

PROFILE

2022

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 Association québécoise de la production médiatique, the Department of Canadian Heritage and Telefilm Canada

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Profile 2022 provides an analysis of economic activity in Canada's screen-based media production industry during the period of April 1, 2021 to March 31, 2022. It also provides comprehensive reviews of the historical trends in production activity between the fiscal years of 2012/13 and 2021/22.



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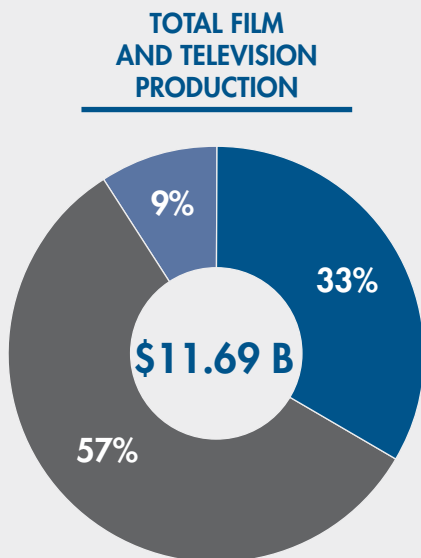
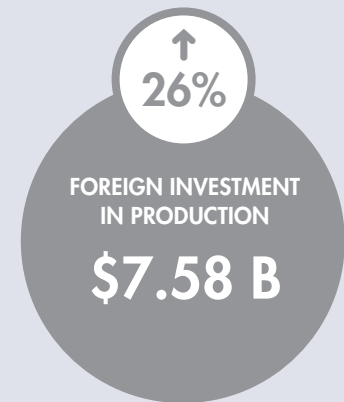
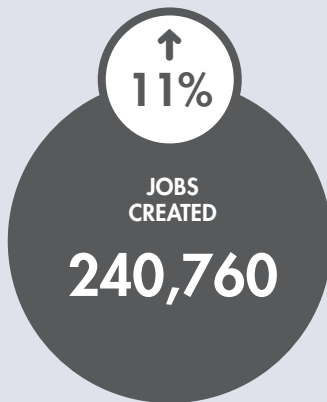
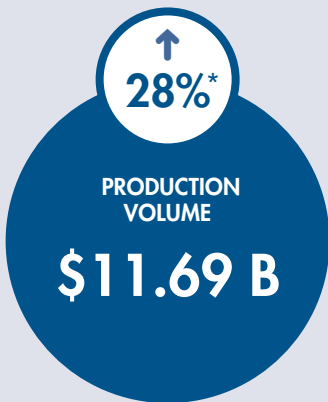
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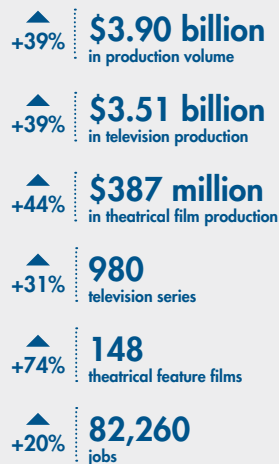
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AT A GLANCE

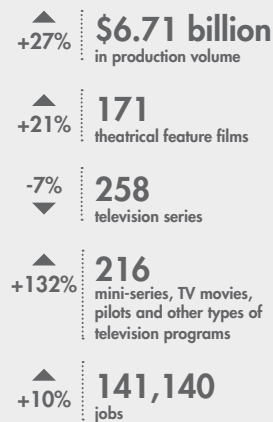
Total film and television production in Canada



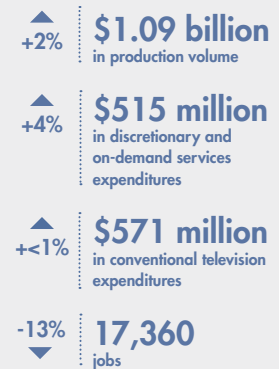
CANADIAN CONTENT (TELEVISION AND THEATRICAL FEATURE FILM)



FOREIGN LOCATION AND SERVICE



BROADCASTER IN-HOUSE



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

Profile 2022 provides a detailed overview of the production activity in the film and television industry from the start of April 2021 to the end of March 2022. It presents economic data for quite a unique period in time, as a confluence of factors have impacted results for an industry emerging out of a pandemic environment.

In almost every way, 2021/22 was a record year. Total production volume leapt by an unprecedented amount, reaching an all-time high of \$11.69 billion. The industry added over \$2.56 billion in production spending, pushing it 21.8% higher than the previous pre-pandemic high of \$9.60 billion in 2019/20. Every segment of the Canada's film and television production industry contributed to this growth, although the biggest contributions came from foreign location and service (FLS) production, increasing 27.3% to \$6.71 billion, and Canadian television production, increasing 38.9% to \$3.51 billion.

But that kind of growth also reflects a number of unique variables, each of them contributing to the significant increases in production activity in 2021/22. Coming out of the COVID-19 pandemic, the industry reversed recent trends and experienced a robust rebound in production activity. That increase was further fueled by general inflationary pressures on productions costs, as it was across much of the Canadian economy. Results for Canadian television production were impacted by Canadian broadcasters restoring their levels of licence fee funding in 2021/22 (even catching up for underspends in prior pandemic years), as well as the continued injection of additional government funding resources made available during the pandemic.

The challenge will be to sustain that level of production activity. The general economy is facing significant economic headwinds, with real concerns about lingering inflation and a possible recession. The prospect of such an economic downturn may impact the general level of economic activity in Canada, including film and television production. Canadian content levels from Canadian broadcasters may be readjusted going forward, as shortfalls from prior years may have been fulfilled.

At the same time, the legislative framework governing the broadcasting sector is under extensive review as a result of Bill C-11 (the *Online Streaming Act*), an act that will modernize the *Broadcasting Act*. That legislation will then trigger a structural examination of the Canadian broadcasting system by the Canadian Radio-television Communications Commission, focusing on a wide range of critical factors affecting the production industry, including the contributions to be made by Canadian as well as foreign services.

Profile 2022 reflects a strong and vibrant Canadian production industry coming out of the pandemic. While the immediate future may include economic and policy uncertainties, longer term trends have demonstrated overall growth and development. This is a resilient industry that has become an important contributor to the Canadian economy. With continued investment and policy support, it is well-positioned to take advantage of the opportunities afforded by new business models for the production and distribution of programming content in Canada and around the world.

1. Overview of the screen sector in Canada

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

1. The **Canadian television production** segment 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).¹
2. The **Canadian theatrical feature film production** segment includes feature-length films made by independent production companies that were certified as Canadian content by CAVCO.
3. The **foreign location and service (FLS) production** segment largely consists of feature films and television programs filmed in Canada by foreign producers or by Canadian service producers.² For the vast majority of FLS projects, the copyright is held by non-Canadian producers.
4. The **broadcaster in-house production** segment 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 2021/22



- The total volume³ of film and television production in Canada increased by 28% to \$11.69 billion in 2021/22.
- Canadian content production (i.e. television and theatrical feature film production) increased by 39.4% to \$3.90 billion.
- Canadian television production increased by 38.9% to \$3.51 billion.
- Canadian theatrical feature film production increased by 43.8% to \$387 million.
- Foreign location and service (FLS) production increased by 27.3% to \$6.71 billion.
- Broadcaster in-house production increased by 1.9% to \$1.09 billion.
- The value of foreign investment in production (FIIP) in Canada increased by 25.2% to \$7.58 billion.
- Film and television production in Canada generated employment for 240,760 Canadians in 2021/22 (including direct and spin-off impacts), up by 10.5% compared to 2020/21.
- The total gross domestic product (GDP) impact of film and television production in Canada increased by 21.2% – from \$11.33 billion to \$13.73 billion in 2021/22.
- The entire screen sector value chain (including film and television production, distribution, exhibition, television broadcasting and broadcasting distribution) generates employment for an estimated 337,610 jobs, \$16.68 billion in labour income and \$23.35 billion in GDP for the Canadian economy (both direct and spin-off impacts).

¹ 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 million in 2018/19, \$150 million in 2019/20, \$168 million in 2020/21 and \$80 million in 2021/22. For more information, see Box 2.

² Canadian service producers are producers who provide production and/or post-production services in Canada on behalf of non-Canadian producers.

³ "Volume" or "total volume" refers to the sum of production budgets.

Canada's film and television production industry experienced a robust rebound in 2021/22, following the effects of the COVID-19 pandemic. The **total volume of film and television production** leapt by an unprecedented 28% in 2021/22 to reach a new all-time high of \$11.69 billion (Exhibit 1-1). The industry added over \$2.56 billion in production spending, pushing it 21.8% higher than the previous high of \$9.60 billion in 2019/20. Every segment of Canada's film and television production industry contributed to this growth, although the biggest contributions came from foreign location and service (FLS) production and Canadian television production.

Production cost inflation – including the costs of mitigating the effects of COVID-19 on film and television productions – as well as general wage and price inflation across the Canadian economy contributed, in part, to the increased production volume; although the statistics for the number of projects does indicate that the increased volume in 2021/22 was also very much linked to increased production activity (Exhibit 3-2, Exhibit 4-2 and Exhibit 6-2).

Canadian television production increased by 38.9% to a record \$3.51 billion in 2021/22 (Exhibit 1-1). A combination of temporary COVID-19 funding, cost inflation and Canadian broadcasters' resumption of commissioning helped underpin the growth in 2021/22. In fact, the CRTC required private Canadian broadcasters (owned by a large ownership group) to catch up their Canadian programming expenditures (CPE) under-spend during the pandemic before August 31, 2023.⁴

The increase in Canadian television production was, by and large, broad-based with all production types, language markets and genres experiencing increases in production volume. The only notable exceptions were French-language children's and youth production, which declined, while English-language children's and youth production rose; and animation production (in both languages), which also declined (Exhibit 3-10). Indeed, it appears that the increase in English-language children's and youth production was largely due to higher levels of live action production, since animation production was lower in 2021/22.

Canadian theatrical feature film production also experienced a healthy rebound from the pandemic downturn. Its volume increased by 43.8% to a 10-year high of \$387 million. As in the television segment, the gains in theatrical feature film production were shared across both language markets, but more pronounced in the French-language market, where volume rose by 64.7% to an all-time record of \$141 million (Exhibit 4-1).

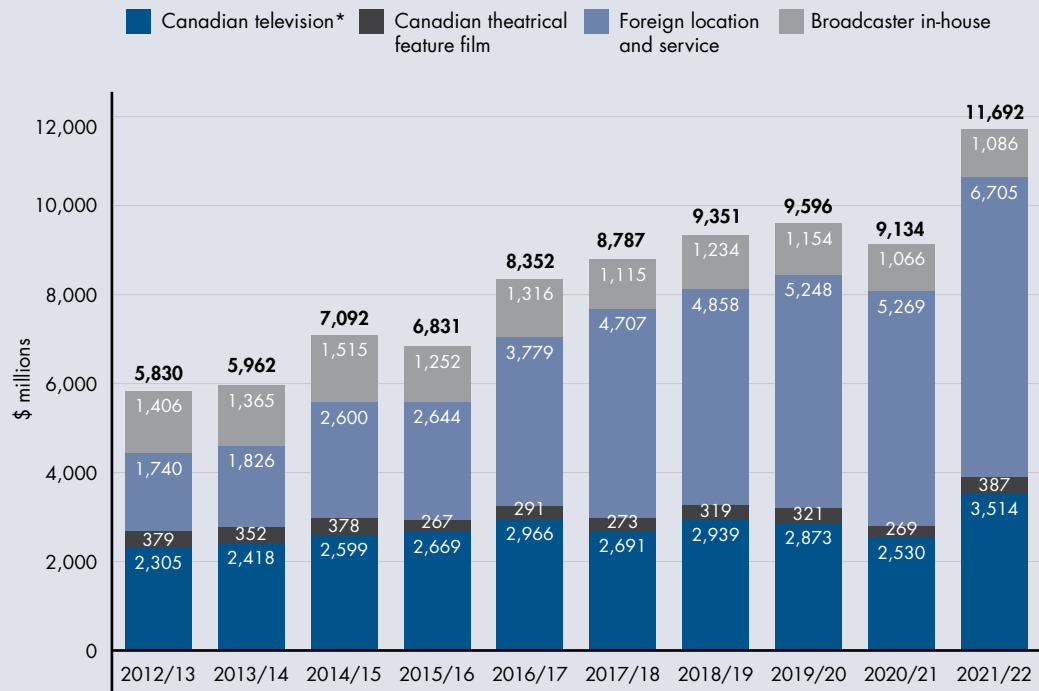
The **FLS production** segment was the single largest source of growth in 2021/22. Volume in that segment rose by 27.3% to a record \$6.71 billion. It grew by \$1.44 billion in a single year, accounting for 56% of the overall growth in film and television production in Canada of \$2.58 billion. The production of FLS television series in Canada was relatively flat in 2021/22; instead, the growth came from a quadrupling in the volume of production of television movies, specials and single-episode programming (Exhibit 6-1). The production of FLS feature films was also higher in 2021/22. From a regional perspective, all the provinces with FLS production activity in 2020/21 saw it grow in 2021/22 – in some case by very significant rates (Exhibit 6-4).

Broadcaster in-house production also recovered from its COVID-19 downturn, increasing by 1.9% in 2021 (Exhibit 1-1). And while the in-house production of sports programming continued to decline in 2021, higher levels of spending on news programming and other genres (i.e. other than news and sports), particularly on discretionary services, helped lift volume in this segment (Exhibits 7-1 and 7-2).

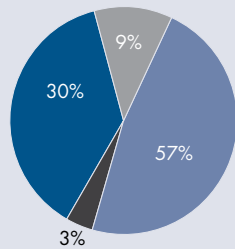
⁴ CRTC (2021a), "Broadcasting Decision CRTC 2021-274: Regulatory relief for private Canadian broadcasters in the context of the COVID-19 pandemic," August 12, 2021.

FILM AND TELEVISION PRODUCTION IN CANADA

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



Share
2021/22



Annual average growth rate

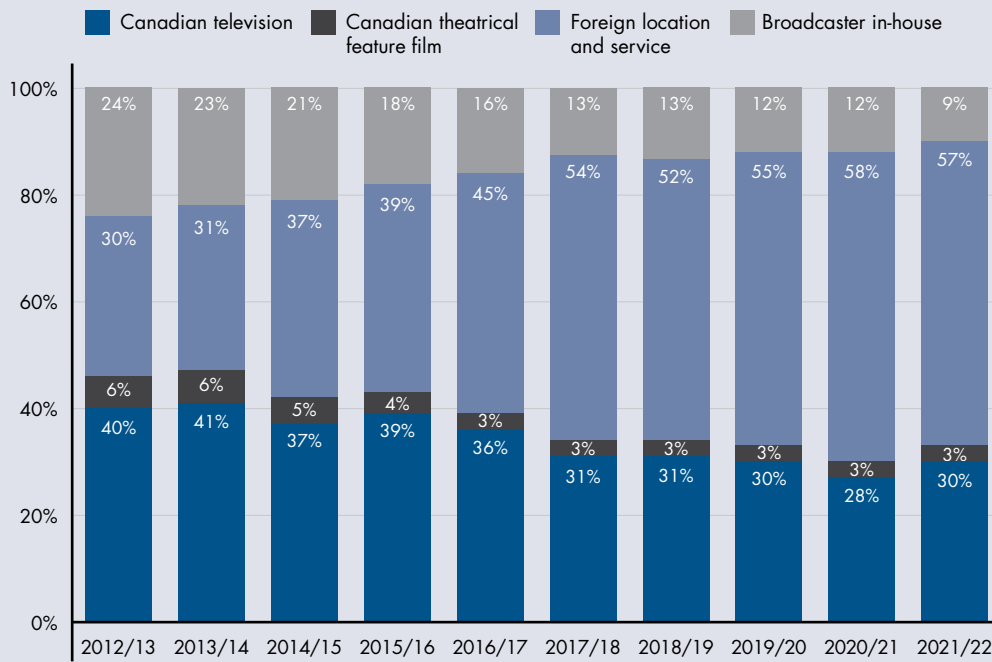
Sector	2021/22	2012/13–2021/22
Canadian television*	38.9%	4.8%
Canadian theatrical feature film	43.8%	0.2%
Foreign location and service	27.3%	16.2%
Broadcaster in-house	1.9%	(2.8%)
Average: all segments	28.0%	8.0%

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 Public Notice CAVCO 2017-01. CAVCO reports that the total volume of online-first production was \$181 million in 2018/19, \$150 million in 2019/20, \$168 million in 2020/21 and \$80 million in 2021/22.

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 and Territorial Funding 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



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)	2012/13	2013/14	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2021/22 share of total
Ontario	2,439	2,439	2,769	2,750	3,016	2,891	3,229	3,652	3,134	3,873	33%
British Columbia	1,605	1,618	2,243	2,133	2,957	3,556	3,452	2,919	3,331	3,684	32%
Quebec	1,351	1,280	1,582	1,429	1,759	1,761	2,003	2,325	2,101	3,019	26%
Prairie Provinces and Territories*	273	429	377	361	429	395	525	541	413	868	7%
Atlantic Canada**	163	196	120	157	193	183	141	159	155	249	2%
Total	5,830	5,962	7,092	6,831	8,352	8,787	9,351	9,596	9,134	11,692	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 2022*. 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

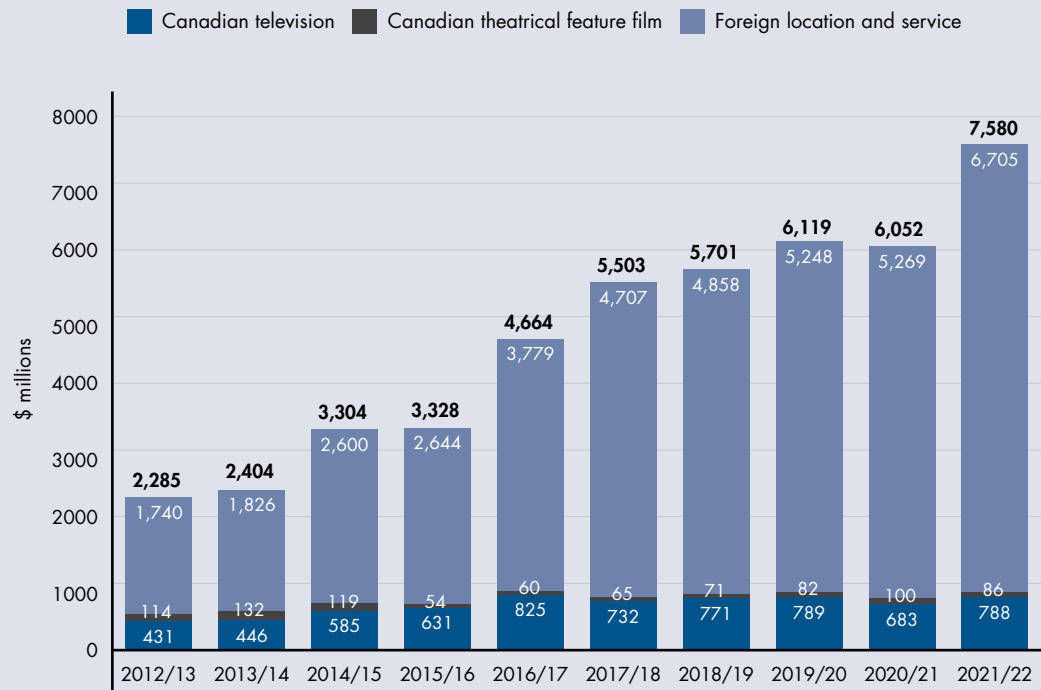
Foreign investment in production (FIIP) tracks the value of international financial participation in the film and television production industry in Canada. It includes foreign presales and distribution advances for all projects certified by CAVCO, estimates of foreign presales and distribution advances for non-CAVCO-certified productions, and the total value of FLS production in Canada.⁵

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).

