoid disclosure of budgets for individual projects. Please see *Notes on methodology* for additional information. Some totals may not sum due to rounding.

* Alberta, Saskatchewan, Manitoba, Yukon, Nunavut and Northwest Territories.

** Nova Scotia, Newfoundland and Labrador, New Brunswick and Prince Edward Island.

FOREIGN INVESTMENT IN PRODUCTION

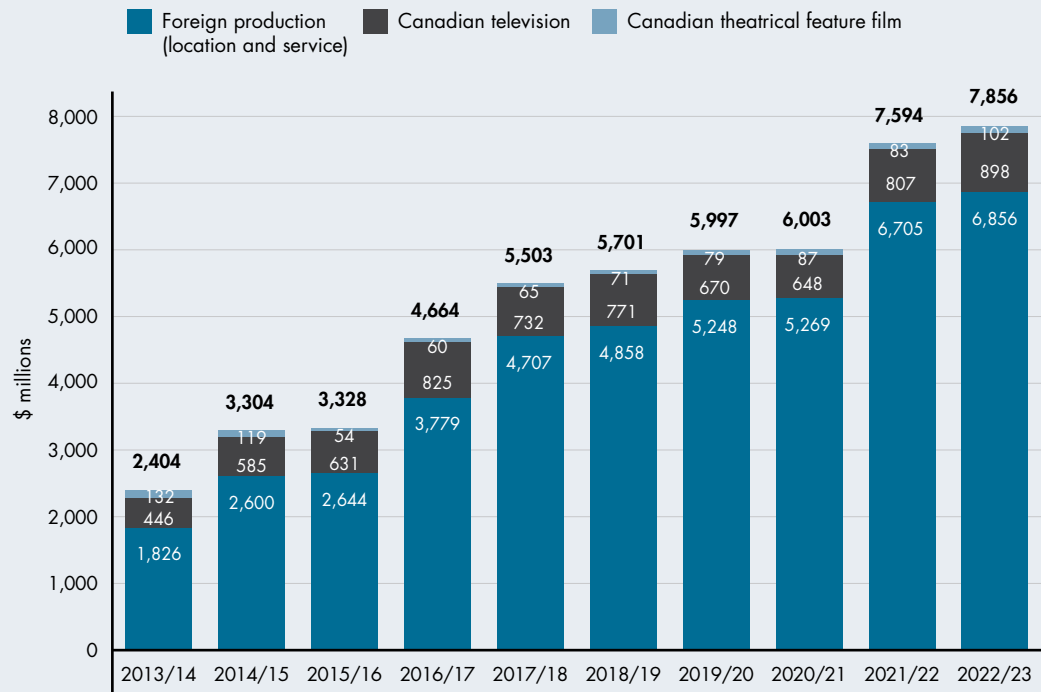
Foreign investment in production (FIIP) tracks the value of international financial participation in the film and television production industry in Canada. A major portion of that investment is FLS production. However, along with FLS production, there are also significant foreign investments in the production of Canadian content. These investments include foreign presales and distribution advances for all projects certified by CAVCO, as well as estimates of foreign presales and distribution advances for non-CAVCO-certified productions. Together, foreign investments in Canadian content totalled about \$1 billion.⁹

FIIP excludes the amount of revenue earned from the distribution of completed Canadian films and television programs to foreign broadcasters and distributors. However, data published by Statistics Canada (and found in Section 8) indicates that these sales of completed content generated \$100 million in 2021 (Exhibit 8 - 2), meaning that foreign investments in Canadian content were even higher than \$1 billion.

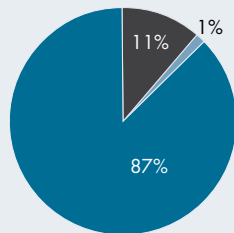
The vast majority of FIIP is generated by English-language content. In fact, out of the \$1 billion in FIIP generated by Canadian content in 2022/23, French-language content accounted for only \$24 million (see data found in Exhibits 3 - 17c and 4 - 7c).

⁹ In the case of treaty coproductions, the data used to estimate FIIP includes only the financing of the Canadian budget. As a result, the foreign budgets for treaty coproductions do not directly contribute to FIIP. Treaty coproductions contribute only to FIIP if the financing of the Canadian budget includes a foreign presale or distribution advance.

Exhibit 1-5 Foreign investment in production in Canada



Share
2022/23



Annual average growth rate

Sector	2022/23	2013/14–2022/23
Foreign production (location and service)	2.3%	15.8%
Canadian television	11.4%	8.1%
Canadian theatrical feature film	23.8%	(2.8%)
Average: all segments	3.5%	14.1%

Sources: Estimates based on data collected from CAVCO and the Association of Provincial Television and Film Agencies.
 Note: Some totals may not sum due to rounding. See Notes on methodology for the definition of FIIP. Excludes Canadian online production.

EMPLOYMENT AND ECONOMIC CONTRIBUTION

Film and television production

Exhibit 1-6 Number of jobs (i.e. person-count) generated by film and television production in Canada

	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23
Canadian television production						
Direct	40,130	42,500	42,360	37,080	46,800	47,520
Spin-off	31,810	32,590	27,440	22,510	27,220	26,540
Total	71,940	75,090	69,800	59,590	74,020	74,060
Canadian theatrical feature film production						
Direct	4,110	4,580	4,980	3,780	4,860	5,940
Spin-off	3,250	3,580	3,250	2,240	2,910	3,360
Total	7,360	8,160	8,230	6,020	7,770	9,300
FLS production						
Direct	70,150	70,150	83,130	80,460	89,280	88,380
Spin-off	55,660	53,870	53,980	48,720	51,860	49,390
Total	125,810	124,020	137,110	129,180	141,140	137,770
Broadcaster in-house production						
Direct	11,760	12,660	11,540	10,080	8,960	9,630
Spin-off	13,220	13,660	11,870	9,860	8,400	8,620
Total	24,980	26,320	23,410	19,940	17,360	18,250
Grand total						
Direct	126,150	129,890	142,010	131,400	149,900	151,470
Spin-off	103,940	103,700	96,540	83,330	90,390	87,910
Total	230,090	233,590	238,550	214,730	240,290	239,380

Sources: Estimates based on Nordicity research and data collected from CAVCO, CRTC, CBC/Radio-Canada, the Association of Provincial Television and Film Agencies, unions and guilds, Statistics Canada and Conference Board of Canada.

Note: Person-count estimates only available beginning in 2015/16. See *Notes on methodology* for a description of the job-estimation methodology.

Exhibit 1-7 Labour income and GDP impact of film and television production in Canada

	2021/22			2022/23		
	Direct	Spin-off	Total	Direct	Spin-off	Total
Labour income (\$ millions)						
Canadian content production						
Canadian television production	2,005	1,371	3,376	2,099	1,381	3,480
Canadian theatrical feature film production	211	147	358	261	175	436
Subtotal	2,216	1,518	3,734	2,360	1,556	3,916
FLS production	3,821	2,612	6,433	3,908	2,570	6,478
Broadcaster in-house production	619	423	1,042	683	449	1,132
Grand total	6,656	4,553	11,209	6,951	4,575	11,526
GDP (\$ millions)						
Canadian content production						
Canadian television production	2,076	2,043	4,119	2,172	2,058	4,230
Canadian theatrical feature film production	219	219	438	270	260	530
Subtotal	2,295	2,262	4,557	2,442	2,318	4,760
FLS production	3,955	3,892	7,847	4,045	3,829	7,874
Broadcaster in-house production	641	668	1,309	707	709	1,416
Grand total	6,891	6,822	13,713	7,194	6,856	14,050

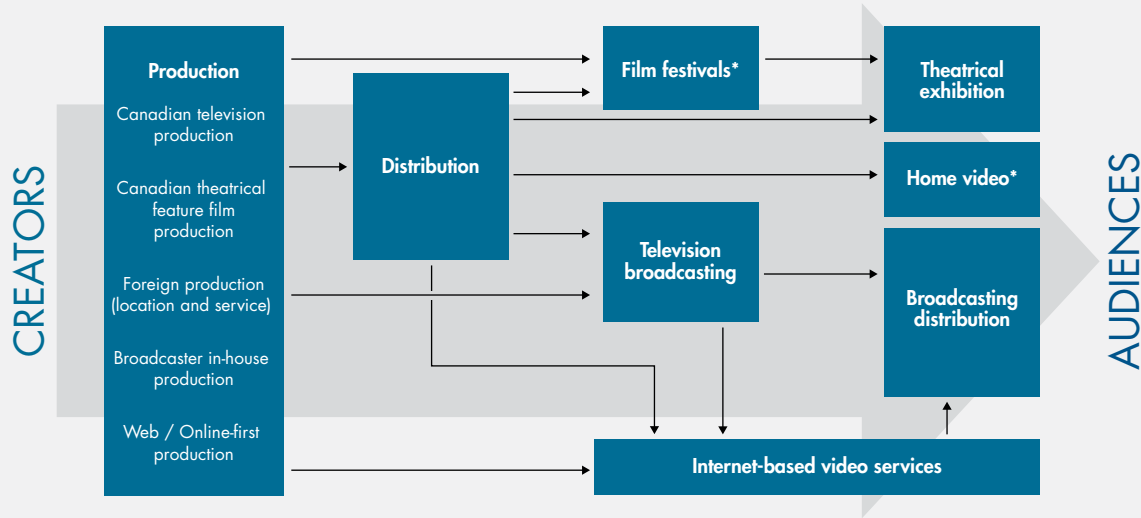
Sources: Estimates based on Nordicity research and data collected from CAVCO, CRTC, CBC/Radio-Canada, the Association of Provincial Television and Film Agencies, unions and guilds, Statistics Canada and Conference Board of Canada
 Note: See *Notes on methodology* for a description of methodology.

Screen sector value chain segments

While film and television production is the largest source of economic impact within the screen sector value chain, the other value chain industries also generate significant economic impacts.

- The distribution industry in Canada generated employment for 5,490 people, as well as \$298 million in labour income and \$495 million in GDP in 2021 (most recent year of published data).
- The exhibition industry generated employment for 20,090 people, as well as \$630 million in labour income and \$1.18 billion in GDP in 2023.
- The television-broadcasting industry generated employment for 18,780, as well as \$1.37 billion in labour income and \$2.38 billion in GDP in 2022.
- The broadcasting distribution undertaking (BDU) industry generated employment for 52,380 people, as well as \$3.22 billion in labour income and more than \$4.92 billion in GDP in 2022.

Box 1 Screen sector value chain



* Estimates of the revenues and economic impact of film festivals and the home video market in Canada are not included in this report.

The screen sector value chain begins with production. **Production** converts the creative ideas of the screenwriter and director into a finished film or television program. In this report, the production segment includes pre-production (i.e. development), live-action production, animation production, post-production and visual effects production (VFX).

The production stage is followed by **distribution**. Canadian and foreign distribution companies typically control the economic rights of films and television programs, and plan and execute the release windows of these films and television programs. Distributors are a key feature of the theatrical market. In television, programs are often licensed directly by producers (or their distribution arms) to first-window broadcasters without a third-party distributor.

The evolution of the screen sector value chain is most evident in the content consumption stage. For television programming, content consumption typically begins in the **television broadcasting** industry, which includes the conventional television broadcasters, and discretionary and on-demand services licensed by the CRTC to operate in Canada.

Film festivals are an important platform through which producers and distributors can raise awareness for their films and sell them to new territories. Film festivals can also generate significant economic benefits for their host cities.

Many films are released first in the **theatrical exhibition** window, with a secondary release window on other platforms. However, that is not always the case. Some films may be simultaneously released in theatres and by **Internet-based video services**, with either a common “day and date” release or a significantly shortened window following the theatrical release. Other films have their first release on **Internet-based video services**. In these cases, the films can bypass the television broadcasting or theatrical exhibition industries altogether.

For the Canadian screen sector, it is also important to recognize the role of cable-television, direct-to-home (DTH) satellite and Internet protocol television (IPTV). These entities comprise the **broadcasting distribution** industry and are referred to as broadcasting distribution undertakings (BDUs). They play an essential role in ensuring that Canadian audiences can reliably access the screen content from the television broadcasting industry and licensed on-demand services. Most Internet-based video services, however, exhibit content directly to consumers over broadband Internet connections, thus bypassing Canadian BDUs.

Combining estimates of the economic impact from the most recent year of published data indicates that the screen sector value chain in Canada generates an estimated 336,120 jobs, \$17.04 billion in labour income and \$23.02 billion in GDP for the Canadian economy (both direct and spin-off impacts).

Exhibit 1-8 Economic impact of selected sectors in the screen sector value chain

	Direct	Spin-off	Total
Employment (jobs)			
Film and TV production (2022/23)	151,470	87,910	239,380
Distribution (2021*)	810	4,680	5,490
Exhibition (2023)	10,510	9,580	20,090
Broadcasting** (2022)	4,980	13,800	18,780
Broadcasting distribution (2022)	26,720	25,660	52,380
Total	194,490	141,630	336,120
Labour income (\$ millions)			
Film and TV production (2022/23)	6,951	4,575	11,526
Distribution (2021*)	98	200	298
Exhibition (2023)	200	430	630
Broadcasting** (2022)	652	721	1,373
Broadcasting distribution (2022)	2,125	1,092	3,217
Total	10,026	7,018	17,044
GDP (\$ millions)			
Film and TV production (2022/23)	7,194	6,856	14,050
Distribution (2021*)	145	350	495
Exhibition (2023)	379	798	1,177
Broadcasting** (2022)	1,234	1,147	2,381
Broadcasting distribution (2022)	2,958	1,957	4,915
Total	11,910	11,108	23,018

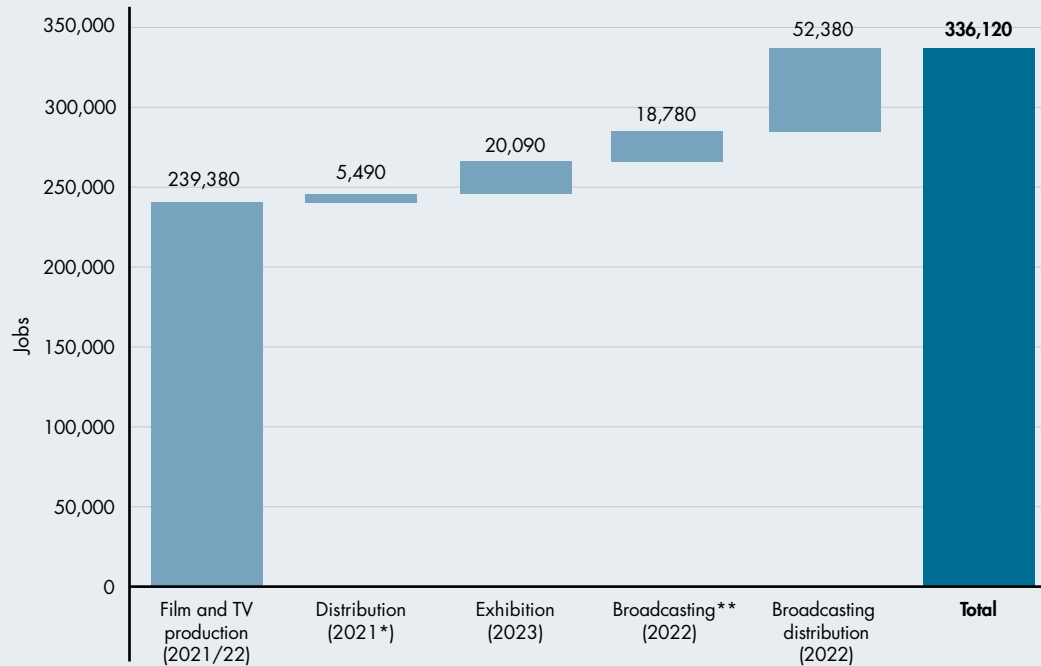
Sources: Estimates based on Nordicity research and data collected from CAVCO, CRTC, CBC/Radio-Canada, the Association of Provincial Television and Film Agencies, unions and guilds, Statistics Canada, Conference Board of Canada, the Movie Theatre Association of Canada (MTAC) and Cineplex Entertainment.

* The most recent year of published data

** Excludes in-house production, which is included in *Film and TV production*

SUMMARY OF EMPLOYMENT AND GDP IMPACTS

Exhibit 1-9 Summary of total employment impact of screen sector value chain

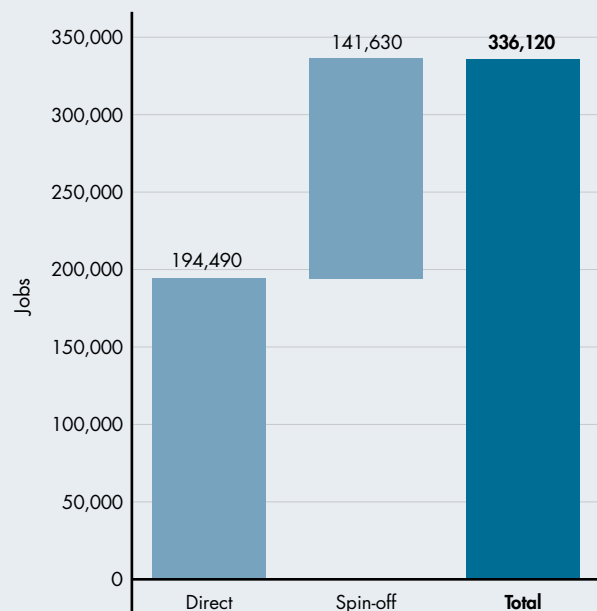


Sources: Estimates based on Nordicity research and data collected from CAVCO, CRTC, CBC/Radio-Canada, the Association of Provincial Television and Film Agencies, unions and guilds, Statistics Canada, Conference Board of Canada, the Movie Theatre Association of Canada (MTAC) and Cineplex Entertainment.

* The most recent year of published data

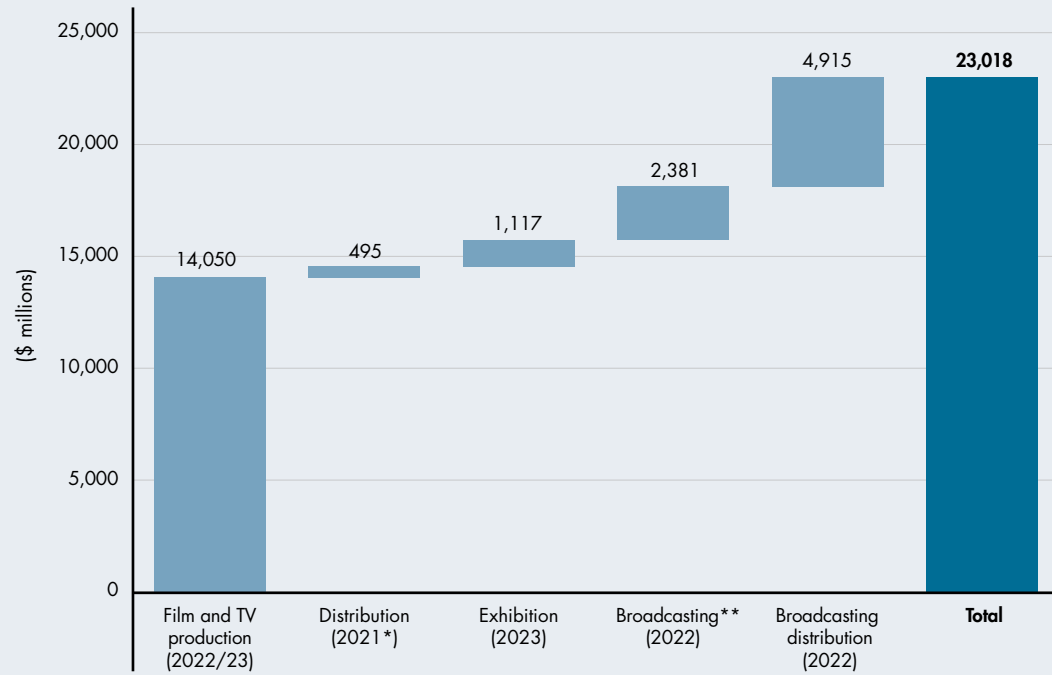
** Excludes in-house production, which is included in *Film and TV production*

Exhibit 1-10 Direct and spin-off employment impact across screen sector value chain



Sources: Estimates based on Nordicity research and data collected from CAVCO, CRTC, CBC/Radio-Canada, the Association of Provincial Television and Film Agencies, unions and guilds, Statistics Canada, Conference Board of Canada, the Movie Theatre Association of Canada (MTAC) and Cineplex Entertainment.

Exhibit 1-11 Summary of total GDP impact of screen sector value chain

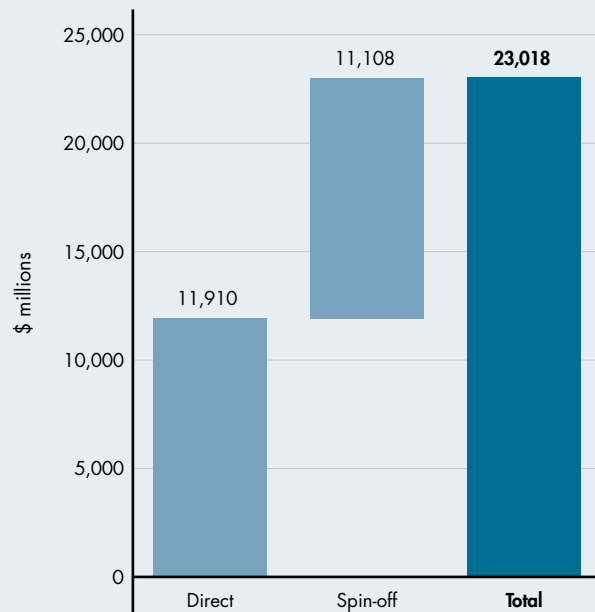


Sources: Estimates based on Nordicity research and data collected from CAVCO, CRTC, CBC/Radio-Canada, the Association of Provincial Television and Film Agencies, Statistics Canada, Conference Board of Canada, the Movie Theatre Association of Canada (MTAC) and Cineplex Entertainment.

* The most recent year of published data

** Excludes in-house production, which is included *Film and TV production*

Exhibit 1-12 Direct and spin-off GDP impact across the screen sector value chain



Sources: Estimates based on Nordicity research and data collected from CAVCO, CRTC, CBC/Radio-Canada, the Association of Provincial Television and Film Agencies, Statistics Canada, Conference Board of Canada, the Movie Theatre Association of Canada (MTAC) and Cineplex Entertainment.

2. Canadian content production

Canadian content production consists of all films and television programs certified as Canadian content by the Canadian Audio-Visual Certification Office (CAVCO) or the Canadian Radio-television and Telecommunications Commission (CRTC), and includes audiovisual content made for initial release on online services. Most Canadian content productions are made by independent production companies, although broadcaster-affiliated production companies¹⁰ also account for some production in this segment.

The Canadian content production segment excludes broadcaster in-house production and foreign production (location and service) (FLS). In this section, we provide summary statistics for Canadian content production. In Sections 3 and 4, we provide more detailed statistics for Canadian television and Canadian theatrical feature film production, respectively.

The Canadian content production segment experienced another increase in production in 2022/23, which raised annual volume beyond pre-pandemic levels. However, it is important to note that these increases were partly due to higher production-cost inflation; large private Canadian broadcasters' restoration of their Canadian programming expenditures (CPE) levels and the CRTC requirement that they catch up on their CPE under-spend during the pandemic before August 31, 2023;¹¹ and additional public funding. For the period 2021/22 to 2023/24, the Canada Media Fund received \$60 million in additional funding from the federal government for equity, inclusion and diversity initiatives, particular production.¹² During the same three-year period, Telefilm Canada received an additional \$105 million in funding from the federal government, which helped support the growth in the theatrical feature film segment.

Highlights from 2022/23



- Canadian content production increased by 6.5% to \$4.14 billion.
- English-language production¹³ increased by 10.9% to \$2.97 billion.
- Fiction production increased by 7.9% to \$2.20 billion.
- Children's and youth production increased by 7.8% to \$626 million.
- Documentary production increased by 4.2% to \$559 million.
- Production in the variety and performing arts (VAPA) genre increased by 17.3% to \$180 million.
- Animation production increased by 28.4% to \$357 million.



- French-language production decreased by 3.3% to \$1.17 billion.
- Production of programs in the lifestyle and human interest genre¹⁴ decreased by 0.8% to \$573 million.

¹⁰ Affiliated production companies are production companies in which a Canadian broadcaster owns or controls at least 30% of the voting equity.

¹¹ CRTC (2021a).

¹² Canada Media Fund (2024). *Creating Change: An Evaluation of the CMF's Equity and Inclusion Initiatives*. P. 2.

¹³ Includes data for projects produced in bilingual format and non-official languages, which comprised less than one percent of the total volume of Canadian content production between 2011/12 and 2019/20 and which cannot be reported on separately due to confidentiality issues arising from low production volume.

¹⁴ Includes magazine programming and a small amount of programming that was previously allocated to the educational/instructional genre.

Higher levels of both Canadian television and Canadian theatrical feature film production, particularly in the English-language market, helped lift the total volume of Canadian content production by 6.5% in 2022/23 to \$4.14 billion (Exhibit 2 - 1). This volume was also 27.0% higher than the pre-pandemic peak of \$3.26 billion recorded in 2018/19.

Although Canadian theatrical feature film production only accounted for 10% of the total volume of Canadian content production in 2021/22, it accounted for 35% of the growth in Canadian content production in 2022/23 (Exhibit 2 - 1). Canadian theatrical feature film production increased by \$87 million, or 23.5%, to \$458 million. Still, as the much-larger sub-sector of Canadian content production, Canadian television production was the larger source of growth. It increased by \$164 million, or 4.7%, to \$3.68 billion.

The growth in Canadian content production was entirely due to higher levels of English-language production in 2022/23. Production in that language increased by 10.9%, while the total volume of French-language Canadian content production decreased by 3.3% (Exhibit 2 - 2).

The fiction genre was the single biggest contributor to the \$252 million increase in Canadian content production in 2022/23. Production volume in that genre rose by \$162 million, accounting for over 60% of the overall gain (Exhibit 2 - 3). The children's and youth genre was the second largest contributor, followed by the variety and performing arts (VAPA) genre and documentary genre. The lifestyle and human interest genre was the only one to record a decrease in 2022/23.

After declining in 2021/22, animation production was higher in 2022/23. In fact, it increased by 28.4% to a 10-year high of \$357 million (Exhibit 2 - 7). Animation production for television was up by \$16 million, or 6.1%, to \$277 million. However, it was a sharp jump in spending on theatrical animation production, from \$17 million to \$80 million in 2022/23, which fuelled the overall increase in Canadian animation production.

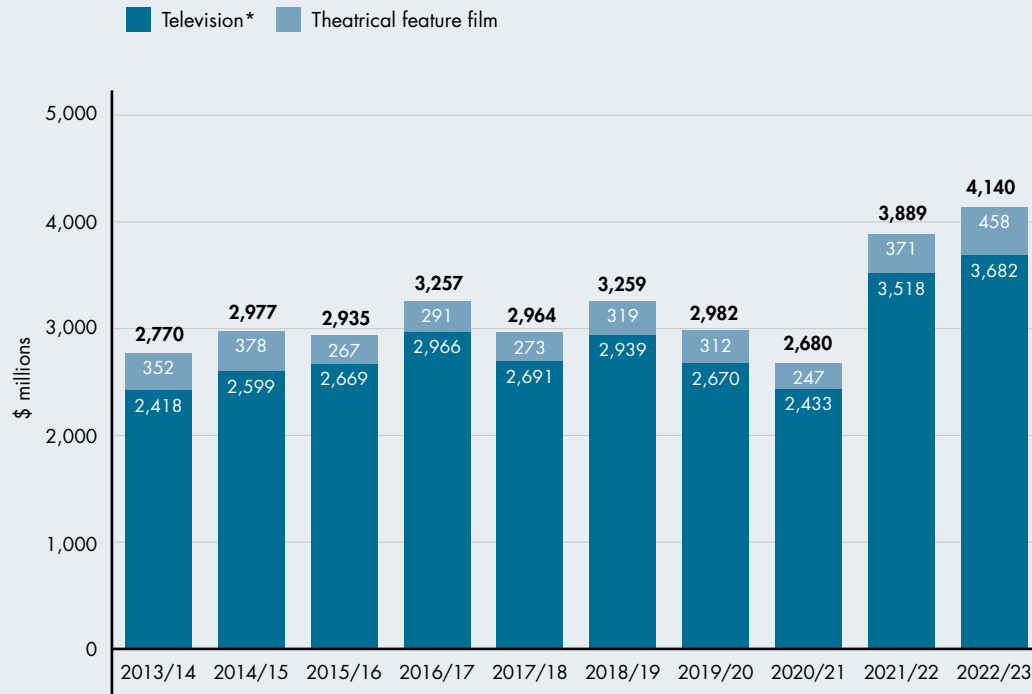
Coming out of the COVID-19 pandemic, a large portion of the rebound in Canadian content production in 2021/22 was propelled by Canadian broadcasters that were quickly restoring their investments in Canadian television programming, in order to adhere to their regulatory obligations. In 2022/23, however, the increase in Canadian content production can also be traced back to increased investment by Canadian distributors. They injected an additional \$135 million of financing into Canadian content production – more than half the overall increase in volume of \$251 million (Exhibit 2 - 10). This higher level of Canadian distributor financing reflects, in part, the significant contribution to year-over-year growth from Canadian theatrical feature film production.

Alongside the federal and provincial tax credits that are automatically triggered, direct public funding from federal or provincial governments also contributed to the growth in Canadian content production, with more modest contributions from Canadian broadcaster licence fees (Exhibit 2 - 10). Historically, strong growth in Canadian content production has often been associated with increased levels of foreign financing. However, in 2022/23, that was not the case, as foreign financing actually declined by \$25 million.

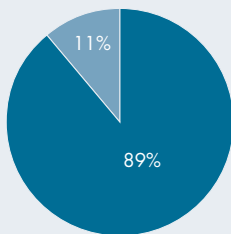
The smaller regions of Canada appear to have been the main sources of the overall growth in Canadian content production in 2022/23. Out of the five regions covered in *Profile* (i.e. Ontario, Quebec, British Columbia, the Prairie Provinces and Territories, and Atlantic Canada), the Prairie Provinces and Territories led the way with a 117.8% increase in the volume of Canadian content production, adding \$227 million to its annual volume (Exhibit 2 - 9). It was followed by Atlantic Canada, with a 61.0% increase, or \$63 million. Ontario's volume of Canadian content production was virtually flat in 2022/23, increasing by 0.8%, while Quebec and British Columbia both experienced year-over-year declines in their volumes of Canadian content production.

RELEASE MEDIUM

Exhibit 2-1 Volume of Canadian content production, by release medium



Share
2022/23



Annual average growth rate

Sector	2022/23	2013/14–2022/23
Television*	4.7%	4.8%
Theatrical feature film	23.8%	3.0%
Average: all segments	6.5%	4.6%

Source: Estimates based on data collected from CAVCO.

Note: Some totals may not sum due to rounding. Data includes an estimate of CRTC-certified television production.

* Includes 'online-first' audiovisual content that was first released on an online service, which includes 'online-only' audiovisual content that in the two years after completion, was only released in Canada on an acceptable online service pursuant to CAVCO Public Notice 2017-01. CAVCO reports that the total volume of online-first production was \$181.3 million in 2018/19, \$118.9 million in 2019/20, \$193.4 million in 2020/21, \$97.2 million in 2021/22 and \$94.6 million in 2022/23. Note that statistics for online-first production do not incorporate the CAVCO application-lag adjustment or the adjustment for CRTC-certified production.

Box 2 Online-first production

Prior to 2017, Canadian producers only received the Canadian Film or Video Production Tax Credit (CPTC) for audiovisual content that was certified by CAVCO and ultimately shown in Canada by a licensed Canadian broadcaster, in a movie theatre, or by release on Blu-ray or DVD, although that content could also be shown initially online. However, with the proliferation of online, and on-demand services in recent years, many Canadian producers have been increasingly premiering their films and television programs on online platforms, as well as producing content primarily intended for online consumption.