The vast majority of FIIP is generated by English-language content. In fact, out of the \$874 million in FIIP generated by Canadian content in 2021/22, French-language content accounted for only \$38 million (see data found Exhibits 3-17c and 4-7c).

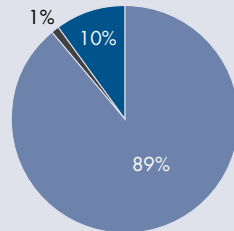
⁵ In the case of treaty coproductions, the data used to estimate FIIP includes only the financing of the Canadian budget. As a result, the foreign budgets for treaty coproductions do not directly contribute to FIIP. Treaty coproductions contribute only to FIIP if the financing of the Canadian budget includes a foreign presale or distribution advance.

Exhibit 1-5 Foreign investment in production in Canada



Share

2021/22



Annual average growth rate

Sector	2021/22	2012/13–2021/22
Canadian television	15.5%	6.9%
Canadian theatrical feature film	(14.2%)	(3.0%)
Foreign location and service	27.3%	16.2%
Average: all segments	25.2%	14.3%

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
Canadian television production					
Direct	40,130	42,500	45,570	38,700	46,800
Spin-off	31,810	32,590	29,570	23,410	27,220
Total	71,940	75,090	75,140	62,110	74,020
Canadian theatrical feature film production					
Direct	4,110	4,580	5,160	4,140	5,220
Spin-off	3,250	3,580	3,360	2,460	3,020
Total	7,360	8,160	8,520	6,600	8,240
FLS production					
Direct	70,150	70,150	83,130	80,460	89,280
Spin-off	55,660	53,870	53,980	48,720	51,860
Total	125,810	124,020	137,110	129,180	141,140
Broadcaster in-house production					
Direct	11,760	12,660	11,540	10,080	8,960
Spin-off	13,220	13,660	11,870	9,860	8,400
Total	24,980	26,320	23,410	19,940	17,360
Grand total					
Direct	126,150	129,890	145,400	133,380	150,260
Spin-off	103,940	103,700	98,780	84,450	90,500
Total	230,090	233,590	244,180	217,830	240,760

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 GDP and labour income impact of film and television production in Canada

	2020/21			2021/22		
	Direct	Spin-off	Total	Direct	Spin-off	Total
Labour income (\$ millions)						
Canadian content production						
Canadian television production	1,442	1,096	2,538	2,003	1,371	3,374
Canadian theatrical feature film production	154	115	269	221	152	373
Subtotal	1,596	1,211	2,807	2,224	1,523	3,747
FLS production	3,003	2,283	5,286	3,822	2,612	6,434
Broadcaster in-house production	608	462	1,070	619	423	1,042
Grand total	5,207	3,956	9,163	6,665	4,558	11,223
GDP (\$ millions)						
Canadian content production						
Canadian television production	1,493	1,633	3,126	2,074	2,043	4,117
Canadian theatrical feature film production	159	173	331	228	227	455
Subtotal	1,652	1,805	3,457	2,302	2,270	4,572
FLS production	3,109	3,401	6,510	3,956	3,892	7,847
Broadcaster in-house production	629	730	1,359	641	668	1,309
Grand total	5,390	5,936	11,326	6,889	6,830	13,729

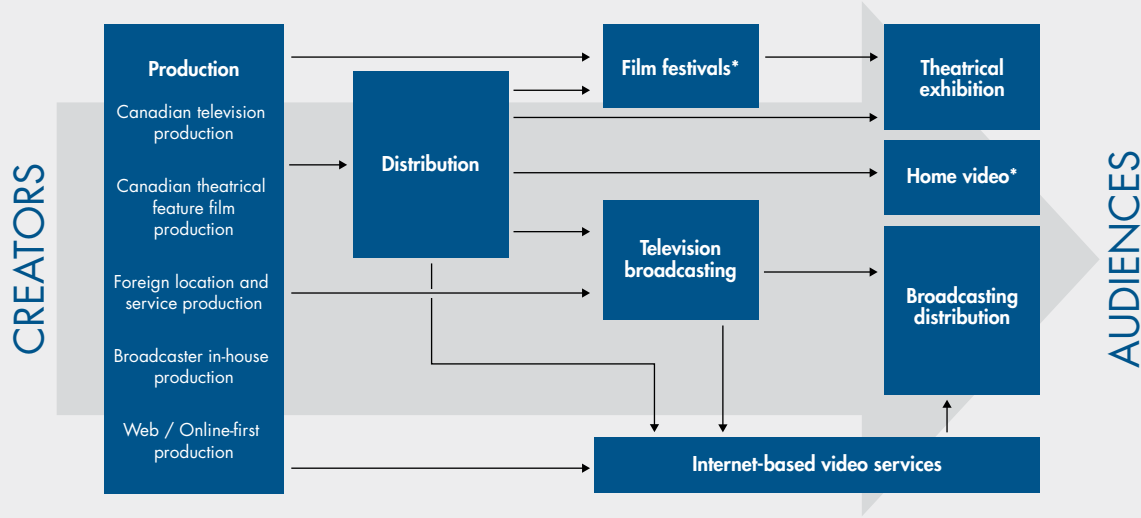
Sources: Estimates based on Nordicity research and data collected from CAVCO, CRTC, CBC/Radio-Canada, the Association of Provincial Television and Film Agencies, unions and guilds, Statistics Canada and Conference Board of Canada.
 Note: See *Notes on methodology* for a description of methodology.

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 16,820 people, as well as \$528 million in labour income and more than \$986 million in GDP in 2022.
- The television-broadcasting industry generated employment for 19,170, as well as \$1.40 billion in labour income and \$2.88 billion in GDP in 2021.
- The broadcasting distribution undertaking (BDU) industry generated employment for 55,370 people, as well as \$3.23 billion in labour income and more than \$5.25 billion in GDP in 2021.

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 creative ideas 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.

Many films are released first in the **theatrical exhibition** window; however, this is not always the case. Some films have their first release on **Internet-based video services** such as video-on-demand (VOD), subscription VOD (SVOD), transactional VOD (TVOD) or advertising VOD (AVOD). Some films will be simultaneously released in theatres and via online on-demand services (i.e. “day and date” releases).

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.

As noted above, audiences can also access films and television programs through **Internet-based video services**. Many films and television programs use these services for secondary release windows or even first-release windows, the latter thus 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 the estimates of economic impact for 2021/22, the 2021 broadcast year and 2022 calendar year (or the most recent year of published data) indicates that the screen sector value chain in Canada generates an estimated 337,160 jobs, \$16.68 billion in labour income and \$23.35 billion in GDP for the Canadian economy (both direct and spin-off impacts).

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

	Direct	Spin-off	Total
Employment (jobs)			
Film and TV production (2021/22)	150,260	90,500	240,760
Distribution (2021*)	810	4,680	5,490
Exhibition (2022)	8,800	8,020	16,820
Broadcasting** (2021)	5,630	13,540	19,170
Broadcasting distribution (2021)	28,300	27,070	55,370
Total	193,800	143,810	337,610
Labour income (\$ millions)			
Film and TV production (2021/22)	6,665	4,558	11,223
Distribution (2021*)	98	200	298
Exhibition (2022)	168	360	528
Broadcasting** (2021)	695	707	1,402
Broadcasting distribution (2021)	2,075	1,152	3,227
Total	9,700	6,977	16,677
GDP (\$ millions)			
Film and TV production (2021/22)	6,899	6,830	13,729
Distribution (2021*)	145	350	495
Exhibition (2022)	318	668	986
Broadcasting** (2021)	1,757	1,126	2,883
Broadcasting distribution (2021)	3,188	2,065	5,253
Total	12,307	11,040	23,347

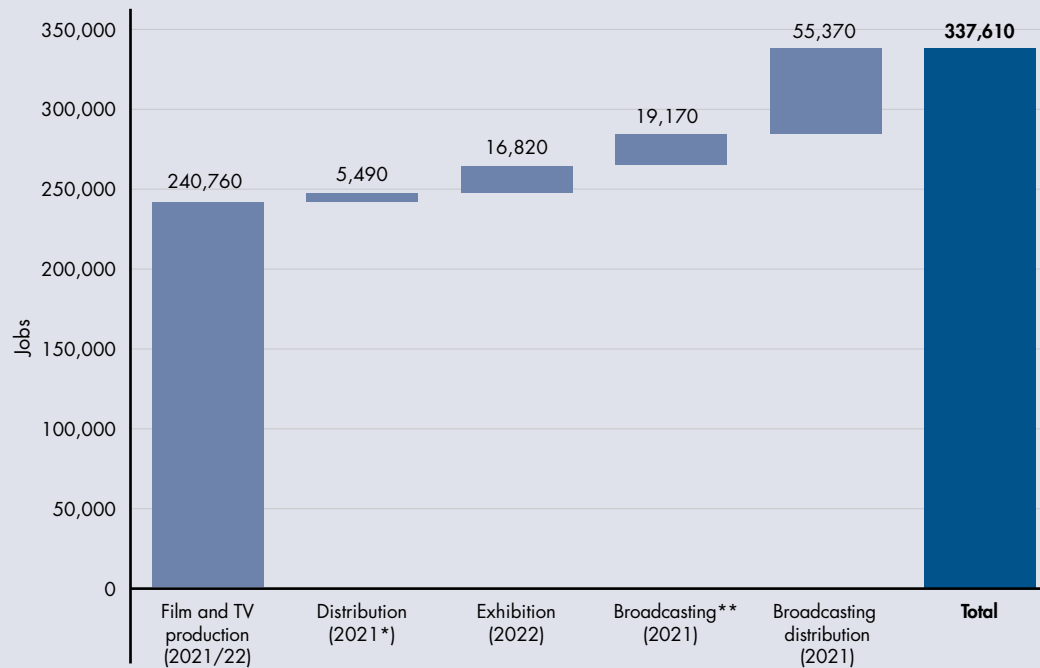
Sources: Estimates based on Nordicity research and data collected from CAVCO, CRTC, CBC/Radio-Canada, the Association of Provincial Television and Film Agencies, unions and guilds, Statistics Canada, Conference Board of Canada, the Movie Theatre Association of Canada (MTAC) and Cineplex Entertainment.

* 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

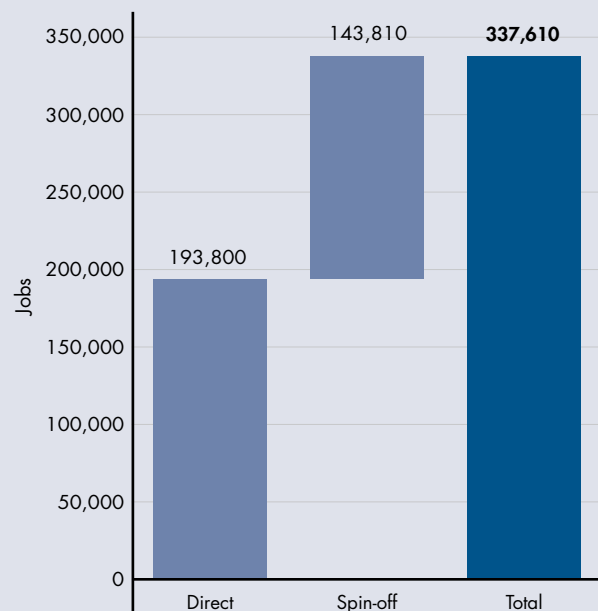


Sources: Estimates based on Nordicity research and data collected from CAVCO, CRTC, CBC/Radio-Canada, the Association of Provincial Television and Film Agencies, unions and guilds, Statistics Canada, Conference Board of Canada, the Movie Theatre Association of Canada (MTAC) and Cineplex Entertainment.

* The most recent year of published data

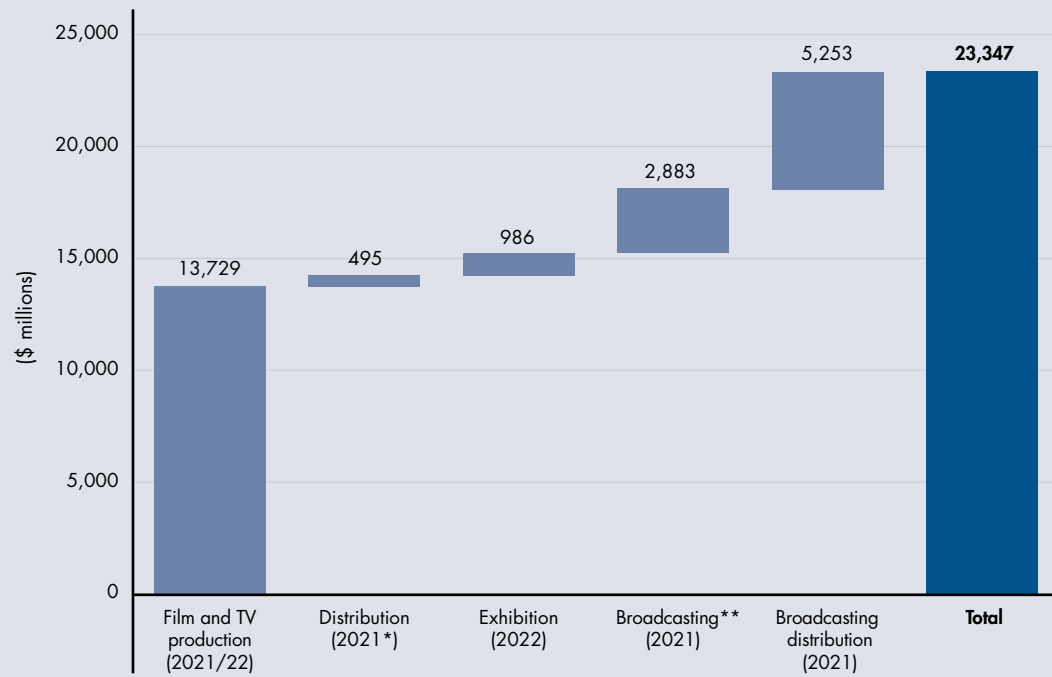
** Excludes in-house production, which is included in *Film and TV production*

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

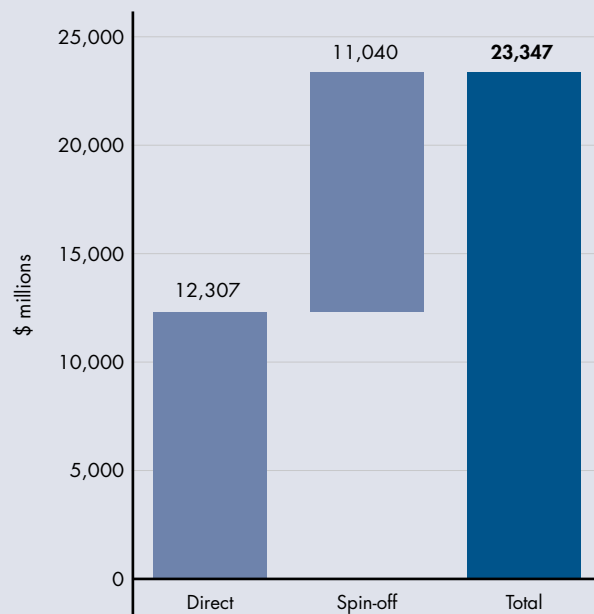


Sources: Estimates based on Nordicity research and data collected from CAVCO, CRTC, CBC/Radio-Canada, the Association of Provincial Television and Film Agencies, Statistics Canada, Conference Board of Canada, the Movie Theatre Association of Canada (MTAC) and Cineplex Entertainment.

* The most recent year of published data

** Excludes in-house production, which is included in *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,⁶ although broadcaster-affiliated production companies also account for some production in this segment.

The Canadian content production segment excludes broadcaster in-house production and foreign location and service (FLS) production. 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 a very significant increase in production in 2021/22, as indicated by the statistics in this section. However, it is important to note that these increases reflect the rebound in production activity from the pandemic-induced lows experienced in 2020/21. The increase in Canadian television production, in particular, was partly due to 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, 2023.⁷ The increase in theatrical feature film production, meanwhile, was, in part, supported by the federal government's injection of an additional \$105 million (over three years) into Telefilm Canada.

Highlights from 2021/22



- Canadian content production increased by 39.4% to \$3.90 billion.
- French-language production increased by 44% to \$1.24 billion.
- English-language production⁸ increased by 37.4% to \$2.66 billion.
- Fiction production increased by 44.7% to \$2.13 billion.
- Children's and youth production increased by 17.5% to \$534 million.
- Documentary production increased by 59% to \$531 million.
- Production of programs in the lifestyle and human interest genre⁹ increased by 43.3% to \$547 million.
- Production in the variety and performing arts (VAPA) genre increased by 2.2% to \$162 million.



- Animation production decreased by 22.6% to \$226 million.

⁶ Affiliated production companies are production companies in which a Canadian broadcaster owns or controls at least 30% of the voting equity.

⁷ CRTC (2021a).

⁸ 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.

⁹ Includes magazine programming and a small amount of programming that was previously allocated to the educational/instructional genre.

The COVID-19 pandemic resulted in a 12.4% drop in the total volume of Canadian content production in 2020/21 (Exhibit 2 -1). However, in 2021/22, Canadian content production experienced a robust rebound that propelled the volume to an all-time high that was well above the pre-pandemic level of 2019/20. What is more, the 2021/22 rebound was very broad-based, with similar gains in Canadian television and Canadian theatrical feature film production, and in each of the official language markets. In fact, the only type of Canadian content production to experience a decline in 2021/22 was animation production.

Overall, the total volume of Canadian content production rose by 39.4% in 2021/22 to an all-time high of \$3.90 billion (Exhibit 2 -1). This was 22.1% higher than the pre-pandemic level of 2019/20 and 19.7% higher than the previous high of \$3.26 billion recorded in 2018/19.

After experiencing a 12% drop in 2020/21, Canadian television production rebounded by 38.9% in 2021/22, to finish the year at an all-time high of \$3.51 billion (Exhibit 2-1). As detailed in Section 3, the restoration of Canadian broadcasters' expenditures on Canadian programming combined with an injection of short-term COVID-19 emergency relief funding for the audiovisual sector led to a significant increase in television series production in both language markets and particularly in the fiction genre.

Canadian theatrical feature film production also posted its best year ever. It grew by 43.8% coming out of the COVID-19 pandemic (Exhibit 2 -1). As detailed in Section 4, both language markets experienced healthy gains in production volume; although the rate of growth was approximately twice as fast for French-language theatrical feature film production (64.7%) compared to English-language production (34.1%).

French-language Canadian content production rose by 44% to an all-time high of \$1.24 billion in 2021/22 (Exhibit 2-2). While English-language Canadian content production increased by 37.4% to an all-time high of \$2.66 billion.

The fiction genre was the single biggest contributor to the \$1.10 billion increase in Canadian content production in 2021/22. Production volume in that genre rose by \$657 million, accounting for nearly 60% of the overall gain (Exhibit 2-3). The documentary genre was the second largest contributor. A jump in television documentary production, but also higher levels of documentary feature film production led to an overall increase of \$197 million in documentary production volume, accounting for 17.9% of the overall rise in Canadian content production.

The lifestyle and human interest (\$165 million), and children's and youth (\$80 million) genres also made significant positive contributions to the overall rise in 2021/22. Although in the case of children's and youth, the gain was entirely due to an increase in English-language television production (Exhibit 3-8) – and was likely concentrated in live action production rather than animation. The variety and performing arts (VAPA) genre, however, only posted a \$4 million, or 2.2%, increase. This probably reflected the slow resumption of live audience programming following the pandemic.

As noted above, animation production was the only type of Canadian content production that fell in 2021/22. It declined by 22.6% to \$226 million. Its lowest level since 2013/14 (Exhibit 2-7). Animation production for television was down by \$13 million, or 5.9%, to \$209 million. However, it was the fall in theatrical animation production – from the 10-year high of \$70 million in 2020/21 – to \$17 million, which really led to the overall decline.

The drop in Canadian animation production in 2021/22 marked the second consecutive year of decline. In fact, after hitting a 10-year high of \$411 million immediately before the pandemic in 2019/20, the annual volume of animation has dropped by 45%, with television animation down by nearly 43.2%. This recent decline in Canadian animation production likely reflects the gradual migration of children's and youth audiences away from regulated platforms such as Canadian discretionary television services, thereby reducing those Canadian television services' ability to commission original Canadian animation content. Indeed, according to statistics published by the CRTC, total revenue and CPE at five of Canada's largest children's and youth discretionary television services (i.e. YTV, Treehouse TV, VRAK, Nickelodeon, YOOPA) were both down by approximately one-third between the 2017 and 2021 broadcast years.¹⁰

The COVID-19 pandemic had clear negative effects on advertising revenue and business conditions within the Canadian broadcasting sector, as evident from the financing profile of Canadian content production in 2020/21. In particular, the drop in value of private Canadian broadcaster licence fees reflected the sector's curtailment of investment in new programming. The financing statistics for 2021/22, however, indicate that Canadian broadcasters quickly restored their investments in Canadian programming. Private Canadian broadcasters' licence fees for Canadian content more-than-doubled in 2021/22 to an estimated \$577 million (Exhibit 2 -10). Public Canadian broadcasters' licence fees increased by 24.1%. Financing from Canadian distributors and foreign sources also recovered in 2021/22, but only to their pre-pandemic levels of 2019/20.

Other than the automatic federal and provincial tax credits, the other key sources of financing that helped fuel the post-pandemic rebound were other public funding and other private financing. The former is estimated to have increased by \$132 million in 2021/22, as a result of short term COVID-19 emergency relief funding for the audiovisual sector introduced by federal and provincial governments.

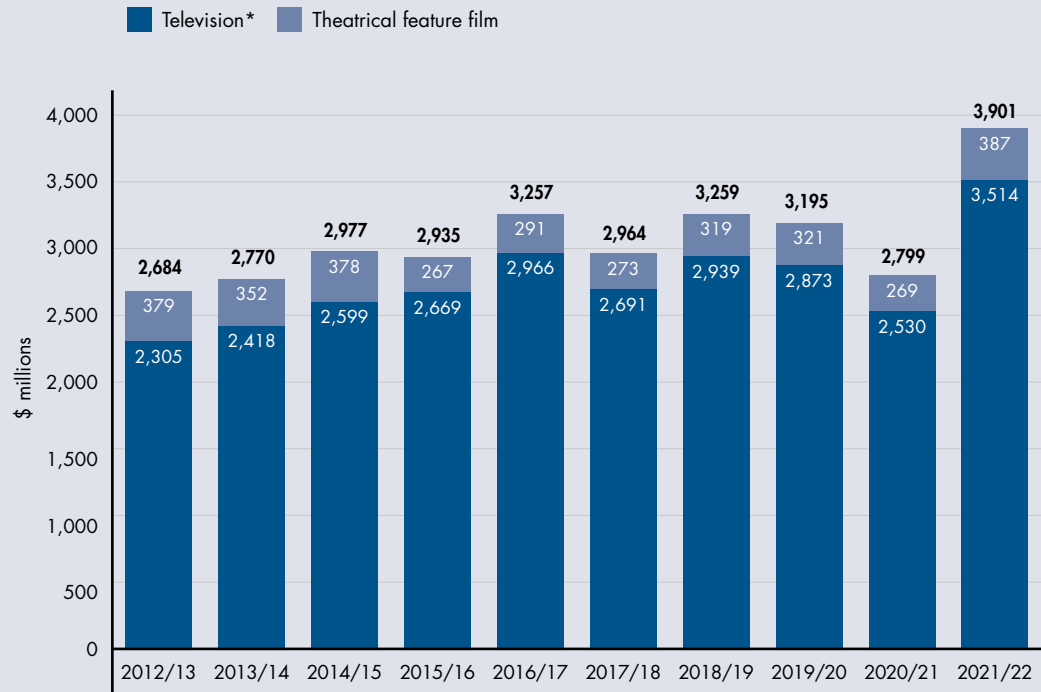
The fact that much of the rebound in production volume in 2021/22 was financed by Canadian broadcasters catching up on their pandemic underspending as well as short-term emergency relief funding suggests that there is a strong likelihood that rate of growth and production volume levels observed in 2021/22 may be transitory. As these two sources of financing taper off or even disappear in 2022/23, the volume of Canadian content production will likely retreat to a lower level – although it may still be higher than pre-pandemic levels.

Additional production financing support from the Government of Quebec and the federal government's Short-Term Compensation Fund (STCF) for Canadian audiovisual productions also contributed to sustain the rebound in Canadian film and television production. In particular, the STCF allowed Canadian producers to protect their projects from the effects of COVID-19. This then allowed them to obtain commissioning orders from broadcasters and to access production financing, in order to resume production during the pandemic.

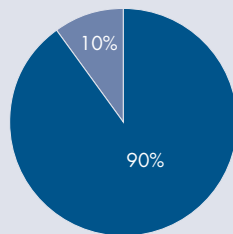
¹⁰ CRTC (2022a), *Individual Discretionary and On-Demand Services: Statistical and Financial Summaries, 2017-2021*. The combined revenue for YTV, Treehouse TV, VRAK, Nickelodeon decreased from \$97.2 million in 2017 to \$66.3 million in 2021. Their combined CPE decreased from \$40.1 million to \$26.7 million.

RELEASE MEDIUM

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



Share
2021/22



Annual average growth rate

Sector	2021/22	2012/13–2021/22
Television*	38.9%	4.8%
Theatrical feature film	43.8%	0.2%
Average: all segments	39.4%	4.2%

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 Public Notice CAVCO 2017-01. CAVCO reports that the total volume of online-first production was \$181 million in 2018/19, \$150 million in 2019/20, \$168 million in 2020/21 and \$80 million in 2021/22. Note that statistics for online-first production do not incorporate and CAVCO application-lag adjustment.

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 on 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.

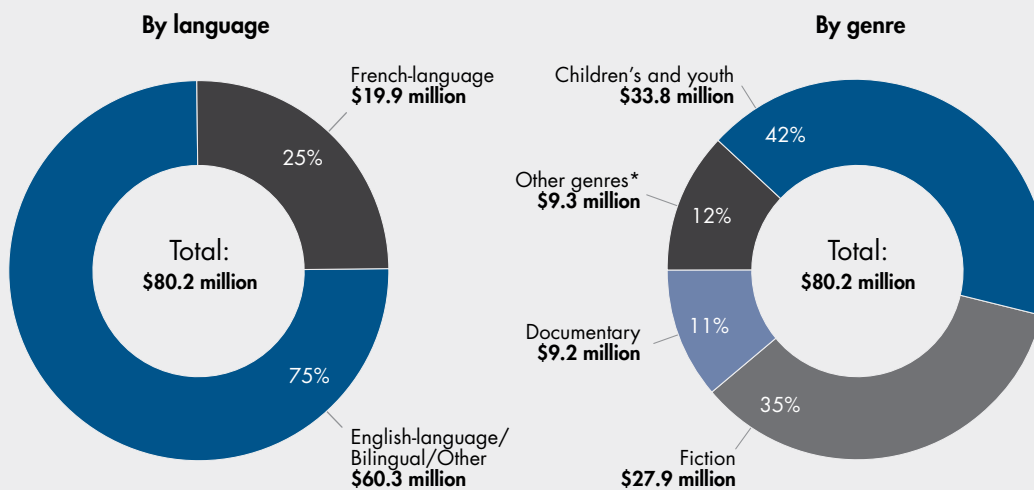
This type of audiovisual production may be referred to as “online-first” production. “Online-only” production is a subset of online-first production and includes audiovisual content that, during its first two years after completion, is only released in Canada on one of the many online platforms on CAVCO’s list of acceptable online services pursuant to [CAVCO Public Notice 2017-01](#). As of October 7, 2022, this list included at least 16 CRTC licensed broadcaster websites (e.g. CBC Gem [previously known as CBC TV app], ICI Tou.tv, APTN lumi, CTV GO and VRAK.tv), two hybrid video-on-demand services (Club illico and Crave), and 38 other online video services (including Netflix Canada, Amazon Prime Canada, iTunes Canada and 12 separate CAVCO-approved YouTube channels).

Volume and number of Canadian online-first audiovisual content

	2017/18	2018/19	2019/20	2020/21	2021/22
Volume (\$M)	68.9	181.3	149.8	167.6	80.2
Number of projects	100	136	97	109	103
Average budget (\$000s)	689	1,333	1,544	1,538	779

Source: Estimates based on data collected from CAVCO.
 Note: Statistics for online-first production do not incorporate CAVCO application-lag adjustment.

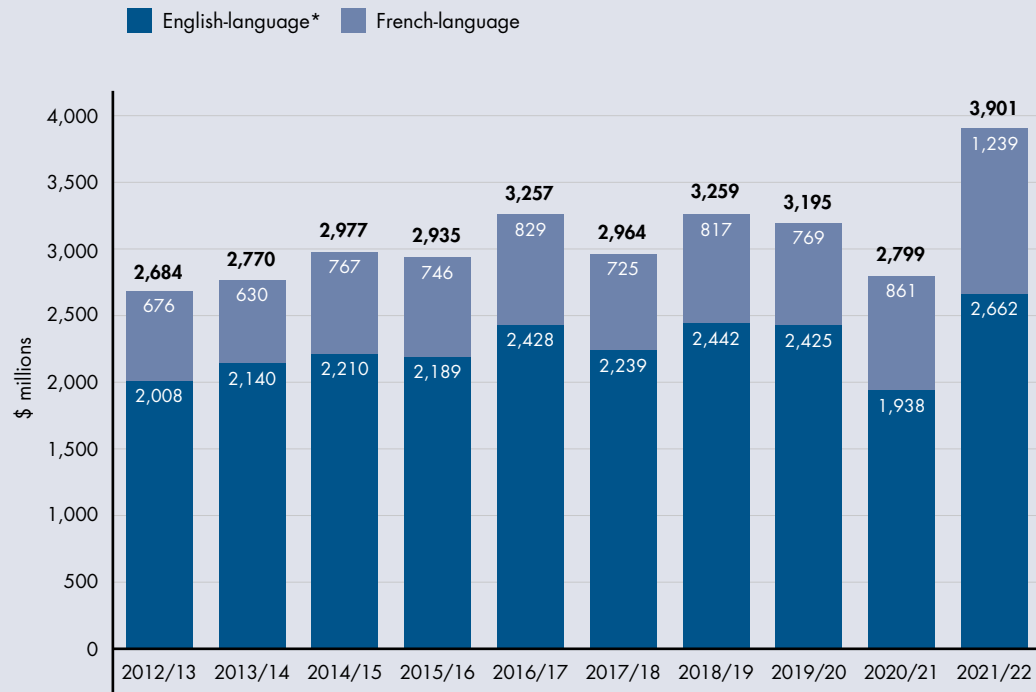
Volume and number of Canadian online-first audiovisual content, 2021/22



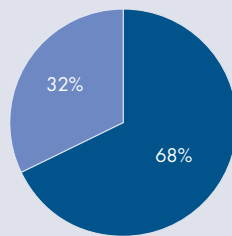
Source: Estimates based on data collected from CAVCO.
 * Includes lifestyle and human interest, and variety and performing arts genres.
 Projects in these other genres have been combined to avoid disclosure of amounts for individual projects.

LANGUAGE

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



Share
2021/22



Annual average growth rate

Language	2021/22	2012/13–2021/22
English-language*	37.4%	3.2%
French-language	44.0%	7.0%
Average: all languages	39.4%	4.2%

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 2012/13 and 2021/22 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)	2012/13	2013/14	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22
Fiction										
Television	1,096	1,093	1,226	1,188	1,574	1,265	1,416	1,437	1,277	1,809
Theatrical feature film	357	314	295	179	253	205	269	256	193	318
Total	1,453	1,407	1,521	1,366	1,827	1,470	1,685	1,693	1,470	2,127
Children's and youth										
Television	322	419	467	552	459	516	531	533	384	492
Theatrical feature film	14	29	74	76	29	50	31	55	71	42
Total	336	448	541	628	488	566	562	588	455	534
Documentary										
Television	370	311	248	274	247	259	316	260	329	504
Theatrical feature film	7	8	7	10	10	19	19	10	5	27
Total	377	319	255	284	257	278	335	270	334	531
Lifestyle and human interest**										
Total	395	478	542	553	564	497	599	529	382	547
VAPA										
Total	122	118	118	104	122	155	78	114	159	162

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 for 2016/17 to 2021/22 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, 2021/22

	Fiction	Children's and youth	Documentary	Lifestyle and human interest*	Variety and performing arts	All genres
Number						
Television programming	409	150	496	317	86	1,458
Theatrical feature films	109	9	30	0	0	148
Total	518	159	526	317	86	1,606
Share of total						
Television programming	79%	94%	94%	100%	100%	91%
Theatrical feature films	21%	6%	6%	0%	0%	9%
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.

Exhibit 2-5 Volume of Canadian content production, by genre and language, 2021/22

	Fiction	Children's and youth	Documentary	Lifestyle and human interest*	Variety and performing arts	All genres
(\$ millions)						
English-language**	1,553	408	398	253	50	2,662
French-language	573	126	134	294	112	1,239
Total	2,127	534	531	547	162	3,901
Share of total						
English-language**	73%	76%	75%	46%	31%	68%
French-language	27%	24%	25%	54%	69%	32%
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 2021/22 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)	2020/21			2021/22		
	Animation	Live Action	Total	Animation	Live Action	Total
English-language**	250	24	274	207	180	387
French-language	9	101	110	14	91	105
Total	259	125	384	221	271	492

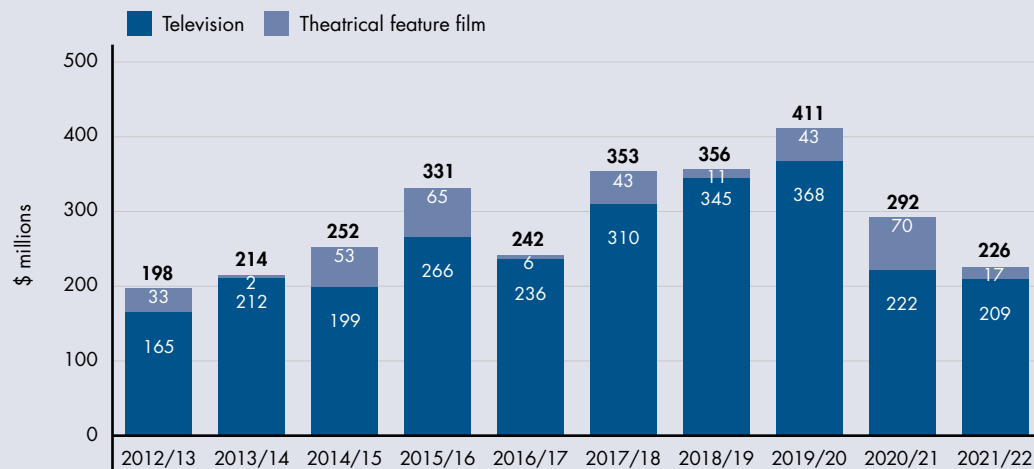
Source: Estimates based on data collected from CAVCO.

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.

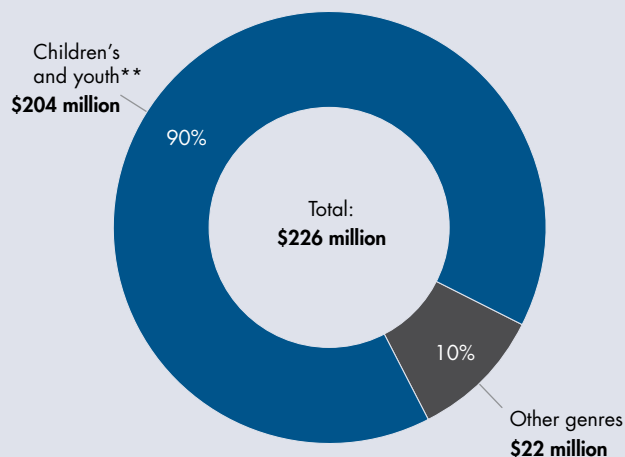
** Includes data for projects produced in bilingual format and non-official languages, which comprised less than one percent of the total volume of Canadian content production in 2020/21 and 2021/22, and cannot be reported separately due to confidentiality issues arising from low production volume.

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, 2021/22*

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 2020/21 was in the children's and youth genre, which was the average share observed between 2015/16 and 2018/19 inclusive.

REGION

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

(\$ millions)	2012/13	2013/14	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2021/22 share of total
Ontario	1,229	1,225	1,340	1,376	1,405	1,410	1,559	1,489	1,137	1,629	42%
Quebec	846	842	977	869	1,048	838	936	911	932	1,341	34%
British Columbia	425	435	470	463	549	430	549	484	532	641	16%
Prairie Provinces and Territories*	100	146	121	130	145	147	133	226	124	180	5%
Atlantic Canada**	84	122	70	98	111	139	81	84	74	112	3%
Total	2,684	2,770	2,977	2,935	3,257	2,964	3,259	3,195	2,799	3,901	100%

Sources: Estimates based on data collected from CAVCO.

Note: Data includes an estimate of CRTC-certified television production. Statistics published by provincial funding agencies may differ from those in *Profile 2022*.

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

	2017/18		2018/19		2019/20		2020/21		2021/22	
	\$ millions	%	\$ millions	%	\$ millions	%	\$ millions	%	\$ millions	%
Private broadcaster licence fees	375	13%	406	12%	403	13%	284	10%	577	15%
Public broadcaster licence fees	347	12%	337	10%	328	10%	361	13%	448	11%
Federal tax credits ¹	301	10%	324	10%	314	10%	278	10%	396	10%
Provincial tax credits ¹	551	19%	624	19%	602	19%	532	19%	752	19%
Canadian distributors ²	337	11%	395	12%	358	11%	332	12%	356	9%
Foreign pre-sales and advances ³	460	16%	448	14%	513	16%	451	16%	519	13%
Canada Media Fund	260	9%	262	8%	276	9%	281	10%	289	7%
Telefilm Canada	67	2%	70	2%	68	2%	38	1%	78	2%
Other public ⁴	98	3%	167	5%	143	4%	103	4%	235	6%
Other private ⁵	170	6%	226	7%	190	6%	138	5%	252	6%
Total	2,964	100%	3,259	100%	3,195	100%	2,799	100%	3,901	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 financing includes 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. 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 has 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.¹¹

The Canadian television production segment experienced a very significant increase in production in 2021/22, as indicated by the statistics in this section. However, it is important to note that these increases reflect a rebound in production activity from the pandemic-induced lows experienced in 2020/21 and Canadian broadcasters' restoration of their Canadian programming expenditures (CPE) levels and the requirement by the CRTC that they catch up on their CPE under-spend during the pandemic.¹²

Highlights from 2021/22



- Canadian television production increased by 38.9% to \$3.51 billion.
- The volume of Canadian television series production increased by 44.7% to \$2.96 billion, and the number of series produced increased from 746 to 980.
- English-language television production increased by 37.3%.
- The volume of French-language television production increased by 41.7%.
- The volume of Canadian television production was higher in all genres: fiction (41.7%), children's and youth (28.3%), documentary (53.2%), lifestyle and human interest (43.3%) and VAPA genres (2.2% increase).
- The average budget for English-language fiction programming increased to \$1.41 million per hour.
- The average budget for French-language fiction programming increased to \$701,000 per hour.
- The average hourly budgets for English-language children's and youth, documentary, and lifestyle and human interest programming increased.
- The average hourly budgets for French-language lifestyle and human interest, and VAPA programming increased.
- The Canada Media Fund's (CMF) financial contributions to Canadian television increased to \$289 million and supported \$1.73 billion in television production volume.
- The financial leverage of the CMF's Convergent Stream funding increased to \$4.98 of third-party financing for every dollar of CMF funding.