This type of audiovisual production may be referred to as “online-first” production. “Online-only” production is a subset of online-first production and includes audiovisual content that, during its first two years after completion, is only released in Canada on one of the many online platforms on CAVCO’s list of acceptable online services pursuant to [CAVCO Public Notice 2017-01](#).

As of December 19, 2023, this list included at least 17 CRTC licensed broadcaster websites (e.g. CBC Gem, ICI Tou.tv, APTN lumi and CTV GO), three hybrid video-on-demand services (Club illico, Crave and VRAI), and 54 other online video services (including Netflix Canada, Amazon Prime Canada, Apple TV+, 16 separate CAVCO-approved YouTube channels, and 3 free ad-supported streaming television (FAST) channels).

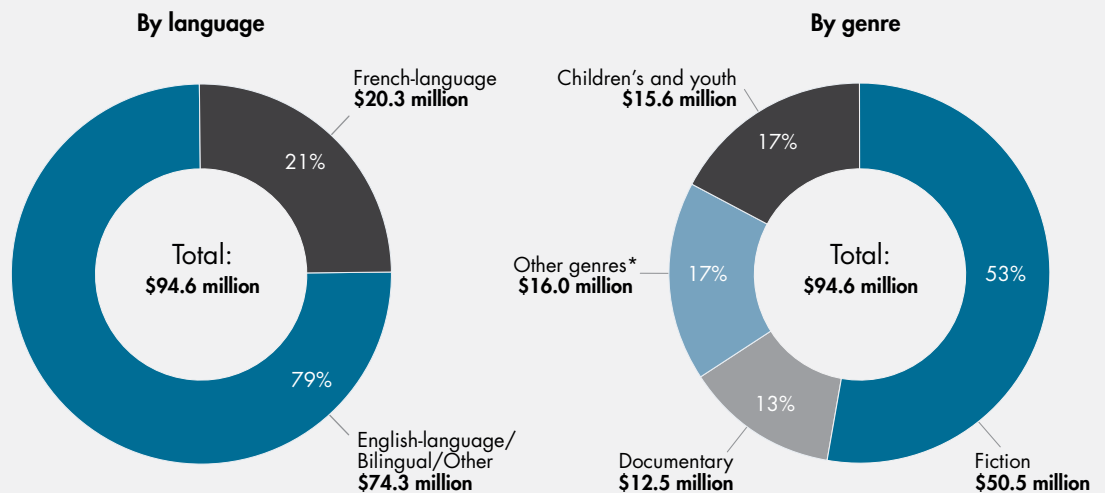
Volume and number of Canadian online-first audiovisual content

	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23
Volume (\$M)	68.9	181.3	118.9	193.4	97.2	94.6
Number of projects	100	136	99	117	116	90
Average budget (\$000s)	689	1,333	1,201	1,653	838	1,051

Source: Estimates based on data collected from CAVCO.

Note: Statistics for online-first production do not incorporate CAVCO application-lag adjustment.

Volume and number of Canadian online-first audiovisual content, 2022/23

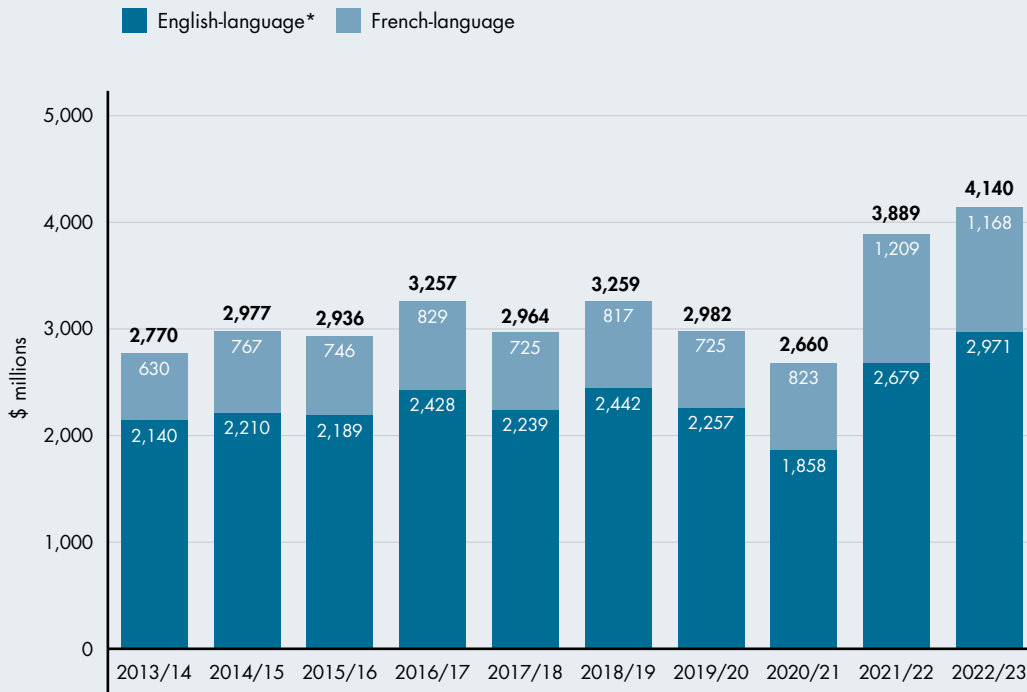


Source: Estimates based on data collected from CAVCO

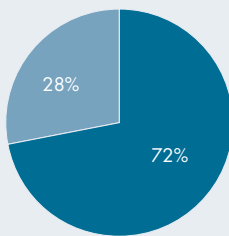
* Includes lifestyle and human interest, and VAPA genres. Projects in these other genres have been combined to avoid disclosure of amounts for individual projects.

LANGUAGE

Exhibit 2-2 Total volume of Canadian content production, by language



Share
2022/23



Annual average growth rate

Language	2022/23	2013/14–2022/23
English-language*	10.9%	3.7%
French-language	(3.3%)	7.1%
Average: all languages	6.5%	4.6%

Source: Estimates based on data collected from CAVCO.

Note: Some totals may not sum due to rounding. Data includes an estimate of CRTC-certified television production.

* Includes data for projects produced in bilingual format and non-official languages, which comprised less than one percent of the total volume of Canadian content production between 2013/14 and 2022/23 and which cannot be reported separately due to confidentiality issues arising from low production volume.

GENRES

Exhibit 2-3 Volume of Canadian content production, by genre and release medium*

(\$ millions)	2013/14	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23
Fiction										
Television	1,093	1,226	1,188	1,574	1,265	1,416	1,344	1,232	1,745	1,873
Theatrical feature film	314	295	179	253	205	269	245	171	295	329
Total	1,407	1,521	1,366	1,827	1,470	1,685	1,589	1,403	2,040	2,202
Children's and youth										
Television	419	467	552	459	516	531	444	334	537	527
Theatrical feature film	29	74	76	29	50	31	54	71	43	99
Total	448	541	628	488	566	562	498	405	580	626
Documentary										
Television	311	248	274	247	259	316	270	305	504	528
Theatrical feature film	8	7	10	10	19	19	12	6	33	31
Total	319	255	284	257	278	335	282	311	537	559
Lifestyle and human interest**										
Total	478	542	553	564	497	599	495	414	578	573
VAPA										
Total	118	118	104	122	155	78	117	148	154	180

Source: Estimates based on data collected from CAVCO.

Note: Some totals may not sum due to rounding. Data includes an estimate of CRTC-certified television production.

* Due to low numbers of lifestyle and human interest, and VAPA productions in the theatrical market, the theatrical volumes have been merged into the fiction genre.

** Includes magazine programming and a small amount of programming that was previously allocated to the educational/instructional genre.

Exhibit 2-4 Number of Canadian content projects, by genre and release medium, 2022/23

	Fiction	Children's and youth	Documentary	Lifestyle and human interest*	Variety and performing arts	All genres
Number						
Television programming	416	122	450	286	104	1,378
Theatrical feature films	109	8	32	-**	-**	149
Total	525	130	482	286	104	1,527
Share of total						
Television programming	79%	94%	93%	100%	100%	90%
Theatrical feature films	21%	6%	7%	0%	0%	10%
Total	100%	100%	100%	100%	100%	100%

Source: Estimates based on data collected from CAVCO.

Note: Data includes an estimate of CRTC-certified television production.

* Includes magazine programming and a small amount of programming that was previously allocated to the educational/instructional genre.

** Due to low numbers of lifestyle and human interest, and VAPA productions in the theatrical market, theatrical project numbers have been merged into the fiction genre.

Exhibit 2-5 Volume of Canadian content production, by genre and language, 2022/23

	Fiction	Children's and youth	Documentary	Lifestyle and human interest*	Variety and performing arts	All genres
(\$ millions)						
English-language**	1,690	510	444	270	57	2,971
French-language	511	116	115	303	123	1,168
Total	2,202	626	559	573	180	4,140
Share of total						
English-language**	77%	82%	79%	47%	32%	72%
French-language	23%	19%	21%	53%	68%	28%
Total	100%	100%	100%	100%	100%	100%

Source: Estimates based on data collected from CAVCO.

Note: Some totals may not sum due to rounding. Data includes an estimate of CRTC-certified television production.

* Includes magazine programming and a small amount of programming that was previously allocated to the educational/instructional genre.

** Includes data for projects produced in bilingual format and non-official languages, which comprised less than one percent of the total volume of Canadian content production between 2011/12 and 2022/23 and cannot be reported separately due to confidentiality issues arising from low production volume.

Exhibit 2-6 Volume of Canadian children's and youth television production, by language and category*

(\$ millions)	2021/22			2022/23		
	Animation	Live Action	Total	Animation	Live Action	Total
English-language**	237	196	433	253	163	416
French-language	23	81	104	20	90	110
Total	260	277	537	273	253	526

Source: Estimates based on data collected from CAVCO.

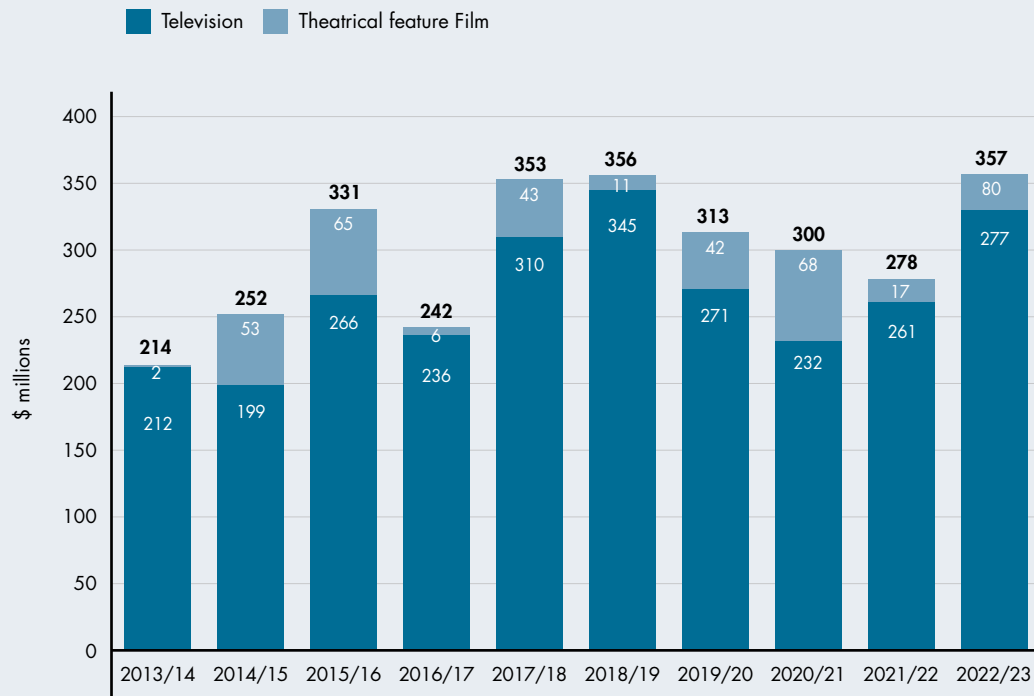
Note: Some totals do not sum due to rounding. Data includes an estimate of CRTC-certified television production.

* Due to data confidentiality, statistics can only be presented for television production and exclude theatrical feature film production.

** Includes data for projects produced in bilingual format and non-official languages, which comprised less than one percent of the total volume of Canadian content production in 2020/21 and 2022/23, and cannot be reported separately due to confidentiality issues arising from low production volume.

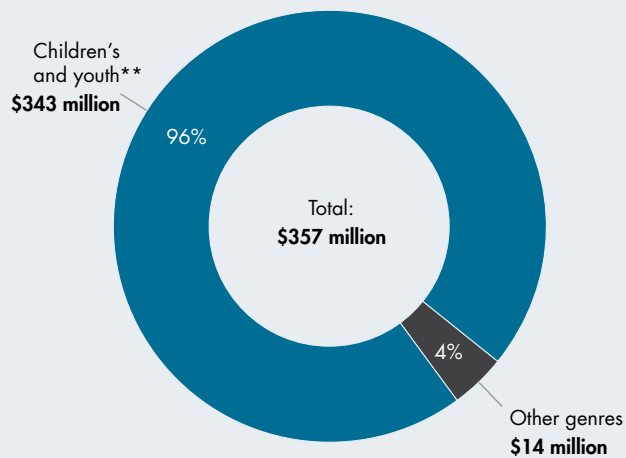
ANIMATION

Exhibit 2-7 Volume of Canadian animation production



Source: Estimates based on data collected from CAVCO.
 Note: Data includes an estimate of CRTC-certified television production.

Exhibit 2-8 Volume of Canadian animation production, by genre, 2022/23*



Source: Estimates based on data collected from CAVCO.
 Note: Data includes an estimate of CRTC-certified television production. Some totals do not sum due to rounding.
 * Includes television and theatrical production.
 ** Assumes that 95% of animation production released in the theatrical market in 2022/23 was in the children's and youth genre, which was the average share observed between 2015/16 and 2018/19 inclusively.

REGION

Exhibit 2-9 Total volume of Canadian content production, by region

(\$ millions)	2013/14	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	2022/23 share of total
Ontario	1,225	1,340	1,376	1,405	1,410	1,559	1,436	1,189	1,690	1,703	41%
Quebec	842	977	869	1,048	838	936	867	893	1,289	1,287	31%
British Columbia	435	470	463	549	430	549	385	411	614	567	14%
Prairie Provinces and Territories*	146	121	130	145	147	133	216	122	192	419	10%
Atlantic Canada**	122	70	98	111	139	81	78	66	104	167	4%
Total	2,770	2,977	2,935	3,257	2,964	3,259	2,982	2,680	3,889	4,140	100%

Sources: Estimates based on data collected from CAVCO.

Note: Statistics published by provincial funding agencies may differ from those in *Profile 2023*. Due to the low number of projects (particularly theatrical feature film projects) in certain provinces and territories, production volume statistics are grouped by region to avoid disclosure of budgets for individual projects. Please see Notes on methodology for additional information. Some totals may not sum due to rounding.

* Alberta, Saskatchewan, Manitoba, Yukon, Nunavut and Northwest Territories.

** Nova Scotia, Newfoundland and Labrador, New Brunswick and Prince Edward Island.

FINANCING

Exhibit 2-10 Financing for Canadian film and television production

	2018/19		2019/20		2020/21		2021/22		2022/23	
	\$ millions	%	\$ millions	%	\$ millions	%	\$ millions	%	\$ millions	%
Private broadcaster licence fees	406	12%	406	14%	298	11%	571	15%	584	14%
Public broadcaster licence fees	337	10%	313	10%	344	13%	421	11%	429	10%
Federal tax credits ¹	324	10%	295	10%	270	10%	390	10%	421	10%
Provincial tax credits ¹	624	19%	562	19%	499	19%	776	20%	816	20%
Canadian distributors ²	395	12%	287	10%	366	14%	357	9%	492	12%
Foreign pre-sales and advances ³	448	14%	463	16%	368	14%	533	14%	508	12%
Canada Media Fund	262	8%	276	9%	281	10%	289	7%	290	7%
Telefilm Canada	70	2%	68	2%	38	1%	78	2%	78	2%
Other public ⁴	167	5%	132	4%	116	4%	219	6%	246	6%
Other private ⁵	226	7%	180	6%	101	4%	255	7%	274	7%
Total	3,259	100%	2,982	100%	2,682	100%	3,889	100%	4,140	100%

Sources: Estimates based on data obtained from CAVCO, CMF and Telefilm Canada.

Notes: Some totals may not sum due to rounding. Data includes an estimate of CRTC-certified television production.

1. Canadian production companies receive federal and provincial tax credits based on their eligible expenditures, and, in almost all cases, invest their tax credits directly into their film and television projects, in order to complete their project financing.
2. Canadian distributors' financing includes minimum guarantees and advances invested in television programs and theatrical feature films in exchange for rights to market, license and exhibit the audiovisual productions in Canada, unsold territories outside of Canada or on global distribution platforms.
3. Foreign pre-sales and advances include broadcast licence fees, minimum guarantees, advances and other forms of financing from broadcasters, distributors or other organizations based outside of Canada.
4. 'Other public' includes financing from provincial governments, and other federal government departments and agencies; excludes federal and provincial tax credits, Canadian public broadcasters' licence fees and funding from Telefilm Canada.
5. 'Other private' includes financing from production companies (excluding the tax credit contribution), independent production funds, broadcaster equity and other Canadian private investors.

Box 3 Financing from Canadian production companies

Federal and provincial tax credits represent part of a Canadian production company's contribution in film and television projects. Canadian production companies receive tax credits based on their eligible labour expenditures, with some provinces (i.e., Alberta and Manitoba) also imposing additional all-spend in the province requirements. In almost all cases, the amount of tax credits received by the producer for a specific project is invested directly into that project, in order to complete the project's financing.

After taking into account federal and provincial tax credits and production company financing, the producer's contribution to a production budget is, at a minimum, between 25% and 35% of the budget in most instances. Producers also organize domestic and foreign distribution, as well as arrange bank financing.

Many producers also point to the emergence of a 'new normal' that sees production companies take on greater financial risks in developing film or television projects prior to obtaining production financing. In part, industry consolidation among Canadian broadcasters (i.e. the primary buyers of Canadian content), and a subsequent strengthening of their market power in the television content commissioning market have contributed to this new normal.

3. Canadian television production

Canadian television production includes the production of television series, mini-series, TV movies, single-episode television programs and television pilots. It consists of productions that are certified as Canadian content by either the Canadian Audio-visual Certification Office (CAVCO) or the Canadian Radio-television and Telecommunications Commission (CRTC).

Television production is produced across various genres, including fiction (i.e. drama and comedy), children's and youth, documentary, lifestyle and human interest, and variety and performing arts (VAPA). This segment excludes broadcaster in-house production, such as news, sports and public affairs programs produced by Canadian broadcasters.¹⁵

The Canadian television production segment experienced a very significant increase in production in 2021/22 and further growth in 2022/23, as indicated by the statistics in this section. A portion of the increase experienced over the past two years reflects the rebound in production activity from the pandemic-induced lows experienced in 2020/21 and Canadian broadcasters' requirement to catch up on their Canadian programming expenditures (CPE) under-spend during the pandemic.¹⁶ Other factors such as production-cost inflation, additional government funding support, increased broadcaster spending on sports and more financing from Canadian distributors also contributed to the growth in Canadian television production in 2022/23.

Highlights from 2022/23



- Canadian television production increased by 4.7% to \$3.68 billion.
- The volume of Canadian TV movie production increased by 31.8% to \$614 million.
- The volume of English-language television production increased by 7.5%.
- The volume of Canadian television production increased in the fiction (7.3%), documentary (4.8%), and VAPA genres (17.3%).
- The average budget for English-language fiction programming increased by 4.8% to \$1.49 million per hour.
- The average hourly budgets for English-language children's and youth, documentary, lifestyle and human interest, and VAPA programming increased.
- The average hourly budgets for French-language children's and youth, documentary and lifestyle and human-interest programming increased.
- Canadian television animation production increased by 6.1% to \$277 million.



- The volume of Canadian television series production was virtually unchanged at \$2.95 billion.

¹⁵ Statistics for the volume of broadcaster in-house production can be found in Section 7 of this report.

¹⁶ CRTC (2021a)

Highlights from 2022/23 *continued*



- The number of Canadian television series decreased by 7.8% from 911 to 840.
- The volume of French-language television production decreased by 1.2% to \$1.05 billion.
- The average budget for French-language fiction programming decreased by 3.9% to \$784,000 per hour.
- The volume of television production supported by the Canada Media Fund (CMF) decreased by 5.6% to \$1.63 billion.
- The financial leverage of the CMF's Convergent Stream funding decreased by 7.6% to \$4.63 of third-party financing for every dollar of CMF funding.
- The average hourly budgets for French-language VAPA programming decreased by 8.8% to \$320,000 per hour.

Canadian television production continued its rebound in 2022/23, increasing by 4.7% to \$3.68 billion in 2022/23 (Exhibit 3 - 1). This increase in Canadian television production took place despite a lack of growth in television series production – with all of the increase originating from increased levels of television movies and single-episode programming.

After climbing to an all-time high of 911 television series in 2021/22, the number of Canadian television series produced in 2022/23 dropped by 7.8% to 840 (Exhibits 3 - 1 and 3 - 2). Average series budgets rose, however, and so the total volume of television series production remained virtually unchanged in 2022/23, declining by only \$4 million to \$2.95 billion.

The number of Canadian television movies rose from 264 to 323 in 2022/23, lifting the volume of production by 31.8% to a \$614 million (Exhibits 3 - 1 and 3 - 2). The volume production of other television content such as single-episode programming also rose by 19.6% to \$116 million, even though the number of projects actually fell from 253 to 215.

The growth in Canadian television production in 2022/23 was concentrated in English-language production. It increased by 7.5% to \$2.61 billion, while French-language production declined by 1.2% and production in other languages dropped by 33% (Exhibit 3 - 3).

The fiction genre was the largest genre of television production in 2022/23 and the largest driver of the year-over-year growth. Fiction production increased by \$128 million, or 7.3%, to \$1.87 billion (Exhibit 3 - 5). The documentary and variety and performing arts (VAPA) genres also posted increases of 4.8% and 17.3%, respectively, in 2022/23. In contrast, the children's and youth, and lifestyle and human-interest genres experienced small declines of 2.0% and 0.8%, respectively.

The growth in fiction production in 2022/23 was concentrated in the English-language market, as was the growth in documentary production. English-language fiction production increased by \$167 million or 12.9% to \$1.46 billion in 2022/23, while French-language fiction production decreased by 8.6% (Exhibit 3 - 8). English-language documentary production increased by \$37 million, or 9.5%, while French-language production decreased by \$12 million, or 10.3%. Growth in the VAPA genre was led by French-language production, which increased by \$21.7 million or 21.4% in 2022/23.

Meanwhile, the overall declines in production volume in children's and youth, and lifestyle and human-interest genres can be traced back to lower levels of English-language production in both genres in 2022/23, specifically because their levels of English-language production declined. In the children's and youth genre, French-language production increased by \$6 million or 6.2%; but the increase was not enough to offset a \$17 million drop in the genre's English-language production (Exhibit 3 - 8). Similarly, in the lifestyle and human-interest genre, French-language production increased by \$10 million, or 3.6%, but it was not enough to offset a \$15 million decline in English-language production in that genre.

In the English-language market, hourly budgets were higher in every genre, and in some cases rose very steeply. In the children's and youth genre, the average hourly budget jumped \$884,000 to a 10-year high of \$1,552,000 (Exhibit 3 - 9a). In the fiction genre, the average hourly budget rose by 4.8% to \$1,492,000. Average budgets also increased in the documentary (22.2%), lifestyle and human-interest (16.6%) and VAPA (4.4%) genres.

In the French-language market, hourly budgets increased in the children's and youth (29.7%), documentary (19.0%) and lifestyle and human-interest (2.1%) genres (Exhibit 3 - 9b). In the fiction genre, the average hourly budget declined by 3.9% to \$784,000, and in the VAPA genre, it decreased by 9.0%.

When viewing production trends over the past five years (2017/18 to 2022/23), the fiction and documentary genres were the most important drivers of overall growth in Canadian television production. The fiction genre led the way with \$608 million of growth in volume or a 48.1% increase (Exhibit 3 - 7b). In percentage growth terms, however, the documentary genre led the way. It grew by 104% between 2017/18 and 2022/23, adding \$269 million to the total annual volume of Canadian television production.

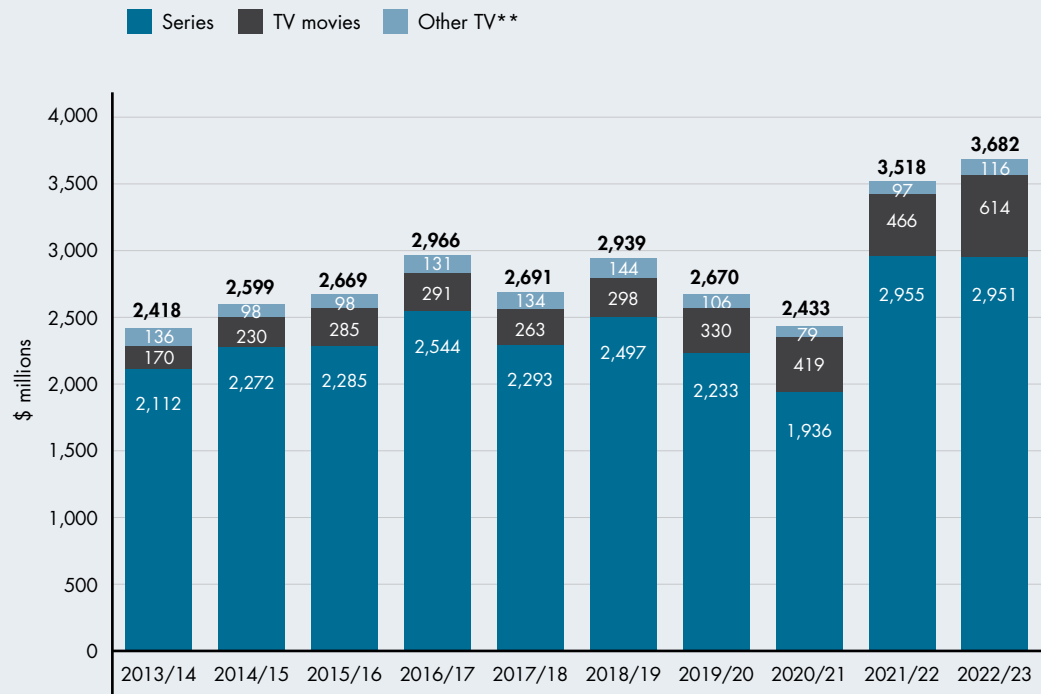
The CMF continued to be a major player in the Canadian television segment in 2022/23, disbursing \$290 million and supporting \$1.63 billion in Canadian television production – representing just under half (44%) of the total volume of Canadian television production in 2022/23 (Exhibit 3 - 13). This was the highest level of funding disbursed by the CMF over the past decade. However, the financing leverage of this funding declined in 2022/23. Whereas in 2021/22, every dollar of CMF Convergent Stream funding helped producers attract an additional \$4.98 in production financing from other sources, in 2022/23, the rate was \$4.63. Still, the CMF's rate of financing leverage in 2022/23 (\$4.63) was well above the average of \$3.74 observed over the previous nine years (2013/14 to 2021/22).

Historically, periods of growth in Canadian television production have been accompanied by higher levels of Canadian broadcast licence fees or foreign financing. Indeed, this was partly the case in 2021/22, as Canadian broadcasters restored their levels of licence fee funding for Canadian television production. In 2022/23, however, the growth in English-language television production – which underpinned the overall growth in Canadian television production – was largely financed by a significant increase in financing from Canadian distributors for English-language production.

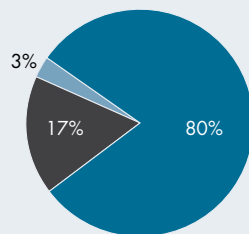
Canadian private and public broadcasters did increase their financing of Canadian television production by \$52 million in 2022/23 (Exhibit 3 - 17a). However, their share of total production financing was unchanged. Canadian distributors, meanwhile, injected an additional \$126 million of financing into Canadian television production, bringing the total value of their investment to \$443 million – a 5-year high and 39.7% increase over 2021/22. Importantly, Canadian distributors' share of total financing rose from 9% to 12%. This increase in Canadian distributor financing of Canadian television partly reflected their confidence that Canadian programming could be sold into markets outside of Canada, including to global subscription video-on-demand (SVOD) services.

TYPES

Exhibit 3-1 Volume of Canadian television* production, by type



Share
2022/23



Annual average growth rate

Type	2022/23	2013/14–2022/23
Series	(0.1%)	3.8%
TV movies	31.8%	15.3%
Other TV**	19.6%	(1.7%)
Average: all types	4.7%	4.8%

Source: Estimates based on data collected from CAVCO.

Note: Some totals may not sum due to rounding. Data includes an estimate of CRTC-certified television production.

* Includes 'online-first' audiovisual content that was first released on an online service, which in turn includes 'online-only' audiovisual content that in the two years after completion, was only released in Canada on an acceptable online service pursuant to CAVCO Public Notice 2017-01. CAVCO reports that the total volume of online-first production was \$181.3 million in 2018/19, \$118.9 million in 2019/20, \$193.4 million in 2020/21, \$97.2 million in 2021/22 and \$94.6 million in 2022/23.

** Other TV category includes single-episode television programming and television pilots.

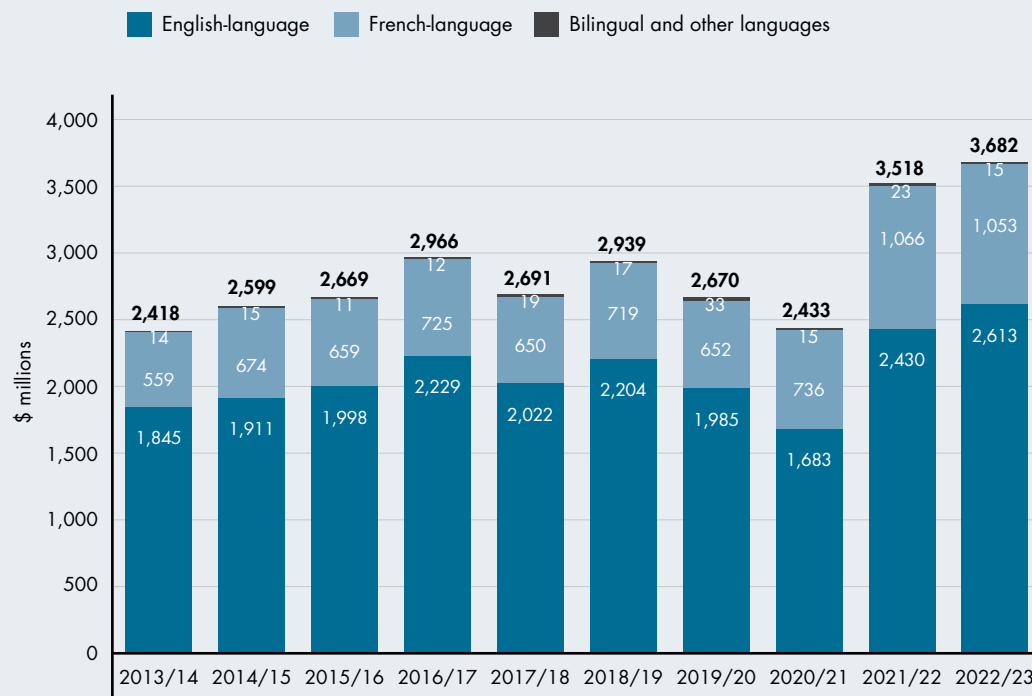
Exhibit 3-2 Number of Canadian television projects, by type

	2013/14	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23
Series	725	813	836	853	827	896	694	660	911	840
TV features	127	151	170	155	139	392	180	240	264	323
Other TV*	339	300	297	323	313	122	290	211	253	215
Total	1,191	1,264	1,303	1,331	1,279	1,410	1,164	1,111	1,428	1,378

Source: Estimates based on data collected from CAVCO.
 Note: Data includes an estimate of CRTC-certified television production.
 * Other TV category includes single-episode television programming and television pilots.

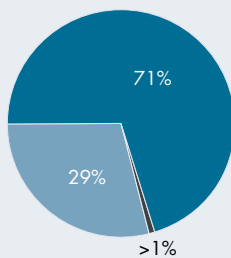
LANGUAGE

Exhibit 3-3 Volume of Canadian television production, by language



Share

2022/23



Annual average growth rate

Language	2022/23	2013/14–2022/23
English-language	7.5%	3.9%
French-language	(1.2%)	7.3%
Bilingual and non-official languages	(33.0)%	0.8%
Average: all languages	4.6%	4.8%

Source: Estimates based on data collected from CAVCO.
 Note: Some totals may not sum due to rounding. Data includes an estimate of CRTC-certified television production.

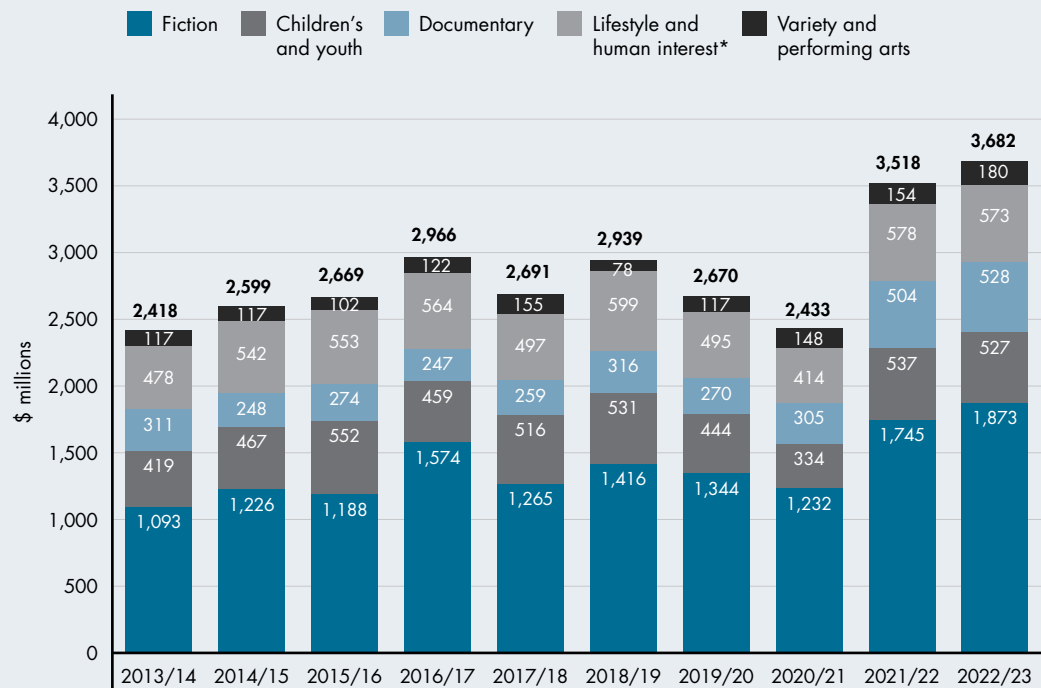
Exhibit 3-4 Number of Canadian television projects, by language

	2013/14	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23
English-language	689	662	705	702	697	761	645	593	762	790
French-language	485	587	583	615	567	623	493	498	632	575
Bilingual and other languages	17	15	15	14	15	25	26	20	34	13
Total	1,191	1,264	1,303	1,331	1,279	1,409	1,164	1,111	1,428	1,378

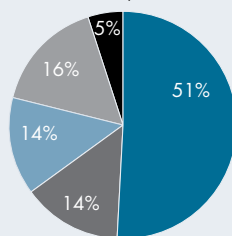
Source: Estimates based on data collected from CAVCO.

GENRES

Exhibit 3-5 Volume of Canadian television production, by genre



Share
2022/23



Annual average growth rate

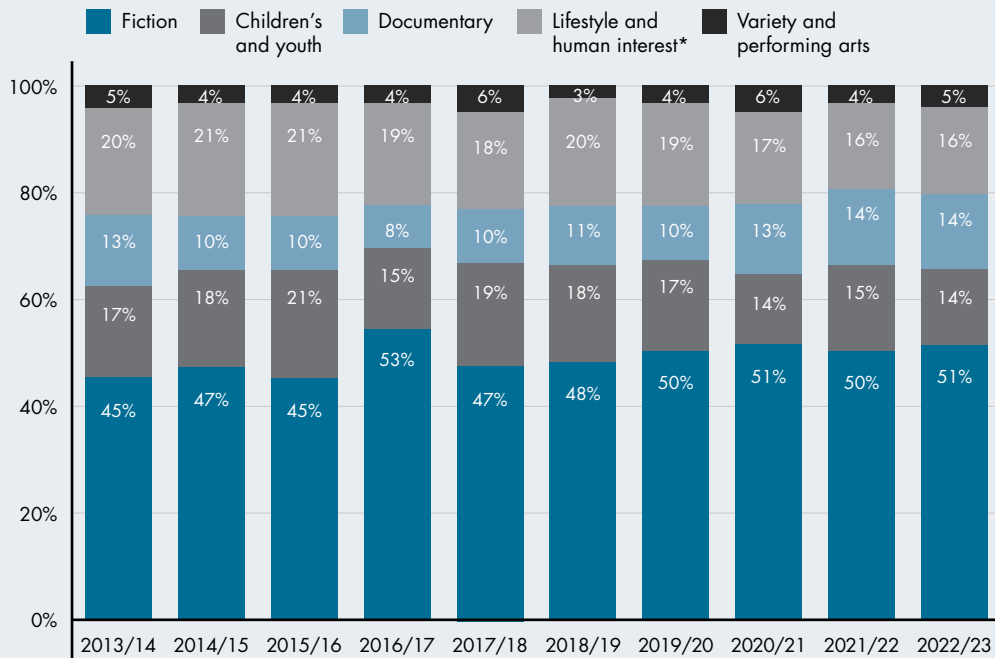
Genre	2022/23	2013/14–2022/23
Fiction	7.3%	6.2%
Children's and youth	(2.0)%	2.6%
Documentary	4.8%	6.1%
Lifestyle and human interest*	(0.8)%	2.0%
VAPA	17.3%	4.9%
Average: all genres	4.6%	4.8%

Source: Estimates based on data collected from CAVCO.

Note: Some totals may not sum due to rounding. Data includes an estimate of CRTC-certified television production.

* Includes magazine programming and a small amount of programming that was previously allocated to the educational/instructional genre.

Exhibit 3-6 Shares of total volume of Canadian television production, by genre



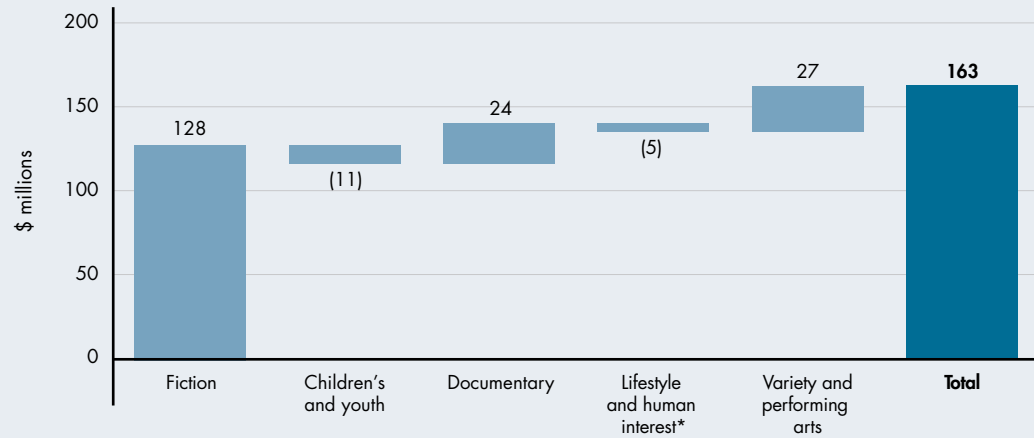
Source: Estimates based on data collected from CAVCO.

Note: Some totals may not sum due to rounding. Data includes an estimate of CRTC-certified television production.

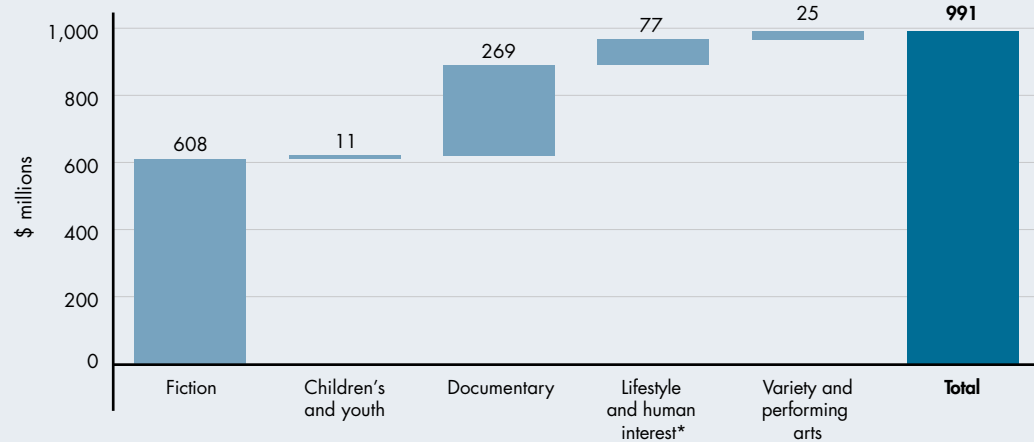
* Includes magazine programming and a small amount of programming that was previously allocated to the educational/instructional genre.

Exhibit 3-7 Contribution to growth in volume of production, by genre (\$ millions)

One-year (2021/22 to 2022/23)



Five-year (2017/18 to 2022/23)



Source: Estimates based on data collected from CAVCO.

Note: Some totals may not sum due to rounding. Data includes an estimate of CRTC-certified television production.

* Includes magazine programming and a small amount of programming that was previously allocated to the educational/instructional genre.

Exhibit 3-8 Volume of Canadian television production, by genre and language

(\$ millions)	2013/14	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23
Fiction										
English-language*	909	1,003	988	1,314	1,071	1,162	1,124	1,004	1,296	1,463
French-language	184	223	200	260	194	254	220	228	449	410
Total	1,093	1,226	1,188	1,574	1,265	1,416	1,344	1,232	1,745	1,873
Children's and youth										
English-language*	354	389	468	368	409	416	354	236	433	416
French-language	65	78	84	90	106	115	90	98	104	110
Total	419	467	552	459	516	531	444	334	537	527
Documentary										
English-language*	238	162	195	175	207	260	206	221	385	422
French-language	73	85	79	72	52	55	64	84	119	106
Total	311	248	274	247	259	316	270	305	504	528
Lifestyle and human interest**										
English-language*	327	333	329	326	277	345	293	186	285	270
French-language	151	209	224	238	220	254	202	228	293	303
Total	478	542	553	564	497	599	495	414	578	573
Variety and performing arts										
English-language*	32	37	29	58	76	36	40	50	52	57
French-language	85	79	73	64	79	42	77	98	101	123
Total	117	117	102	122	155	78	117	148	154	180

Source: Estimates based on data collected from CAVCO.

Note: Some totals may not sum due to rounding. Data includes an estimate of CRTC-certified television production.

* Includes data for projects produced in bilingual format and non-official languages, which comprised less than one percent of the total volume of English-language television production between 2013/14 and 2022/23 and cannot be reported on separately due to confidentiality issues arising from low production volume.

** Includes magazine programming and a small amount of programming that was previously allocated to the educational/instructional genre.

BUDGETS

Exhibit 3-9 Average budgets, by genre

English-language production*

\$000s per hour	2013/14	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23
Fiction										
Average	1,220	1,240	1,298	1,401	1,307	1,316	1,381	1,362	1,424	1,492
Median	1,150	1,231	1,269	1,454	1,313	1,257	1,293	974	949	1,032
Children's and youth										
Average	867	855	1,073	1,190	1,018	1,471	975	799	884	1,552
Median	656	764	817	528	448	513	461	435	515	658
Documentary										
Average	312	307	333	348	355	380	412	331	336	411
Median	249	253	260	319	313	291	344	260	242	306
Lifestyle and human interest**										
Average	322	265	273	298	250	295	310	285	340	396
Median	286	223	232	240	178	212	249	216	270	327
Variety and performing arts										
Average	461	363	424	580	585	448	403	678	617	644
Median	267	248	258	323	408	300	242	391	387	583

French-language production

\$000s per hour	2013/14	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23
Fiction										
Average	402	450	553	597	506	581	622	632	816	784
Median	342	417	564	575	488	575	632	648	744	745
Children's and youth										
Average	187	220	186	187	380	327	326	335	336	435
Median	143	159	142	134	144	187	214	191	261	357
Documentary										
Average	204	222	196	202	208	186	183	189	193	230
Median	179	190	168	170	173	167	157	165	166	194
Lifestyle and human interest**										
Average	119	73	93	105	102	107	101	112	122	125
Median	63	69	84	97	92	105	97	104	114	109
Variety and performing arts										
Average	229	261	226	236	273	252	228	303	351	320
Median	166	201	150	133	196	192	155	192	246	229

Source: Estimates based on data collected from CAVCO.

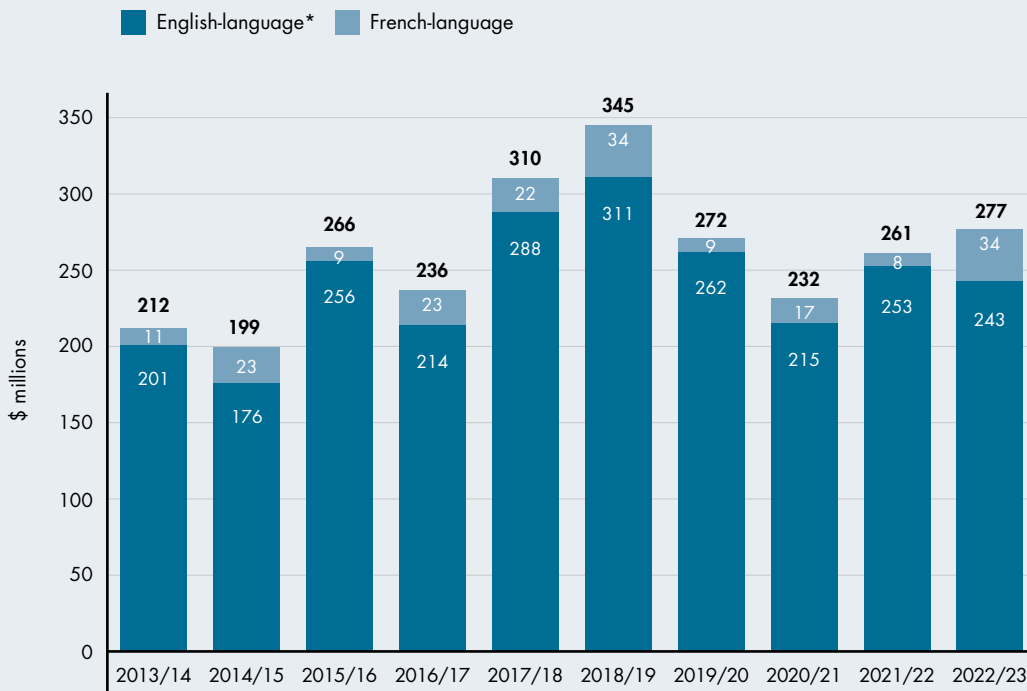
Note: The data does not include an estimate (as used in other exhibits) of CRTC-certified television production.

* Includes data for projects produced in bilingual format and non-official languages, which comprised less than one percent of the total volume of English-language television production between 2013/14 and 2022/23 and cannot be reported on separately due to confidentiality issues arising from low production volume.

** Includes magazine programming and a small amount of programming that was previously allocated to the educational/instructional genre.

ANIMATION

Exhibit 3-10 Volume of Canadian animation television production, by language



Source: Estimates based on data collected from CAVCO.

Note: Some totals may not sum due to rounding. Data includes an estimate of CRTC-certified television production.

* Includes data for projects produced in bilingual format and non-official languages, which comprised less than one percent of the total volume of English-language television production between 2011/12 and 2022/23 and cannot be reported on separately due to confidentiality issues arising from low production volume.

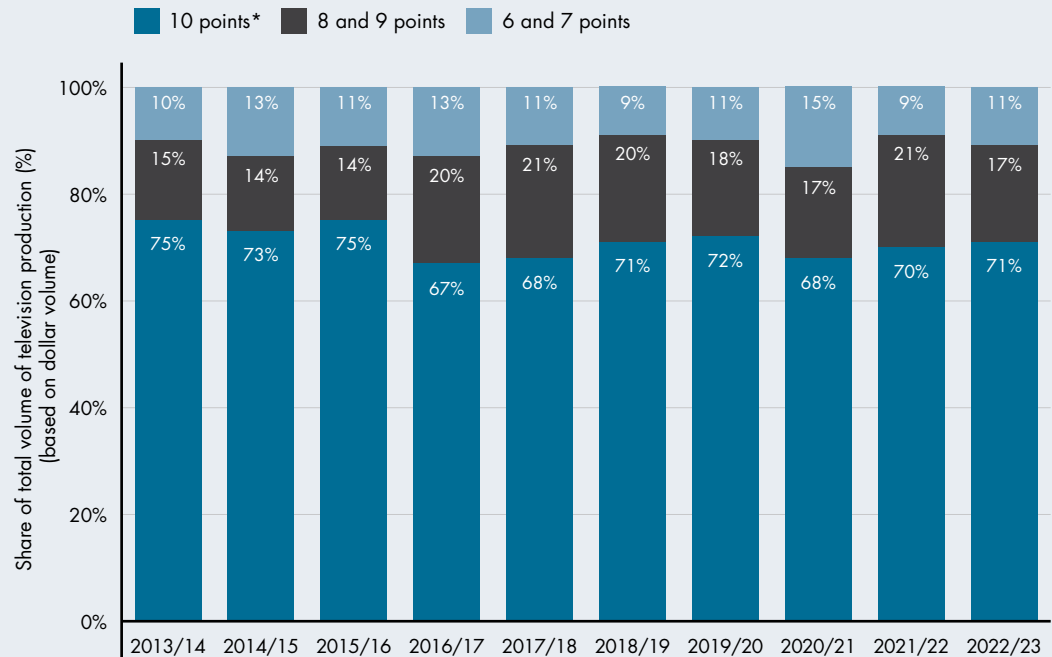
CANADIAN CONTENT POINTS

To certify television programs and films as Canadian content, CAVCO and the CRTC use similar evaluation tools based on assigning points to key creative production roles. Canadian broadcasters can use these certified films and television programs to meet their Canadian television exhibition requirements. CAVCO uses a point scale, which assigns points to key creative production roles occupied by Canadians to determine (in conjunction with other eligibility criteria) if a film or television program is eligible to access the Canadian Film or Video Production Tax Credit (CPTC) and other funding mechanisms through Telefilm Canada and the CMF.¹⁷ To be certified as Canadian content, a film or television program (other than audiovisual treaty coproduction) must obtain a minimum of six points, up to a maximum of 10 points.¹⁸ The significant majority of Canadian television programs obtain the maximum 10 Canadian content points and this share has remained relatively stable over the past decade.

¹⁷ For more information on the Canadian content point scale and all other CPTC requirements, please see CAVCO's [CPTC Application Guidelines](#).

¹⁸ A documentary project can receive certification even if it obtains fewer than six points; however, all the key creative positions must be occupied by Canadians.

Exhibit 3-11 Television production by Canadian content points (excludes audiovisual treaty coproduction)



Source: Estimates based on data collected from CAVCO.

Note: Some totals may not sum due to rounding.

* Includes all productions (other than audiovisual treaty coproductions) for which Canadians occupied all of the key creative positions as defined by CAVCO, even if not all key creative point positions were occupied. For example, a television program with only one lead performer would receive 9 out of 9 points, rather than 10 out of 10 points. A similar mapping of points has been done to give all productions a score out of 10 points for the purposes of this exhibit. For example, a television program that receives 7 out of 9 points would be represented as an 8-out-of-10-point production.

REGION

Exhibit 3-12 Volume of Canadian television production, by region

(\$ millions)	2013/14	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	2022/23 share of total
Ontario	1,094	1,216	1,263	1,323	1,297	1,418	1,294	1,059	1,522	1,475	40%
Quebec	664	774	762	895	703	798	725	800	1,112	1,115	30%
British Columbia	417	426	429	512	420	527	378	391	600	552	15%
Prairie Provinces and Territories*	127	114	122	127	138	119	199	119	182	383	10%
Atlantic Canada**	116	70	93	109	133	78	73	65	101	157	4%
Total	2,418	2,599	2,669	2,966	2,691	2,939	2,670	2,433	3,518	3,682	100%

Source: Estimates based on data collected from CAVCO.

Note: Some totals may not sum due to rounding. Data includes an estimate of CRTC-certified television production. Statistics published by provincial funding agencies may differ from those in Profile 2023. Due to the low number of projects (particularly theatrical feature film projects) in certain provinces and territories, production volume statistics are grouped by region to avoid disclosure of budgets for individual projects. Please see Notes on methodology for additional information. Historical figures for certain provinces/territories have been revised due to the re-coding of some productions to different fiscal years (in which principal photography started) and/or to different provinces/territories.

* Alberta, Saskatchewan, Manitoba, Yukon, Nunavut and Northwest Territories.

** Nova Scotia, Newfoundland and Labrador, New Brunswick and Prince Edward Island.

CANADA MEDIA FUND

The Canada Media Fund (CMF) is funded by the Government of Canada, as well as cable-television, direct-to-home (DTH) satellite and Internet protocol television (IPTV) service providers (collectively also known as broadcasting distribution undertakings (BDUs)). It fosters, develops, finances and promotes the production of Canadian content and applications for all audiovisual media platforms.

In 2022/23, the CMF had an overall program budget of more than \$365 million.¹⁹ During this period, it funded the production of screen-based media content across two streams: the Convergent Stream and the Experimental Stream. It also provided funding to a variety of industry development initiatives through its Sector Development funding program.²⁰

The CMF's Convergent Stream provided financial support to screen-based projects with television content and content or applications for at least one additional digital media platform. The Experimental Stream funded the creation of innovative digital media content and software applications. This section provides an overview of the screen-based production supported by the Convergent Stream. Box 4 (later in this section) provides data for the Experimental Stream.

CMF's Convergent Stream funding of \$290 million supported \$1.63 billion²¹ in television production in 2022/23 and generated an estimated 36,300 jobs (including direct and spin-off impacts). The total employment impact in 2022/23 was down from 2021/22 due to the lower volume of supported production and the fact production cost inflation means that average wages are higher and fewer jobs are created for a given dollar volume of production.

While the CMF overall has experienced reduced revenue from BDUs in recent years – on account of decreasing subscriber levels and revenue in that industry – additional funding from the Government of Canada to offset the lower revenue from BDUs and to enable the CMF to promote production within Canada's Indigenous and equity-seeking communities has allowed the CMF to maintain and even increase its funding levels.²²

While CMF funding rose by \$1 million in 2022/23, the total value of supported production budgets still decreased by \$97 million to \$1.63 billion (Exhibit 3 - 13). The total number of supported hours of production also declined in every CMF genre (Exhibit 3 - 15). As a result of the decrease in the total value of supported production budgets, the CMF's overall financial leverage also declined in 2022/23. Each dollar of CMF Convergent Stream funding helped to attract \$4.63 in additional financing, down from \$4.98 in 2021/22. Of note, as the CMF is reporting production budgets before CAVCO, the slight decline for 2022-23 is a reflection of a return from the post-pandemic bump, as seen in overall television production results.

In addition to its regular sector funding, in 2022/23, the CMF was one of the organizations selected by the federal government to distribute COVID-19 emergency relief funding to the Canadian audiovisual sector. However, the amount of COVID-19 emergency relief funding distributed by the CMF in 2022/23 was significantly reduced since only one program – the "COVID-19 Recovery Funding - CMF Third Language Allocation" – was still open.²³

¹⁹ Canada Media Fund (2023). *Annual Report 2022/2023*. P. 12.

²⁰ As of 2024/25, the CMF has moved away from the Convergent and Experimental Streams model and now instead has separate programs across three pillars: Ideation, Creation, and Industry. <https://cmf-fmc.ca/news/cmf-to-invest-357m-in-the-screen-sector-in-2024-2025/>.

²¹ Canada Media Fund, custom tabulations.

²² Canada Media Fund (2023). P. 131. In 2022/23, the Government of Canada increased its annual funding of the CMF by \$4.5 million to offset the decline in revenue from BDUs. The Government of Canada also provided the CMF with \$20 million, annually, in new funding for equity-deserving communities.

²³ Canada Media Fund (2023). P. 125.

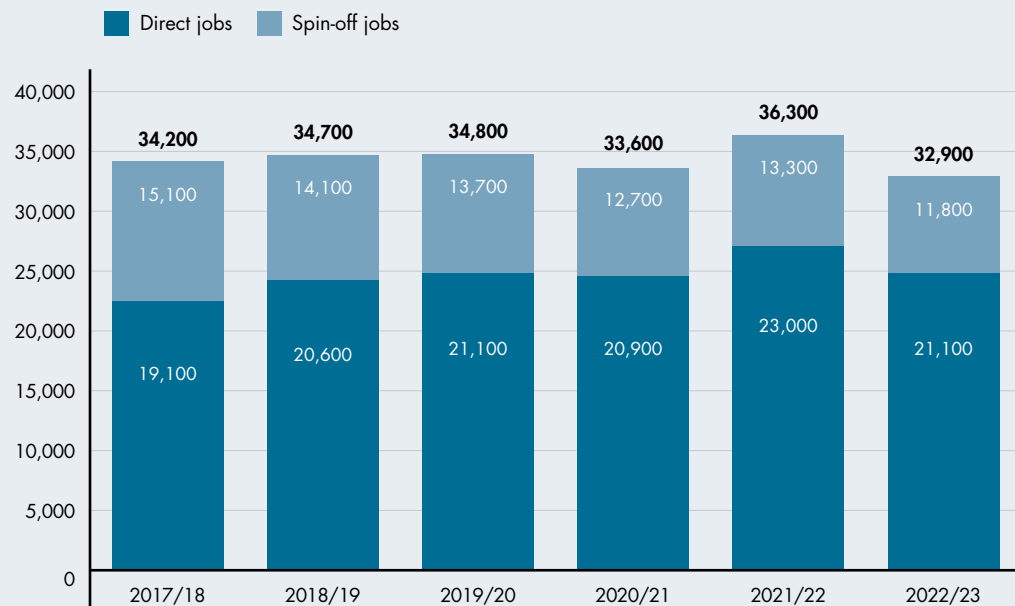
Exhibit 3-13 Volume of Canadian television production with CMF contributions



Source: CMF.

* Other financing includes contributions from production companies, broadcasters, distributors and government sources other than CMF.

Exhibit 3-14 Number of jobs (i.e. person-count) generated by CMF-supported production



Sources: Estimates based on data from the CMF, Statistics Canada and the Conference Board of Canada.

Note: See the *Notes on methodology* section for a description of the job-estimation methodology.

Exhibit 3-15 Number of CMF-supported hours of television production, by genre

	2013/14	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23
Documentary	886	925	1,041	1,045	831	959	1,051	1,035	1,142	990
Children's and youth	712	799	763	688	697	516	547	546	463	404
Drama (i.e. fiction)	661	700	757	728	724	727	760	674	947	908
Variety and performing arts	321	354	398	418	452	393	415	360	317	305
Total	2,580	2,778	2,959	2,878	2,704	2,595	2,773	2,615	2,869	2,607

Source: CMF.

Note: Some totals may not sum due to rounding.

Exhibit 3-16 CMF contribution to television production, by genre

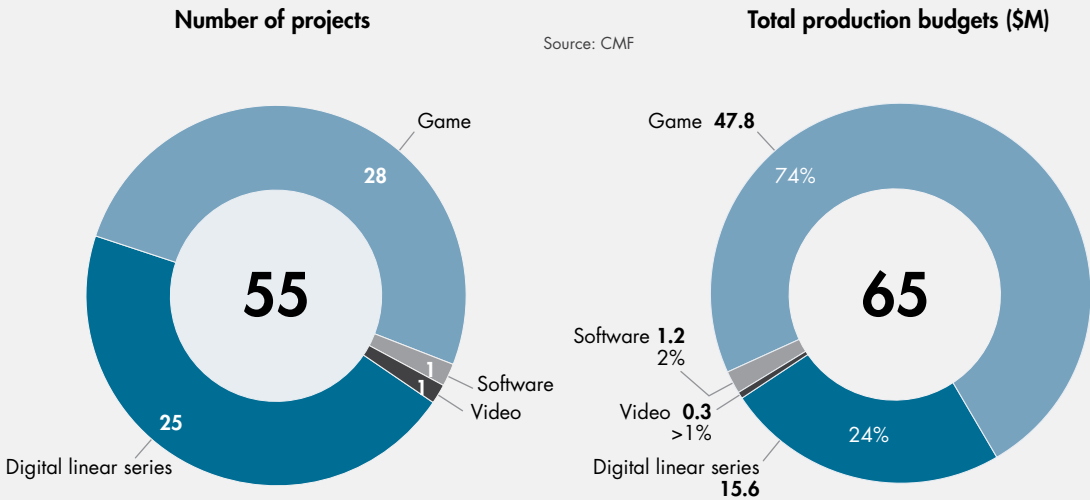
	2013/14	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23
(\$ millions)										
Documentary	57	59	65	69	58	64	69	64	76	69
Children's and youth	56	56	54	39	37	33	38	37	41	40
Drama (i.e. fiction)	152	158	153	151	151	153	150	154	157	166
Variety and performing arts	16	13	13	19	15	13	18	26	14	16
Total	282	286	286	278	260	262	276	281	289	290
Share of total										
Documentary	20%	21%	23%	25%	22%	24%	25%	23%	26%	24%
Children's and youth	20%	20%	19%	14%	14%	13%	14%	13%	14%	14%
Drama (i.e. fiction)	54%	55%	53%	54%	58%	58%	54%	55%	54%	57%
Variety and performing arts	6%	5%	5%	7%	6%	5%	7%	9%	5%	6%
Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

Source: CMF.

Note: Some totals may not sum due to rounding.

Box 4 CMF-supported Experimental Stream digital media production, 2022/23

The Experimental Stream funds the creation of innovative digital media content and software applications. In 2022/23, the Experimental Stream provided \$36.3 million in funding to 55 projects with total production budgets of \$64.9 million.²⁴



²⁴ Statistics may differ from those reported in the CMF Annual Report for two reasons: (i) statistics reported in *Profile 2023* only include production-stage funding, whereas statistics in the CMF Annual Report include funding for all stages of product development and distribution; and (ii) statistics in *Profile 2023* include international coproductions, whereas statistics in the CMF Annual Report includes main CMF programs in the Experimental Stream and national partnerships (i.e. Shaw Rocket Fund CMF Program). As of 2019/20, the CMF no longer separately reports statistics for the digital media projects funded through the Convergent Stream. Instead, the statistics for those projects have been combined with the statistics for the television projects funded through the Convergent Stream and reported elsewhere in this section.