¹¹ Statistics for the volume of broadcaster in-house production can be found in Section 7 of this report.

¹² CRTC (2021a)

Highlights from 2021/22 *continued*



- Canadian television animation production decreased by 5.9% to \$209 million.
- The average hourly budgets for English-language VAPA programming decreased.
- The average hourly budgets for French-language children's and youth, and documentary programming decreased.

After declining by 12.0% during the depths of the COVID-19 pandemic in 2020/21, the total volume of Canadian television production jumped by an unprecedented 38.9% to an all-time high of \$3.51 billion in 2021/22 (Exhibit 3-1). Not only did this represent a very healthy rebound from 2020/21, but raised volume to 22.3% above the pre-pandemic level of \$2.87 billion in 2019/20 and the previous all-time peak of \$2.97 billion recorded in 2016/17.

The increase in Canadian television production was, by and large, broad-based with all production-types, language markets and genres contributing to the gains. The only notable exception was animation production, which actually experienced a year-over-year decline in volume of 5.9%, placing it (\$209 million) at its lowest level since 2014/15 (\$199 million) (Exhibit 3-10). Indeed, as noted in Section 2, the annual volume of Canadian television animation production has declined in recent years – down by 43.2% since 2019/20. This drop is consistent with the one-third drop in revenue and CPE observed across several of Canada's largest children's and youth discretionary television services (i.e. YTV, Treehouse TV, VRAK, Nickelodeon, YOOPA) between 2017 and 2021.¹³

While there was strong growth in the production of both television movies and other single-episode television programs, it was growth in television series production that really drove the gains in 2021/22. A total of 980 television series were produced in 2021/22, an all-time record and up by 31.4% compared to 2020/21 (Exhibit 3-2). The volume of television series expanded by even more – 44.7% – increasing to \$2.96 billion. This was 21.6% higher than the pre-pandemic volume of television series production in 2019/20. Meanwhile, the number of television movies produced rose from 239 to 278, and the associated volume increased by 15.1% to \$468 million.

Production in each of the official-languages markets was in step. French-language production increased by 41.7% to an all-time high of \$1.1 billion in volume in 2021/22, while English-language production increased by 37.3% to an all-time high of \$2.39 billion (Exhibit 3-3).

On a percentage basis, the largest increase in production volume was in the documentary genre. The documentary genre bucked the trend in declines in 2020/21 and continued to grow in 2021/22, with a 53.2% increase in volume (Exhibit 3-5).

On a dollar basis, the largest volume increase in 2021/22 was in the fiction genre. It grew by \$532 million, or 41.7%, and thereby, accounted for 54% of the overall increase in Canadian television production (\$985 million). Production volume in the variety and performing arts (VAPA) genre rose by only \$4 million or 2.2% in 2021/22, which likely partially reflected the slow resumption of live audience programming following the pandemic.

A deeper dive into the statistics reveals how different genres performed in each language market and contributed to growth. In the English-language market, all genres posted higher production volumes in 2021/22, with the largest percentage increase in the documentary genre (60.2%), followed by lifestyle and human interest (57.9%), and children's and youth (41.5%), fiction (29.9%) and VAPA genres (8.7%) (Exhibit 3-8). Average hourly budgets were moderately higher, with, for example, a 4.1% increase in the fiction genre and a 7.2% increase in the documentary genre (Exhibit 3-9a). This would suggest that the volume increase in 2021/22 was linked to the quantity of projects and hours of production.

¹³ CRTC (2022a), *Individual Discretionary and On-Demand Services: Statistical and Financial Summaries, 2017-2021*. The combined revenue for YTV, Treehouse TV, VRAK, Nickelodeon decreased from \$97.2 million in 2017 to \$66.3 million in 2021. Their combined CPE decreased from \$40.1 million to \$26.7 million.

In the French-language market, the fiction genre led the way in terms of growth, as volume nearly doubled from \$243 million to \$467 million (Exhibit 3-8). The fiction genre was followed by the documentary (35.3%), and lifestyle and human interest genres (32.7%). The VAPA, and children's and youth genres actually posted volume decreases of 0.8% and 4.4%, respectively.

Average hourly budgets rose at a faster rate in the French-language market compared to the English-language. For example, in the fiction genre, average hourly budgets were 9% higher in 2021/22 (compared to 4.0% in the English-language market) and 10.9% higher in the lifestyle and human interest genre (compared to 6% in the English-language market) (Exhibit 3-9b). However, in the documentary, and children's and youth genres, average hourly budgets actually declined by 4.2% and 10.4%, respectively. The decline in the average hourly budgets for French-language television documentaries (negative 4.2%) was in contrast to the increase (7.2%) observed for English-language television documentaries. In general, average hourly budgets were two to three times higher in the English-language market than in the French-language market.

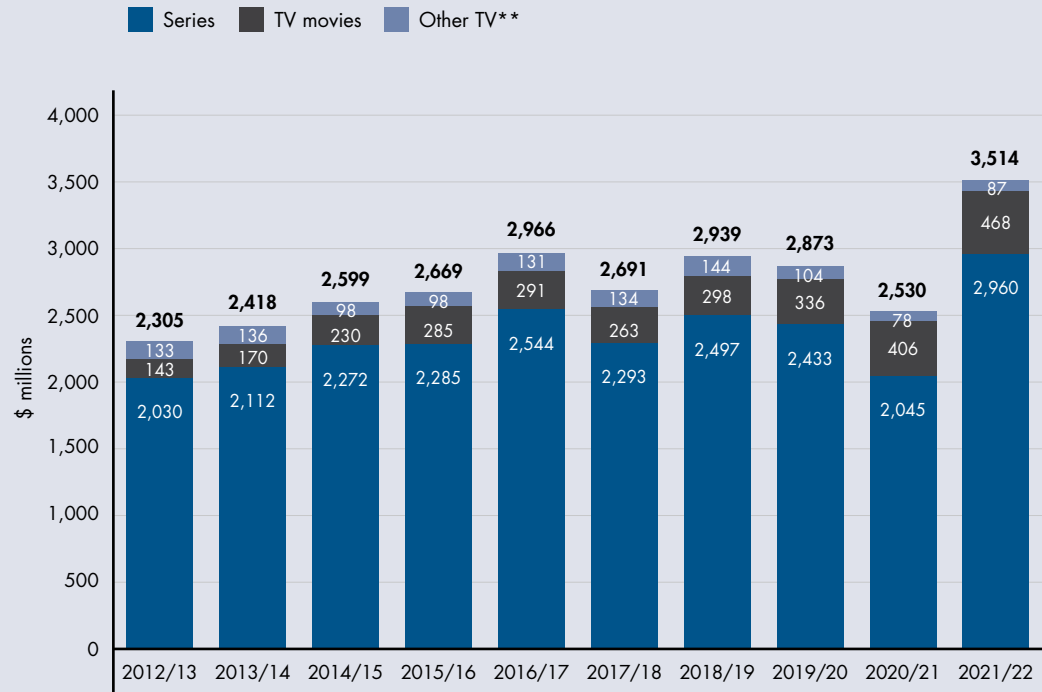
When viewing production trends over the past five years (2016/17 to 2021/22), the fiction and documentary genres were the most important drivers of overall growth in Canadian television production. In fact, the growth in documentary production (\$257 million) actually outpaced the growth in fiction production (\$234 million) (Exhibit 3-7b). However, looking over the past decade (2012/13 to 2021/22), the fiction genre was clearly the most important source of growth, accounting for \$713 million or 59% of the overall growth in Canadian television production during that period (Exhibit 3-5). Other important contributors to long-term growth included French-language lifestyle and human interest production, which increased by \$145 million, and English-language children's and youth production, which grew by \$139 million.

The CMF continued to be a major player in the Canadian television segment in 2021/22, disbursing \$289 million and supporting \$1.73 billion in Canadian television production (Exhibit 3-13). This accounted for approximately half of all Canadian television production in 2021/22. The CMF's financing leverage also increased significantly in 2021/22. In 2020/21, every dollar of CMF Convergent Stream funding helped producers attract an additional \$3.86 in production financing from other sources. In 2021/22, the rate of financing leverage rose to \$4.98.

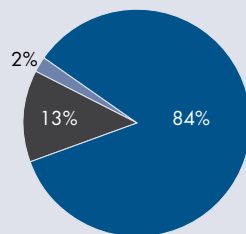
More generally, the rebound in the volume of Canadian television production can be traced back to additional monies available from two key financing sources. First, Canadian broadcasters restored their levels of licence fee funding for Canadian television production. This injected \$377 million back into the Canadian production segment, or the equivalent of 38.3% of the \$985 million increase in production volume (Exhibit 3-17a). The second key source was direct public funding (i.e. 'other public' funding) outside of the CMF and tax credits. For example in the case of French-language production, the increased production volume in 2021/22 can be explained by the fact that the Government of Quebec granted temporary aid to the audiovisual sector to cover part of the costs generated by the COVID-19 mitigation measures on the sets. According to SODEC, this aid corresponded to 8% of the budgets for drama productions and 5% of the budget for other genres. In both language markets, production cost inflation also contributed to the higher production volume in 2021/22.

TYPES

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



Share
2021/22



Annual average growth rate

Type	2021/22	2012/13–2021/22
Series	44.7%	4.3%
TV movies	15.1%	14.1
Other TV**	10.8%	(4.6%)
Average: all types	38.9%	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 Public Notice CAVCO 2017-01. CAVCO reports that the total volume of online-first production was \$132 million in 2018/19, \$107 million in 2019/20 and \$159 million in 2020/21.

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

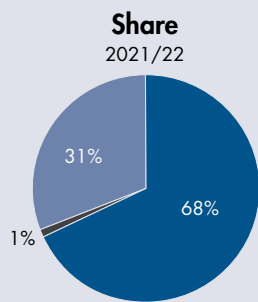
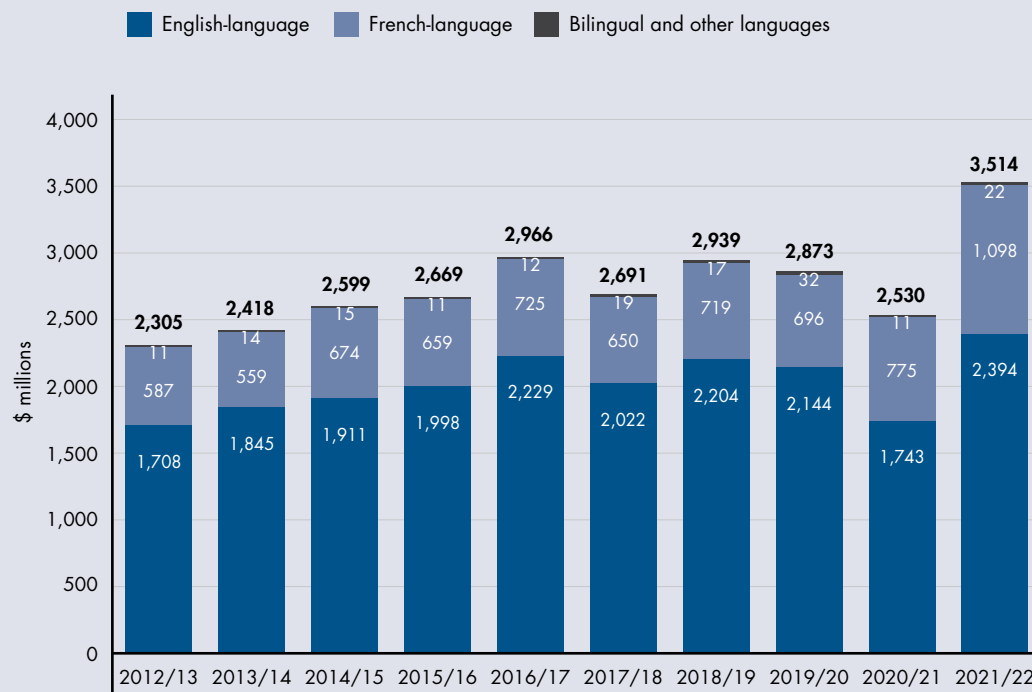
Exhibit 3-2 Number of television projects, by type

	2012/13	2013/14	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22
Series	751	725	813	836	853	827	896	802	746	980
TV features	102	127	151	170	155	139	392	323	239	278
Other TV*	330	339	300	297	323	313	122	142	193	200
Total	1,183	1,191	1,264	1,303	1,331	1,279	1,410	1,267	1,178	1,458

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



Annual average growth rate

Language	2021/22	2012/13–2021/22
English-language	37.3%	3.8%
French-language	41.7%	7.2%
Bilingual and other languages	94.1%	8.1%
Average: all languages	38.9%	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.

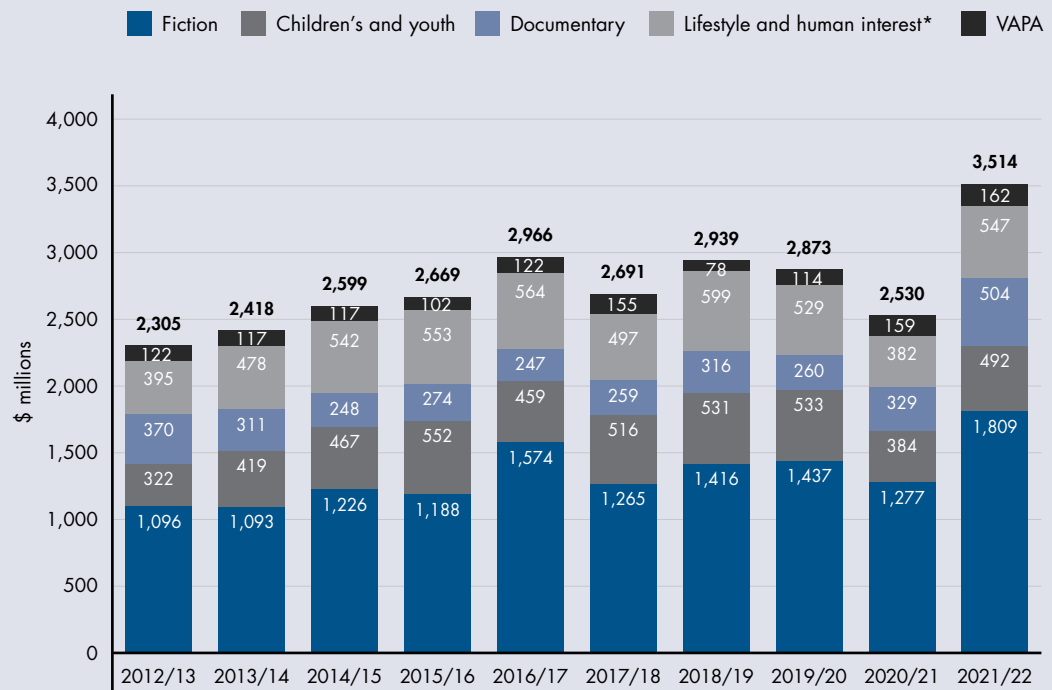
Exhibit 3-4 Number of Canadian television projects, by language

	2012/13	2013/14	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22
English-language	665	689	662	705	702	697	761	662	597	743
French-language	499	485	587	583	615	567	623	579	570	680
Bilingual and other languages	19	17	15	15	14	15	25	26	11	33
Total	1,183	1,191	1,264	1,303	1,331	1,279	1,409	1,267	1,178	1,456

Source: Estimates based on data collected from CAVCO.

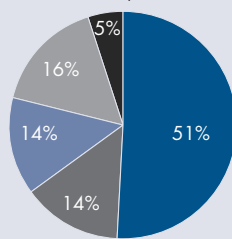
GENRES

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



Share

2021/22



Annual average growth rate

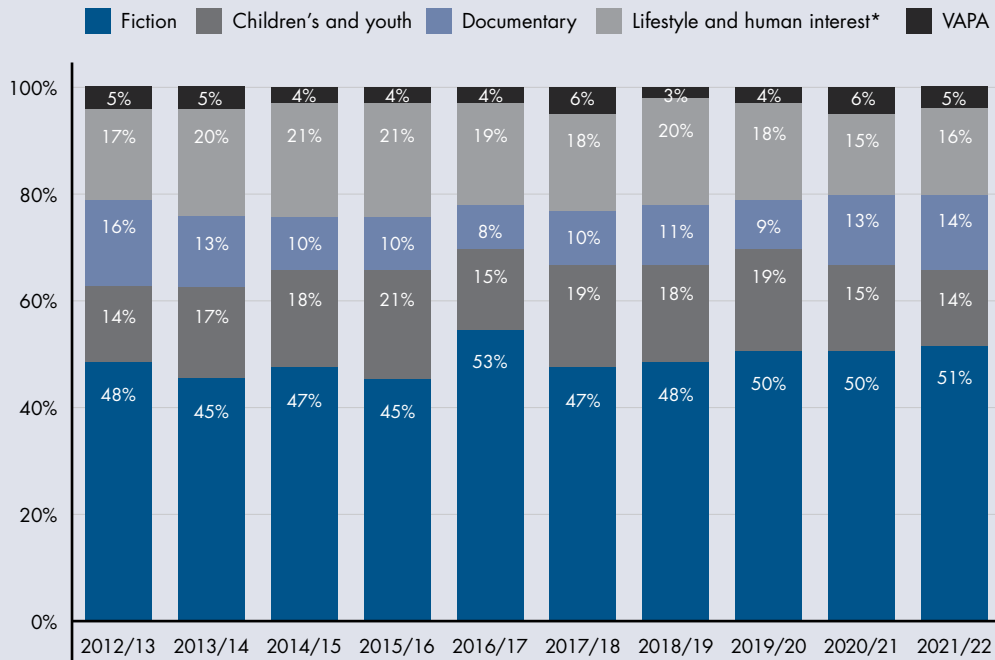
Genre	2021/22	2012/13–2021/22
Fiction	41.7%	5.7%
Children's and youth	28.3%	4.8%
Documentary	53.2%	3.5%
Lifestyle and human interest*	43.3%	3.7%
VAPA	2.2%	3.2%
Average: all genres	38.9%	4.8%

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



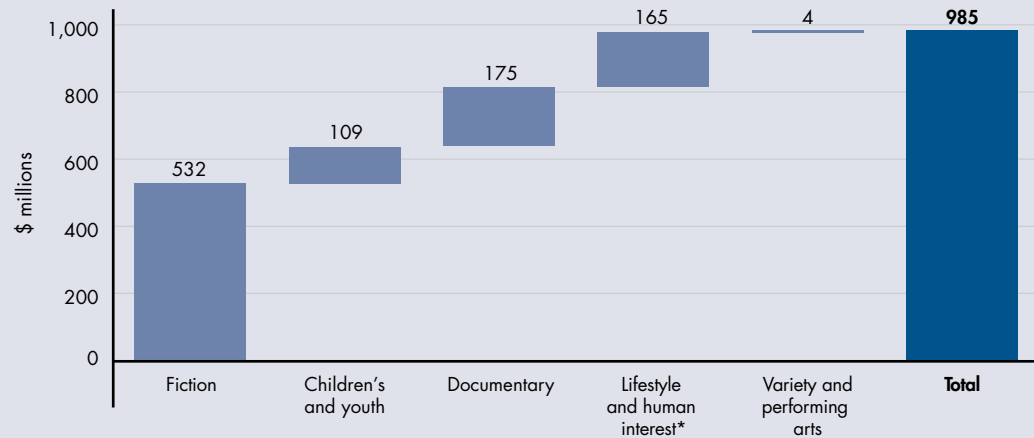
Source: Estimates based on data collected from CAVCO.