FINANCING

Exhibit 3-17 Financing of Canadian television production

All Canadian television production	2018/19		2019/20		2020/21		2021/22		2022/23	
	\$ millions	%	\$ millions	%	\$ millions	%	\$ millions	%	\$ millions	%
Private broadcaster licence fees	405	14%	405	15%	298	12%	569	16%	582	16%
Public broadcaster licence fees	333	11%	311	12%	343	14%	420	12%	427	12%
Federal tax credit ¹	304	10%	277	10%	255	10%	367	10%	392	11%
Provincial tax credits ¹	562	19%	504	19%	450	19%	699	20%	721	20%
Canadian distributors ²	366	12%	260	10%	311	13%	317	9%	443	12%
Foreign pre-sales and advances ³	405	14%	410	15%	336	14%	490	14%	456	12%
CMF ⁴	262	9%	276	10%	281	12%	289	8%	290	8%
Other public ⁵	126	4%	98	4%	76	3%	157	4%	169	5%
Other private ⁶	176	6%	130	5%	82	3%	210	6%	202	5%
Total	2,939	100%	2,670	100%	2,433	100%	3,518	100%	3,682	100%

English-language production ⁷	2018/19		2019/20		2020/21		2021/22		2022/23	
	\$ millions	%	\$ millions	%	\$ millions	%	\$ millions	%	\$ millions	%
Private broadcaster licence fees	246	11%	253	13%	142	8%	251	10%	276	11%
Public broadcaster licence fees	155	7%	140	7%	157	9%	220	9%	210	8%
Federal tax credit ¹	222	10%	203	10%	176	10%	250	10%	274	10%
Provincial tax credits ¹	448	20%	403	20%	336	20%	539	22%	556	21%
Canadian distributors ²	369	17%	255	13%	306	18%	308	13%	431	16%
Foreign pre-sales and advances ³	386	17%	407	20%	334	20%	476	19%	451	17%
CMF ⁴	178	8%	188	9%	188	11%	195	8%	197	7%
Other public ⁵	95	4%	85	4%	25	1%	70	3%	101	4%
Other private ⁶	121	5%	85	4%	34	2%	143	6%	131	5%
Total	2,220	100%	2,018	100%	1,698	100%	2,452	100%	2,628	100%

French-language production	2018/19		2019/20		2020/21		2021/22		2022/23	
	\$ millions	%	\$ millions	%	\$ millions	%	\$ millions	%	\$ millions	%
Private broadcaster licence fees	162	22%	153	23%	158	21%	321	30%	308	29%
Public broadcaster licence fees	183	25%	172	26%	188	26%	201	19%	218	21%
Federal tax credit ¹	82	11%	74	11%	79	11%	118	11%	118	11%
Provincial tax credits ¹	113	16%	101	15%	114	15%	160	15%	165	16%
Canadian distributors ²	6	1%	4	1%	4	1%	7	1%	9	1%
Foreign pre-sales and advances ³	2	<1%	2	<1%	0	0%	10	1%	2	<1%
CMF ⁴	84	12%	88	13%	92	13%	93	9%	93	9%
Other public ⁵	32	5%	13	2%	51	7%	89	8%	68	7%
Other private ⁶	55	8%	45	7%	49	7%	67	6%	71	7%
Total	719	100%	652	100%	736	100%	1,066	100%	1,053	100%

Sources: Estimates based on data obtained from CAVCO and CMF.

Note: Some totals may not sum due to rounding. Data includes an estimate of CRTC-certified television production.

1. Canadian production companies receive federal and provincial tax credits based on their eligible expenditures, and, in almost all cases, invest their tax credits directly into their television projects, in order to complete their project financing.
2. Canadian distributors financing includes minimum guarantees and advances invested in television projects in exchange for rights to market, license and exhibit the audiovisual productions in Canada, unsold territories outside of Canada or on global distribution platforms.
3. Foreign pre-sales and advances include broadcast licence fees, minimum guarantees, advances and other forms of financing from broadcasters, distributors or other organizations based outside of Canada.
4. Only programming in the fiction, children's and youth, documentary and VAPA genres is eligible for CMF funding.
5. 'Other public' includes financing from provincial governments, and other federal government departments and agencies; excludes federal and provincial tax credits, Canadian public broadcasters' licence fees and funding from Telefilm Canada.
6. 'Other private' includes financing from production companies (excluding the tax credit contribution), independent production funds, broadcaster equity and other Canadian private investors.
7. Includes data for projects produced in bilingual format and non-official languages, which cannot be reported on separately due to confidentiality issues arising from low production volume.

Exhibit 3-18 Financing of Canadian television production, by genre, 2022/23

All languages	Fiction	Children's and youth	Documentary	Lifestyle and human interest ¹	VAPA	All genres
Amount (\$M)						
Private broadcaster licence fees	176	38	75	252	42	582
Public broadcaster licence fees	199	47	40	89	52	427
Federal tax credit ²	196	55	54	67	21	392
Provincial tax credits ²	389	127	99	79	27	721
Canadian distributors ³	257	105	63	14	3	443
Foreign pre-sales and advances ⁴	312	64	64	15	0	456
CMF ⁵	166	40	69	0	16	290
Other public ⁶	105	17	16	19	10	169
Other private ⁷	72	34	47	38	10	202
Total	1,872	527	527	573	180	3,682
Share of total financing						
Private broadcaster licence fees	9%	7%	14%	44%	23%	16%
Public broadcaster licence fees	11%	9%	8%	16%	29%	12%
Federal tax credit ²	10%	10%	10%	12%	11%	11%
Provincial tax credits ²	21%	24%	19%	14%	15%	20%
Canadian distributors ³	14%	20%	12%	2%	2%	12%
Foreign pre-sales and advances ⁴	17%	12%	12%	3%	0%	12%
CMF ⁵	9%	8%	13%	0%	9%	8%
Other public ⁶	6%	3%	3%	3%	6%	5%
Other private ⁷	4%	7%	9%	7%	6%	5%
Total	100%	100%	100%	100%	100%	100%
English-language production⁸						
Amount (\$M)						
Private broadcaster licence fees	72	33	45	105	21	276
Public broadcaster licence fees	132	10	23	37	8	210
Federal tax credit ²	152	43	42	29	6	274
Provincial tax credits ²	318	104	83	44	8	556
Canadian distributors ³	252	105	61	14	0	431
Foreign pre-sales and advances ⁴	309	64	63	15	0	451
CMF ⁵	109	28	51	0	9	197
Other public ⁶	66	11	11	9	3	101
Other private ⁷	52	17	43	16	3	131
Total	1,463	416	421	270	57	2,628
Share of total financing						
Private broadcaster licence fees	5%	8%	11%	39%	36%	11%
Public broadcaster licence fees	9%	2%	6%	14%	14%	8%
Federal tax credit ²	10%	10%	10%	11%	11%	10%
Provincial tax credits ²	22%	25%	20%	16%	13%	21%
Canadian distributors ³	17%	25%	14%	5%	0%	16%
Foreign pre-sales and advances ⁴	21%	15%	15%	5%	0%	17%
CMF ⁵	7%	7%	12%	0%	16%	7%
Other public ⁶	5%	3%	3%	3%	5%	4%
Other private ⁷	4%	4%	10%	6%	5%	5%
Total	100%	100%	100%	100%	100%	100%

(Continued next page)

Exhibit 3-18 Financing of Canadian television production, by genre, 2022/23 (continued)

French-language production	Fiction	Children's and youth	Documentary	Lifestyle and human interest¹	VAPA	All genres
Amount (\$M)						
Private broadcaster licence fees	106	5	30	147	21	308
Public broadcaster licence fees	68	37	17	52	44	218
Federal tax credit ²	43	11	12	38	14	118
Provincial tax credits ²	71	22	17	35	19	165
Canadian distributors ³	4	1	2	0	3	9
Foreign pre-sales and advances ⁴	1	0	1	0	0	2
CMF ⁵	56	12	17	0	7	93
Other public ⁶	40	5	6	9	7	68
Other private ⁷	20	17	4	22	7	71
Total	409	110	106	303	123	1,053
Share of total financing						
Private broadcaster licence fees	26%	4%	29%	48%	17%	29%
Public broadcaster licence fees	17%	34%	16%	17%	36%	21%
Federal tax credit ²	11%	10%	11%	12%	12%	11%
Provincial tax credits ²	17%	20%	16%	12%	15%	16%
Canadian distributors ³	1%	<1%	2%	0%	3%	1%
Foreign pre-sales and advances ⁴	<1%	<1%	1%	0%	0%	<1%
CMF ⁵	14%	11%	16%	0%	6%	9%
Other public ⁶	10%	5%	6%	3%	6%	7%
Other private ⁷	5%	15%	4%	7%	6%	7%
Total	100%	100%	100%	100%	100%	100%

Sources: Estimates based on data obtained from CAVCO and CMF.

Note: Some totals may not sum due to rounding. Data includes an estimate of CRTC-certified television production.

1. Includes magazine programming and a small amount of programming that was previously allocated to the educational/instructional genre.

2. Canadian production companies receive federal and provincial tax credits based on their eligible expenditures, and, in almost all cases, invest their tax credits directly into their television projects, in order to complete their project financing.

3. Canadian distributors financing includes minimum guarantees and advances invested in television projects in exchange for rights to market, license and exhibit the audiovisual productions in Canada, unsold territories outside of Canada or on global distribution platforms.

4. Foreign pre-sales and advances include broadcast licence fees, minimum guarantees, advances and other forms of financing from broadcasters, distributors or other organizations based outside of Canada.

5. Only programming in the fiction, children's and youth, documentary and VAPA genres is eligible for CMF funding.

6. 'Other public' includes financing from provincial governments, and other federal government departments and agencies; excludes federal and provincial tax credits, Canadian public broadcasters' licence fees and funding from Telefilm Canada.

7. 'Other private' includes financing from production companies (excluding the tax credit contribution), independent production funds, broadcaster equity and other Canadian private investors.

8. Includes data for projects produced in bilingual format and non-official languages, which cannot be reported on separately due to confidentiality issues arising from low production volume.

4. Canadian theatrical feature film production

The Canadian theatrical feature film segment produces feature-length films intended for primary release in movie theatres.²⁵ Recent examples of notable Canadian theatrical feature films include *Paw Patrol: The Mighty Movie*, *Le temps d'un été*, *Testament* and *BlackBerry*.

Highlights from 2022/23



- Canadian theatrical feature film production increased by 23.8% to \$458 million.
- Canadian producers made 149 theatrical feature films, up from 147 in 2021/22.
- Theatrical feature film production in English²⁶ increased by 51.1% to \$343 million.
- The number of English-language theatrical feature films increased by 4.9% from 102 to 107.
- The average budget for Canadian fiction feature films increased by 6.9% to \$3.1 million.
- The average budget for fiction feature films made in English increased by 11.6% to \$2.9 million.
- The total volume of theatrical feature film production in the fiction genre increased by 11.5% to \$329 million.
- The share of theatrical feature films with a budget between \$2.5 million and \$5 million increased from 24% to 32%.
- The share of theatrical feature films with a budget of more than \$5 million increased from 16% to 18%.



- The number of theatrical feature films in the fiction genre was unchanged at 109.



- Theatrical feature film production in French decreased by 19.6% to \$115 million.
- The number of theatrical feature films made in French decreased by 6.7%, from 45 to 42.
- The average budget for fiction films made in French decreased by 5.4% to \$3.5 million.
- The share of theatrical feature films with a budget under \$1 million decreased from 27% to 19%.
- The share of theatrical feature films with a budget between \$1 million and \$2.5 million decreased from 33% to 31%.

²⁵ For this report, the feature film category includes all films 75 minutes and over in length. Theatrical feature films are financed for release in theatres.

²⁶ Due to the low number of projects produced in bilingual format and non-official languages, the data for this category was combined with the data for the English-language market for 2016/17 to 2022/23.

Additional production funding from Telefilm Canada helped propel the volume of Canadian theatrical feature film production to a 10-year high of \$458 million in 2022/23 (Exhibit 4 - 1). Indeed, with an additional \$105 million in federal government funding (over three years) beginning in 2021/22, Telefilm Canada has been able to increase its financial support of theatrical feature film production, which has translated into higher volumes in recent years.²⁷

While the number of films only increased from 148 to 149 in 2022/23, higher average spending per film – \$3.1 million in 2022/23 vs. \$2.9 million in 2021/22 (Exhibit 4 - 4) helped lift the total volume of production by 23.8% (Exhibit 4 - 1).

Whereas the strong rebound in theatrical feature film production in 2021/22 was shared across both language markets, in 2022/23, it was growth in English-language production that offset a drop in French-language production. The number of English-language feature films increased from 102 to 107 in 2022/23, however, the volume of spending associated with those films increased by 51.1% to \$343 million (Exhibits 4 - 1 and 4 - 2). Indeed, it would appear that a small number of large-budget films were likely behind the sharp increase in volume.

In the French-language market, meanwhile, the number of films produced declined from 45 to 42, while the volume of production dropped by 19.6% to \$115 million. Even at that level, though, French-language theatrical feature film production in 2022/23 was higher than any other year during the previous decade, excluding 2021/22.

Telefilm Canada

As a Partner of Choice, Telefilm Canada is a Crown corporation dedicated to the success of Canada's audiovisual industry, fostering access and excellence by delivering programs that support cultural resonance and audience engagement. With a lens of equity, inclusivity and sustainability, Telefilm bolsters dynamic companies and a range of creative talent at home and around the world. Telefilm also makes recommendations regarding the certification of audiovisual coproduction treaties to the Minister of Canadian Heritage, and administers the programs of the Canada Media Fund. Launched in 2012, the Talent Fund raises private donations which principally support emerging talent.

In 2022/23, Telefilm Canada provided a total of \$158.7 million in ongoing financial support to Canada's audiovisual sector.²⁸ This included \$101.0 million in support of the development of the audiovisual industry (e.g. production, development, theatrical documentary programs) and \$49.2 million in funding for promotional support (e.g. support for Canadian film festivals, domestic and international marketing and promotion, Theatrical Exhibition Program support for exhibitors, Theatrical Distribution Compensation Program).²⁹ In addition to this ongoing financial support, Telefilm Canada provided \$8.5 million in COVID-19 relief funding in 2022/23.³⁰

While the rebound in theatrical feature film production in 2021/22 was also clearly concentrated in the fiction genre, in 2022/23, growth was concentrated in other genres such as documentary, and children's and youth (Exhibit 4 - 5). Those other genres accounted for 62% of the overall increase in production volume in 2022/23, even though they only accounted for 20% of the baseline level of production volume in 2021/22.

Historically, the global film market, international treaty coproduction and annual levels of foreign investment in production (FIIP)³¹ have been key drivers of the year-to-year fluctuations in the volume of Canadian theatrical feature film production. In 2022/23, FIIP once again played a key role in financing the growth in English-language production, and thereby, the sub-sector's overall growth. However, domestic private financing sources also played an equally important role. Domestic private financing of English-language feature film production increased by \$36 million, underpinning one-third of the increase in English-language production volume (Exhibit 4 - 7b).

²⁷ Telefilm Canada (2022), *A New Spirit of Collaboration: 2021-2022 Annual Report*, p. 18.

²⁸ Telefilm Canada (2023). *Full Screen: 2022-2023 Annual Report*. P. 13.

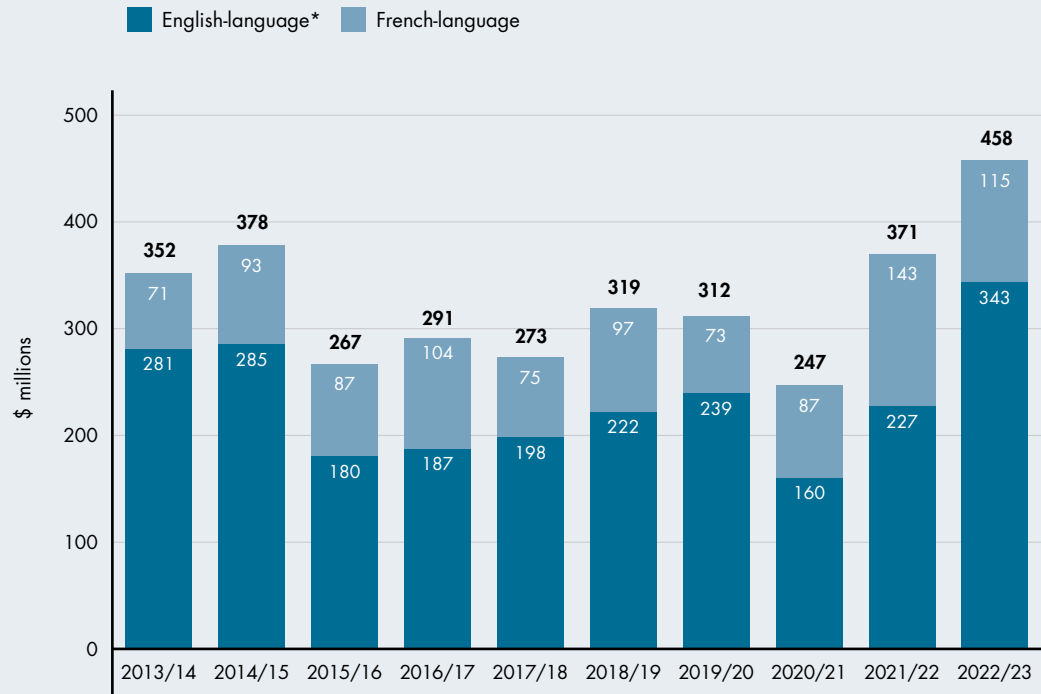
²⁹ Ibid.

³⁰ Ibid.

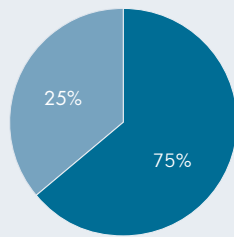
³¹ FIIP includes the value of financing from foreign sources and Canadian distributors, which often finance Canadian theatrical feature film production for not only domestic theatrical release, but also to re-sell to other markets.

LANGUAGE

Exhibit 4-1 Volume of Canadian theatrical feature film production, by language



Share
2022/23



Annual average growth rate

Language	2022/23	2013/14–2022/23
English-language*	51.1%	2.2%
French-language	(19.6%)	5.5%
Average: all languages	23.5%	3.0%

Source: Estimates based on data collected from CAVCO.

Note: Figures may differ from those published by Telefilm Canada due to differences in accounting and coverage of Telefilm Canada production funding.

* Due to the very low number of projects produced in bilingual format and non-official languages, the data for this category was combined with the data for the English-language market for 2016/17 to 2022/23, and with the French-language market for 2013/14 to 2015/16.

Exhibit 4-2 Number of Canadian theatrical feature films produced in Canada on an annual basis, by language

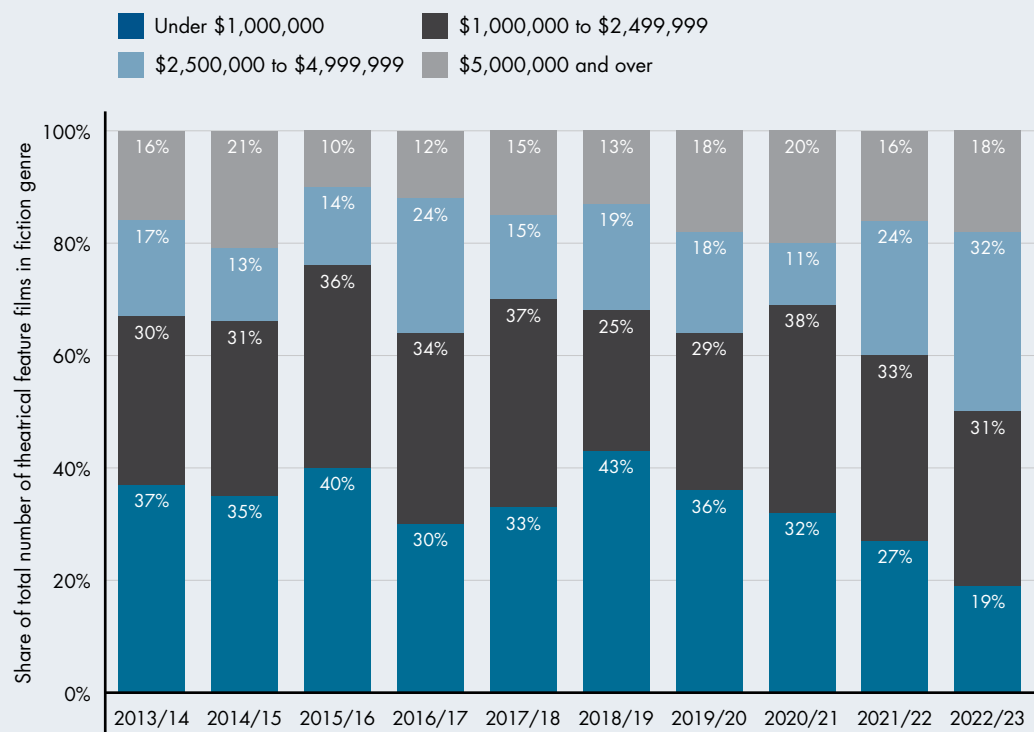
	2013/14	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23
English-language/ Bilingual/Other*	75	89	84	81	82	108	95	47	102	107
French-language*	42	42	38	42	40	40	41	27	45	42
Total	117	131	122	123	122	148	136	74	147	149

Source: Estimates based on data collected from CAVCO.

* Due to the very low number of projects produced in bilingual format and non-official languages, the data for this category was combined with the data for the English-language market for 2016/17 to 2022/23, and with the French-language market for 2013/14 to 2015/16.

BUDGETS

Exhibit 4-3 Theatrical feature film projects, by budget size (fiction genre only)



Source: Estimates based on data collected from CAVCO.

Note: Some totals may not sum due to rounding. Budget calculations exclude the foreign budgets of audiovisual treaty coproductions.

Exhibit 4-4 Budgets of theatrical feature films (fiction genre only)

(\$ millions per film)	2013/14	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23
English-language										
Average	3.9	3.5	1.8	2.6	2.8	2.2	2.5	2.7	2.6	2.9
Median	1.3	1.4	1.0	1.6	1.3	1.2	1.2	1.2	1.5	2.1
French-language										
Average	2.5	2.4	2.2	3.4	2.2	3.2	2.6	3.5	3.7	3.5
Median	1.9	1.3	1.8	2.4	1.7	3.0	1.9	2.2	2.9	3.1
All languages*										
Average	3.5	3.1	2.0	2.8	2.6	2.5	2.5	3.0	2.9	3.1
Median	1.4	1.3	1.3	1.8	1.4	1.6	1.3	1.6	2.1	2.5

Source: Estimates based on data from CAVCO.

Note: Calculations exclude the foreign budgets of audiovisual treaty coproductions.

* Includes production in bilingual format and non-official languages

GENRES**Exhibit 4-5 Volume of Canadian theatrical feature film production, by genre**

	2013/14	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23
Volume (\$ millions)										
Fiction	314	295	179	253	205	269	245	171	295	329
Other genres*	38	83	88	39	69	50	66	76	76	130
Total	352	378	267	291	273	319	312	247	371	458
Number of films										
Fiction	89	94	91	90	80	110	104	70	109	109
Other genres*	28	37	31	33	42	38	32	14	39	40
Total	117	131	122	123	122	148	136	74	147	149

Source: Estimates based on data from CAVCO.

Note: Some totals may not sum due to rounding.

* Includes documentary, children's and youth, and VAPA genres.

REGION**Exhibit 4-6 Volume of Canadian theatrical feature film production, by region**

(\$ millions)	2013/14	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	2022/23 share of total
Ontario	131	124	113	82	113	141	142	130	168	228	50%
Quebec	178	203	107	153	135	138	142	93	177	172	38%
British Columbia	18	44	34	37	10	22	7	20	14	15	3%
Prairie Provinces and Territories*	19	7	8	18	9	14	17	3	10	36	8%
Atlantic Canada**	6	0	5	2	6	3	4	1	2	10	<1%
Total	352	378	267	291	273	319	312	247	371	458	100%

Source: Estimates based on data collected from CAVCO.

Note: Some totals may not sum due to rounding. Statistics published by provincial funding agencies may differ from those in *Profile 2023*. Due to the low number of projects (particularly theatrical feature film projects) in certain provinces and territories, production volume statistics are grouped by region to avoid disclosure of budgets for individual projects. See *Notes on methodology* for additional information. Historical figures for certain provinces/territories have been revised due to the recoding of some productions to different fiscal years (in which principal photography started) and/or to different provinces/territories.

* Alberta, Saskatchewan, Manitoba, Yukon, Nunavut and Northwest Territories.

** Nova Scotia, Newfoundland and Labrador, New Brunswick and Prince Edward Island.

FINANCING

Exhibit 4-7 Financing of Canadian theatrical feature film production

All languages	2018/19		2019/20		2020/21		2021/22		2022/23	
	\$ millions	%	\$ millions	%	\$ millions	%	\$ millions	%	\$ millions	%
Private broadcaster licence fees	1	<1%	2	1%	<1	<1%	2	1%	2	1%
Public broadcaster licence fees	4	1%	2	1%	1	<1%	2	<1%	2	<1%
Federal tax credits ¹	20	6%	19	6%	15	6%	23	6%	29	6%
Provincial tax credits ¹	62	19%	57	18%	49	20%	77	21%	95	21%
Canadian distributors ²	28	9%	27	9%	55	22%	40	11%	49	11%
Foreign pre-sales and advances ³	43	13%	52	17%	32	13%	43	12%	53	12%
Telefilm Canada	70	22%	68	22%	38	15%	78	21%	78	17%
Other public ⁴	41	13%	35	11%	40	16%	62	17%	77	17%
Other private ⁵	50	16%	50	16%	19	8%	45	12%	73	16%
Total	319	100%	312	100%	269	100%	371	100%	458	100%

English-language, bilingual format and non-official languages ⁶	2018/19		2019/20		2020/21		2021/22		2022/23	
	\$ millions	%	\$ millions	%	\$ millions	%	\$ millions	%	\$ millions	%
Private broadcaster licence fees	1	<1%	2	1%	<1	<1%	1	<1%	2	<1%
Public broadcaster licence fees	3	1%	2	1%	<1	<1%	2	1%	2	1%
Federal tax credits ¹	16	7%	17	7%	13	8%	18	8%	28	8%
Provincial tax credits ¹	42	19%	43	18%	32	20%	48	21%	72	21%
Canadian distributors ²	23	10%	21	9%	47	30%	29	13%	44	13%
Foreign pre-sales and advances ³	38	17%	51	21%	28	18%	36	16%	55	16%
Telefilm Canada	47	21%	41	17%	23	14%	53	23%	53	15%
Other public ⁴	13	6%	20	8%	5	3%	8	4%	20	6%
Other private ⁵	39	18%	42	18%	11	7%	33	15%	69	20%
Total	222	100%	239	100%	160	100%	227	100%	343	100%

French-language	2018/19		2019/20		2020/21		2021/22		2022/23	
	\$ millions	%	\$ millions	%	\$ millions	%	\$ millions	%	\$ millions	%
Private broadcaster licence fees	1	1%	<1	<1%	<1	<1%	1	1%	1	1%
Public broadcaster licence fees	1	1%	<1	1%	<1	<1%	<1	<1%	<1	<1%
Federal tax credits ¹	4	4%	2	3%	3	3%	4	3%	3	3%
Provincial tax credits ¹	20	20%	15	20%	18	21%	29	20%	23	20%
Canadian distributors ²	6	6%	6	8%	6	7%	10	7%	8	7%
Foreign pre-sales and advances ³	5	5%	0	0%	2	3%	5	4%	4	4%
Telefilm Canada	23	24%	27	37%	15	17%	25	17%	25	22%
Other public ⁴	27	28%	16	23%	35	40%	56	39%	40	35%
Other private ⁵	11	12%	7	9%	8	9%	12	9%	10	9%
Total	97	100%	73	100%	87	100%	143	100%	115	100%

Sources: Estimates based on data obtained from CAVCO and Telefilm Canada.

Note: Some totals may not sum due to rounding.

1. Canadian production companies receive federal and provincial tax credits based on their eligible expenditures, and, in almost all cases, invest their tax credits directly into their films, in order to complete their project financing.
2. Canadian distributors' financing includes minimum guarantees and advances invested in theatrical feature films in exchange for rights to market, license and exhibit the audiovisual content in Canada, unsold territories outside of Canada or on global distribution platforms.
3. Foreign pre-sales and advances include broadcast licence fees, minimum guarantees, advances and other forms of financing from broadcasters, distributors or other organizations based outside of Canada.
4. 'Other public' includes financing from provincial governments, and other federal government departments and agencies; excludes federal and provincial tax credits, Canadian public broadcasters' licence fees and funding from Telefilm Canada.
5. 'Other private' includes financing from production companies (excluding the tax credit contribution), independent production funds, broadcaster equity and other Canadian private investors.
6. Data for projects produced in bilingual format and non-official languages cannot be reported on separately due to confidentiality issues arising from low production volume.

5. Audiovisual treaty coproduction

The Government of Canada currently has audiovisual coproduction treaties or memoranda of understanding with close to 60 partners.³² These agreements offer Canadian and foreign producers the opportunity to combine their creative, technical and financial resources to make coproductions that can be granted national production status in each of the partnering countries.

Coproductions that have obtained national production status are considered Canadian for the purposes of domestic incentives and broadcast quotas. This status can also enable foreign producers to access their own country's incentives for the foreign portion of the budget. Partnering production companies can take either a majority or minority participation position in an audiovisual treaty coproduction depending on the proportion of financing each producer brings to the project.

Highlights from 2022/23



- Canada participated in 59 treaty coproductions – up from 53 in 2021/22.
- The total budgets of Canada's treaty coproductions increased by 29.3% to \$371 million.
- The median project budget for feature film treaty coproductions increased from \$3.3 million to \$4.4 million.
- The total budgets of Canada's feature film treaty coproductions increased by 20.5% to \$212 million.
- Canada was a majority (or equal) partner for 44% of its treaty coproduction projects in 2022/23, up from 40% in 2021/22.
- The Canadian share of treaty coproduction budgets increased from \$114 million to \$168 million in 2022/23.
- The total number of television treaty coproductions increased from 20 to 24.
- The total number of drama television coproductions increased from 5 to 6, while volume virtually doubled to \$47 million.
- The total number and volume of documentary television coproductions increased to 14 and \$48 million, respectively.
- The total budgets of television treaty coproductions increased by 43.2% to \$159 million.
- French-language treaty coproduction had a strong year with \$86 million in total budgets, the highest number in the past 10 years.



- UK and France continued to be Canada's leading coproduction partners between 2013/14 and 2022/23. The UK was the leading television treaty coproduction partner. France was the leading partner for feature films.



- The total number of children's television treaty coproductions decreased from 8 to 4, while volume decreased from \$73 million to \$64 million.

³² A list of these agreements can be found on Telefilm Canada's website at <https://telefilm.ca/en/coproduction/international-treaties>.

Canada's overall volume of treaty coproduction (i.e. total global budgets) experienced its second consecutive year of growth in 2022/23. After increasing by 22.1% in 2021/22, it grew by a further 29.3% to reach \$371 million in 2022/23 (Exhibit 5 - 1). The Canadian share of those total budgets grew even faster in 2022/23, increasing by 47.4% to \$168 million.

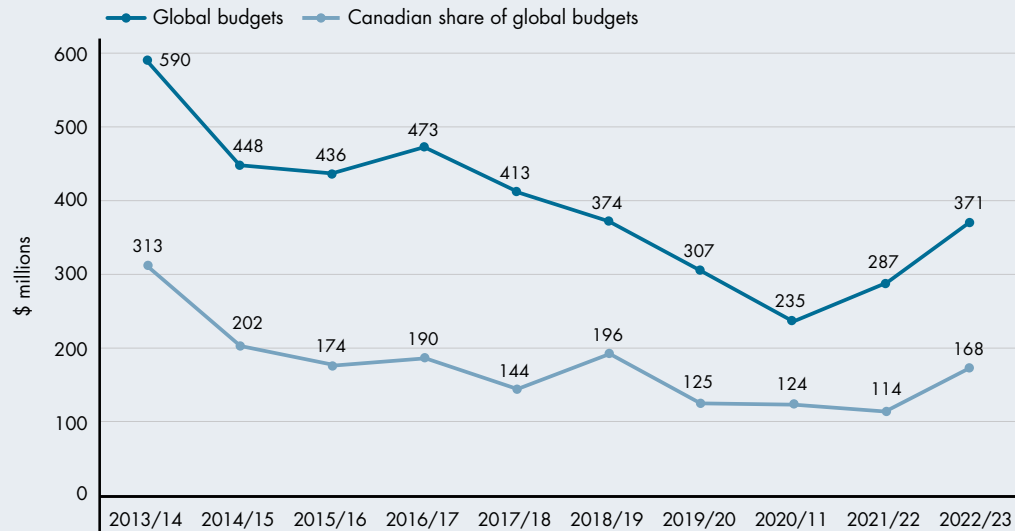
The annual volume of treaty coproduction can be prone to significant year-to-year fluctuations due to a small number of large-budget productions – either feature films or television series – often driving shifts in annual activity. For that reason, the increases in overall volume in 2021/22 and 2022/23 could very well reverse direction in 2023/24 or thereafter. That being said, since reaching \$590 million in 2013/14, the annual volume of Canada's treaty coproduction has been on a downward trend (Exhibit 5 - 1). Since 2013/14, the annual volume has experienced a year-over-year decline in six of the last eight years. Overall, the total volume of Canada's treaty coproduction in 2022/23 (\$371 million) was 37.1% lower than the 10-year peak in 2013/14 (\$590 million).