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

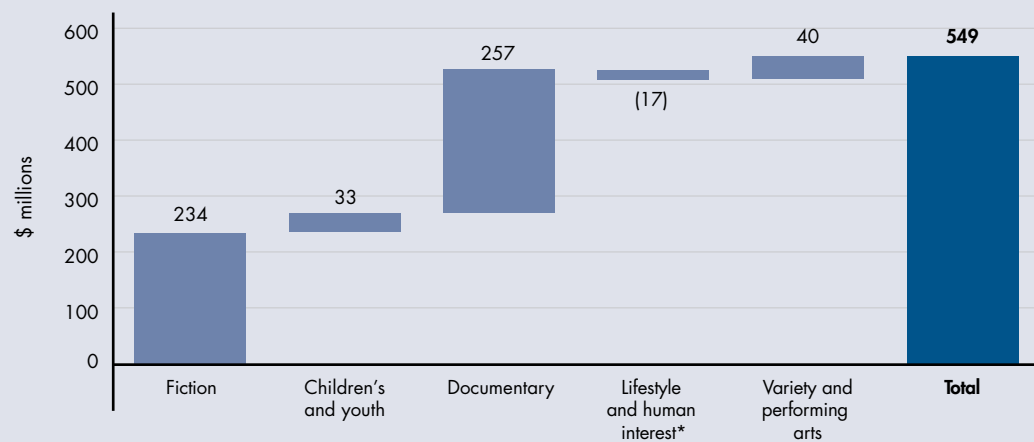
* Includes magazine programming and a small amount of programming that was previously allocated to the educational/instructional genre.

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

One-year (2020/21 to 2021/22)



Five-year (2016/17 to 2021/22)



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)	2012/13	2013/14	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22
Fiction										
English-language*	901	909	1,003	988	1,314	1,071	1,162	1,190	1,033	1,342
French-language	195	184	223	200	260	194	254	247	243	467
Total	1,096	1,093	1,226	1,188	1,574	1,265	1,416	1,437	1,277	1,809
Children's and youth										
English-language*	249	354	389	468	368	409	416	444	274	387
French-language	74	65	78	84	90	106	115	90	110	105
Total	322	419	467	552	459	516	531	533	384	492
Documentary										
English-language*	281	238	162	195	175	207	260	194	236	379
French-language	89	73	85	79	72	52	55	66	93	126
Total	370	311	248	274	247	259	316	260	329	504
Lifestyle and human interest**										
English-language*	246	327	333	329	326	277	345	308	160	253
French-language	149	151	209	224	238	220	254	220	221	294
Total	395	478	542	553	564	497	599	529	382	547
Variety and performing arts										
English-language*	42	32	37	29	58	76	36	41	51	55
French-language	81	85	79	73	64	79	42	73	108	107
Total	122	117	117	102	122	155	78	114	159	162

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 2012/13 and 2021/22 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	2012/13	2013/14	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22
Fiction										
Average	1,304	1,220	1,240	1,298	1,401	1,307	1,316	1,388	1,358	1,414
Median	1,308	1,150	1,231	1,269	1,454	1,313	1,257	1,293	996	943
Children's and youth										
Average	711	867	855	1,073	1,190	1,018	1,471	1,074	899	924
Median	512	656	764	817	528	448	513	561	497	549
Documentary										
Average	321	312	307	333	348	355	380	382	332	356
Median	292	249	253	260	319	313	291	325	213	259
Lifestyle and human interest*										
Average	265	322	265	273	298	250	295	333	301	319
Median	277	286	223	232	240	178	212	270	245	270
Variety and performing arts										
Average	386	461	363	424	580	585	448	407	695	656
Median	197	267	248	258	323	408	300	250	415	430

French-language production

\$000s per hour	2012/13	2013/14	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22
Fiction										
Average	427	402	450	553	597	506	581	555	643	701
Median	327	342	417	564	575	488	575	568	616	665
Children's and youth										
Average	313	187	220	186	187	380	327	302	326	292
Median	167	143	159	142	134	144	187	215	191	238
Documentary										
Average	212	204	222	196	202	208	186	176	189	181
Median	173	179	190	168	170	173	167	154	162	160
Lifestyle and human interest*										
Average	104	119	73	93	105	102	107	106	110	122
Median	79	63	69	84	97	92	105	100	109	117
Variety and performing arts										
Average	205	229	261	226	236	273	252	186	296	336
Median	148	166	201	150	133	196	192	147	192	234

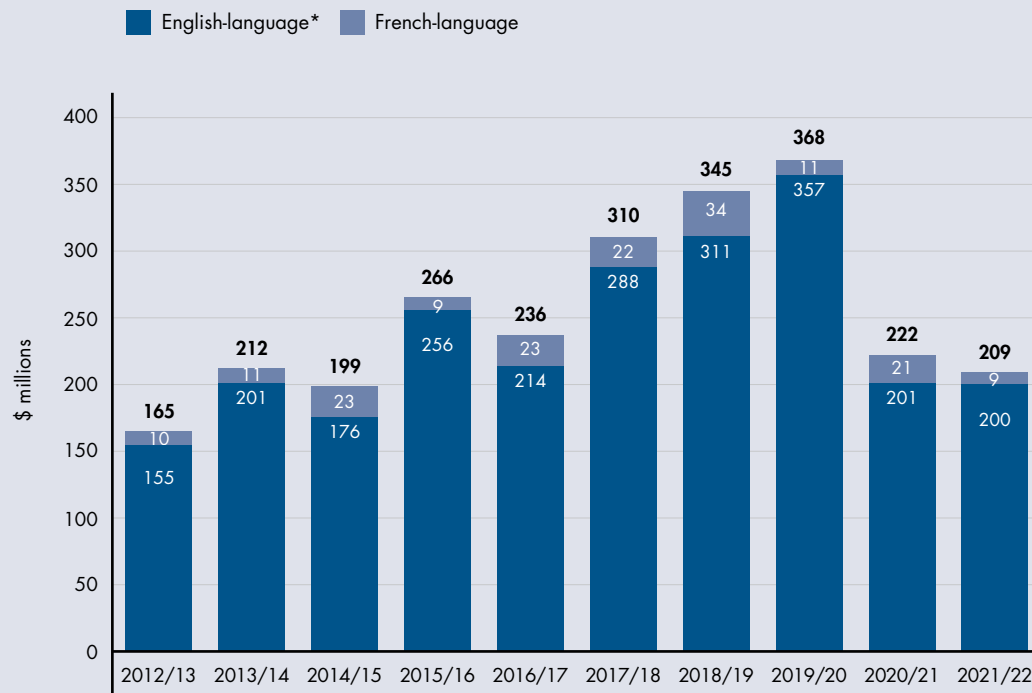
Source: Estimates based on data collected from CAVCO.

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

* Includes 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.

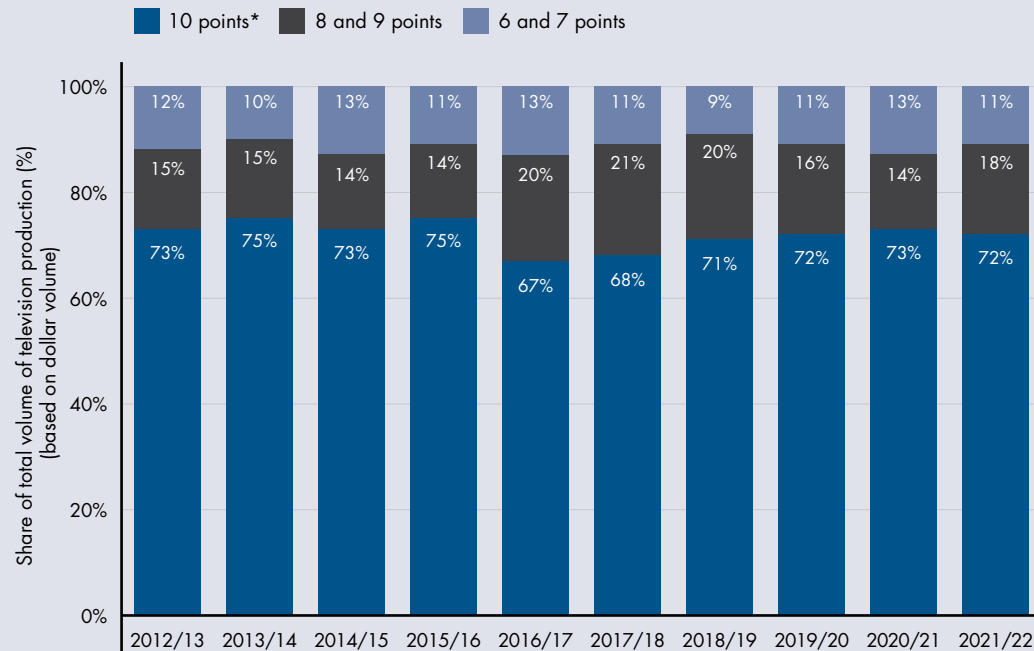
* Includes data for projects produced in bilingual format and non-official languages, which comprised less than one percent of the total volume of English-language television production between 2011/12 and 2021/22 and cannot be reported on separately due to confidentiality issues arising from low production 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.¹⁴ To be certified as Canadian content, a film or television program (other than an audiovisual treaty coproduction) must obtain a minimum of six points, up to a maximum of 10 points.¹⁵ The vast majority of Canadian television programs obtain the maximum 10 Canadian content points and this share has remained relatively stable over the past decade.

¹⁴ For more information on the Canadian content point scale and all other CPTC requirements, please see CAVCO's [CPTC Application Guidelines](#).

¹⁵ 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)	2012/13	2013/14	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2021/22 share of total
Ontario	1,056	1,094	1,216	1,263	1,323	1,297	1,418	1,340	984	1,452	41%
Quebec	701	664	774	762	895	703	798	768	841	1,159	33%
British Columbia	387	417	426	429	512	420	527	477	511	624	18%
Prairie Provinces and Territories*	88	127	114	122	127	138	119	209	122	170	5%
Atlantic Canada**	73	116	70	93	109	133	78	80	71	110	3%
Total	2,305	2,418	2,599	2,669	2,966	2,691	2,939	2,873	2,530	3,514	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 2022*. 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, promotes, develops and finances the production of Canadian content of relevant applications for all audiovisual media platforms.

The CMF had an overall program budget of \$359 million in 2021-22. It funds the production of screen-based media content across two streams: the Convergent Stream and the Experimental Stream. It also provides funding to a variety of industry-development initiatives through its Sector Development funding program.

The CMF's Convergent Stream provides financial support to screen-based projects with television content and content or applications for at least one additional digital media platform. The Experimental Stream funds 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 3 (later in this section) provides data for the Experimental Stream.

CMF's Convergent Stream funding of \$289 million supported \$1.73 billion¹⁶ in television production in 2021/22 and generated an estimated 36,300 jobs (including direct and spin-off impacts). The total value of CMF funding in 2021/22 (\$289 million) represented the highest level since 2012/13. While the CMF overall has experienced reduced revenue from BDUs in recent years – on account of decreasing subscriber levels and revenue – additional funding from the Government of Canada to offset the lower revenue from BDUs and to enable the CMF to promote production within equity-deserving communities (i.e. Black, Indigenous, and racialized people; people with disabilities; and people who identify as 2SLGBTQ+) has allowed the CMF to maintain and even increase its funding levels.¹⁷ While CMF funding rose by \$8 million in 2021/22, the total value of supported production budgets increased by \$355 million to an all-time record of \$1.73 billion.

Indeed, the CMF's financial leverage was also at its highest in 2021/22, with each dollar of CMF Convergent Stream funding helping to attract \$4.98 in additional financing. This rate of financial leverage was 43% higher than the 10-year average of \$4.49 observed between 2012/13 and 2020/21.

In addition to its regular sector funding, in 2020/21, the CMF was one of the organizations selected by the federal government to distribute COVID-19 emergency relief funding to the Canadian audiovisual sector. The CMF was given responsibility to distribute \$120.2 million of Emergency Relief Funds support, of which \$101.2 million was disbursed in 2020/21 (with the balance of \$19 million held over to 2021/22).¹⁸ Of the total disbursed in 2020/21, \$91.8 million was provided directly to Canadian production companies, with the other \$9.4 million provided to the Indigenous Screen Office, regular CMF programs and other sector-development initiatives.¹⁹

¹⁶ Canada Media Fund, custom tabulations. Funding and production statistics only include television-platform component of Convergent Stream projects.

¹⁷ Canada Media Fund (2022), *Annual Report 2021/2022*, p. 111. In 2020-2021, the Government of Canada increased its annual funding of the CMF by \$3.3 million to offset the decline in revenue from BDUs. The Government of Canada also provided the CMF with \$20 million in new funding for equity-deserving communities.

¹⁸ Canada Media Fund (2021), *Canada Media Fund 2020-2021 Annual Report*, p. 106.

¹⁹ Canada Media Fund (2021), *Canada Media Fund 2020-2021 Annual Report*, p. 108.

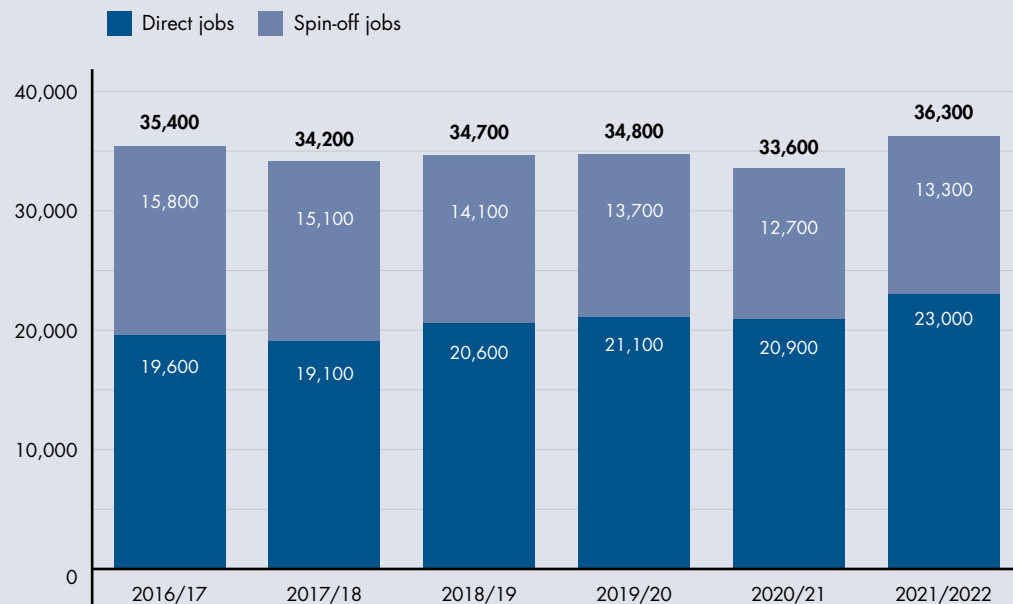
Exhibit 3-13 Volume of Canadian television production with CMF contributions



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

	2012/13	2013/14	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22
Documentary	828	886	925	1,041	1,045	831	959	1,051	1,035	1,142
Children's and youth	785	712	799	763	688	697	516	547	546	463
Drama (i.e. fiction)	671	661	700	757	728	724	727	760	674	947
Variety and performing arts	404	321	354	398	418	452	393	415	360	317
Total	2,688	2,580	2,778	2,959	2,878	2,704	2,595	2,773	2,615	2,869

Source: CMF.

Note: Some totals may not sum due to rounding.

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

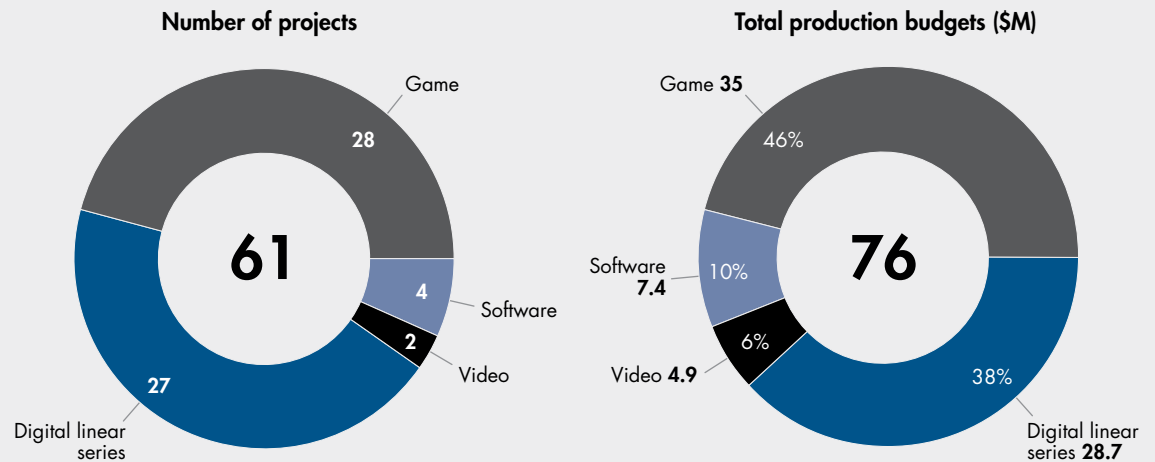
	2012/13	2013/14	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22
(\$ millions)										
Documentary	58	57	59	65	69	58	64	69	64	76
Children's and youth	56	56	56	54	39	37	33	38	37	41
Drama (i.e. fiction)	166	152	158	153	151	151	153	150	154	157
Variety and performing arts	18	16	13	13	19	15	13	18	26	14
Total	300	282	286	286	278	260	262	276	281	289
Share of total										
Documentary	19%	20%	21%	23%	25%	22%	24%	25%	23%	26%
Children's and youth	19%	20%	20%	19%	14%	14%	13%	14%	13%	14%
Drama (i.e. fiction)	55%	54%	55%	53%	54%	58%	58%	54%	55%	54%
Variety and performing arts	6%	6%	5%	5%	7%	6%	5%	7%	9%	5%
Total	99%	100%	100%	100%	100%	100%	100%	100%	100%	100%

Source: CMF.

Note: Some totals may not sum due to rounding.

Box 3 CMF-supported Experimental Stream digital media production, 2021/22

The Experimental Stream funds the creation of innovative digital media content and software applications. In 2021/22, the Experimental Stream provided \$35.8 million in funding to 61 projects with total production budgets of \$76 million.²⁰



Source: CMF

²⁰ Statistics may differ from those reported in the CMF Annual Report for two reasons: (i) statistics re-ported in *Profile 2022* 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 2022* 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	2017/18		2018/19		2019/20		2020/21		2021/22	
	\$ millions	%	\$ millions	%	\$ millions	%	\$ millions	%	\$ millions	%
Private broadcaster licence fees	374	14%	405	14%	401	14%	284	11%	575	16%
Public broadcaster licence fees	344	13%	333	11%	325	11%	360	14%	446	13%
Federal tax credit ¹	285	11%	304	10%	295	10%	264	10%	372	11%
Provincial tax credits ¹	500	19%	562	19%	542	19%	487	19%	671	19%
Canadian distributors ²	301	11%	366	12%	330	11%	283	11%	314	9%
Foreign pre-sales and advances ³	431	16%	405	14%	459	16%	400	16%	474	13%
CMF ⁴	260	10%	262	9%	276	10%	281	11%	289	8%
Other public ⁵	67	2%	126	4%	105	4%	62	2%	165	5%
Other private ⁶	129	5%	176	6%	139	5%	109	4%	207	6%
Total	2,691	100%	2,939	100%	2,873	100%	2,530	100%	3,514	100%

English-language production ⁷	2017/18		2018/19		2019/20		2020/21		2021/22	
	\$ millions	%	\$ millions	%	\$ millions	%	\$ millions	%	\$ millions	%
Private broadcaster licence fees	235	12%	246	11%	242	11%	126	7%	240	10%
Public broadcaster licence fees	161	8%	155	7%	144	7%	162	9%	235	10%
Federal tax credit ¹	210	10%	222	10%	216	10%	180	10%	249	10%
Provincial tax credits ¹	401	20%	448	20%	434	20%	362	21%	506	21%
Canadian distributors ²	293	14%	369	17%	323	15%	272	16%	304	13%
Foreign pre-sales and advances ³	425	21%	386	17%	454	21%	380	22%	461	19%
CMF ⁴	177	9%	178	8%	188	9%	188	11%	195	8%
Other public ⁵	58	3%	95	4%	85	4%	36	2%	81	3%
Other private ⁶	81	4%	121	5%	90	4%	50	3%	145	6%
Total	2,041	100%	2,220	100%	2,177	100%	1,755	100%	2,416	100%

French-language production	2017/18		2018/19		2019/20		2020/21		2021/22	
	\$ millions	%	\$ millions	%	\$ millions	%	\$ millions	%	\$ millions	%
Private broadcaster licence fees	140	22%	162	22%	161	23%	161	21%	339	31%
Public broadcaster licence fees	184	28%	183	25%	184	26%	202	26%	213	19%
Federal tax credit ¹	75	12%	82	11%	79	11%	84	11%	123	11%
Provincial tax credits ¹	99	15%	113	16%	108	15%	121	16%	164	15%
Canadian distributors ²	5	1%	6	1%	4	1%	4	1%	8	1%
Foreign pre-sales and advances ³	5	1%	2	0%	2	0%	0	0%	11	1%
CMF ⁴	83	13%	84	12%	88	13%	92	12%	93	8%
Other public ⁵	10	1%	32	5%	21	3%	58	7%	86	8%
Other private ⁶	49	8%	55	8%	49	7%	53	7%	61	6%
Total	650	100%	719	100%	696	100%	775	100%	1,098	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 financing includes 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, 2021/22

All languages	Fiction	Children's and youth	Documentary	Lifestyle and human interest ¹	VAPA	All genres
Amount (\$M)						
Private broadcaster licence fees	162	37	83	245	48	575
Public broadcaster licence fees	209	53	57	91	36	446
Federal tax credit ²	190	48	53	63	18	372
Provincial tax credits ²	366	116	91	73	24	671
Canadian distributors ³	202	51	51	9	2	314
Foreign pre-sales and advances ⁴	348	77	36	8	5	474
CMF ⁵	157	41	76	0	14	289
Other public ⁶	92	30	10	27	7	165
Other private ⁷	83	39	46	31	8	207
Total	1,809	492	504	547	162	3,514
Share of total financing						
Private broadcaster licence fees	9%	8%	17%	45%	30%	16%
Public broadcaster licence fees	12%	11%	11%	17%	22%	13%
Federal tax credit ²	11%	10%	10%	12%	11%	11%
Provincial tax credits ²	20%	24%	18%	13%	15%	19%
Canadian distributors ³	11%	10%	10%	2%	1%	9%
Foreign pre-sales and advances ⁴	19%	16%	7%	1%	3%	13%
CMF ⁵	9%	8%	15%	0%	9%	8%
Other public ⁶	5%	6%	2%	5%	4%	5%
Other private ⁷	5%	8%	9%	6%	5%	6%
Total	100%	100%	100%	100%	100%	100%
English-language production⁸						
Amount (\$M)						
Private broadcaster licence fees	37	28	51	110	13	240
Public broadcaster licence fees	137	18	35	35	10	235
Federal tax credit ²	141	36	39	28	6	249
Provincial tax credits ²	290	97	71	40	8	506
Canadian distributors ³	195	51	49	8	1	304
Foreign pre-sales and advances ⁴	338	77	33	8	5	461
CMF ⁵	104	29	55	0	7	195
Other public ⁶	41	19	7	12	2	81
Other private ⁷	59	32	39	12	3	145
Total	1,342	387	379	253	55	2,416
Share of total financing						
Private broadcaster licence fees	3%	7%	13%	44%	24%	10%
Public broadcaster licence fees	10%	5%	9%	14%	19%	10%
Federal tax credit ²	10%	9%	10%	11%	11%	10%
Provincial tax credits ²	22%	25%	19%	16%	14%	21%
Canadian distributors ³	14%	13%	13%	3%	2%	13%
Foreign pre-sales and advances ⁴	25%	20%	9%	3%	9%	19%
CMF ⁵	8%	7%	15%	0%	13%	8%
Other public ⁶	3%	5%	2%	5%	4%	3%
Other private ⁷	4%	8%	10%	5%	5%	6%
Total	100%	100%	100%	100%	100%	100%

(Continued next page)

Exhibit 3-18 Financing of Canadian television production, by genre, 2021/22 (continued)

French-language production	Fiction	Children's and youth	Documentary	Lifestyle and human interest¹	VAPA	All genres
Amount (\$M)						
Private broadcaster licence fees	127	10	33	135	35	339
Public broadcaster licence fees	73	35	23	56	26	213
Federal tax credit ²	49	11	14	36	12	123
Provincial tax credits ²	75	19	20	33	17	164
Canadian distributors ³	6	<1	2	<1	<1	8
Foreign pre-sales and advances ⁴	8	<1	2	<1	<1	11
CMF ⁵	53	12	21	0	7	93
Other public ⁶	51	12	4	15	5	86
Other private ⁷	24	6	7	19	5	61
Total	467	105	126	294	107	1,098
Share of total financing						
Private broadcaster licence fees	27%	9%	26%	46%	33%	44%
Public broadcaster licence fees	16%	33%	18%	19%	24%	28%
Federal tax credit ²	11%	11%	11%	12%	12%	16%
Provincial tax credits ²	16%	18%	16%	11%	16%	22%
Canadian distributors ³	1%	<1%	1%	<1%	<1%	1%
Foreign pre-sales and advances ⁴	2%	<1%	2%	<1%	<1%	<1%
CMF ⁵	11%	11%	17%	0%	7%	12%
Other public ⁶	11%	11%	3%	5%	5%	11%
Other private ⁷	5%	6%	5%	6%	5%	8%
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 financing includes 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.²¹ Recent examples of notable Canadian theatrical feature films include *Falcon Lake*, *Confessions*, *23 Décembre*, *Crimes of the Future*, *Charlotte* and *Scarborough*.

Highlights from 2021/22



- Canadian theatrical feature film production increased by 43.8% to \$387 million.
- Canadian producers made 148 theatrical feature films, up from 85 in 2020/21.
- Theatrical feature film production in English²² increased by 34.1% to \$246 million.
- Theatrical feature film production in French increased by 64.7% to \$141 million.
- The average budget for Canadian fiction feature films increased to \$2.9 million.
- The average budget for fiction feature films made in English increased to \$2.6 million.
- The average budget for fiction films made in French increased to \$3.8 million.
- The total volume of theatrical feature film production in the fiction genre increased by 64.8% to \$318 million.
- The number of theatrical feature films in the fiction genre increased from 70 to 109.
- The share of theatrical feature films with a budget between \$2.5 million and \$5 million increased from 12% to 24%.
- The share of theatrical feature films with a budget between \$1 million and \$2.5 million increased from 32% to 39%.



- The share of theatrical feature films with a budget of more than \$5 million decreased slightly, from 18% to 16%.

²¹ 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.

²² 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 2021/22.

With additional production funding from Telefilm Canada and the Government of Quebec, along with support from the federal government's COVID-19 emergency stabilization programs, the volume of Canadian theatrical feature film production rebounded to a 10-year high of \$387 million in 2021/22 (Exhibit 4-1). This increase reflected slightly higher average spending per film – \$2.9 million in 2021/22 vs. \$2.8 million in 2020/21 (Exhibit 4-4) – as well as an increase in the number of films produced. A total of 148 Canadian theatrical feature films were produced in 2021/22 – also matching a 10-year high (Exhibit 4-2).

The dramatic rebound in theatrical feature film production was shared across both language markets; however, it was most pronounced in the French-language market, which was much more resilient in the midst of the pandemic in 2020/21. The volume of French-language theatrical feature film production increased significantly by 64.7% in 2021/22, reaching a 10-year high of \$141 million (Exhibit 4-1). At that level, the volume of production was approximately double the pre-pandemic volume of \$73 million in 2019/20. In fact, this volume of French-language theatrical feature film production was the highest ever recorded, when looking back over 26 years of production statistics. It was 33% higher than the next best year, 2009/10, when it hit \$106 million.

Telefilm Canada

As a Partner of Choice, Telefilm Canada is a Crown corporation dedicated to the success of the Canadian audiovisual industry, fostering access and excellence through programming that supports cultural resonance and public engagement. Telefilm supports dynamic companies and creative talent in Canada and around the world, always with an eye to equity, inclusion and sustainability. In addition, it makes recommendations to the Department of Canadian Heritage regarding the certification of treaty audiovisual co-productions, and administers the Canada Media Fund programs. Launched in 2012, the Talent Fund accepts private donations that are primarily used to support emerging talent.

In 2021/22, Telefilm Canada provided a total of \$132.7 million in ongoing financial support to Canada's audiovisual sector.²³ This included \$95.4 million in support of the development of the audiovisual industry (e.g. production, development, theatrical documentary programs) and \$37.3 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).²⁴ In addition to this ongoing financial support, Telefilm Canada provided \$4.1 million in COVID-19 relief funding in 2021/22 via the Short-Term Compensation Fund (STCF).²⁵

The annual number of French-language films produced increased similarly by 64% – from 25 to 41 (Exhibit 4-2). French-language theatrical feature films were also larger in budget terms: the average budget rose from \$3.5 million in 2020/21 to a 10-year high of \$3.8 million.

The resiliency demonstrated by French-language theatrical feature film production in 2020/21 and the robust rebound experienced in 2021/22 were both, in large part, due to the additional financial support offered by the Government of Quebec, as part of its general funding for the audio-visual sector²⁶ and its short-term measures to mitigate the effects of the pandemic.²⁷

With an additional \$105 million in federal government funding (over three years) beginning in 2021/22, Telefilm Canada was also able to increase its financial support of French-language theatrical feature film production as well as English-language production.²⁸

²³ Telefilm Canada (2022), *A New Spirit of Collaboration: 2021-2022 Annual Report*, p. 9.

²⁴ Ibid.

²⁵ Ibid.

²⁶ Société de développement des entreprises culturelles (2020), "[155,2 M\\$ additionnels pour la relance des entreprises culturelles québécoises](#)," press release, June 2, 2020.

²⁷ Ministère de la Culture et des Communications (2020), "[Québec crée un programme pour permettre la reprise des tournages pour le cinéma et la télé](#)," press release, July 13, 2020.

²⁸ Telefilm Canada (2022), p. 18.

English-language feature film production bounced back by 34.1% in 2021/22, reaching \$246 million, or just \$2 million short of its pre-pandemic volume of \$248 million in 2019/20 (Exhibit 4-1). A total of 107 English-language theatrical feature films were produced in 2021/22. This was 78.3% higher than the number in 2020/21 and 7% higher than the 100 films produced in 2019/20, immediately prior to the pandemic.

The rebound in theatrical feature film production in 2021/22 was also clearly concentrated in the fiction genre (Exhibit 4-5). That genre accounted for virtually all of the increase in volume, with volume in the other genres (e.g. documentary, children's and youth) actually declining by \$7 million in 2021/22 compared to 2020/21.

Historically, the global film market, international treaty coproduction and annual levels of foreign investment in production (FIIP)²⁹ have been key drivers of the year-to-year fluctuations in the volume of Canadian theatrical feature film production. However, in 2021/22, Telefilm Canada and other public sources played a more prominent role in the financing of Canadian theatrical feature film production, and thereby underpinning the sub-sector's strong rebound. In particular, as noted above, 2021/22 marked the first year of Telefilm Canada's additional \$105 million in funding from the federal government (over three years).³⁰

In 2021/22, the level of FIIP flowing into Canadian theatrical feature film production actually decreased – in both absolute and percentage terms. FIIP dropped from \$100 million to \$86 million (Exhibit 1-5) and its share of total financing declined from 37% to 22% (Exhibit 4-7a). This decrease in FIIP was exclusive to English-language production, as French-language production actually saw its FIIP increase to a five-year high of \$15 million (Exhibits 4-7b and 4-7c). However, even with this increase in 2021/22, FIIP only accounted for 11% of total financing for French-language theatrical feature film production, with financing directly from foreign broadcasters and distributors accounting for 4% of total financing.

The decline in FIIP in the English-language market was more than offset by the higher levels of public financial support. Total public funding (i.e. Telefilm Canada, federal and provincial tax credits, and other public funding) for English-language theatrical feature film production increased from \$71 million to \$139 million in 2021/22. Its share of total financing for English-language feature film production subsequently rose from 39% to 57% (Exhibit 4-7b). Funding from Telefilm Canada alone increased to \$53 million, which was 29.3% higher than the pre-pandemic funding level of \$41 million in 2019/20.

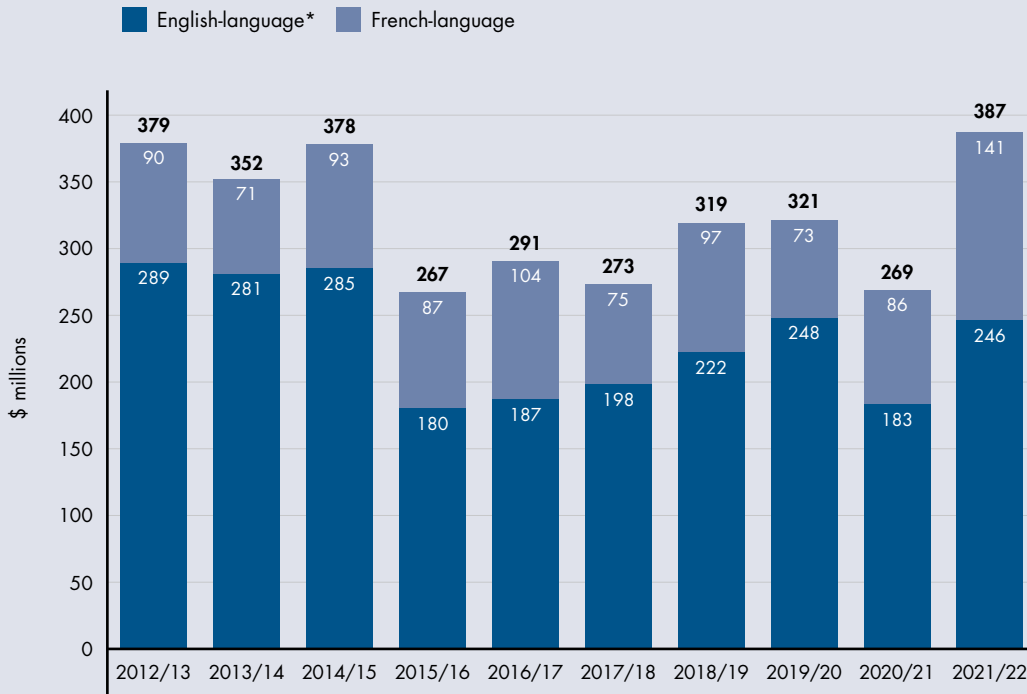
Total public funding for French-language theatrical feature film production increased from \$69 million to \$112 million, although its share of the total financing was relatively stable at 80% (Exhibit 4-7c).

²⁹ 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.

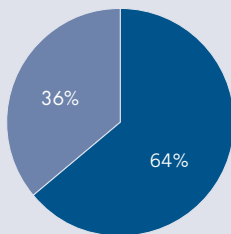
³⁰ Telefilm Canada (2022), p. 18.

LANGUAGE

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



Share
2021/22



Annual average growth rate

Language	2021/22	2012/13– 2021/22
English-language*	34.1%	(1.8%)
French-language	64.7%	5.1%
Average: all languages	43.8%	0.2%

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 2021/22, and with the French-language market for 2012/13 to 2015/16.

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

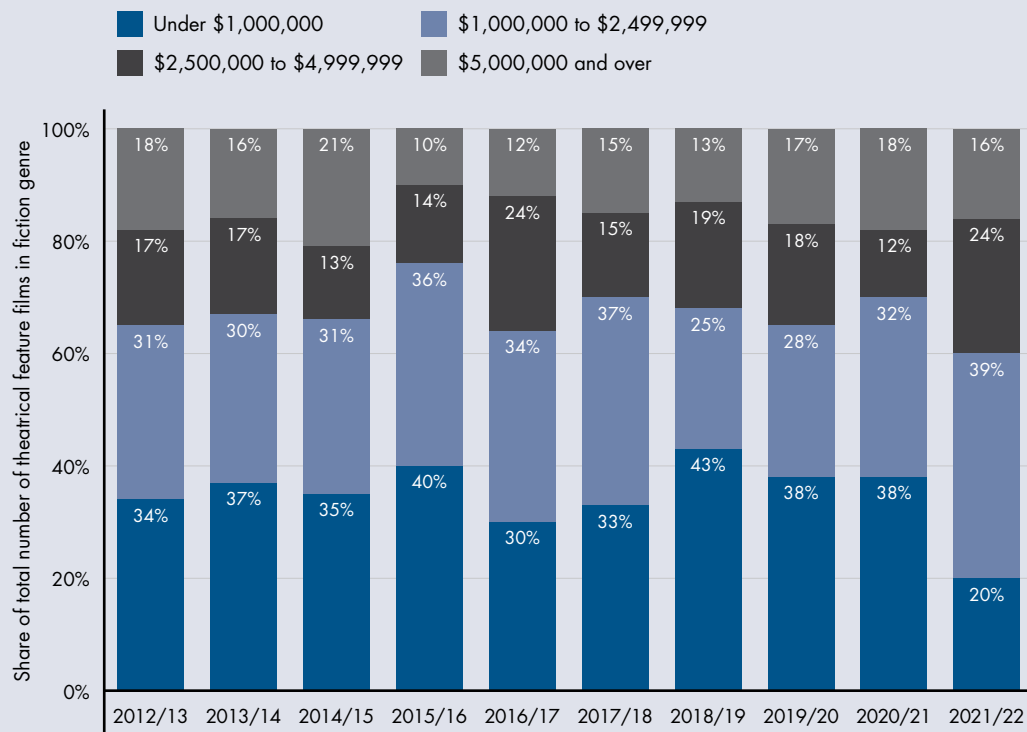
	2012/13	2013/14	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22
English-language/ Bilingual/Other*	90	75	89	84	81	82	108	100	60	107
French-language*	38	42	42	38	42	40	40	38	25	41
Total	128	117	131	122	123	122	148	138	85	148

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 2021/22, and with the French-language market for 2012/13 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)	2012/13	2013/14	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22
English-language										
Average	3.6	3.9	3.5	1.8	2.6	2.8	2.2	2.4	2.5	2.6
Median	1.3	1.3	1.4	1.0	1.6	1.3	1.2	1.2	1.1	1.6
French-language										
Average	2.7	2.5	2.4	2.2	3.4	2.2	3.2	2.5	3.5	3.8
Median	1.8	1.9	1.3	1.8	2.4	1.7	3.0	1.8	2.4	3.1
All languages*										
Average	3.4	3.5	3.1	2.0	2.8	2.6	2.5	2.5	2.8	2.9
Median	1.4	1.4	1.3	1.3	1.8	1.4	1.6	1.4	1.4	2.0

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**

	2012/13	2013/14	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22
Volume (\$ millions)										
Fiction	357	314	295	179	253	205	269	256	193	318
Other genres*	21	38	83	88	39	69	50	65	76	69
Total	379	352	378	267	291	273	319	321	269	387
Number of films										
Fiction	107	89	94	91	90	80	110	104	70	109
Other genres*	21	28	37	31	33	42	38	34	15	39
Total	128	117	131	122	123	122	148	138	85	148