The growth in treaty coproduction in 2022/23 can be traced back to increased levels of both television and feature film treaty coproduction. The increase in television treaty coproduction volume in 2022/23 was a result of higher levels of drama and documentary production, while the treaty coproduction of children's and youth television programming decreased. The volume of television treaty coproduction in the drama genre nearly doubled to \$47 million (Exhibit 5 - 7). The number of television treaty coproduction documentaries doubled from 7 to 14 in 2022/23, and the volume of documentaries climbed by over 240% to \$48 million – the highest level since 2014/15 (Exhibit 5 - 7). In contrast, the volume of children's and youth television treaty coproduction decreased by 12.3%, from \$73 million to \$64 million.

The vast majority of Canada's television treaty coproduction in 2022/23 was concentrated in English-language production, accounting for 93% of Canada's overall coproduction volume in 2022/23 (Exhibit 5 - 6). While the volume of French-language feature film treaty coproduction was virtually unchanged at \$75 million in 2022/23, English-language production underpinned the growth in 2022/23 (Exhibit 5 - 9). Although the number of English-language feature films declined from 22 to 20, volume jumped by 37% and \$37 million to \$137 million. Overall French-language coproduction had a strong year in 2022/23 with \$86 million in total budgets, the highest number in the past 10 years (Exhibit 5 - 2).

ALL RELEASE WINDOWS

Exhibit 5-1 Volume* of Canadian audiovisual treaty coproduction, all release windows



Source: Telefilm Canada.

Note: Statistics as of September 2023.

* Volume of coproduction refers to the value of total global budgets for coproduction projects and includes the financial participation of Canadian producers (i.e. Canadian share of budgets) and foreign producers (i.e. foreign share of budgets).

Exhibit 5-2 Audiovisual treaty coproduction, volume* and number of projects, all release windows

	2013/14	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23
English-language										
Canadian share of budgets (\$M)	304	182	141	–**	132	185	114	117	–**	136
Foreign share of budgets (\$M)	260	225	214	–**	226	142	143	88	–**	149
Total budgets (\$M)	564	407	355	–**	358	327	257	205	–**	285
Number of projects	58	50	31	–**	35	44	35	32	–**	42
French-language										
Canadian share of budgets (\$M)	9	21	33	–**	12	11	11	8	–**	22
Foreign share of budgets (\$M)	17	20	47	–**	43	36	40	20	–**	64
Total budgets (\$M)	26	41	80	–**	55	47	51	28	–**	86
Number of projects	7	14	17	–**	21	12	9	7	–**	17
All languages										
Canadian share of budgets (\$M)	313	202	174	190	144	196	125	126	114	168
Foreign share of budgets (\$M)	278	245	262	283	269	178	182	110	173	203
Total budgets (\$M)	590	448	436	473	413	374	307	234	287	371
Number of projects	65	64	48	53	56	56	44	39	53	59

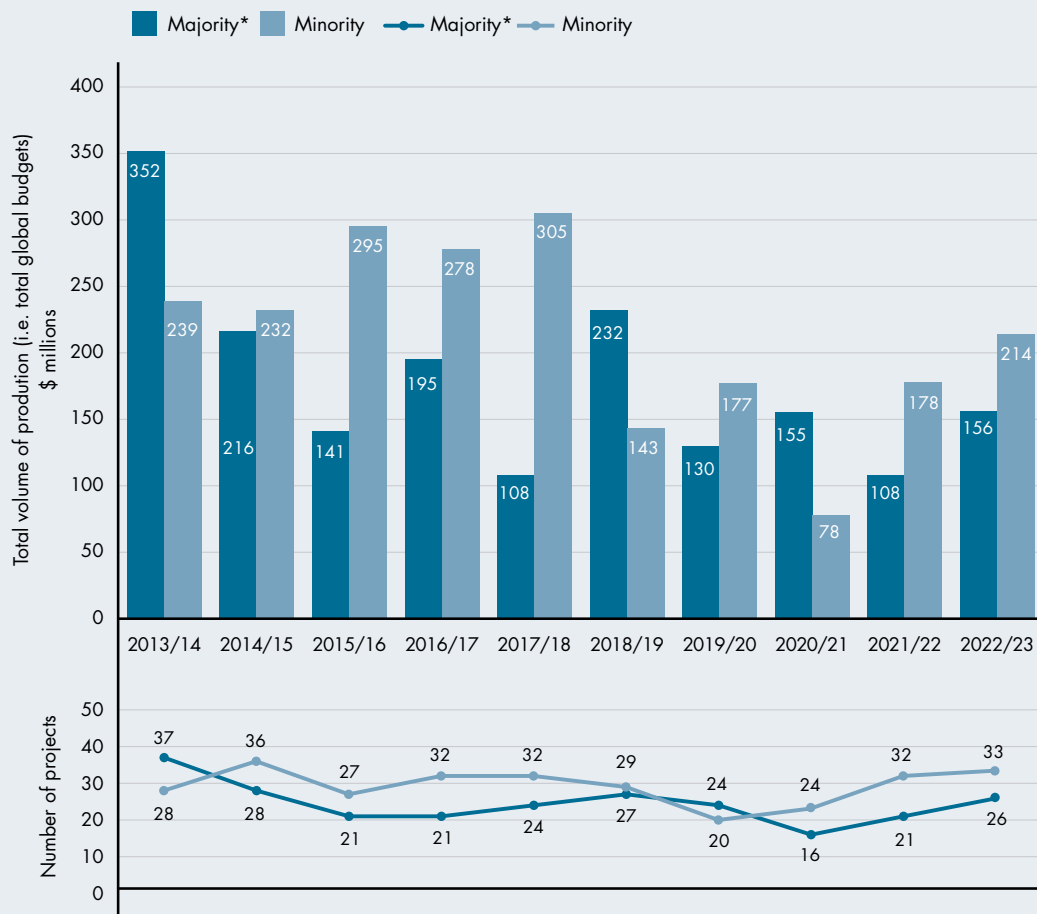
Source: Telefilm Canada.

Note: Some totals may not sum due to rounding. Statistics as of September 2023.

* Volume of coproduction refers to the value of total global budgets for coproduction projects. The total volume of production includes the financial participation of Canadian producers (i.e. Canadian share of budgets) and foreign producers (i.e. foreign share of budgets).

** Statistics cannot be disclosed due to the low number of projects.

Exhibit 5-3 Audiovisual treaty coproduction, majority- vs. minority-Canadian production



Source: Telefilm Canada.

Note: Statistics as of September 2023.

* The statistics for majority-Canadian treaty coproduction includes projects where the Canadian share of spending was equal to or more than 50% of the total project budget.

Exhibit 5-4 Audiovisual treaty coproduction, median project budgets

(\$ millions)	2013/14	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23
By language										
English-language	4.6	2.7	5.1	4.2	2.2	3.8	4.8	2.5	3.4	4.2
French-language	2.4	1.7	3.5	1.7	1.1	3.0	2.0	3.2	3.3	5.1
By medium										
Television	2.8	2.0	1.6	1.7	1.3	2.6	3.4	2.6	3.6	4.2
Feature film	10.2	5.7	5.5	6.2	4.1	3.9	3.6	4.1	3.3	4.4
All projects	3.8	2.6	4.1	3.1	1.8	3.8	3.6	2.6	3.3	4.4

Source: Telefilm Canada.

Note: Statistics as of September 2023.

Exhibit 5-5 Audiovisual treaty coproduction partner countries, 2013/14 to 2022/23

	Number of projects	Total global budgets (\$ millions)	Canadian share of total global budgets	
			\$ millions	%
France	129	958	387	40%
United Kingdom	122	728	379	52%
Germany	36	345	198	57%
Ireland	35	725	227	31%
Australia	23	151	86	57%
Israel	21	43	28	65%
Belgium	16	118	66	56%
New Zealand	14	50	19	38%
South Africa	13	70	35	50%
Switzerland	10	24	14	56%
Italy	9	48	22	47%
Hungary	8	163	75	61%
Brazil	7	36	19	53%
Other bipartite	63	238	113	47%
Multipartite*	31	235	84	36%
Total	537	3,932	1,752	45%

Source: Telefilm Canada.

Note: Some totals may not sum due to rounding. Statistics as of September 2023.

* Multipartite production includes audiovisual treaty coproduction projects where Canada has two or more partner countries.

TELEVISION

Exhibit 5-6 Audiovisual treaty coproduction, volume*, and number of projects, by language, television segment

	2013/14	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23
English-language										
Canadian share of budgets (\$M)	122	105	107	97	87	76	46	63	-**	61
Foreign share of budgets (\$M)	124	169	175	174	192	63	99	55	-**	87
Total budgets (\$M)	246	274	282	271	279	139	145	118	-**	148
Number of projects	38	35	23	26	20	18	15	23	-**	22
French-language										
Canadian share of budgets (\$M)	2	5	2	7	7	4	3	1	-**	-**
Foreign share of budgets (\$M)	5	7	3	18	10	13	3	4	-**	-**
Total budgets (\$M)	7	12	5	25	17	17	6	5	-**	-**
Number of projects	3	7	4	8	16	5	4	4	-**	-**
All languages										
Canadian share of budgets (\$M)	124	109	108	104	94	80	49	65	42	64
Foreign share of budgets (\$M)	129	177	178	193	202	76	101	58	69	95
Total budgets (\$M)	253	286	287	297	296	156	150	123	111	159
Number of projects	41	42	27	34	36	23	19	27	20	24

Source: Telefilm Canada.

Note: Some totals may not sum due to rounding. Statistics as of September 2023.

* Volume of coproduction refers to the value of total global budgets for coproduction projects. The total volume of production includes the financial participation of Canadian producers (i.e. Canadian share of budgets) and foreign producers (i.e. foreign share of budgets).

** Statistics cannot be disclosed due to the low number of projects.

Exhibit 5-7 Audiovisual treaty coproduction, volume* and number of projects by genre, television segment

	2013/14	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23
Total global budgets (\$ millions)										
Drama (i.e. fiction)	134	184	185	222	223	52	98	36	24	47
Documentary	36	63	23	35	33	45	17	32	14	48
Children's and youth	83	39	78	39	40	58	35	55	73	64
Total	253	286	287	297	296	156	150	123	111	159
Number of projects										
Drama (i.e. fiction)	11	8	5	7	4	–**	6	7	5	6
Documentary	19	27	16	21	27	16	8	14	7	14
Children's and youth	11	7	6	6	5	–**	5	6	8	4
Total	41	42	27	34	36	23	19	27	20	24
Average project budgets (\$ millions)										
Drama (i.e. fiction)	12.2	23.0	37.1	31.7	55.8	–**	16.3	5.1	4.8	7.9
Documentary	1.9	2.3	1.5	1.7	1.2	2.8	2.2	2.3	2.0	3.4
Children's and youth	7.6	5.5	13.0	6.5	8.0	–**	7.0	9.1	9.1	15.9
All genres	6.2	6.8	10.6	8.7	8.2	6.8	7.9	4.6	5.5	6.6

Source: Telefilm Canada.

Note: Some totals may not sum due to rounding. Statistics as of September 2023.

* Volume of coproduction refers to the value of total global budgets for coproduction projects. The total volume of production includes the financial participation of Canadian producers (i.e. Canadian share of budgets) and foreign producers (i.e. foreign share of budgets).

** Statistics cannot be disclosed due to the low number of projects.

Exhibit 5-8 Audiovisual treaty coproduction partner countries, television segment, 2013/14 - 2022/23

	Number of projects	Total global budgets (\$ millions)	Canadian share of total global budgets	
			\$ millions	%
United Kingdom	96	554	274	49%
France	69	346	128	37%
Australia	19	136	81	59%
Ireland	16	595	147	25%
Germany	15	32	12	38%
New Zealand	12	39	10	27%
Israel	9	20	14	69%
South Africa	6	44	20	45%
Brazil	5	31	16	53%
Hungary	5	124	57	46%
Belgium	4	42	24	58%
Malta	4	7	3	40%
Other bipartite	19	52	21	41%
Multipartite*	14	96	30	31%
Total	293	2,118	838	40%

Source: Telefilm Canada.

Note: Some totals may not sum due to rounding. Statistics as of September 2023.

* Multipartite production includes audiovisual treaty coproduction projects where Canada has two or more partner countries.

FEATURE FILM

Exhibit 5-9 Audiovisual treaty coproduction, volume* and number of projects, by language, theatrical feature film segment

	2013/14	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23
English-language										
Canadian share of budgets (\$M)	182	77	35	–**	45	109	68	54	52	75
Foreign share of budgets (\$M)	136	55	39	–**	35	79	44	33	48	62
Total budgets (\$M)	318	133	73	–**	79	188	112	87	100	137
Number of projects	20	15	8	–**	15	26	20	9	22	20
French-language										
Canadian share of budgets (\$M)	6	16	31	–**	6	7	8	8	20	29
Foreign share of budgets (\$M)	12	13	45	–**	32	23	37	15	56	46
Total budgets (\$M)	19	29	76	–**	37	30	45	23	76	75
Number of projects	4	7	13	–**	5	7	5	3	11	15
All languages										
Canadian share of budgets (\$M)	189	93	66	87	51	116	76	61	72	104
Foreign share of budgets (\$M)	148	69	83	90	66	102	81	49	104	108
Total budgets (\$M)	337	161	149	177	117	218	157	110	176	212
Number of projects	24	22	21	19	20	33	25	12	33	35

Source: Telefilm Canada.

Note: Some totals may not sum due to rounding. Statistics as of September 2023.

* Volume of coproduction refers to the value of total global budgets for coproduction projects. The total volume of production includes the financial participation of Canadian producers (i.e. Canadian share of budgets) and foreign producers (i.e. foreign share of budgets).

** Statistics cannot be disclosed due to the low number of projects.

Exhibit 5-10 Audiovisual treaty coproduction partner countries, theatrical feature film segment, 2013/14 - 2022/23

	Number of projects	Total global budgets (\$ millions)	Canadian share of total global budgets	
			\$ millions	%
France	60	612	258	42%
United Kingdom	26	174	105	60%
Germany	21	314	186	59%
Ireland	19	129	80	62%
Israel	12	23	14	61%
Belgium	12	77	42	55%
Switzerland	9	24	13	56%
South Africa	7	25	15	60%
Italy	7	24	17	68%
Spain	4	37	12	32%
Cuba	4	13	9	72%
Australia	4	14	5	37%
Denmark	4	33	16	48%
Other bipartite	38	176	87	50%
Multipartite*	17	139	54	39%
Total	244	1,814	914	50%

Source: Telefilm Canada.

Note: Statistics as of September 2023. Some totals may not sum due to rounding.

* Multipartite production includes audiovisual treaty coproduction projects where Canada has two or more partner countries.

6. Foreign production (location and service)

The foreign production (location and service) (FLS) segment is primarily comprised of films and television programs filmed in Canada mainly by foreign producers with the involvement of Canadian-based service producers. This includes the visual effects (VFX) work done by Canadian VFX studios for foreign films and television programs. For the vast majority of FLS projects, the copyright is held by non-Canadian producers.

In recent years, Canada's FLS production segment has contributed to numerous films released globally. Some recent Hollywood films that have either been shot in Canada or had their VFX work done in Canada include *Dune: Part Two* and *Priscilla*.

Canada has also become a destination for the filming of many television series commissioned by US networks or subscription video on demand (SVOD) services. Some recent series include *The Good Doctor*, *Fargo* and *Star Trek: Strange New Worlds*.

2023 Hollywood strikes: The statistics for 2022/23 found in this section relate to the fiscal-year period, April 1, 2022 to March 31, 2023. During the subsequent 2023/24 fiscal year, Hollywood experienced two major multi-month strikes. Between May 2 and September 27, 2023, the Writers Guild of America (WGA) was on strike, and between July 14 and November 8, 2023, the Screen Actors Guild - American Federation of Television and Radio Artists (SAG-AFTRA) was on strike. These strikes led to a significant decrease in FLS production in the US, Canada and globally during the 2023/24 fiscal year.

Highlights from 2022/23



- The total volume of FLS production in Canada increased by 2.3% to \$6.86 billion.
- The total number of FLS productions increased from 645 to 705.
- The total volume of FLS television series production increased by 41.3% to \$4.67 billion.
- The number of FLS television series shot in Canada increased from 258 to 384.
- The total volume of FLS feature film production increased by 4.5% to \$1.74 billion.
- The number of FLS feature films shot in Canada increased from 171 to 206.



- The total volume of other³³ FLS television production decreased by 74.2% to \$449 million.
- The number of other FLS television projects decreased by 46.8%, from 216 to 115.

³³ Other television production includes television movies, specials, pilots and other single-episode programming. It excludes mini-series, which are counted in the television series category.

After remaining resilient during the COVID-19 pandemic and experiencing a breakout year in 2021/22, FLS production experienced slower growth in 2022/23. The annual growth in the total volume of FLS production slowed to 2.3% in 2022/23 (Exhibit 6 - 1). This still lifted the sub-sector to \$6.86 billion in total volume in 2022/23.

The strong growth in Canada's FLS production segment in recent years – including the rapid 'catch-up' in 2021/22 – has been supported by the continued global demand for original content, particularly from subscription video-on-demand (SVOD) services, such as Netflix, Amazon Prime Video, Disney+ and Apple TV+.

The production of other television content (i.e. television movies, specials and single-episode programming) – much of which would be destined for SVOD services – tripled in 2021/22 to a \$1.74 billion (Exhibit 6 - 1). However, in 2022/23 the production of this type of FLS content fell by 74.2% to \$449 million, as the number of projects was practically halved from 216 in 2021/22 to 115 in 2022/23 (Exhibit 6 - 2). At \$449 million, the volume of production was more in line with the pre-pandemic level (i.e. \$508 million in 2019/20).

This steep drop in the volume of other television production was offset by higher levels of feature film production and significant higher levels of television series production. The number of FLS feature films shot in Canada rose by 20.5%, from 171 to 206 films in 2022/23, while spending on the production of those films increased by 4.5% to \$1.74 billion (Exhibits 6 - 1 and 6 - 2).

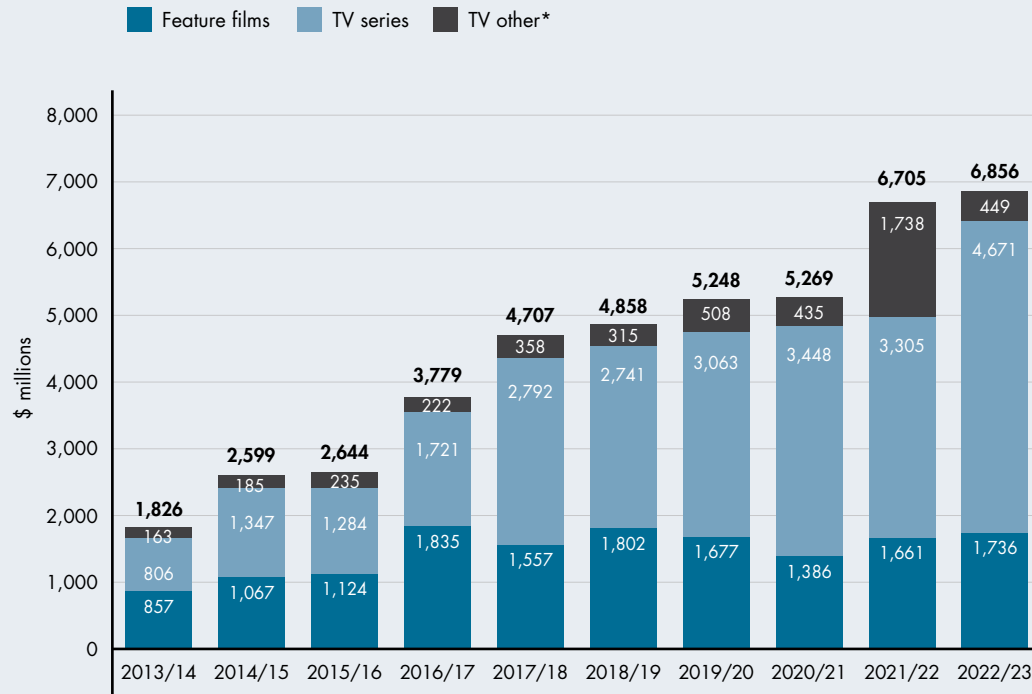
The production of FLS television series reached an all-time high in 2022/23. A total of 384 FLS television series were shot in Canada in 2022/23 (Exhibit 6 - 2). This was 48.8% higher than the number in 2021/22 and more than double the annual average observed over the prior nine years (2013/14 to 2021/22). The filming of these 384 television series generated a record \$4.67 billion in production spending (Exhibit 6 - 1). This was a 41.3% increase over 2021/22 and similarly more than double the annual average observed over the prior nine years (2013/14 to 2021/22).

Unlike the broad-based regional growth in FLS production observed in 2021/22, the growth in 2022/23 was concentrated in certain provinces (Exhibit 6 - 4).

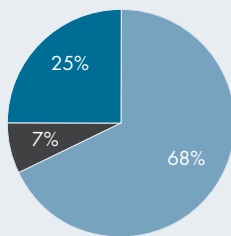
- **British Columbia** was once again Canada's leading province for FLS production. Its volume of FLS production rose by 4.8% or \$141 million to a record \$3.10 billion in 2022/23.
- **Ontario** experienced the largest gains in FLS production in Canada in 2022/23. Higher volumes of television series production but also feature film production helped lift the value of Ontario's FLS production by 18.5% to a record \$1.98 billion.
- In **Quebec**, higher levels of FLS feature film production contributed to an 8.4% or \$119 million increase in its FLS production. Quebec also reached a record level of FLS production in 2022/23, with a total \$1.54 billion in volume.
- In **Nova Scotia**, a 29.7% or \$27 million increase in the annual level of FLS production helped the province vault past Alberta and Manitoba to become Canada's fourth largest centre of FLS production in 2022/23, with a record \$118 million.
- **Manitoba** maintained its position as Canada's fifth largest centre for FLS production in 2022/23, with \$60 million in FLS production volume. This was despite the fact that the province's FLS production volume fell by 42.9%, or \$45 million, to \$60 million.
- In **Alberta**, FLS production fell steeply in 2022/23. After more-than-quintupling to \$492 million in 2021/22, the province's total volume of FLS production dropped by nearly nine-tenths to \$49 million in 2022/23.

TOTAL PRODUCTION AND TYPES

Exhibit 6-1 Volume of foreign production (location and service), by type



Share
2022/23



Annual average growth rate

Type	2022/23	2013/14–2022/23
Feature films	4.5%	8.2%
TV series	41.3%	21.6%
TV other*	(74.2%)	11.9%
Average: all types	2.3%	15.8%

Source: Association of Provincial and Territorial Funding Agencies.

Note: Some totals may not sum due to rounding.

* Includes TV movies, specials, pilots and other single-episode programming. Prior to 2017/18, mini-series were included as part of the TV other category. In 2017/18, the statistics for mini-series were collected in the TV series category. For this reason, the year-over-year growth in TV series production in 2017/18 is slightly overstated. However, the vast majority of production in the TV series category is still likely comprised of TV series rather than TV mini-series.

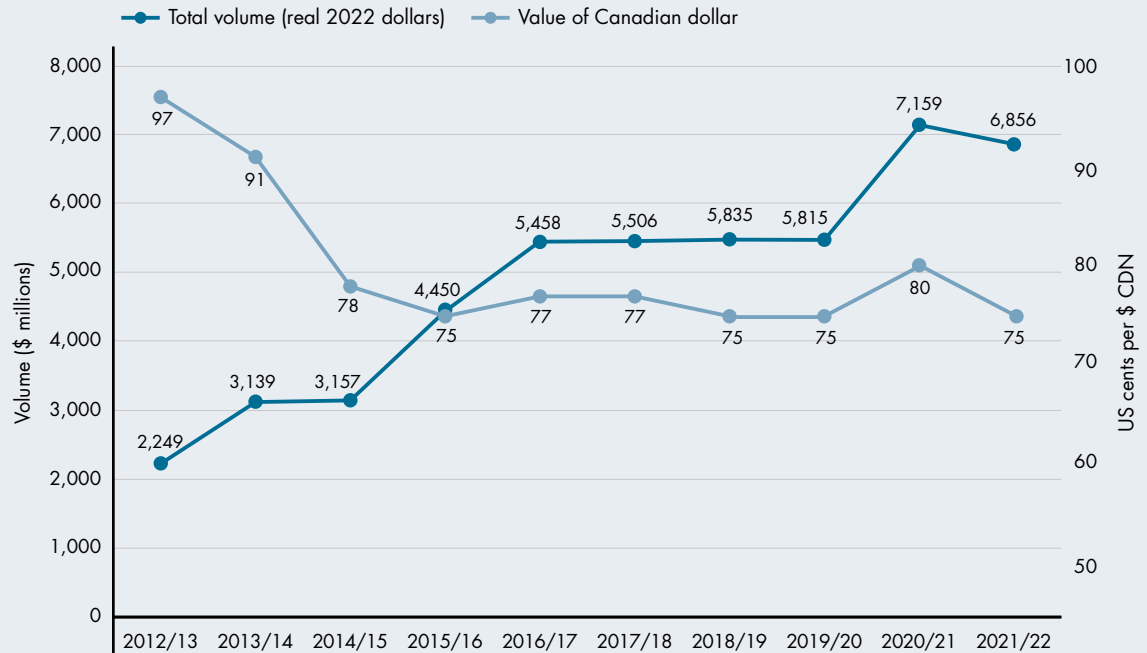
Exhibit 6-2 Annual number of foreign production (location and service) projects, by type

	2013/14	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23
Feature films	91	111	128	186	167	164	166	141	171	206
TV series	92	115	156	137	209	208	224	277	258	384
TV other*	51	53	71	77	104	93	131	93	216	115
Total	234	279	355	400	480	465	521	511	645	705

Source: Association of Provincial and Territorial Funding Agencies.

Note: Totals are based on available data and make no allowance for unavailable data.

* Includes TV movies, specials, pilots and other single-episode programming. Prior to 2017/18, mini-series were included as part of the TV other category. In 2017/18, the statistics for mini-series were collected in the TV series category. For this reason, the year-over-year growth in TV series production in 2017/18 is slightly overstated. However, the vast majority of production in the TV series category is still likely comprised of TV series rather than TV mini-series.

Exhibit 6-3 Total volume of foreign production (location and service) (real inflation-adjusted dollars vs. value of Canadian dollar)

Source: Bank of Canada, Statistics Canada and Association of Provincial Television and Film Agencies.

REGION

Exhibit 6-4 Volume of foreign production (location and service), by province and territory

(\$ millions)	2013/14	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	2022/23 share of total
British Columbia*	1,080	1,672	1,574	2,311	3,040	2,816	2,347	2,719	2,963	3,104	45%
Ontario	446	545	698	882	869	985	1,541	1,426	1,672	1,981	29%
Quebec	147	275	282	404	666	771	1,142	922	1,421	1,540	22%
Nova Scotia	17	n/a	12	39	12	26	40	46	91	118	2%
Manitoba	47	11	42	70	89	167	171	84	105	60	1%
Alberta	88	92	34	54	31	86	0	68	441	49	1%
Territories*	2	3	3	18	1	7	8	4	3	4	<1%
Newfoundland and Labrador	0	0	0	0	0	0	0	0	8	0	0%
Saskatchewan	0	0	0	0	0	1	0	0	0	0	0%
New Brunswick	0	1	0	0	0	0	0	n/a	0	0	0%
Prince Edward Island	0	<1	0	0	0	0	0	n/a	0	0	0%
Total	1,826	2,599	2,644	3,779	4,707	4,858	5,248	5,269	6,705	6,856	100%

Source: Association of Provincial and Territorial Funding Agencies.

Note: Some totals may not sum due to rounding. Statistics published by provincial funding agencies may differ from those in *Profile 2023*. Please see *Notes on methodology* for additional information.

n/a: Data not available or suppressed for confidentiality.

* Beginning in 2021/22, Creative BC started reporting production activity and spending on the basis of the fiscal year in which principal photography or key animation started. Prior to 2021/22, Creative BC recorded production activity and spending in the fiscal year within which a project's tax credit application received approval. For that reason, the annual production statistics between 2020/21 and 2021/22 may not be directly comparable.

** Yukon, Nunavut and Northwest Territories.

COUNTRY

Exhibit 6-5 Number of foreign production (location and service) projects, by country of copyright

	2013/14	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23
Number of projects										
United States	177	197	261	304	364.5	365	409	404	469.5	523
Other foreign	31	57	67	72.5	77.5	69	72	72.5	154.5	182
Canada*	26	25	27	23.5	38	31	40	34.5	21.0	0
Total	234	279	355	400	480	465	521	511	645	705
Share of total										
United States	76%	71%	74%	76%	76%	78%	79%	79%	73%	74%
Other foreign	13%	20%	19%	18%	16%	15%	14%	14%	24%	26%
Canada*	11%	9%	8%	6%	8%	7%	8%	7%	3%	0%
Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

Source: Association of Provincial and Territorial Funding Agencies.

Note: Some totals may not sum due to rounding.

* Canadian projects in the FLS segment include projects made by Canadian producers primarily for foreign audiences, or as part of international co-ventures. International co-venture production includes films and television programs made as international coproductions, but outside of the auspices of an audiovisual coproduction treaty.

7. Broadcaster in-house production (Canadian)

Broadcaster in-house production (“in-house production”) refers to television programs made internally by private conventional television broadcasters, public broadcasters, and discretionary and on-demand services. In-house production largely consists of news and sports programs, but can also include production in other genres.

The statistics in this section cover the 2022 broadcasting year, running from September 1, 2021 to August 31, 2022.

Highlights from 2022



- The total volume of in-house production increased by 10.3% to \$1.20 billion.
- Spending on in-house production by discretionary and on-demand services increased by 8.0% to \$556 million.
- Conventional broadcasters’ spending on in-house production increased by 12.4% to \$642 million.
- Spending on the in-house production of sports programming increased by 65.8% to \$335 million.



- Spending on the in-house production of news programming was virtually unchanged at \$709 million.

After falling by 7.6% during the 2020 broadcasting year – on account of the COVID-19 pandemic – broadcasters' in-house production spending rebounded by 1.9% during the 2021 broadcasting year and a further 10.3% during the 2022 broadcasting year (Exhibit 7 - 1). This strong overall growth in spending on in-house production during the 2022 broadcasting year was driven by higher spending at both conventional television services, and discretionary and on-demand services. The increase in spending on in-house production reflects, in part, the need for broadcasters to catch up on spending shortfalls from prior COVID years as well as higher spending on sports programming.

Within the conventional television sub-segment (including private conventional broadcasters, CBC/Radio-Canada and provincial educational broadcasters), spending was up by \$71 million, or 12.4% (Exhibit 7 - 1). This increase could be traced back to higher spending on sports programming in 2022.³⁴ In particular, spending on the in-house production of sports programming was significantly higher at CBC/Radio-Canada, which televised the 2022 Beijing Winter Olympics.³⁵

Within the discretionary and on-demand sub-segment, spending was up by 8.0% to \$556 million (Exhibit 7 - 1). The increase in in-house production at discretionary and on-demand services was also linked to higher spending on sports programming, driven primarily by higher spending at the large English-language sports services – Sportsnet and TSN.³⁶

Overall spending on the in-house production of sports programming rose by 65.8% to a five-year high of \$335 million in 2022 (Exhibit 7 - 2). Meanwhile, spending on news programming increased by \$2 million to \$709 million – an increase of less than one percent.

Broadcaster in-house production remained very concentrated in Ontario and Quebec in 2022 – the two provinces that are home to the vast majority of Canada's television broadcasting industry, particularly discretionary television services. Those two provinces accounted for 80% of Canada's total volume of broadcaster in-house production (Exhibit 7 - 3), which was higher than those two provinces' 70% share of Canadian television production made by independent and broadcaster-affiliated producers external to broadcasters (Exhibit 3 - 12).

Despite the post-pandemic recovery of in-house production spending in the 2021 broadcasting year and particularly 2022, over the longer-term, the volume of broadcaster in-house production has been in decline. In 2022, it was still 20.9% lower than the 10-year peak of \$1.52 billion reached in 2014.

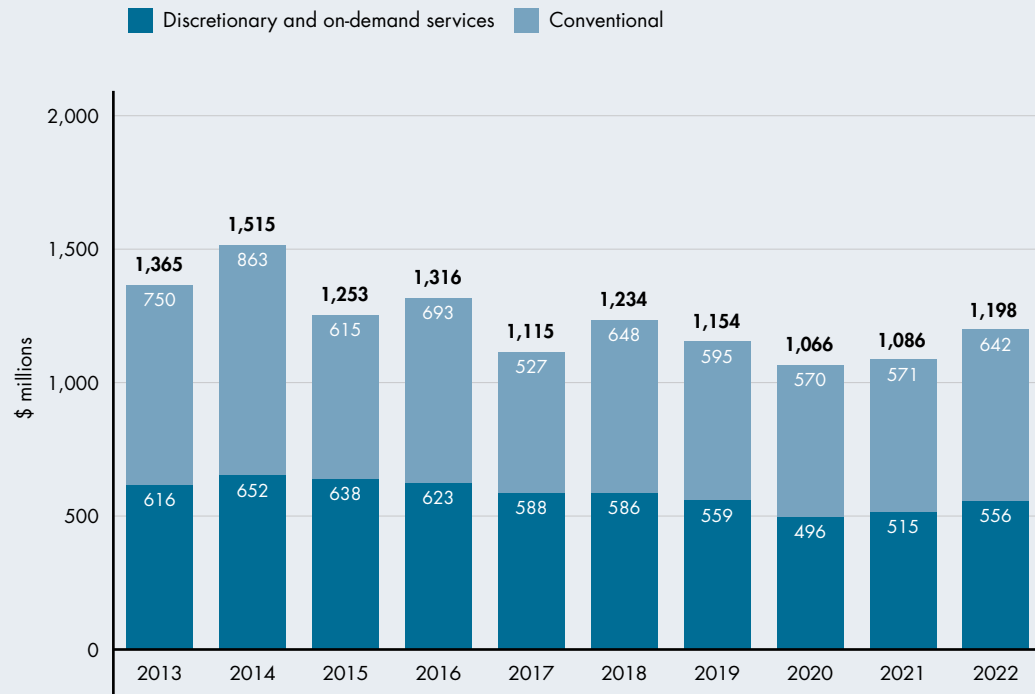
³⁴ Calculations based on data from CRTC (2023b). *Conventional Television: Statistical and Financial Summaries, 2018-2022*. CRTC (2022b). *Conventional Television: Statistical and Financial Summaries, 2017-2021*.

³⁵ Calculations based on data from CRTC (2023b) and CRTC (2022b).

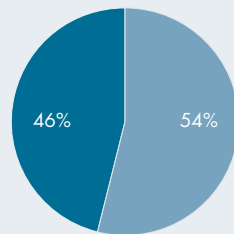
³⁶ Calculations based on data from CRTC (2023c). *Discretionary and On-Demand Services: Statistical and Financial Summaries, 2018-2022*. CRTC (2022c). *Discretionary and On-Demand Services: Statistical and Financial Summaries, 2017-2021*.

PRODUCTION VOLUME

Exhibit 7-1 Volume of broadcaster in-house production, by sub-segment



Share
2022



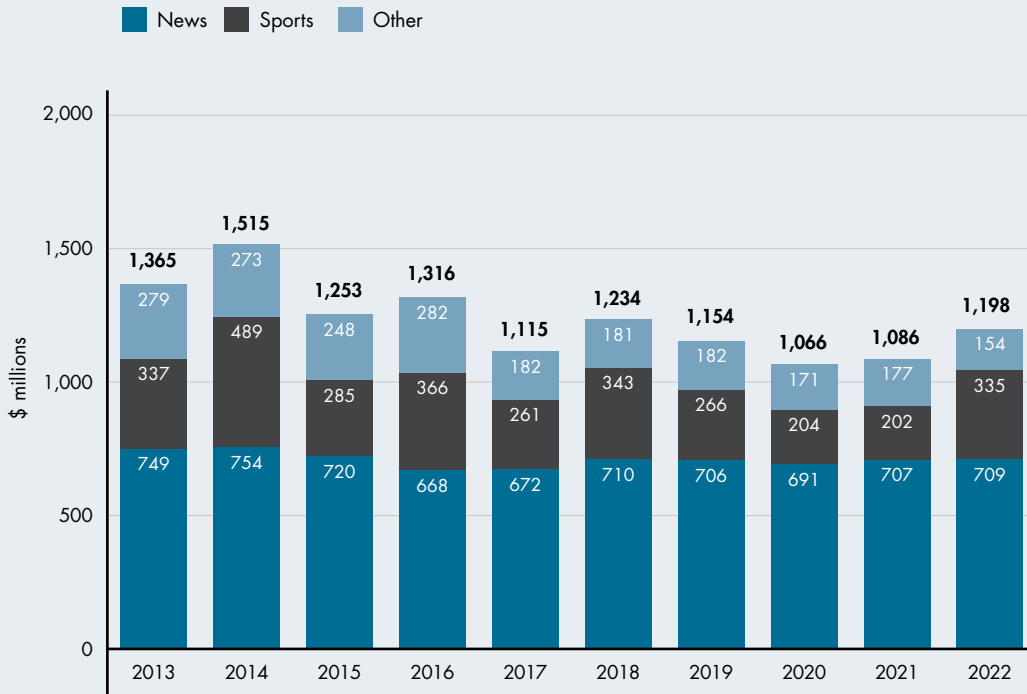
Annual average growth rate

Sub-segment	2022	2013–2022
Discretionary and on-demand services	8.0%	(1.1%)
Conventional	12.4%	(1.7%)
Average: all sub-segments	10.3%	(1.4%)

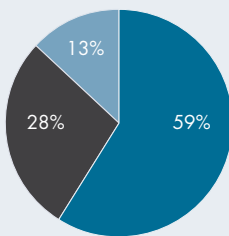
Sources: Estimates based on data collected from CRTC.
Note: Some totals may not sum due to rounding.

GENRES

Exhibit 7-2 Volume of broadcaster in-house production, by genre



Share
2022



Annual average growth rate

Genre	2022	2013–2022
News	0.3%	(0.6%)
Sports*	65.8%	(0.1%)
Other	(13.0%)	(6.4%)
Average: all genres	10.3%	(1.4%)

Sources: Estimates based on data collected from CRTC.

Note: Some totals may not sum due to rounding.

* Excludes amounts paid for rights to sports programming

REGION

Exhibit 7-3 Volume of broadcaster in-house production, by province and territory

(\$ millions)	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2022 share of total
Ontario	767	885	677	729	612	686	622	570	571	669	56%
Quebec	291	331	279	307	258	296	272	247	257	287	24%
Alberta	92	91	94	88	80	83	87	85	85	82	7%
British Columbia	103	101	97	96	87	87	89	80	81	79	7%
Manitoba	24	29	30	28	25	26	27	26	33	26	2%
Saskatchewan	28	27	27	24	20	20	21	21	21	20	2%
Nova Scotia	32	27	26	23	16	17	18	17	18	17	1%
New Brunswick	13	11	11	10	8	9	9	9	10	9	1%
Newfoundland and Labrador	11	10	9	8	7	7	7	7	8	7	1%
Prince Edward Island	2	2	2	2	1	1	1	2	2	1	<1%
Territories*	3	3	2	1	1	1	1	1	1	1	<1%
Total	1,365	1,515	1,253	1,316	1,115	1,234	1,154	1,066	1,086	1,198	100%

Sources: Estimates based on data collected from CRTC, CBC/Radio-Canada and Statistics Canada.

Note: Some totals may not sum due to rounding. Statistics published by provincial funding agencies may differ from those in *Profile 2023*. See *Notes on methodology* for additional information.

* Yukon, Nunavut and Northwest Territories.

8. Distribution

Canada's distribution industry includes both Canadian-controlled and foreign-controlled companies that distribute film and television content through theatres, television broadcasters, wholesaling of physical media and other video platforms. Some of the leading Canadian-controlled distribution companies include Elevation Pictures and Immina Films, as well as the distribution arms of Canadian independent production companies such as WildBrain Ltd., Cineflix Media and Thunderbird Entertainment. Foreign-controlled distribution companies operating in Canada include the distribution arms of major Hollywood studios.

Note: As of 2011, Statistics Canada only publishes data for the audiovisual distribution industry on a biennial basis. For that reason, data for industry revenue is not available for 2012, 2014, 2016, 2018, 2020 and 2022. The most recent year of published data is 2021. Data for distributor investment in Canadian films and television programs is sourced from the Canadian Audio-visual Certification Office (CAVCO) and, in contrast, is available on an annual fiscal-year basis.

Highlights from 2022/23 and 2021



- Canadian distributors' investment in Canadian films and television programs in 2022/23 increased by 37.9% (compared with 2021/22) and totalled \$492 million.
- Revenue from the distribution of Canadian films and television programs accounted for 15.8% of total industry revenue in 2021 – up from 13.0% in 2019.



- Revenue of the total Canadian distribution industry decreased by 26.3% between 2019 and 2021 to a total of \$1.31 billion.
- Revenue from the distribution of Canadian films and television programs decreased by 10.4% in 2021 (compared with 2019) to a total of \$207 million.
- Sales of Canadian films and television programs to foreign markets in 2021 decreased by 20% (compared with 2019) to a total of \$100 million.

While total revenue within the Canadian film and television distribution industry was over \$2 billion as recently as 2017, it has since fallen by nearly 40% (Exhibit 8 - 1). Between 2019 and 2021, total revenue within the film and television distribution industry in Canada dropped by 26.3% to \$1.31 billion.

According to Statistics Canada, the drop in revenue can be linked to audiences' ongoing shift to digital streaming services and away from traditional release windows such as theatres and film festivals, which were negatively affected by the COVID-19 pandemic and have a greater reliance on content distribution services.³⁷ Total revenue from the distribution of film and television content fell by 23.8% between 2019 and 2021, hitting a 10-year low of \$1.2 billion. Canadians' decreasing purchasing of pre-recorded physical media led to a 45.2% drop in revenue associated with the latter between 2019 and 2021 (Exhibit 8 - 1).

The revenue earned by Canadian distributors from Canadian content also fell in 2021, decreasing by \$24 million or 10.4% to \$207 million (Exhibit 8 - 2). Canadian content revenue from domestic television, theatres, video-on-demand services, and other platforms was relatively stable between 2019 and 2021, declining by under one percent. However, revenue earned from the distribution of Canadian content in foreign markets fell to \$100 million in 2021 – a 20% drop compared to 2019.

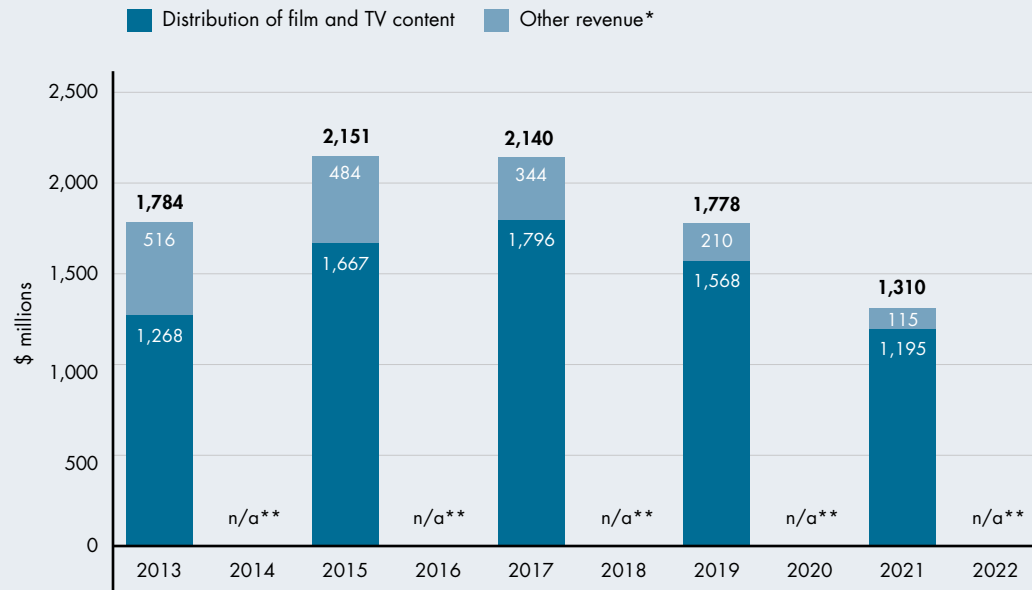
Although the revenue earned from Canadian content dropped between 2019 and 2021, it fell at a slower rate than overall industry revenue and thereby actually increased its market share from 13% in 2019 to 15.8% in 2021 (Exhibits 8 - 1 and 8 - 2).

Canadian distributors invest in Canadian films and television programs through minimum guarantees and advances on anticipated distribution revenues. In 2022/23, Canadian distributors invested an estimated \$492 million in Canadian films and television programs. This represented an increase of 37.9% compared to 2021/22 and was just shy of the 10-year high of \$494 million invested by Canadian distributors in 2016/17 (Exhibit 8 - 3).

³⁷ Statistics Canada (2022). "The pandemic and growing digital demand unfavourable to film and video distributors in 2021." *The Daily*. October 4, 2022.

REVENUE

Exhibit 8-1 Total revenue in the Canadian distribution industry



Source: Statistics Canada, Table 21-10-0075-01.

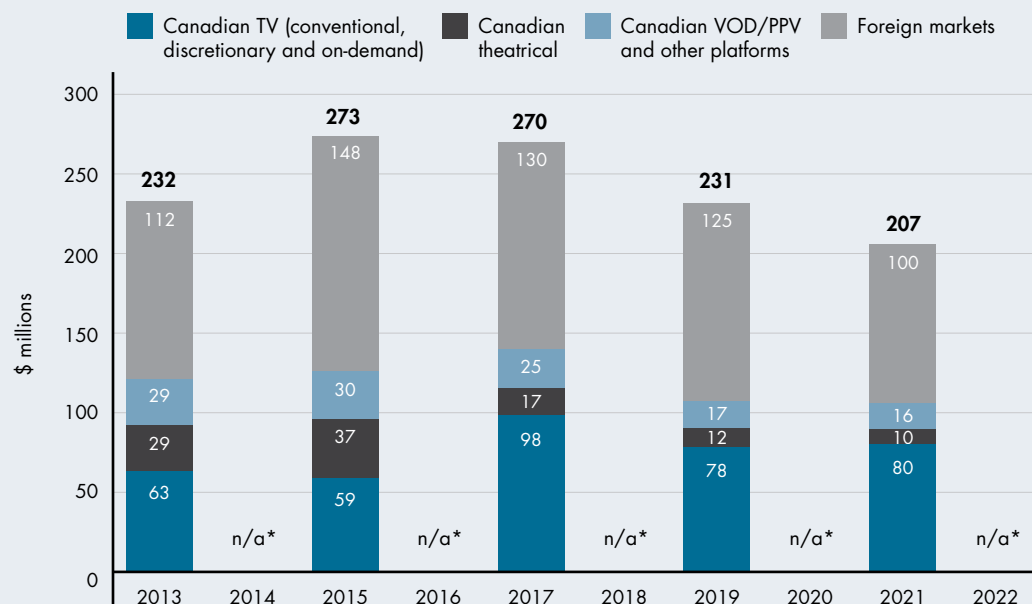
Note: Beginning with 2013, Statistics Canada adopted a new methodology for measuring total revenue in the film and video distribution industry. For that reason, the figures reported before and after 2012 may not be directly comparable for the purpose of time-series analysis.

n/a: No data available.

* Includes revenue from the wholesaling of pre-recorded video, production of audiovisual works for outright sale, contract production of audiovisual works, and other sources.

** As of 2011, Statistics Canada only publishes data on a biennial basis. For that reason, no data is available for 2012, 2014, 2016, 2018, 2020 and 2022.

Exhibit 8-2 Revenue from the distribution of Canadian film and television content, by market



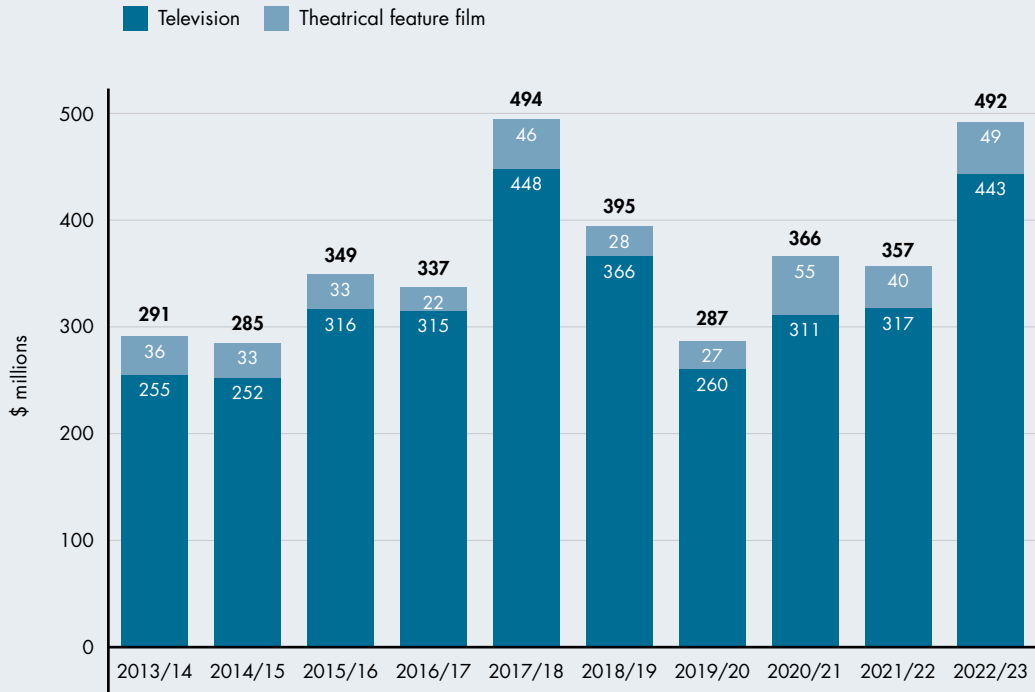
Source: Statistics Canada, Table 21-10-0074-01.

Note: Some totals may not sum due to rounding.

* As of 2011, Statistics Canada only publishes data on a biennial basis. For that reason, no data is available for 2012, 2014, 2016, 2018, 2020 and 2022.

INVESTMENT IN CANADIAN PRODUCTIONS

Exhibit 8-3 Canadian distributors' investment in Canadian film and television production



Source: Estimates based on data obtained from CAVCO.
Note: Some totals may not sum due to rounding.

9. Television broadcasting

The Canadian television broadcasting industry consists of four key sub-segments:

- The **private conventional television** sub-segment, which includes private broadcasters that maintain over-the-air infrastructure to broadcast to households.³⁸
- **CBC/Radio-Canada's** conventional services, which also maintain over-the-air infrastructure to broadcast in English and French across Canada.
- **Provincial educational broadcasters** operating in Quebec, Ontario and British Columbia.
- Services in the **discretionary and on-demand** sub-segment, which are only available via cable television, direct-to-home (DTH) satellite television or Internet protocol television (IPTV) providers. Discretionary services typically provide sports, 24-hour news, movies, arts, and other thematic programming, and earn revenue from a combination of subscription fees and advertising. On-demand services include video-on-demand (VOD) services that earn revenue from subscription or transactional payments, rather than advertising.

The financial statistics relating to total broadcasting industry revenues and total Canadian programming expenditures (CPE) cover only up to the 2022 broadcasting year, running from September 1, 2021 to August 31, 2022, as information for the 2023 broadcasting year has not yet been provided by the CRTC. However, statistics for the large broadcasting groups relating to CPE, programs of national interest³⁹ (PNI) and independent productions are available from the 2023 broadcasting year and information for these groups, from that year, is set out in this section.

Highlights from 2021/2022



- Broadcasting industry revenue increased by 1.9% to \$6.8 billion in the 2022 broadcasting year (September 1, 2021 to August 31, 2022).
- Revenue at private conventional broadcasters increased by 5.1% to \$1.5 billion.
- Revenue at National news and sports services increased by 15.4% to \$1.8 billion.
- Total industry spending on CPE increased by 13.1% to \$3.2 billion, including a 22.9% increase to \$1.2 billion for National news and sports services.
- CPE spending by Discretionary - Other services increased 1.5% to \$552 million.
- CPE spending by Private Conventional stations increased 14.3% to \$753 million, as did CBC/Radio-Canada by 7.9% to \$568 million.



- Revenue at CBC/Radio-Canada's conventional services decreased by 7.4% during the 2022 broadcasting year due to a reduction in its annual parliamentary appropriation.
- Revenue at Discretionary Services (other than News and Sports) decreased by 3.4% to \$2.1 billion.
- As a share of prior year revenue, CPE spending by the CBC decreased in 2022 from 58.2% to 54.8%.
- As a share of prior year revenue, CPE and PNI spending by Radio-Canada decreased in 2022 from 55.3% to 52.0% and 19.8% to 18.6%, respectively.

³⁸ The vast majority of Canadian households now receive conventional television signals via cable television, DTH satellite television or IPTV providers.

³⁹ Includes Canadian drama and comedy; long-form documentary; English-language awards shows; and French-language music, dance and variety programming.

Highlights from 2022/2023



- CPE spending by large broadcast ownership groups increased by 13.7% to \$2 billion in 2022, with 28.3% of the respective increase in CPE coming from National news and sports services.
- As a share of prior year revenue, CPE spending by English-language broadcast groups increased slightly to 30.8%, with more significant increases from French-language groups to 62.6% of prior year revenues.
- Spending on Programs of National Interest (PNI) by English-language broadcast groups increased slightly to 7.4% of prior year revenues, with a similar increase from the CBC, to 29.8%, but a much higher increase from French-language broadcast groups, from 21.3% to 29.8% in 2022, of prior year revenues.
- Spending by large broadcast ownership groups on Canadian independent production increased by 20.8% in 2022.

Higher revenue at Canada's private television services helped offset declines at federal and provincial public broadcasters during the 2022 broadcasting year (September 1, 2021 to August 31, 2022) and led to the overall Canadian television broadcasting industry increasing its revenue by 1.9% to over \$6.7 billion (Exhibit 9 - 1). Total revenue in Canada's television broadcasting industry in 2022 was still 10.5% lower than the peak of \$7.56 billion reached in 2014.

Looking specifically at the discretionary services segment – the largest within the Canadian television broadcasting industry – overall revenues increased slightly in 2022 (Exhibit 9 - 1). That overall increase was impacted by revenue increases of 15.4% from National news and sports services to \$1.8 billion, which more than offset revenue decrease by 3.4% from Other Discretionary services to \$2.1 billion.

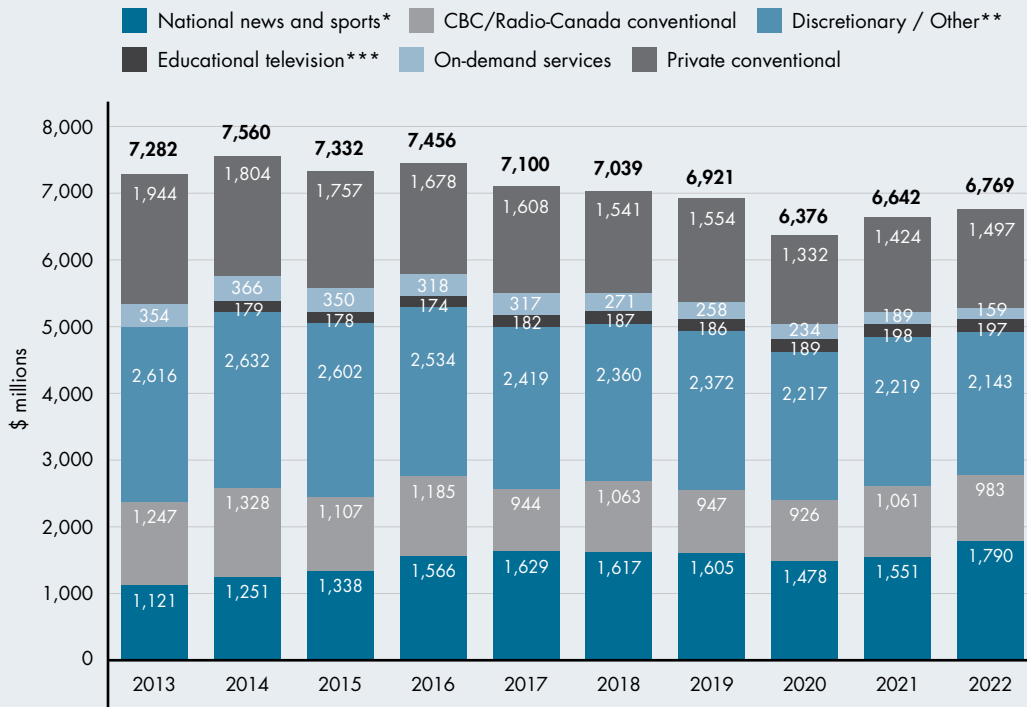
Driven by higher advertising sales, revenues from Canada's private conventional television segment total revenue increased by 5.1% to \$1.50 billion (Exhibit 9 - 1) at private conventional television services. Nevertheless, private conventional television revenue was still 23% lower than where it stood in 2013.

CBC/Radio-Canada also benefited from the more buoyant advertising market. Its advertising revenue increased by 5.7% in 2022. However, this increase in advertising revenue was not enough to offset a 9.4% drop in CBC/Radio-Canada's parliamentary appropriation, leading to an overall 7.4% decrease in its total revenue (Exhibit 9 - 1).

Canadian broadcasters' levels of spending on CPE, PNI and Canadian independent production were all higher in 2023 (Exhibits 9 - 4, 9 - 6 and 9 - 8). However, it is important to note that these high levels of spending followed several years of record low spending on account of the pandemic. Indeed, Canadian broadcasters' average annual levels of spending on CPE, PNI and Canadian independent production between 2020 and 2022 were lower than the average observed during the 2013-to-2019 period.

REVENUE

Exhibit 9-1 Total revenue in the Canadian broadcasting industry, by service segment



Source: Data from the CRTC's *Statistical and Financial Summaries*.

Note: Some totals may not sum due to rounding.

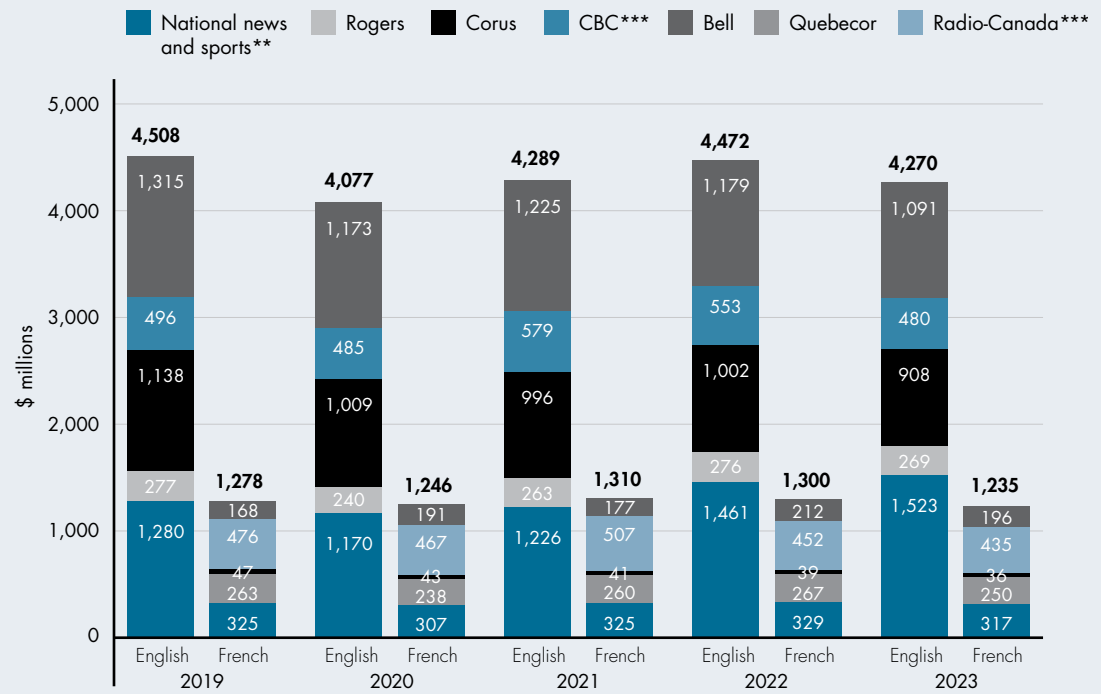
* Includes the following discretionary services: CTV News Channel, CBC News Network, TSN, Sportsnet, Sportsnet One, LCN, ICI RDI, TVA Sports, and RDS.

Data for 2023 is estimated, as it is not yet published on an individual service basis.

** Includes revenue earned by discretionary services owned by CBC/Radio-Canada, other than National News services (i.e., CBC News Network and ICI RDI).

*** Data for educational television services only available beginning in 2014.

Exhibit 9-2 Total revenue, by large broadcasting group*



Source: CRTC, data from the *Aggregate Annual Returns* filed by the Broadcasting Groups.

Note: Some totals may not sum due to rounding.

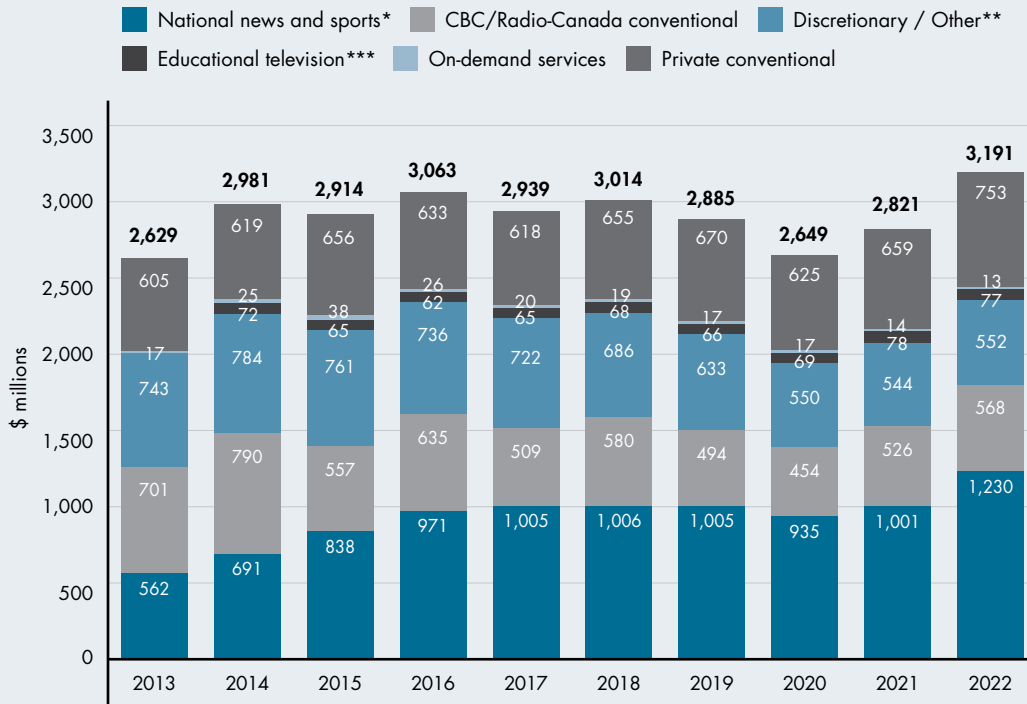
* CRTC designated groups.