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)	2012/13	2013/14	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2021/22 share of total
Ontario	173	131	124	113	82	113	141	149	153	177	46%
Quebec	145	178	203	107	153	135	138	143	91	182	47%
British Columbia	37	18	44	34	37	10	22	8	20	17	4%
Prairie Provinces and Territories*	12	19	7	8	18	9	14	17	2	9	2%
Atlantic Canada**	11	6	0	5	2	6	3	4	2	1	<1%
Total	379	352	378	267	291	273	319	321	269	387	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 2022*. 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	2017/18		2018/19		2019/20		2020/21		2021/22	
	\$ millions	%	\$ millions	%	\$ millions	%	\$ millions	%	\$ millions	%
Private broadcaster licence fees	1	<1%	1	<1%	2	1%	<1	<1%	2	1%
Public broadcaster licence fees	2	1%	4	1%	2	1%	1	<1%	2	<1%
Federal tax credits ¹	17	6%	20	6%	19	6%	14	5%	24	6%
Provincial tax credit ¹	51	19%	62	19%	59	18%	45	17%	80	21%
Canadian distributors ²	36	13%	28	9%	28	9%	49	18%	42	11%
Foreign pre-sales and advances ³	29	11%	43	13%	54	17%	51	19%	45	12%
Telefilm Canada	67	25%	70	22%	68	21%	38	14%	78	20%
Other public ⁴	31	11%	41	13%	38	12%	41	15%	70	18%
Other private ⁵	40	15%	50	16%	51	16%	29	11%	45	12%
Total	273	100%	319	100%	321	100%	269	100%	387	100%

English-language, bilingual format and non-official languages ⁶	2017/18		2018/19		2019/20		2020/21		2021/22	
	\$ millions	%	\$ millions	%	\$ millions	%	\$ millions	%	\$ millions	%
Private broadcaster licence fees	1	<1%	1	<1%	2	1%	<1	<1%	1	<1%
Public broadcaster licence fees	1	1%	3	1%	2	1%	<1	<1%	2	1%
Federal tax credits ¹	14	7%	16	7%	17	7%	11	6%	20	8%
Provincial tax credit ¹	36	18%	42	19%	45	18%	28	15%	52	21%
Canadian distributors ²	31	16%	23	10%	22	9%	43	24%	31	13%
Foreign pre-sales and advances ³	28	14%	38	17%	53	21%	48	26%	39	16%
Telefilm Canada	46	23%	47	21%	41	17%	23	13%	53	22%
Other public ⁴	12	6%	13	6%	23	9%	9	5%	15	6%
Other private ⁵	29	15%	39	18%	44	18%	20	11%	33	13%
Total	198	100%	222	100%	248	100%	183	100%	246	100%

French-language	2017/18		2018/19		2019/20		2020/21		2021/22	
	\$ 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	3	4%	4	4%	2	3%	3	3%	4	3%
Provincial tax credit ¹	15	20%	20	20%	15	20%	18	21%	29	20%
Canadian distributors ²	5	6%	6	6%	6	8%	6	7%	10	7%
Foreign pre-sales and advances ³	1	1%	5	5%	<1	<1%	2	3%	5	4%
Telefilm Canada	21	28%	23	24%	27	37%	15	18%	25	18%
Other public ⁴	19	26%	27	28%	16	23%	34	40%	55	39%
Other private ⁵	11	15%	11	12%	7	9%	8	9%	12	9%
Total	75	100%	97	100%	73	100%	86	100%	141	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 financing includes 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.³¹ 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 2021/22



- Canada participated in 53 treaty coproductions – up from 40 in 2020/21.
- The total number of feature film treaty coproductions increased from 13 to 33.
- The total budgets of Canada's treaty coproductions increased by 22.7% to \$286 million.
- The total budgets of Canada's feature film treaty coproductions increased by 57.3% to \$176 million.
- The median project budget for feature film treaty coproductions increased from \$1.9 million to \$3.3 million.



- UK and France continued to be Canada's leading coproduction partners between 2012/13 and 2021/22. The UK was the leading television treaty coproduction partner. France was the leading partner for feature films.
- Canada was a majority (or equal) partner for 40% of its treaty coproduction projects in 2021/22 (unchanged from 2020/21).



- Canadian budgets accounted for 40% of total treaty coproduction budgets in 2021/22 down from 53% in 2020/21.
- The Canadian share of treaty coproduction budgets decreased from \$124 million to \$114 million in 2021/22.
- The total number of television treaty coproductions decreased from 27 to 20.
- The number of television coproductions in the documentary genre decreased from 14 to 7.
- The total budgets of television treaty coproductions decreased by 9.8% to \$111 million.

³¹ A list of these agreements can be found on Telefilm Canada's website at <https://telefilm.ca/en/coproduction/international-treaties>.

After four consecutive years of annual declines, Canada's overall volume of treaty production – inclusive of the Canadian and foreign shares of budgets – rose by 21.7% in 2021/22 (Exhibit 5-1). Despite this increase in the overall volume, the Canadian share of that budget spending fell by 8.1% to a 10-year low of \$114 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 uptick in overall volume in 2021/22 – or conversely the downtick in the Canadian share of spending – could very well reverse direction in 2022/23 or thereafter. That being said, since reaching \$590 million in 2013/14, the annual volume of Canada's treaty coproduction has been on a clear downward trend (Exhibit 5-1). Since 2013/14, the annual volume has experienced a year-over-year decline in six of eight years. Overall, the total volume of Canada's treaty coproduction in 2021/22 (\$286 million) was half the level it was in 2013/14 (\$590 million).

Looking back over the past decade, 2013/14 was a standout year for Canada in terms of participation in feature film treaty production, with \$337 million in volume – nearly double the volume experienced in the prior two years (2011/12 to 2012/13) and 50% higher than the volume any year after (2014/15 to 2021/22). In the midst of the pandemic in 2020/21, feature film treaty production hit a 10-year low of 13 films and \$112 million in volume, with decreases in both English- and French-language production (Exhibit 5-9). However, in 2021/22, feature film treaty coproduction rebounded by 57.5% to \$176 million. It was this rebound in feature film treaty coproduction that underpinned the overall rebound in Canada's treaty coproduction in 2021/22.

While the volume of English-language feature film treaty coproduction increased by \$11 million or 12.6% in 2021/22, it was French-language production that really underpinned the rebound (Exhibit 5-9). Volume more-than-tripled from \$23 million to \$76 million, as the number of produced films increased from the 3 to 11. The \$53 million increase in French-language feature film treaty coproduction volume accounted for 83% of the overall increase of \$64 million.

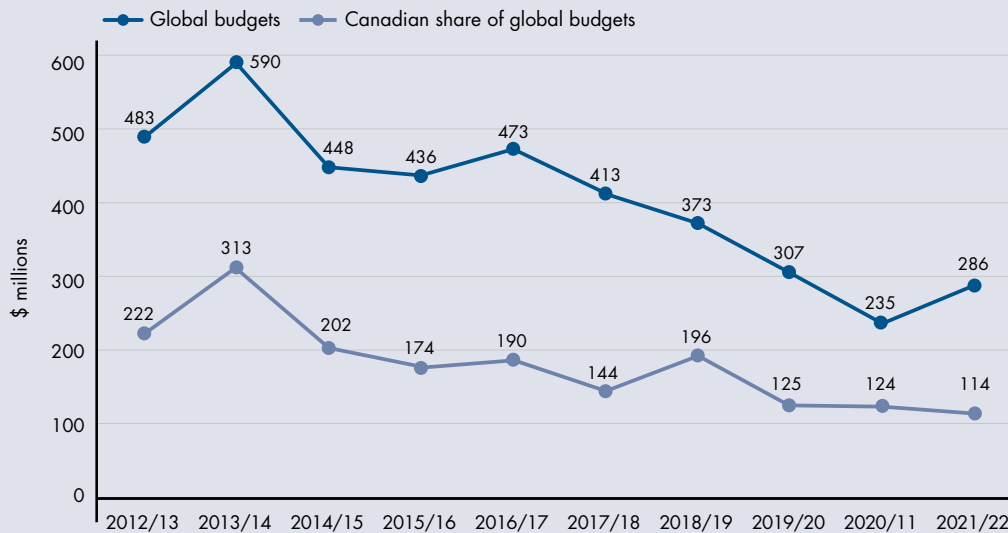
Unlike feature film coproduction, television treaty coproduction dropped by 9.8% to a 10-year low of \$111 million in 2021/22 (Exhibit 5-6). While year-to-year fluctuations in production activity contributed to the decline in 2021/22, it was also likely due to a general downward trend that Canada had been experiencing in the volume of television treaty coproduction going as far back as 2017/18. After averaging \$276 million annually between 2012/13 and 2017/18, the annual average volume of television treaty coproduction has averaged only \$135 million since 2018/19.

The drop in television treaty coproduction volume in 2021/22 was a result of lower levels of drama and documentary production, while the coproduction of children's and youth television programming increased. The volume of television treaty coproduction in the drama genre dropped by 34.5% to a 10-year low of only \$24 million – or approximately one-tenth of where it stood as recently as 2017/18 (Exhibit 5-7). The number of television treaty coproduction documentaries halved from 14 to 7 in 2021/22, as the volume of production also dropped by just over one-half (Exhibit 5-7). In contrast, the volume of children's and youth television treaty coproduction increased by 33.1%, from \$55 million to \$73 million. This made the genre, by far, the largest contributor to Canada's television treaty coproduction in 2021/22 (Exhibit 5-7).

In further contrast to the feature film treaty coproduction segment, Canada's television treaty coproduction activity was heavily focused on English-language production. It accounted for approximately 95% of projects in 2021/22 (Exhibit 5-6).

ALL RELEASE WINDOWS

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



Source: Telefilm Canada.

Note: Statistics as of September 2021.

* 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

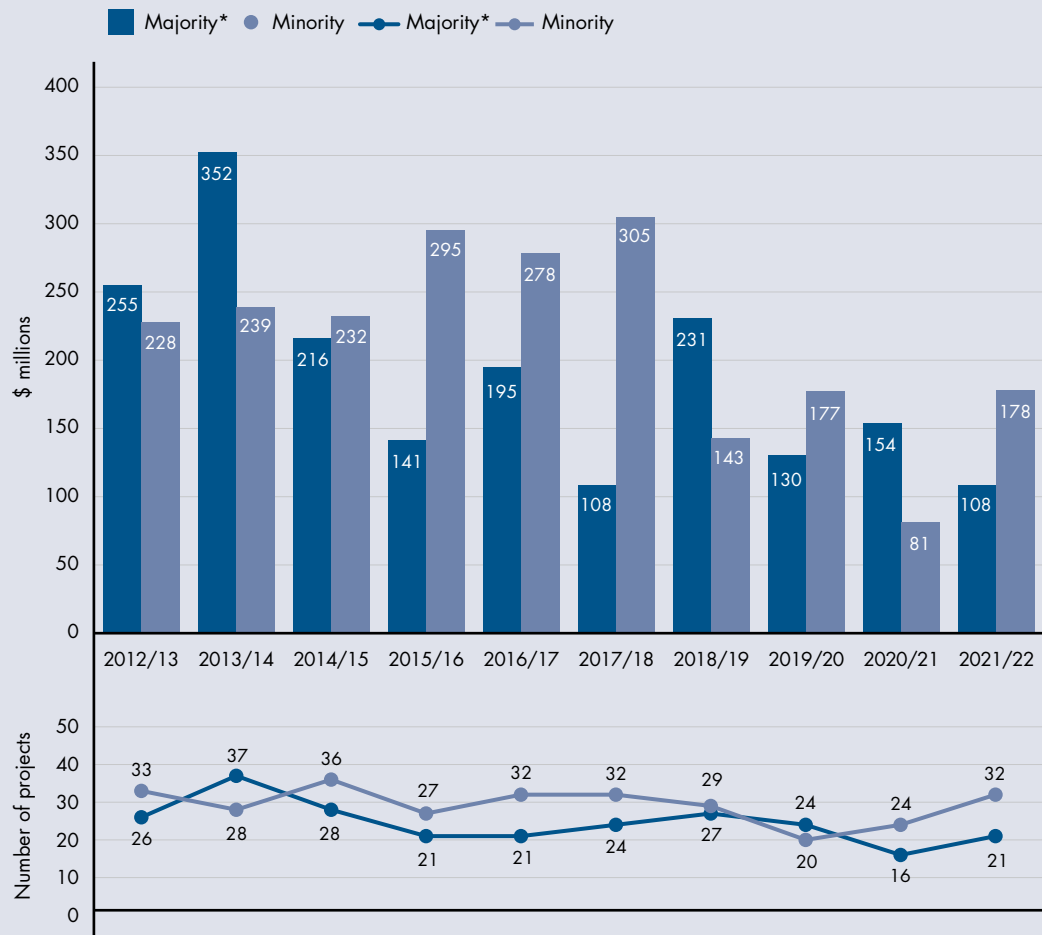
	2012/13	2013/14	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22
English-language										
Canadian share of budgets (\$M)	192	304	182	141	179	132	185	114	116	92
Foreign share of budgets (\$M)	195	260	225	214	240	226	141	143	90	114
Total budgets (\$M)	387	564	407	355	419	358	326	257	206	206
Number of projects	42	58	50	31	43	35	44	35	33	41
French-language										
Canadian share of budgets (\$M)	31	9	21	33	11	12	11	11	8	22
Foreign share of budgets (\$M)	65	17	20	47	43	43	36	39	20	59
Total budgets (\$M)	96	26	41	80	54	55	47	50	28	81
Number of projects	17	7	14	17	10	21	12	9	7	12
All languages										
Canadian share of budgets (\$M)	222	313	202	174	190	144	196	125	124	114
Foreign share of budgets (\$M)	261	278	245	262	283	269	177	182	110	172
Total budgets (\$M)	483	590	448	436	473	413	373	307	235	286
Number of projects	59	65	64	48	53	56	56	44	40	53

Source: Telefilm Canada.

Note: Some totals may not sum due to rounding. Statistics as of September 2022.

* 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).

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



Source: Telefilm Canada.

Note: Statistics as of September 2022.

* 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)	2012/13	2013/14	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22
By language										
English-language	2.7	4.6	2.7	5.1	4.2	2.2	3.6	4.8	2.5	3.4
French-language	2.5	2.4	1.7	3.5	1.7	1.1	3.0	2.0	3.2	3.3
By medium										
Television	1.9	2.8	2.0	1.6	1.7	1.3	2.6	3.3	2.4	3.6
Feature film	4.9	10.2	5.7	5.5	6.2	4.1	3.8	3.7	1.9	3.3
All projects	2.6	3.8	2.6	4.0	3.1	1.8	3.6	3.6	2.4	3.3

Source: Telefilm Canada.

Note: Statistics as of September 2022.

Exhibit 5-5 Audiovisual treaty coproduction partner countries, 2012/13–2021/22

	Number of projects	Total global budgets (\$ millions)	Canadian share of total global budgets	
			\$ millions	%
United Kingdom	133	736	388	53%
France	131	1,003	405	40%
Germany	34	406	240	59%
Ireland	30	743	228	31%
Australia	24	150	86	57%
Belgium	15	95	47	49%
Israel	15	26	16	64%
New Zealand	14	50	19	38%
South Africa	14	72	36	51%
Brazil	8	42	22	53%
Hungary	8	163	75	46%
Italy	8	30	18	61%
Spain	8	76	38	51%
Switzerland	8	17	9	52%
Other bipartite	58	197	98	50%
Multipartite*	30	240	78	33%
Total	538	4,044	1,805	45%

Source: Telefilm Canada.

Note: Some totals may not sum due to rounding. Statistics as of September 2022.

* 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

	2012/13	2013/14	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22
English-language										
Canadian share of budgets (\$M)	99	122	105	107	97	87	76	46	63	–
Foreign share of budgets (\$M)	123	124	169	175	174	192	63	99	54	–
Total budgets (\$M)	222	246	274	282	271	279	139	145	117	–
Number of projects	31	38	35	23	26	20	18	15	23	19
French-language										
Canadian share of budgets (\$M)	6	2	5	2	7	7	4	3	1	–
Foreign share of budgets (\$M)	11	5	7	3	18	10	13	2	4	–
Total budgets (\$M)	18	7	12	5	25	17	17	5	5	–
Number of projects	10	3	7	4	8	16	5	4	4	1
All languages										
Canadian share of budgets (\$M)	105	124	109	108	104	94	80	48	65	42
Foreign share of budgets (\$M)	134	129	177	178	193	202	76	102	58	69
Total budgets (\$M)	240	253	286	287	297	296	156	150	123	111
Number of projects	41	41	42	27	34	36	23	19	27	20

Source: Telefilm Canada.

Note: Some totals may not sum due to rounding. Statistics as of September 2022.

* 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).

** For confidentiality reasons, language breakdown has been suppressed for 2021/22.

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

	2012/13	2013/14	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22
Total global budgets (\$ millions)										
Drama (i.e. fiction)	151	134	184	185	222	223	52	98	36	24
Documentary	52	36	63	23	35	33	45	17	32	14
Children's and youth	37	83	39	78	39	40	58	35	55	73
Total	240	253	286	287	297	296	156	150	123	111
Number of projects										
Drama (i.e. fiction)	6	11	8	5	7	4	2	6	7	5
Documentary	27	19	27	16	21	27	16	8	14	7
Children's and youth	8	11	7	6	6	5	5	5	6	8
Total	41	41	42	27	34	36	23	19	27	20
Average project budgets (\$ millions)										
Drama (i.e. fiction)	25.2	12.2	23.0	37.1	31.7	55.8	26.1	16.3	5.1	4.7
Documentary	1.9	1.9	2.3	1.5	1.7	1.2	2.8	2.1	2.3	2.0
Children's and youth	4.6	7.6	5.5	13.0	6.5	8.0	11.7	7.0	9.1	9.1
All genres	5.8	6.2	6.8	10.6	8.7	8.2	6.8	7.9	4.5	5.5

Source: Telefilm Canada.

Note: Some totals may not sum due to rounding. Statistics as of September 2022.

* 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).

Exhibit 5-8 Audiovisual treaty coproduction partner countries, television segment, 2012/13–2021/22

	Number of projects	Total global budgets (\$ millions)	Canadian share of total global budgets	
			\$ millions	%
United Kingdom	107	571	290	51%
France	77	392	160	41%
Australia	20	136	81	59%
Germany	14	29	11	37%
Ireland	14	621	153	25%
New Zealand	12	39	10	26%
Israel	9	20	13	68%
Brazil	6	37	19	53%
South Africa	6	44	20	45%
Hungary	5	124	57	46%
Malta	4	7	3	40%
Other bipartite	21	54	26	48%
Multipartite*	15	124	36	29%
Total	310	2,196	879	40%

Source: Telefilm Canada.

Note: Some totals may not sum due to rounding. Statistics as of September 2022.

* 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

	2012/13	2013/14	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22
English-language										
Canadian share of budgets (\$M)	93	182	77	35	82	45	109	68	53	52
Foreign share of budgets (\$M)	72	136	55	39	66	35	78	44	36	48
Total budgets (\$M)	165	318	133	73	148	79	187	112	89	100
Number of projects	11	20	15	8	17	15	26	20	10	22
French-language										
Canadian share of budgets (\$M)	24	6	16	31	4	6	7	8	7	20
Foreign share of budgets (\$M)	54	12	13	45	24	32	23	37	16	56
Total budgets (\$M)	78	19	29	76	29	37	30	45	23	76
Number of projects	7	4	7	13	2	5	7	5	3	11
All languages										
Canadian share of budgets (\$M)	117	189	93	66	87	51	116	76	60	72
Foreign share of budgets (\$M)	127	148	69	83	90	66	101	81	52	104
Total budgets (\$M)	244	337	161	149	177	117	217	157	112	176
Number of projects	18	24	22	21	19	20	33	25	13	33

Source: Telefilm Canada.