** Includes the following discretionary services: CTV News Channel, CBC News Network, TSN, Sportsnet, Sportsnet One, LCN, ICI RDI, TVA Sports, and RDS. Data for 2023 is estimated, as it is not yet published on an individual service basis.

*** While the CBC and Radio-Canada are not designated groups, the respective numbers for Conventional TV and discretionary services (excluding National News services) are provided for comparison purposes.

CANADIAN BROADCASTER PROGRAMMING EXPENDITURES

Exhibit 9-3 Total Canadian programming expenditures (CPE), by service segment



Source: Data from the CRTC's *Statistical and Financial Summaries*.

Note: Some totals may not sum due to rounding.

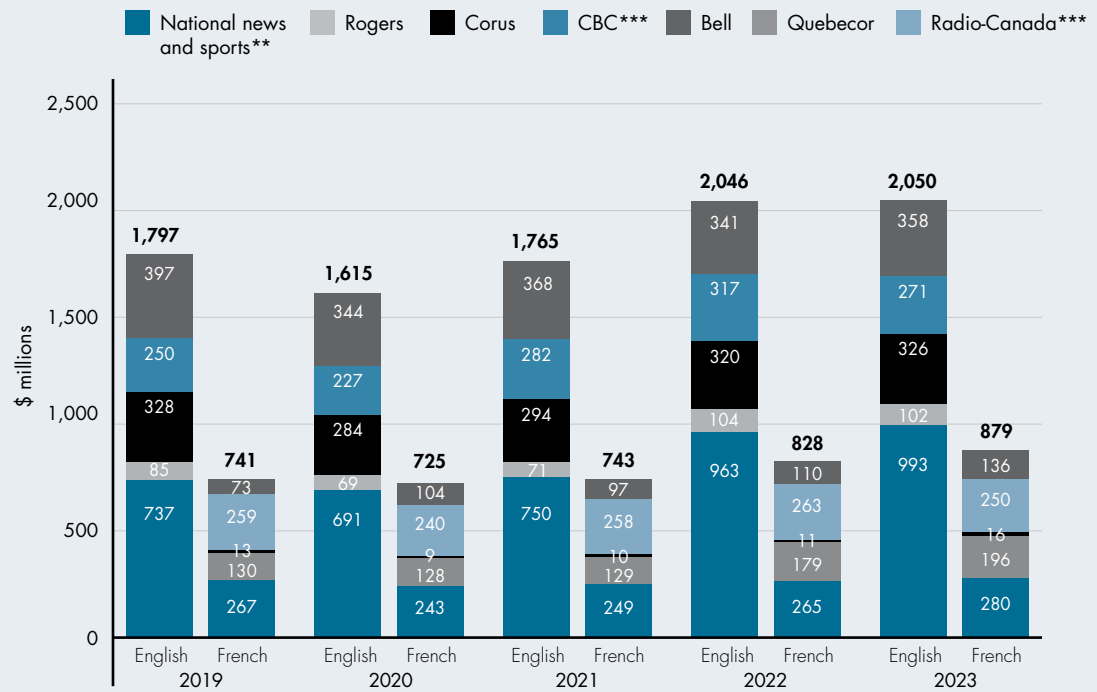
* Includes the following discretionary services: CTV News Channel, CBC News Network, TSN, Sportsnet, Sportsnet One, LCN, ICI RDI, TVA Sports, and RDS.

Data for 2023 is estimated, as it is not yet published on an individual service basis.

** Includes revenue earned by discretionary services owned by CBC/Radio-Canada, other than National News services (i.e., CBC News Network and ICI RDI).

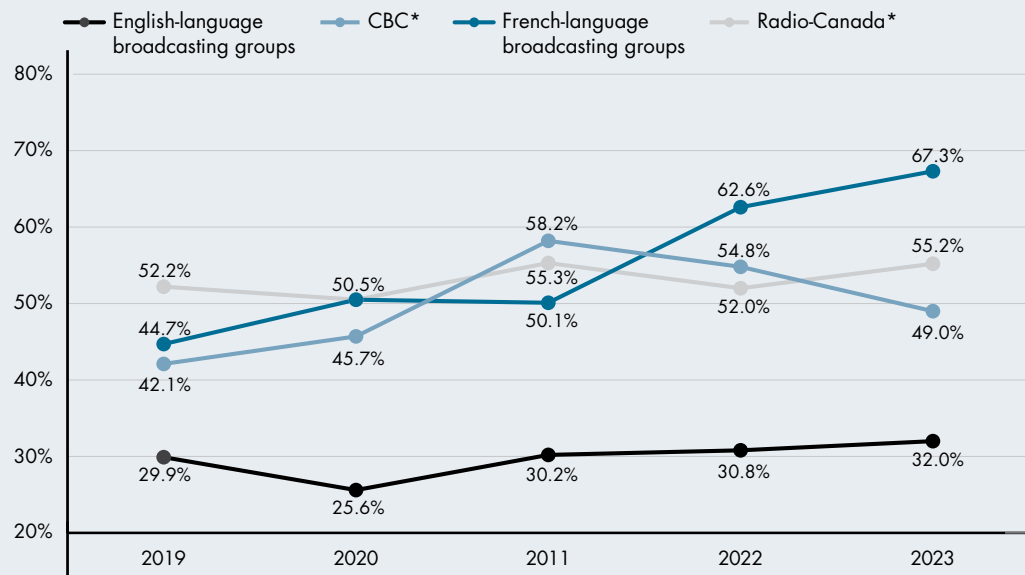
*** Data for educational television services only available beginning in 2014.

Exhibit 9-4 Total Canadian programming expenditures (CPE), by large broadcasting group*



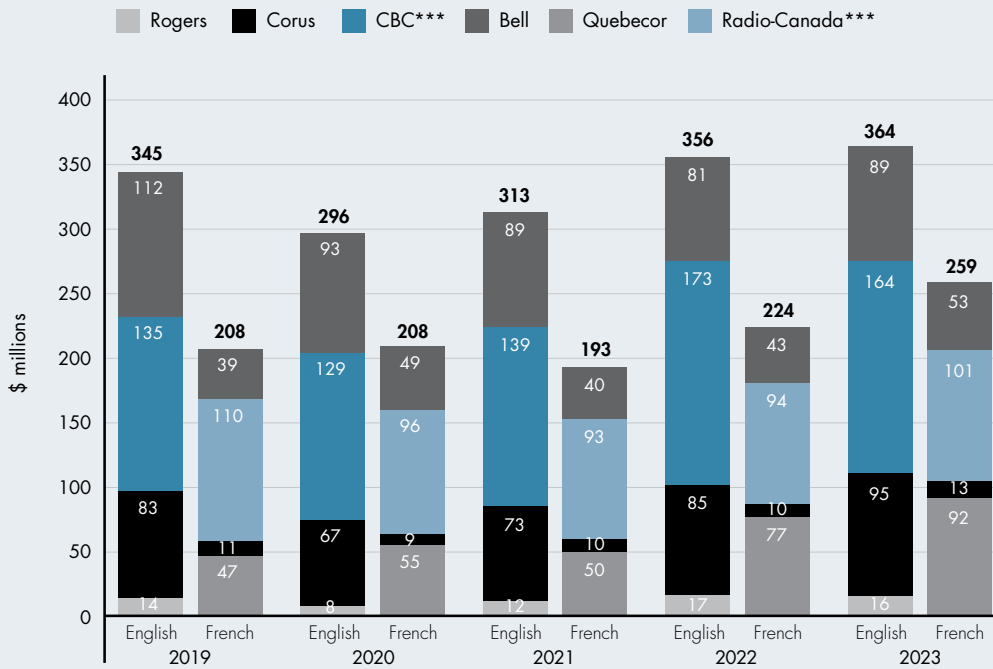
Source: Data from the *Aggregate Annual Returns* filed by the Broadcasting Groups.
 Note: Some totals may not sum due to rounding.
 * CRTC, data from the *Aggregate Annual Returns* filed by the Broadcasting Groups.
 ** Includes the following discretionary services: CTV News Channel, CBC News Network, TSN, Sportsnet, Sportsnet One, LCN, ICI RDI, TVA Sports, and RDS. Data for 2023 is estimated, as it is not yet published on an individual service basis.
 *** While the CBC and Radio-Canada are not designated groups, the respective numbers for Conventional TV and discretionary services (excluding National News services) are provided for comparison purposes.

Exhibit 9-5 CPE as a share of (previous year) revenue



Source: CRTC, data from the *Aggregate Annual Returns* filed by the Broadcasting Groups.
 Note: Some totals may not sum due to rounding.
 * Includes conventional and discretionary services but excludes National News services (i.e., CBC News Network and ICI RDI).

Exhibit 9-6 Programs of national interest* (PNI), by large broadcasting group**



Source: CRTC, data from the *Aggregate Annual Returns* filed by the Broadcasting Groups.

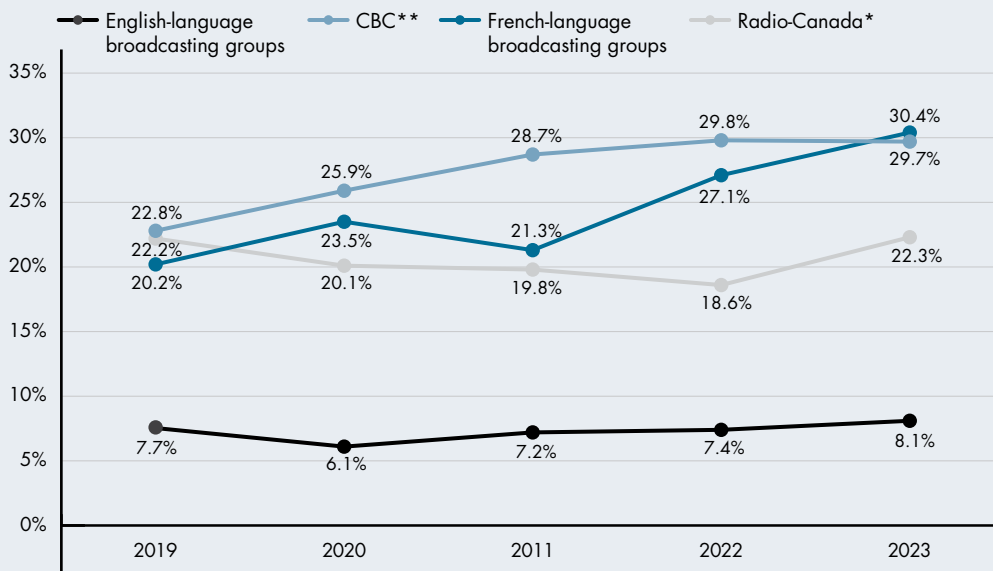
Note: Some totals may not sum due to rounding.

* Includes Canadian drama and comedy; long-form documentary; English-language awards shows; and French-language music, dance and variety programming.

** CRTC designated groups.

*** PNI totals for CBC and Radio-Canada are estimates based in part on CRTC data and will also include expenditures from National News services (i.e., CBC News Network and ICI RDI).

Exhibit 9-7 PNI* as a share of (previous year) revenue



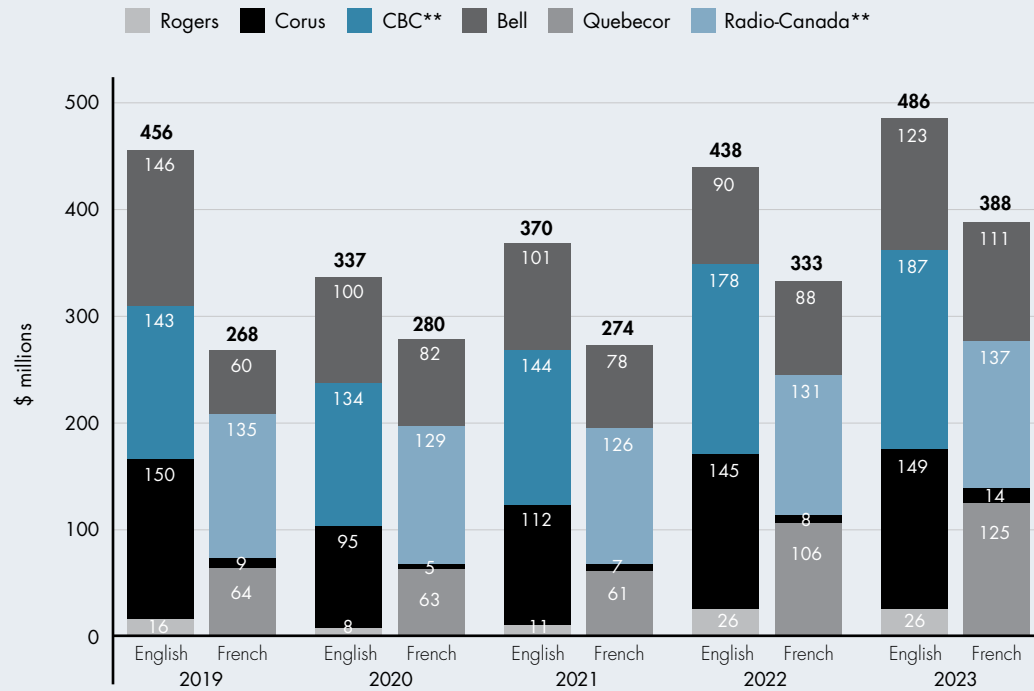
Source: CRTC, data from the *Aggregate Annual Returns* filed by the Broadcasting Groups.

Note: Some totals may not sum due to rounding.

* Includes Canadian drama and comedy; long-form documentary; English-language awards shows; and French-language music, dance and variety programming.

** PNI totals for CBC and Radio-Canada are estimates based in part on CRTC data and will also include expenditures from National News services (i.e., CBC News Network and ICI RDI).

Exhibit 9-8 Canadian broadcaster spending on independent production by large broadcasting group*



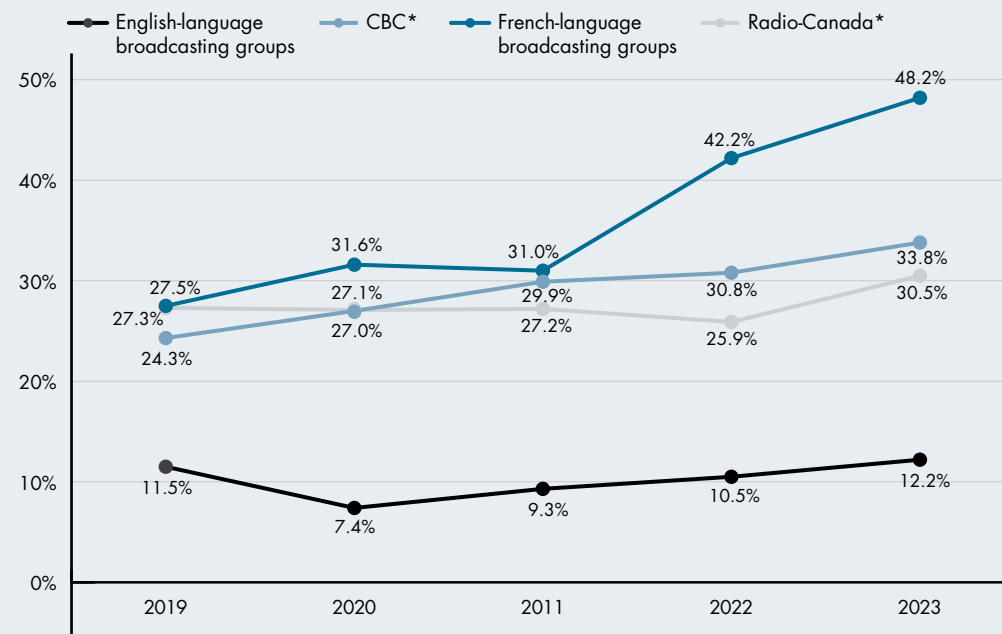
Source: CRTC, data from the *Aggregate Annual Returns* filed by the Broadcasting Groups.

Note: Some totals may not sum due to rounding.

*CRTC designated groups.

** While the CBC and Radio-Canada are not designated groups, the respective numbers for Conventional TV and discretionary services (excluding National News services) are provided for comparison purposes.

Exhibit 9-9 Independent production as a share of (previous year) revenue



Source: CRTC, data from the *Aggregate Annual Returns* filed by the Broadcasting Groups.

Note: Some totals may not sum due to rounding.

* Includes conventional and discretionary services but excludes National News services (i.e., CBC News Network and ICI RDJ).

10. Theatrical exhibition and audiences

The theatrical exhibition industry includes theatre chains, independent theatres and IMAX theatres that exhibit theatrical feature films. Even with the growth in online distribution platforms, the theatrical exhibition industry remains an important window for the release of feature films in Canada. There were 2,677 theatre screens and over 56 million tickets sold in Canada in 2022 (the most recent year of data published by Statistics Canada).⁴⁰ Over 96 million tickets were sold in 2018.⁴¹

Highlights from 2023



- Theatrical exhibition industry revenue increased by 14.2% to \$1.66 billion, from the pandemic-suppressed level observed in 2022.
- Total box office receipts increased by 32.9% to \$889 million.
- Canadian films' box office revenue in Canada increased 148.8% to \$29 million.
- Canadian films' share of the Canadian box office increased to 3.3%.
- In the French-language market, Canadian films' box office revenue increased to \$18.7 million and their share rose to 17.5%.
- In the English-language market, Canadian films' box office revenue increased to \$10.6 million, and their share rose to 1.4%.



- The number of Canadian feature films released in Canadian theatres was virtually unchanged in 2023, declining from 129 to 128.⁴²



- The proportionate number of Canadian films to total new releases in Canadian theatres decreased by 16.1%, with their share declining to 14.0%.

⁴⁰ Statistics Canada (2023). Table 21-10-0180-01.

⁴¹ Statistics Canada (2019). Table 21-10-0180-01.

⁴² Note that the number of new Canadian films released in theatres in a given calendar year will differ from the number of Canadian theatrical feature films produced during the associated fiscal year, since, for example, some of the films released may have been produced in earlier years.

Canada's theatrical exhibition industry continued to recover in 2023 from the effects of COVID-19 closures in 2020; however, it still did not reach its pre-pandemic level of box office revenue. In fact, although the Canadian box office in 2023 (\$889 million) increased by 32.9% compared to 2022, it was still 12.1% below where it was in 2019 (\$1.01 billion), just prior to the onset of COVID-19 pandemic in Canada (Exhibit 10 - 3).

The experience of the Canadian theatrical box office in 2023 was consistent with global trends. Globally, the releases of *Barbie* and *Oppenheimer* in summer 2023 helped bring mass audiences back to cinemas in many countries. However, while the global box office revenue is estimated to have increased by approximately 30% compared to 2022, it was still expected to finish the year 15% lower than pre-pandemic levels (i.e. the average of global box office in 2017 to 2019).⁴³

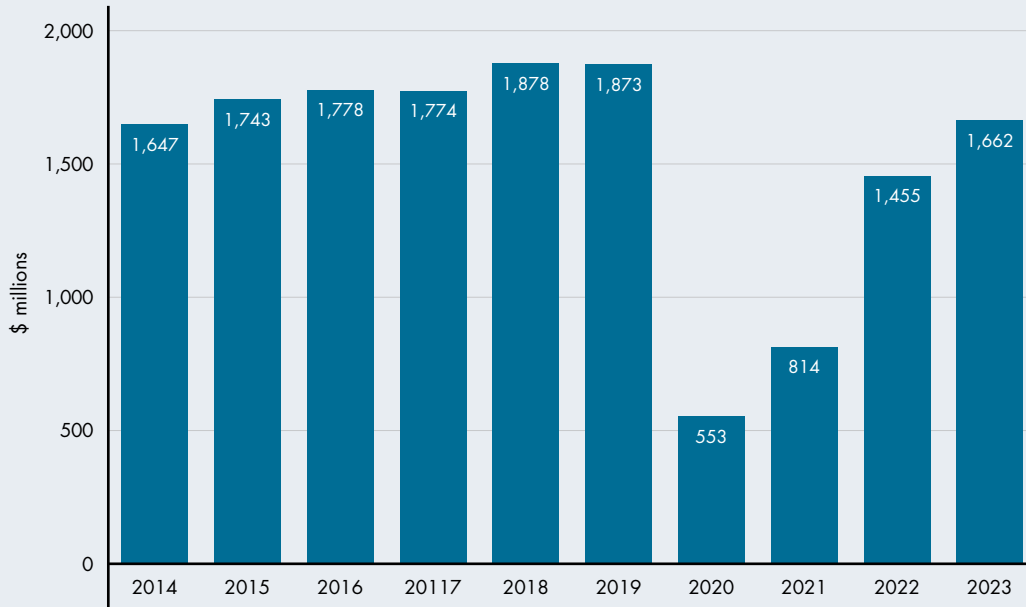
In Canada, total box office revenue rose by 32.9% in 2023 (Exhibit 10 - 3), helping to lift the industry's total revenue (including food and beverage sales, advertising and other revenue) by 14.2% to \$1.66 billion (Exhibit 10 - 1). As the overall box office and industry revenue continued to improve in 2023, Canadian films' box office performance improved at a slightly faster pace, allowing Canadian films to increase their market share. Canadian films earned a total of \$29 million in 2023, up from \$12 million in 2022, lifting their share of the box office from 1.8% to 3.3% (Exhibits 10 - 3 and 10 - 4).

Canadian films' improved box office performance was observed in both language markets. In the French-language market, seven Canadian films earned over \$1 million in Canada in 2023, helping to nearly double Canadian films' total domestic box office revenue to \$18.7 million and lifting their share to 17.5% (Exhibit 10 - 6). In the English-language market, *Paw Patrol: The Mighty Movie* and *BlackBerry*, helped lift Canadian films' box office revenue to \$10.6 million – the highest level since 2014. Canadian films' box office share in the English-language market increased to 1.4%, from only 0.4% in 2022.

⁴³ Gower Street Analytics (2024). "Gower Street Analytics estimates 2023 global box office hit \$33.9 billion." January 4, 2024.

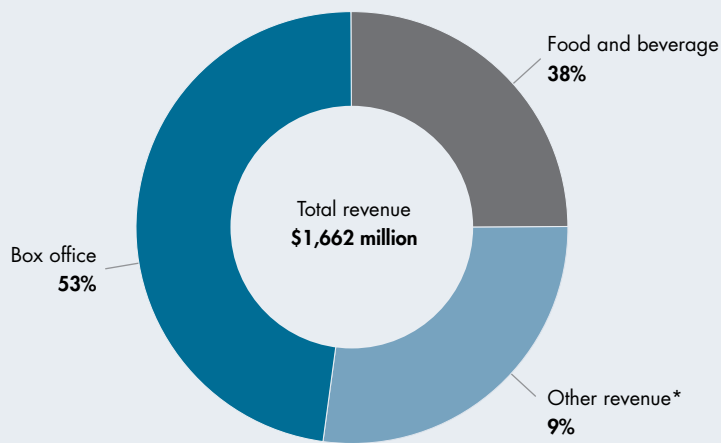
TOTAL REVENUE

Exhibit 10-1 Total revenue in the theatrical exhibition industry in Canada



Sources: Nordicity estimates based on data from the Movie Theatre Association of Canada (MTAC), Statistics Canada, catalogue no. 87F0009X and table: 21-10-0178-01, and Cineplex Inc.

Exhibit 10-2 Sources of revenue in the theatrical exhibition industry in Canada, 2022



Sources: Nordicity estimates based on data from MTAC, Statistics Canada, catalogue no. 87F0009X and table: 21-10-0178-01 and Cineplex Inc.
 * Includes revenue earned from sales of in-theatre advertising, other advertising sales, merchandise sales, private screenings and parties, and corporate events.

FILM FESTIVALS

In recent years, many of the film festivals that traditionally acted as markets for the selling of independent productions to distributors have evolved into more sophisticated marketing and sales operations. Festivals are now often a means of building word-of-mouth and interest by actively cultivating audiences ahead of a theatrical release, as well as providing the forum for industry practitioners to engage with each other and filmmakers. During the COVID-19 pandemic, most festivals accelerated their pivoting towards digital engagement with audiences and delegates, either exclusively or in combination with live events. However, in 2022/23, most festivals resumed their live audience programming, while maintaining their digital programming as well.

In terms of the value chain that operates in the film and television sector, film festivals often play a key role in mediating the transactions between independent filmmakers and distributors and broadcasters. These significant economic benefits are mostly captured within the distribution and broadcasting segments of the value chain.

Film festivals continue to be an integral element of the film sector ecosystem, with hundreds spread all across Canada, covering a broad range of genres. There are genuinely global festivals such as the Toronto International Film Festival (TIFF), operating in the company of Cannes, Venice, and Sundance; world-leading specialist film festivals such as the Ottawa International Animation Festival, Hot Docs Canadian International Documentary Festival, imagineNATIVE Film + Media Arts Festival; and popular genre festivals, such as Montreal's Fantasia International Film Festival, which continue to attract large audiences.

In 2022/23, as part of its support for the promotion of Canadian films, Telefilm Canada provided \$12.2 million in financial support to 150 Canadian film festivals and 86 industry events and initiatives in Canada.⁴⁴ These 150 festivals are major events in Canada and many have adopted hybrid formats with both live and online screenings. In addition, there are numerous smaller, regional⁴⁵ festivals that operate without much public support. Of the 150 supported film festivals, 76 were in the regions⁴⁶ and 43 focused on diversity and inclusion⁴⁷

A total of 135 Canadian film festivals received funding from the Department of Canadian Heritage's Reopening Fund, administered by Telefilm Canada, with \$10 million earmarked for disbursement in 2021/22 and 2022/23.⁴⁸

As part of \$15 million in financial support for national and international promotional activities, Telefilm Canada also supported Canadian films screening or marketed at 40 international festivals, markets and events.⁴⁹

⁴⁴ Telefilm Canada (2023). *Full Screen: 2022-2023 Annual Report*. P. 13

⁴⁵ Telefilm Canada defines 'regional' and 'regions' as all areas outside of 150 km from downtown Montreal or Toronto.

⁴⁶ All areas outside of 150 km from downtown Montreal or Toronto.

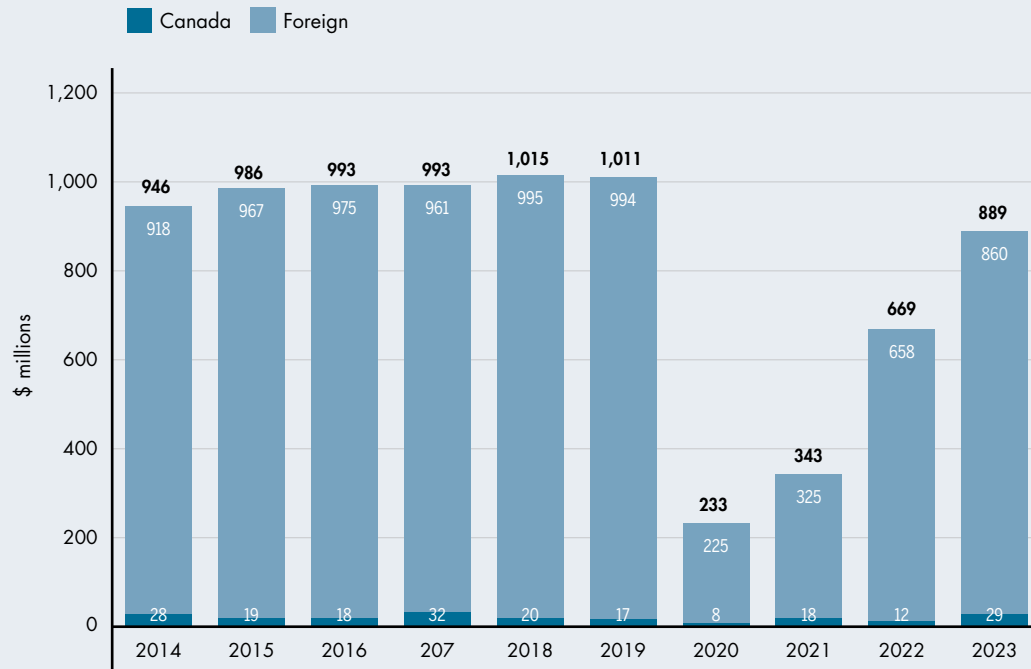
⁴⁷ Telefilm Canada (2023). *Full Screen: 2022-2023 Annual Report*. P. 45.

⁴⁸ Department of Canadian Heritage (2021). "Backgrounder - Continued Support for Arts, Culture, Heritage and Sport Organizations." June 28, 2021.

⁴⁹ Telefilm Canada (2023). *Full Screen: 2022-2023 Annual Report*. P. 13.

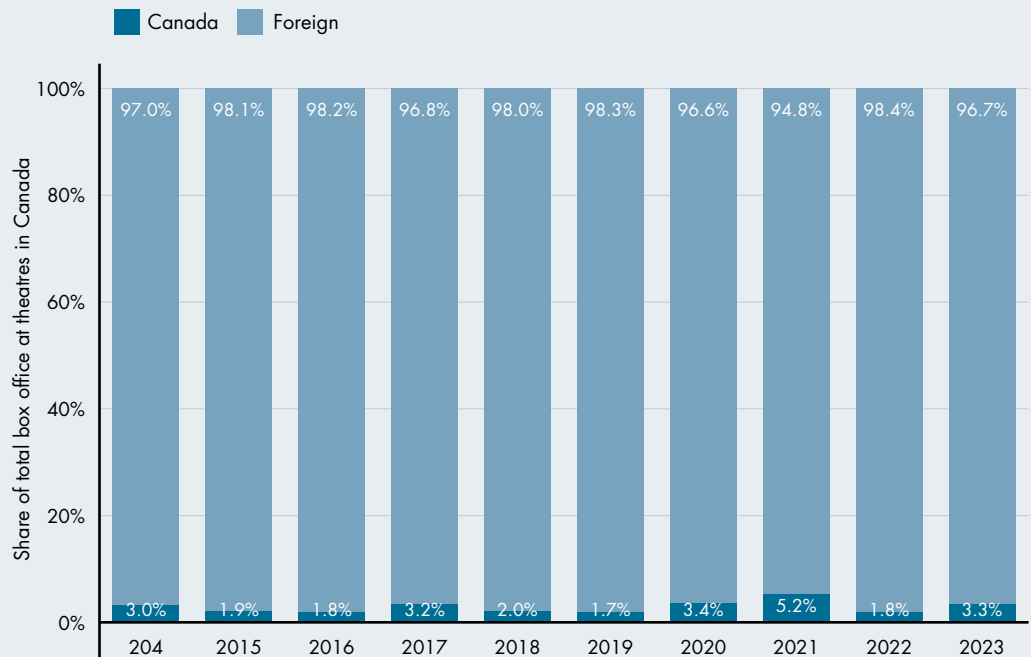
NATIONAL BOX OFFICE TRENDS

Exhibit 10-3 Box office revenue in Canada, by origin of production



Source: MTAC.

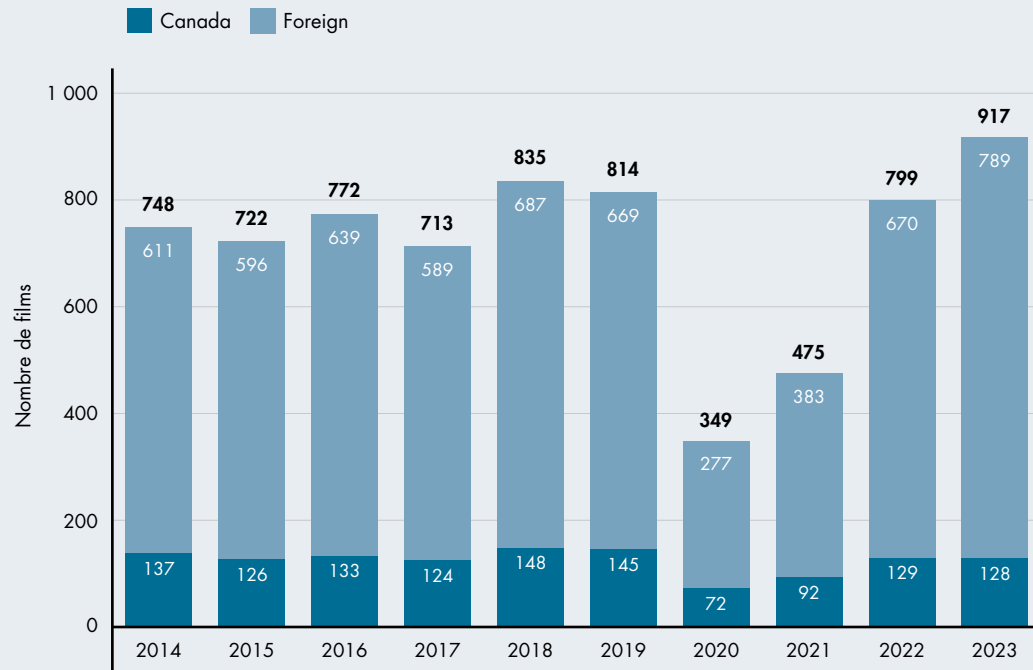
Exhibit 10-4 Shares of total box office revenue in Canada, by origin of production



Source: MTAC.

Note: Some totals may not sum due to rounding.

Exhibit 10-5 Number of new-release feature films playing in theatres in Canada, by origin of production



Source: Department of Canadian Heritage analysis of data from MTAC.

Note: Data only include feature films released for the first time in theatres in a particular year. For example, the statistics for 2023 only include the number of films released in Canadian theatres for the first time in 2023.

BOX OFFICE BY LANGUAGE MARKET

Exhibit 10-6 Box office revenue and market share at theatres in Canada, by language market

French-language market	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023
\$ millions										
Box office of Canadian feature films	12.1	13.8	10.3	23.6	15.8	14.0	6.0	10.8	9.7	18.7
Box office of foreign feature films	108.4	115.2	108.7	103.9	101.6	105.4	28.3	38.4	69.7	88.4
Total box office of feature films	120.5	129.0	119.0	127.5	117.4	119.4	34.3	49.2	79.4	107.1
Canadian feature films' share	10.0%	10.7%	8.7%	18.5%	13.5%	11.7%	17.5%	22.1%	12.2%	17.5%
Number of feature films playing in theatres in Canada										
Canadian	91	84	104	95	112	111	68	78	95	117
Foreign	280	280	291	289	318	345	236	213	262	283
Total	371	364	395	384	430	456	304	291	357	400
Ratio of foreign to Canadian feature films	3.1	3.3	2.8	3.0	2.8	3.1	3.5	2.7	2.8	2.4
English-language market										
\$ millions										
Box office of Canadian feature films	16.3	4.9	7.4	8.6	4.6	3.1	1.7	6.9	2.1	10.6
Box office of foreign feature films	809.1	852.2	866.4	857.3	893.1	888.7	196.9	287.0	587.9	771.7
Total box office of feature films	825.3	857.1	873.8	865.9	897.7	891.8	198.6	293.9	590.0	782.3
Canadian feature films' share	2.0%	0.6%	0.8%	1.0%	0.5%	0.3%	0.9%	2.3%	0.4%	1.4%
Number of feature films playing in theatres in Canada										
Canadian	121	102	113	113	120	132	87	84	136	156
Foreign	870	803	973	949	1,058	1,084	774	703	1,039	1,261
Total	991	905	1,086	1,062	1,178	1,216	861	787	1,175	1,417
Ratio of foreign to Canadian feature films	7.2	7.9	8.6	8.4	8.8	8.2	8.9	8.4	7.6	8.1

Source: MTAC.

Note: Some totals may not sum due to rounding

TOP FEATURE FILMS BY LANGUAGE OF PRESENTATION

Exhibit 10-7 Top 10 Canadian-produced feature films presented in the English-language market, 2023

Title	Box office receipts* (\$ millions)	Original language of production
1. <i>Paw Patrol: The Mighty Movie</i>	5.95	English
2. <i>Blackberry</i>	1.08	English
3. <i>Infinity Pool</i>	0.54	English
4. <i>La légende du Papillon</i>	0.36	French-English
5. <i>Bones of Crows</i>	0.33	English-Cree
6. <i>Toupie et binou, le film</i>	0.31	French
7. <i>Katak, le brave beluga</i>	0.30	French
8. <i>Brother</i>	0.16	English
9. <i>I Like Movies</i>	0.14	English
10. <i>Skinamarink</i>	0.11	English

Source: MTAC.

* Box office receipts earned between January 1 and December 31, 2023. This amount may under-represent a particular film's total box office receipts, if the film played in Canadian cinemas in other calendar years.

Exhibit 10-8 Top 10 Canadian-produced feature films presented in the French-language market, 2023

Title	Box office receipts* (\$ millions)	Original language of production
1. <i>Le temps d'un été</i>	2.18	French
2. <i>Testament</i>	1.73	French
3. <i>Les hommes de ma mère</i>	1.71	French
4. <i>Paw Patrol: The Mighty Movie</i>	1.53	English
5. <i>Katak, le brave beluga</i>	1.48	French
6. <i>Ru</i>	1.36	French
7. <i>Simple comme Sylvain</i>	1.01	French
8. <i>Le plongeur</i>	0.95	French
9. <i>La cordonnère</i>	0.72	French
10. <i>Coco ferme</i>	0.58	French

Source: MTAC.

* Box office receipts earned between January 1 and December 31, 2023. This amount may under-represent a particular film's total box office receipts, if the film played in Canadian cinemas in other calendar years.

Exhibit 10-9 Top 10 feature films presented in the English-language market, 2023

Title	Box office receipts* (\$ millions)	Country of origin
1. <i>Barbie</i>	64.82	US-UK
2. <i>The Super Mario Bros. Movie</i>	51.72	US-Japan
3. <i>Oppenheimer</i>	37.98	US-UK
4. <i>Avatar: The Way of Water</i>	37.91	US
5. <i>Spider-Man: Across the Spider-Verse</i>	32.36	US
6. <i>Guardians of the Galaxy Vol. 3</i>	29.34	US-New Zealand
7. <i>Mission: Impossible - Dead Reckoning Part One</i>	21.15	US
8. <i>John Wick: Chapter 4</i>	20.25	US-Germany
9. <i>Ant-Man and the Wasp: Quantumania</i>	19.43	US-Australia
10. <i>Taylor Swift: The Eras Tour</i>	16.33	US

Source: MTAC.

* Box office receipts earned between January 1 and December 31, 2023. This amount may under-represent a particular film's total box office receipts, if the film played in Canadian cinemas in other calendar years.

Exhibit 10-10 Top 10 feature films presented in the French-language market, 2023

Title	Box office receipts* (\$ millions)	Country of origin
1. <i>Avatar: The Way of Water</i>	8.68	US
2. <i>The Super Mario Bros. Movie</i>	8.39	US-Japan
3. <i>Barbie</i>	5.75	US-UK
4. <i>Elemental</i>	2.81	US
5. <i>Oppenheimer</i>	2.78	US-UK
6. <i>Guardians of the Galaxy Vol. 3</i>	2.48	US-New Zealand
7. <i>Puss in Boots: The Last Wish</i>	2.47	US
8. <i>Mission: Impossible - Dead Reckoning Part One</i>	2.42	US
9. <i>Indiana Jones and the Dial of Destiny</i>	2.40	US
10. <i>Le temps d'un été</i>	2.18	Canada

Source: MTAC.

* Box office receipts earned between January 1 and December 31, 2023. This amount may under-represent a particular film's total box office receipts, if the film played in Canadian cinemas in other calendar years.

11. Broadcasting distribution undertakings

The broadcasting distribution sector includes cable, direct-to-home (DTH) satellite and Internet protocol TV (IPTV) services, which allow Canadian households and businesses to access licensed television programming services, including conventional, discretionary and on-demand services, by subscribing to channel packages and certain à la carte services. Cable, DTH satellite and IPTV services are also referred to as broadcasting distribution undertakings (BDUs); collectively, they comprise the BDU industry.

Highlights from 2022



- IPTV subscribers increased by 28% to 5.5 million.⁵⁰



- The number of BDU subscribers declined by 2.9% to 9.7 million.
- BDU revenues declined by 5.2% to \$7.4 billion.
- BDUs' contributions to the creation of Canadian programming decreased by 1.8% to \$390 million.

⁵⁰ A portion of the increase in IPTV subscribers is due to the migration of some subscribers from Cable TV to an IP-based distribution platform.

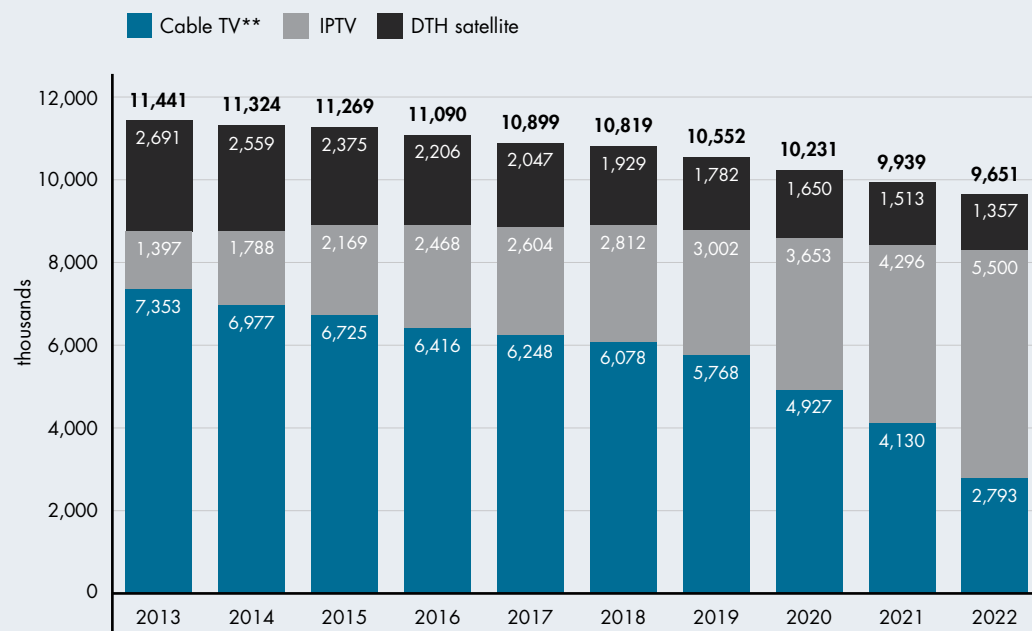
The latest data available is provided from the CRTC annual returns filed for the 2022 broadcasting year (September 1, 2021 to August 31, 2022). Canada’s BDU industry continued to experience a significant rate of cord-cutting in 2022. According to statistics from the Canadian Radio-television and Telecommunications Commission (CRTC), the number of subscriptions to Canadian BDU services peaked at 11,529,000 in 2012 (Exhibit 11 - 1). Since that year, the industry has experienced annual declines, including a record net loss of 338,000 subscribers (3.2%) in 2020. In 2022, the BDU industry shed 288,000 subscribers, or 2.9% of the subscriber base at the end of 2021. Since 2019, Canada’s BDU industry has been losing an average of 2.9% of subscribers annually.

The continued cord-cutting in 2022 was not surprising, given the take-up of subscription video on demand (SVOD) services and other Internet-based video services, including transaction video-on-demand (TVOD) and advertising video-on-demand (AVOD) services. In 2022, the total revenue earned by Internet-based video services in Canada increased by 13% to \$5.7 billion.⁵¹ Between 2014 and 2022, these services’ revenues grew at an annual average rate of 24.6%.⁵² SVOD services, such as Netflix, Amazon Prime Video, Disney+, Crave, Club illico, Gem, ICI Tou.tv and Sportsnet Now, accounted for \$2.6 billion in revenue in 2022; AVOD services such as YouTube accounted for \$2.4 billion; and TVOD services such as iTunes accounted for \$285 million.⁵³

Through their contributions to the Canada Media Fund (CMF), certified independent production funds (CIPFs) and the funding of local programming, BDUs support the creation of Canadian content. In 2022, BDUs’ contributions to the creation of Canadian programming decreased by 1.8% to \$390 million (Exhibit 11 - 3). This overall decrease included a 4.1% decrease in contributions to the CMF. Their contributions to independent production funds were 5.6% lower and still one-third lower than the level in 2015 (\$65 million). Meanwhile, BDUs’ contributions to local expression (i.e., community programming and locally reflective news) increased by 1.8%

BDU SUBSCRIBERS AND REVENUE

Exhibit 11-1 Number of BDU subscribers*



Source: CRTC.

Note: Some totals may not sum due to rounding.

* Excludes BDUs not required by regulations to report financial and operating data to the CRTC.

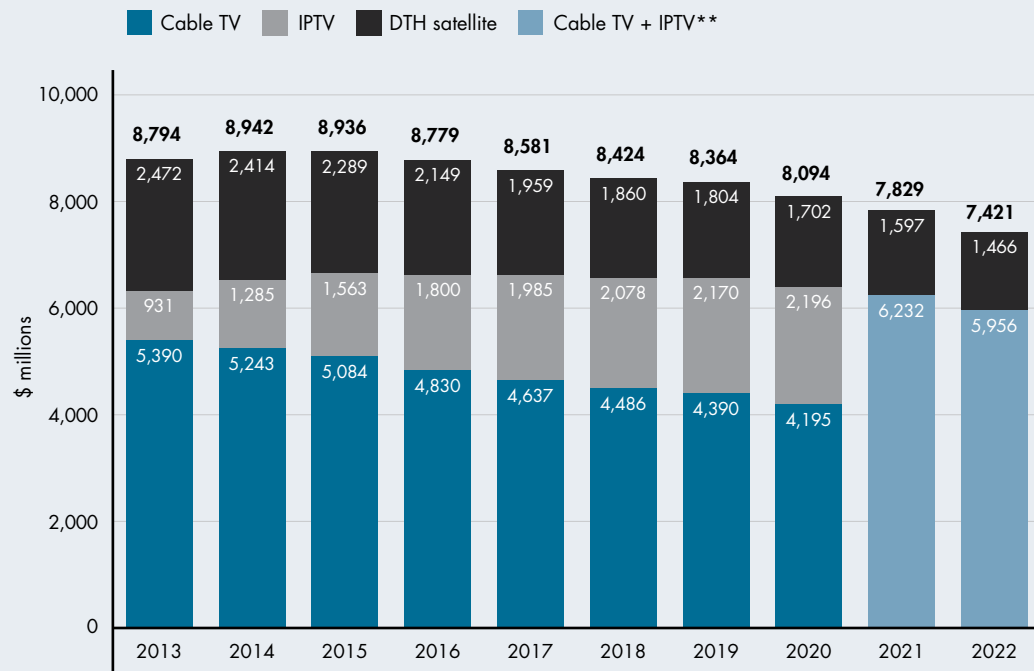
** A portion of the decrease in cable-TV subscribers is due to the migration of subscribers to an IP-based distribution platform, rather than subscriber churn from Cable TV.

⁵¹ CRTC (2022d). *Communications Market Reports – Open Data*. Table TV-21.

⁵² Ibid.

⁵³ Ibid.

Exhibit 11-2 Total revenue in the Canadian BDU industry*



Source: CRTC.

Note: Some totals may not sum due to rounding.

* Excludes BDUs not required by regulations to report financial and operating data to the CRTC.

** Beginning in 2021, the CRTC reports the total revenue for cable TV and IPTV subscribers only on a combined basis.

INVESTMENT IN CANADIAN PROGRAMMING

Exhibit 11-3 BDUs' investments in Canadian programming

	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022
CMF	216	219	219	215	206	193	191	189	185	177
Independent production funds	61	64	65	63	58	46	45	44	43	41
Local Programming Improvement Fund	75	40	0	0	0	0	0	0	0	0
Local expression										
Licensee's own community channel	—*	—*	—*	—*	—*	112	106	107	105	110
Community programming in other markets operated by the licensee	—*	—*	—*	—*	—*	3	2	1	1	3
Locally reflective news programming	—*	—*	—*	—*	—*	48	49	47	43	39
Subtotal	141	152	153	154	154	162	156	156	149	152
Independent Local News Fund (ILNF)	0	0	0	0	0	22	21	21	20	19
Total	493	475	437	431	417	422	414	409	397	390

Source: CRTC.

Note: Some totals may not sum due to rounding.

* Detailed breakdown of local expression not available prior to 2018

Notes on Methodology

Estimates of Canadian production

The estimates of Canadian production are based on data from the Canadian Audio-Visual Certification Office (CAVCO) of the Department of Canadian Heritage. In order to account for the fact that there is a 42-month window in which producers may submit their application to CAVCO,⁵⁴ Nordicity applied the following gross-up factors to the raw production data supplied by CAVCO:

- 2020/21: 2.9%
- 2021/22: 5.4%
- 2022/23: 11.0%

These rates were based on historical rates of under-coverage observed in the CAVCO statistics between 2012/13 and 2018/19 (i.e. before the COVID-19 pandemic), with particular weight given to the rates of under-coverage observed in the latter years of this 7-year period.⁵⁵

Revisions to historical statistics

Due to the 42-month application lag at CAVCO, it is possible that the data from CAVCO may not provide a comprehensive indication of production volume until up to four years after the end of a particular fiscal year. As a result, the Canadian production statistics reported in *Profile 2023* for the previous three years (2019/20, 2020/21 and 2021/22) have been revised to reflect all currently available data from CAVCO.

Estimates of Canadian television production certified by the Canadian Radio-television and Telecommunications Commission

The estimates of Canadian television production include an estimate of television production certified by the Canadian Radio-television and telecommunications Commission (CRTC) (i.e. television production exclusively certified by the CRTC). Research conducted by Nordicity and the Department of Canadian Heritage in 2009 indicated that CRTC-certified television production accounted for an estimated 13.5% of total Canadian production. This rate was used in *Profile 2023* to estimate the total volume of CRTC-certified production.

Short films

Short films include films under 75 minutes in length. In *Profile 2012* and earlier editions, data for theatrical short films was included in the overall statistics for Canadian theatrical production. Beginning in *Profile 2013*, data for theatrical short films was included in the statistics for Canadian television production. In *Profile 2023*, data for theatrical short films has been included in Canadian television production for all years – 2013/14 through 2022/23.

Although the definition of theatrical short films would imply that they should be included in the Canadian theatrical production statistics, by removing them, we can better isolate data on theatrical feature films. Furthermore, we note that the low volume of theatrical short film production reported in earlier editions of *Profile* suggests that applicants had, in fact, reported many theatrical short films in the Canadian television production category.

⁵⁴ Under the Canadian Film or Video Production Tax Credit (CPTC) program, producers can submit their CPTC application to CAVCO up to 42 months after the end of the fiscal year in which principal photography started.

⁵⁵ The higher weighting given to more recent years (i.e. in the years leading up to 2018/19) is intended to reflect the fact that producer-application practices in those more recent years would likely be more reflective of the application lag situation between 2019/20 to 2022/23 than in earlier years.

Canada Media Fund

The statistics reported for the CMF include data for Convergent Stream production supported by the CMF. Statistics for CMF funding and supported production are reported on a fiscal-year basis, April 1 to March 31. Data is collected by the CMF during pre-production. In this report, if the source of the data is CMF alone, the data represents a pre-production year. If the source refers to CMF data with other sources, such as CAVCO, a project's fiscal year is adjusted accordingly.

Broadcaster in-house production

A complete set of provincial statistics was not available for private broadcaster in-house production in the Prairie Provinces and Atlantic Canada. For the Prairie Provinces, Nordicity developed estimates based on the historical shares observed in the CRTC statistics prior to 2001 – before the CRTC began to suppress the provincial statistics. The breakdown of private broadcaster in-house production among the provinces in Atlantic Canada was also based on the development of estimates. Because no historical data existed, each province's share of Atlantic Canada's total gross domestic product (GDP) was used as the proxy variable for the estimate.

Reconciliation with statistics published by federal and provincial funding agencies

Certain federal and provincial funding agencies, including Telefilm Canada, also publish statistics for film and television production activity. The statistics published by these funding agencies may differ from those in *Profile 2023* for a variety of reasons:

- Some funding agencies publish production statistics on a calendar-year basis rather than on a fiscal-year basis, as they are reported in *Profile*.
- Statistics reported by Telefilm Canada only include feature films that either received financial support from the agency or were recommended under one of Canada's audiovisual coproduction treaties.
- Some funding agencies report production activity on the basis of the fiscal year in which a film or television project receives approval for its tax credit application or other type of funding award, rather than the year in which the project's principal photography starts (i.e. the practice used by CAVCO). For example, Telefilm Canada reports feature film production activity based on the fiscal year in which a project receives its funding commitment from the agency.
- Statistics reported by funding agencies exclude broadcaster in-house production.
- Provincial funding agencies typically report production activity on the basis of the province in which the film or television project occurred, whereas the statistics in *Profile* are reported on the basis of the province in which the producer of the project is based (i.e. the practice used by CAVCO).

Foreign investment in production

Foreign investment in production (FIIP) tracks the value of international financial participation in the film and television production industry in Canada. FIIP includes foreign presales and distribution advances for all projects certified by CAVCO; estimates of presales and distribution advances for non-CAVCO-certified productions; and the total value of foreign production (location and service) (FLS) in Canada. FIIP as opposed to just exports better reflects the nature of film and television production in Canada. It acknowledges that film and television productions are intangible products and portions of the copyright can be exported to foreign countries. It also accounts for the budgets of productions shot in Canada, even when the copyright is held by a foreign entity.

The data used to estimate FIIP only includes the financing of the Canadian budget of treaty coproductions. As a result, the foreign budgets for treaty coproductions do not directly contribute to FIIP. Treaty coproductions contribute only to FIIP if the financing of the Canadian budget includes a foreign presale or distribution advance.

Estimation of person-count employment

To estimate the number of people employed in film and television production (i.e. direct employment) as well as the spin-off employment generated by film and TV production, Nordicity developed multipliers for converting the number of full-time equivalents (FTEs) into headcount. (See below for description of the methodology for estimating FTEs).

For direct employment, these multipliers were developed based on research of aggregate wages, days worked, and the number of people currently registered with unions and guilds to work in film and TV production in Canada. In total, data was collected from seven local unions, and three broader labour organisations (i.e. ICG, ACTRA, DGC) representing workers in multiple parts of Canada.

These calculations were based on labour force participation measured in 2017, 2018, 2019 and 2020, and may change over time depending on labour market conditions and changes in the overall composition of the film and TV production workforce by department.

For spin-off employment, Nordicity developed a separate multiplier based on the economy-wide ratio of employees to full-time equivalents. This economy-wide ratio was based on data published in Statistics Canada Tables 14-10-0043-01 and 14-10-0327-03.

Estimation of full-time equivalent (FTE) employment

Nordicity calculated the number of direct jobs by estimating the share of total production volume that was paid as salaries and wages to cast and crew, and then dividing this estimate by an estimate of the average salary of an FTE in the film and television production sector.

Nordicity multiplied total production volume by 57%, to estimate the portion of production budgets that was paid as salary and wages to cast and crew members. This assumption of 57% is based on data provided by CAVCO on the average portion of production budgets comprised of Canadian labour expenditures.

The average FTE salary assumption for 2022/23 was \$79,638. Nordicity developed the average FTE salary assumption based on data from Statistics Canada’s 2016 Census. From 2016 onwards, Nordicity has made annual adjustments to the average FTE assumption by applying the average rate of change in the economy-wide average hourly wage (excluding overtime) of employees paid by the hour in Canada (see Statistics Canada, *Survey of Employment, Payroll and Hours*, Table 14-10-0206-01).⁵⁶

Average FTE salary in the film and television production sector

	2013/14	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23
Average FTE cost	\$56,935	\$58,016	\$58,607	\$59,445	\$60,396	\$62,389	\$64,074	\$67,213	\$77,094	\$79,638

Source: Nordicity calculations based on data from Statistics Canada, Census 2016, and Statistics Canada, *Survey of Employment, Payroll and Hours*, Table 14-10-0206-01.

Spin-off employment impact

The number of spin-off FTEs is equal to the sum of indirect and induced FTEs.

Based on previous reviews of Statistics Canada’s 2004 multiplier tables and data for the *Motion Picture and Video Production, Distribution, Post-Production and Other Motion Picture and Video Industries* (which was the closest industry grouping to film and TV production); Conference Board of Canada, *Valuing Culture: Measuring and Understanding Canada’s Creative Economy* (2008); and adjustments to take into account wage inflation.

Economic impact of production

Labour income

Direct labour income in the film and television production sector was derived by multiplying the number of direct FTEs by the average production-sector FTE cost of in the film and television production industry (see above). The estimate of spin-off labour income was derived by multiplying the number of spin-off FTEs by an economy-wide average FTE cost of \$58,275.

Gross domestic product

Given the prominence of wages and salaries within the direct impact of film and TV production, direct GDP was calculated by multiplying direct labour income by 1.02. Spin-off GDP was derived by applying the GDP-wage ratio of 1.49 implied by the analysis in Conference Board of Canada, *Valuing Culture: Measuring and Understanding Canada’s Creative Economy* (2008).

⁵⁶ To better reflect the labour market and production-cost conditions within the film and television production industry, for 2020/21, Nordicity applied the implied average annual rate of change in the average hourly wage (excluding overtime) within the Information and Cultural Industries (14.7%).

Glossary

Advertising video-on-demand (AVOD)	An Internet-based service that gives consumers free access to video content in exchange for being exposed to advertising (e.g. YouTube).
Average minute audience (AMA)	The average number of persons watching a television program during any 60-second portion of that program.
Broadcaster in-house production	Refers to television programs made internally by broadcasters. It largely consists of news and sports programming, but can also include production in other genres.
Broadcasting distribution undertakings (BDUs)	Includes cable, direct-to-home (DTH) satellite) and Internet protocol TV (IPTV) service providers that allow Canadian households and businesses to access licensed television programming services, including conventional television, discretionary television services and on-demand television services, by subscribing to channel packages and certain à la carte services.
Canada Media Fund (CMF)	Funded by the Government of Canada, and cable, DTH satellite and IPTV service providers, with a mandate to support the creation of Canadian convergent digital content across multiple platforms, including television and leading-edge new media applications, as well as experimental content applications or software for the Internet, wireless and other emerging digital platforms.
Canadian Audio-Visual Certification Office (CAVCO)	The section within the Department of Canadian Heritage that co-administers (with the Canada Revenue Agency) the two federal tax credit programs (Canadian Film or Video Production Tax Credit [CPTC] and Film or Video Production Services Tax Credit [PSTC]). As part of this role, it is responsible for assessing television programs and films against its content-points scale (in conjunction with other eligibility criteria) to determine if a film or television program is eligible to access the CPTC and thereby can also access other funding mechanisms available through Telefilm Canada, CMF or Canadian Independent Production Funds.

Canadian Film or Video Production Tax Credit (CPTC)	The federal government tax credit program for supporting the production of films and television programs that qualify as Canadian content. The CPTC provides a tax credit equal to 25% of a production's qualified labour expenditures. Qualified labour expenditures are capped at 60% of a production's total costs, net of any assistance received.
Canadian programming expenditure (CPE)	The monetary value of licensed Canadian broadcasters' spending on original or acquired television programs that qualify as Canadian content.
Canadian Radio-television and Telecommunication Commission (CRTC)	Canada's regulator of the broadcasting and telecommunications sectors.
Conventional television / Conventional TV	Includes private and public broadcasters that maintain over-the-air (OTA) infrastructure to broadcast to households, although the vast majority of Canadian households now receive conventional television signals via cable television, DTH satellite television or IPTV providers.
Convergent Stream	A funding stream of the CMF that provides financial support to the production of digital media components that are related to CMF-funded television productions in order to provide content on different digital media platforms.
Coproduction	A film or television program made by producers from two or more countries and typically shot in those producers' countries. Coproductions are often made in accordance with international treaties to ensure that they receive national treatment in each producer's country ("audiovisual treaty coproductions"). Note the coproduction section only includes statistics for audiovisual treaty coproductions.
Direct-to-home (DTH) satellite television	A BDU service under which households and businesses utilize a small aperture satellite antenna to receive television signals.
Discretionary services	Refers to television services that are only available via cable, DTH satellite and IPTV service providers, and typically provide sports, 24-hour news, movies, arts and other thematic programming. Discretionary services earn revenue from a combination of subscription fees and advertising. They may also be referred to as specialty television or pay television services.
Educational broadcasters	Refers to the four television broadcasting licensees controlled by provincial governments, which focus on the provision of educational programming. The four educational broadcasters include TéléQuébec, TVO, Knowledge Network (BC) and Groupe Média TFO.

Experimental Stream	A funding stream of the CMF that provides financial support to the production of interactive digital media content, software applications and web series that are unrelated to CMF-funded television productions.
Film or Video Production Services Tax Credit (PSTC)	The federal government tax credit program for supporting the production of films and television programs that do not qualify as Canadian content. The PSTC provides a tax credit equal to 16% of a production's qualified Canadian labour expenditures, net of any assistance received.
Foreign investment in production (FIIP)	A measurement of the value of international financial participation in the film and television production sector in Canada. It includes foreign presales and distribution advances for all projects certified by CAVCO; estimates of presales and distribution advances for non-CAVCO-certified productions; and the total value of foreign production (location and service) (FLS) in Canada
Foreign production (location and service) (FLS)	Includes feature films and television programs filmed in Canada primarily by foreign producers. It also includes the visual effects (VFX) work done by Canadian VFX studios for foreign films and television programs.
Free Ad-Supported Streaming Television (FAST)	A type of internet-based television service that gives consumers access without having to pay a subscription because the service sells advertising to fund its operations.
Gross domestic product (GDP)	The sum of the economic value-added generated within an industry or economy. The difference between the value of an industry's output and the value of the inputs it consumes from other industries.
Internet-based television services or Internet-based video services	Includes SVOD, AVOD, TVOD and FAST services.
Internet protocol TV (IPTV)	A BDU service that is supplied to households and businesses through a broadband connection.
On-demand services	On-demand services permit consumers to watch specific films or television programs whenever they want, rather than at a scheduled time (i.e. linear television). On-demand services can be offered over BDU platforms (VOD) or over the Internet (SVOD, AVOD, TVOD and FAST).
Programs of national interest (PNI)	Television programming that falls within the categories of drama and comedy; long-form documentary; English-language awards shows; and French-language music, dance and variety programming.

Spin-off impact

Refers to the sum of the indirect and induced economic impacts. The indirect impact includes the employment and GDP generated within industries that supply goods and services to the production sector. The induced impact includes the employment and GDP generated in consumer industries within the Canadian economy that benefit from the re-spending of wages earned by production sector cast and crew, and the workers employed in the supplier industries.

Subscription video-on-demand (SVOD)

A television service whereby consumers pay a monthly subscription fee so that they can choose which specific films or television programs to watch and when to watch them (e.g. Netflix, Disney+, Crave, Club illico, Amazon Prime Video, NFL Game Pass). Consumers typically access SVOD services over set-top boxes, smart TVs, personal computers or mobile devices.

Telefilm Canada

Founded in 1967, Telefilm Canada is a Government of Canada Crown corporation in the Canadian Heritage portfolio. The mandate of the Corporation is to foster and promote the development of the audio-visual industry in Canada. It also administers Canada's treaty coproduction agreements on behalf of the federal government, as well as the funding programs of the CMF.

Transactional video-on-demand (TVOD)

An online service whereby consumers can pay a fee to download a specific film or television program (e.g. Apple iTunes). In some cases, TVOD can be used to rent a film or television program, where use of the download is restricted to a period of time.

Video-on-demand (VOD)

A television service whereby consumers can pay a fee to choose specific films or television programs to watch, and when to watch them. In Canada, VOD is typically offered over BDU platforms (i.e. cable-TV, IPTV or DTH satellite).