Note: Some totals may not sum due to rounding. Statistics as of September 2022.

* 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).

* For confidentiality reasons, language breakdown has been suppressed for 2016/17.

Exhibit 5-10 Audiovisual treaty coproduction partner countries, theatrical feature film segment, 2012/13-2021/22

	Number of projects	Total global budgets (\$ millions)	Canadian share of total global budgets	
			\$ millions	%
France	54	611	245	40%
United Kingdom	26	165	98	59%
Germany	20	377	229	61%
Ireland	16	121	76	62%
Belgium	14	83	44	53%
South Africa	8	27	17	60%
Italy	7	24	16	68%
Spain	7	72	37	51%
Switzerland	7	16	8	51%
Israel	6	6	3	48%
Australia	4	14	5	37%
Cuba	4	13	9	72%
Denmark	4	33	16	48%
Other bipartite	36	167	81	48%
Multipartite*	15	116	42	36%
Total	228	1,847	925	50%

Source: Telefilm Canada.

Note: Statistics as of September 2022. 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 location and service production

The foreign location and service (FLS) production segment is primarily comprised of films and television programs filmed in Canada mainly by foreign producers with the involvement of Canadian-based service producers. This includes the visual effects (VFX) work done by Canadian VFX studios for foreign films and television programs. 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 that achieved successful global box office runs. Some recent Hollywood films that have either been shot in Canada or had their VFX work done in Canada include *Peter Pan & Wendy*, *American Dreamer*, and *Shang Chi and the Legends of the Ten Rings*.

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*, *The Flash* and *Peacemaker*.

Highlights from 2021/22



- The total volume of FLS production in Canada increased by 27.3% to an all-time high of \$6.71 billion.
- The total number of FLS productions increased from 511 to an all-time high of 645.
- The total volume of FLS feature film production increased by 19.8% to \$1.66 billion.
- The number of FLS feature films shot in Canada increased from 141 to 171.
- The total volume of other³² FLS television production increased four-fold to \$1.74 billion.
- The number of other FLS television projects increased by 132.2%, from 93 to 216.



- The total volume of FLS television series production decreased by 4.1% to \$3.31 billion.
- The number of FLS television series shot in Canada decreased from 277 to 258.

³² 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, Canada's FLS production segment experienced another breakout year of growth. The total volume of FLS production increased by 27.3% to reach an all-time high of \$6.71 billion (Exhibit 6-1). This tremendous growth was fuelled by a period of 'catch-up' whereby projects initially slated to start filming in 2020 or 2021 finally went into production. The growth was also supported by the continued strong global demand for original content, particularly from subscription video-on-demand (SVOD) services, such as Netflix, Amazon Prime Video, Disney+ and AppleTV+.

While the volume of production FLS television series production actually declined by 4.1% – from an all-time high of \$3.44 billion in 2020/21 – it was the production of other types of television content and, to a lesser extent, feature films, that drove the strong gains observed in 2021/22 (Exhibit 6-1).

The production of television movies, specials and single-episode programming – many of which would be destined for SVOD services – tripled, from \$435 million to \$1.74 billion in 2021/22 (Exhibit 6-1), as the number of projects produced in this category more-than-doubled, from 93 to 216 (Exhibit 6-2).

A total of 171 FLS feature films were produced in Canada in 2021/22, up 21.3% from 141 films in 2020/21 (Exhibit 6-2). The volume of feature film production rose by 19.8% to \$1.66 billion (Exhibit 6-2).

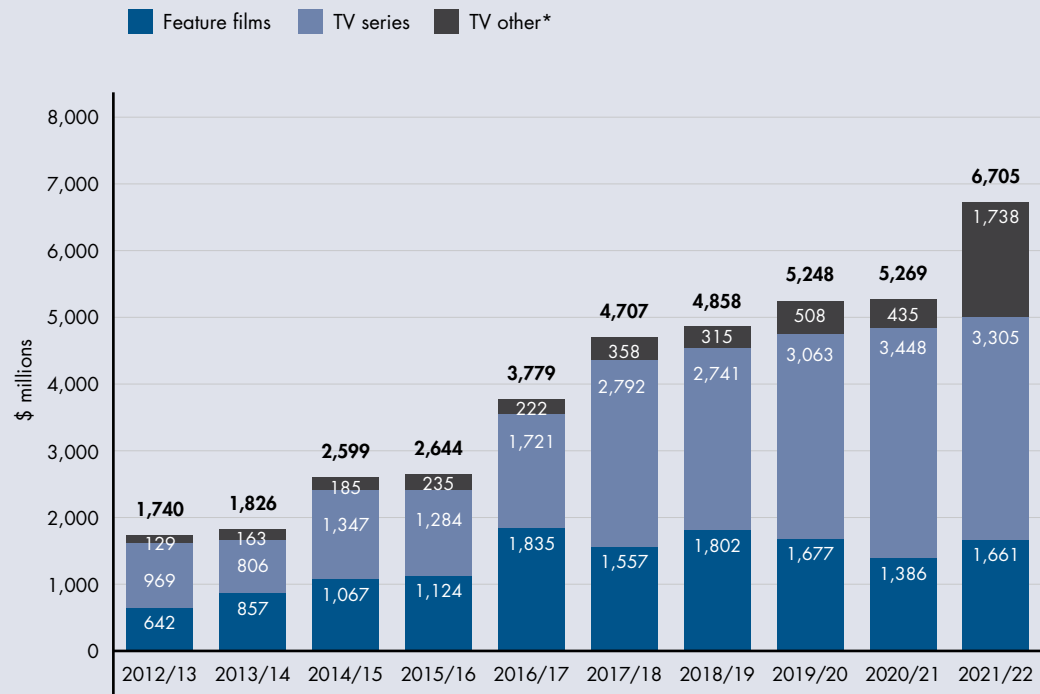
The growth in FLS production in 2021/22 was shared across all provinces that hosted FLS production in 2020/21. Indeed, some provinces experienced remarkable gains that even moved them well past the levels they experienced prior to the COVID-19 pandemic (Exhibit 6-4).

- **British Columbia** was the Canadian province with the highest level of FLS in 2021/22. Its volume of FLS production rose by 9% to a record \$2.96 billion.³³
- In **Ontario**, FLS production increased by 17.3% in 2021/22 to a new record of \$1.67 billion. According to Ontario Creates, all of Ontario's gains in FLS production were in television series category, as both other-television and feature film production declined.
- **Quebec's** volume of FLS production shot up by 54.1% to an all-time high of \$1.42 billion. Approximately 70% of the increase was in the feature film category.
- In **Alberta**, FLS production more-than-quintupled, jumping from \$68 million in 2020/21 to a record \$441 million in 2021/22. Indeed, looking back to 2012/13, Alberta's volume of FLS production was never higher than \$92 million. The vast majority of the growth in 2021/22 was concentrated in the production of television series and mini-series, but there were also substantial gains in other-television and feature film production. Increased funding for Alberta's film and television tax credit combined with the removal of the per-project tax credit cap has helped attract substantial FLS production to Alberta.
- **Manitoba** was Canada's fifth largest centre for FLS production in 2021/22. Its volume of FLS production increased by 25% to \$105 million. According to Manitoba Film and Music, all of Manitoba's gains were in the feature film category. And while the province's growth in FLS was strong in 2021/22, the overall level of FLS production was still lower than the 10-year high of \$171 million recorded in 2019/20.
- In **Nova Scotia**, FLS production practically doubled from \$46 million to \$91 million – a new 10-year high for the province. Approximately 90% of the growth in 2021/22 was in the television series category.
- In **Newfoundland and Labrador**, filming of Disney's *Peter Pan & Wendy* allowed the province to record its first FLS production during the past decade.

³³ 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.

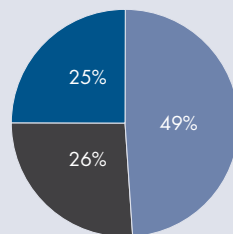
TOTAL PRODUCTION AND TYPES

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



Share

2021/22



Annual average growth rate

Type	2021/22	2012/13–2021/22
Feature films	19.8%	11.1%
TV series	(4.1%)	14.6%
TV other*	299.5%	33.5%
Average: all types	27.3%	16.2%

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 location and service projects, by type

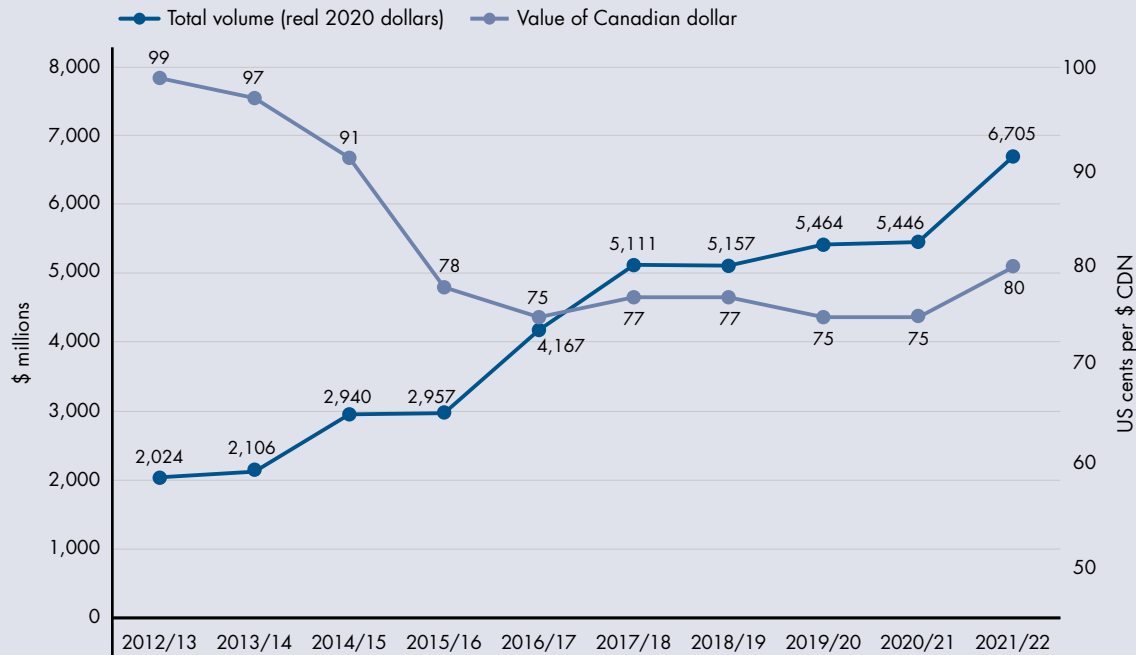
	2012/13	2013/14	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22
Feature films	93	91	111	128	186	167	164	166	141	171
TV series	85	92	115	156	137	209	208	224	277	258
TV other*	42	51	53	71	77	104	93	131	93	216
Total	220	234	279	355	400	480	465	521	511	645

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 location and service production (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 location and service production, by province and territory

(\$ millions)	2012/13	2013/14	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2021/22 share of total
British Columbia*	1,076	1,080	1,672	1,574	2,311	3,040	2,816	2,347	2,719	2,963	44%
Ontario	399	446	545	698	882	869	985	1,541	1,426	1,672	25%
Quebec	212	147	275	282	404	666	771	1,142	922	1,421	21%
Alberta	4	88	92	34	54	31	86	0	68	441	7%
Manitoba	23	47	11	42	70	89	167	171	84	105	2%
Nova Scotia	25	17	n/a	12	39	12	26	40	46	91	1%
Newfoundland and Labrador	0	0	0	0	0	0	0	0	0	8	<1%
Territories**	2	2	3	3	18	1	7	8	4	3	<1%
Saskatchewan	0	0	0	0	0	0	1	0	0	0	0%
New Brunswick	0	0	1	0	0	0	0	0	n/a	0	0%
Prince Edward Island	0	0	<1	0	0	0	0	0	n/a	0	0%
Total	1,740	1,826	2,599	2,644	3,779	4,707	4,858	5,248	5,269	6,705	100.0%

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 2022*. 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 location and service projects, by country of copyright

	2012/13	2013/14	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22
Number of projects										
United States	171	177	197	261	304	364.5	365	409	404	469.5
Other foreign	22	31	57	67	72.5	77.5	69	72	72.5	154.5
Canada*	27	26	25	27	23.5	38	31	40	34.5	21.0
Total	220	234	279	355	400	480	465	521	511	645
Percentage of total										
United States	78%	76%	71%	74%	76%	76%	78%	79%	79%	73%
Other foreign	10%	13%	20%	19%	18%	16%	15%	14%	14%	24%
Canada*	12%	11%	9%	8%	6%	8%	7%	8%	7%	3%
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

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 2021 broadcasting year, running from September 1, 2020 to August 31, 2021.

Highlights from 2021



- The total volume of in-house production increased by 1.9% to \$1.09 billion.
- Spending on in-house production by discretionary and on-demand services increased by 3.8% to \$515 million.
- Spending on the in-house production of news programming increased by 2.3% to \$707 million.



- Conventional broadcasters’ spending on in-house production was virtually unchanged at \$571 million.



- Spending on the in-house production of sports programming decreased by 1.0% to \$202 million.

After falling by 7.6% during the 2020 broadcasting year – on account of the COVID-19 pandemic – broadcasters' in-house production spending rebounded slightly by 1.9% during the 2021 broadcasting year (Exhibit 7-1). Despite the post-pandemic bounce in 2021, over the longer-term, the volume of broadcaster in-house production has been in decline. Between 2012 and 2021, it decreased at an annual average rate of 2.8%.

Virtually all of this rebound was in the discretionary and on-demand services sub-segment. Within that sub-segment, spending on in-house production increased by 3.8%, or \$19 million (Exhibit 7-1). With the conventional television sub-segment (including private conventional broadcasters, CBC/Radio-Canada and provincial educational broadcasters), spending was up by only \$1 million to \$571 million.

Spending on the in-house production of sports programming continued to decline in 2021: it decreased by one percent to \$202 million (Exhibit 7-2). The overall rebound in in-house production was driven by higher levels of spending on news programming and other genres (i.e. other than news and sports). Spending on news programming increased by 2.3% to \$707 million, while spending on other genres increased by 3.5% to \$177 million.

The increase in spending on news programming was broad-based with increases at private conventional broadcasters and discretionary services. At private conventional broadcasters, spending on news programming was up by \$8.8 million, or 2.5%;³⁴ at discretionary services, spending was up by \$11 million, or 5.0%.³⁵

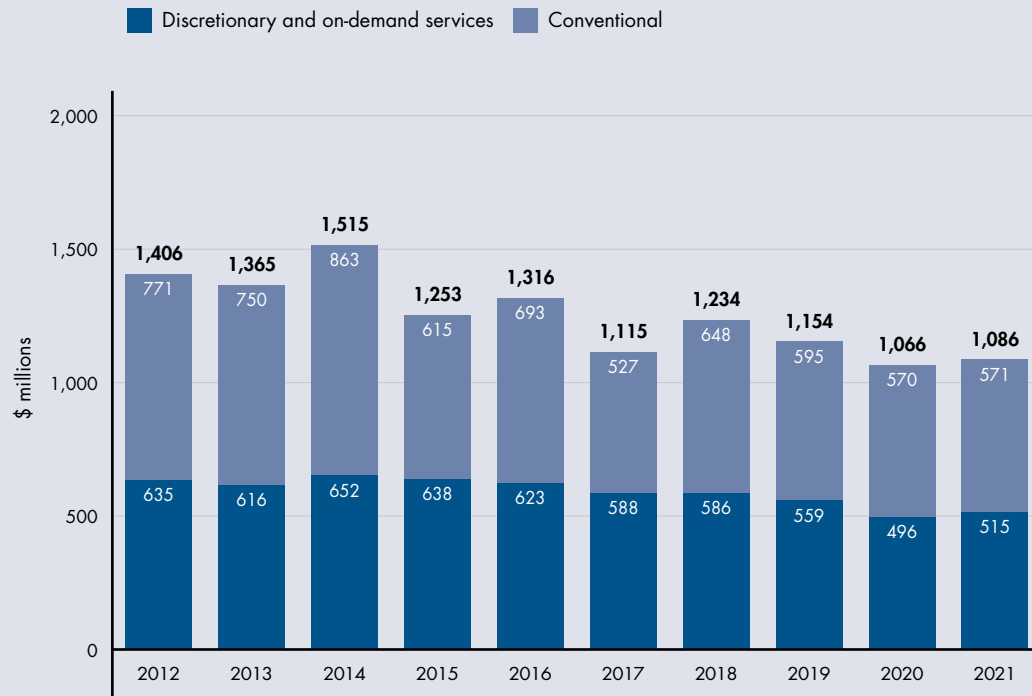
Broadcaster in-house production remained very concentrated in Ontario and Quebec in 2021 – the two provinces that are home to the vast majority of Canada's television broadcasting industry, particularly discretionary television series. Those two provinces accounted for 77% of Canada's total volume of broadcaster in-house production (Exhibit 7-3), which was slightly higher than those two provinces 74% share of Canadian television production (Exhibit 3-12), which was made by independent and broadcaster-affiliated producers.

³⁴ Calculations based on data from CRTC (2022b), *Conventional Television: Statistical and Financial Summaries, 2017-2021*; and CRTC (2021b), *Conventional Television: Statistical and Financial Summaries, 2016-2020*.

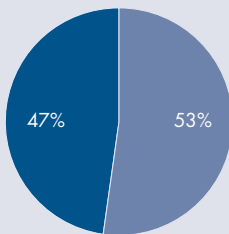
³⁵ Calculations based on data from CRTC (2022c), *Discretionary and On-Demand Services: Statistical and Financial Summaries, 2017-2021*; and CRTC (2021c), *Discretionary and On-Demand Services: Statistical and Financial Summaries, 2016-2020*.

PRODUCTION VOLUME

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



Share
2021



Annual average growth rate

Sub-segment	2021	2012–2021
Discretionary and on-demand services	3.8%	(2.3%)
Conventional	0.2%	(3.3%)
Average: all sub-segments	1.9%	(2.8%)

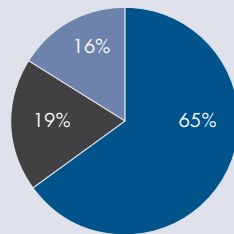
Sources: Estimates based on data collected from CRTC.
Note: Some totals may not sum due to rounding.

GENRES

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



Share
2021



Annual average growth rate

Genre	2021	2012–2021
News	2.3%	(0.3%)
Sports	(1.0%)	(6.5%)
Other	3.5%	(6.2%)
Average: all genres	1.9%	(2.8%)

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

REGION

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

(\$ millions)	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2021 share of total
Ontario	811	767	885	677	729	612	686	622	570	571	53%
Quebec	293	291	331	279	307	258	296	272	247	257	24%
Alberta	92	92	91	94	88	80	83	87	85	85	8%
British Columbia	104	103	101	97	96	87	87	89	80	81	7%
Manitoba	23	24	29	30	28	25	26	27	26	33	3%
Saskatchewan	26	28	27	27	24	20	20	21	21	21	2%
Nova Scotia	31	32	27	26	23	16	17	18	17	18	2%
New Brunswick	12	13	11	11	10	8	9	9	9	10	1%
Newfoundland and Labrador	10	11	10	9	8	7	7	7	7	8	1%
Prince Edward Island	2	2	2	2	2	1	1	1	2	2	<1%
Territories*	3	3	3	2	1	1	1	1	1	1	<1%
Total	1,406	1,365	1,515	1,253	1,316	1,115	1,234	1,154	1,066	1,086	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 2022*. 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 Mongrel Media and Metropole Films Distribution, 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 and 2020. The most recent year of published data is 2021. Data for distributors 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 2020/21 and 2021



- Canadian distributors' investment in Canadian films and television programs in 2021/22 increased by 7.4% (compared with 2020/21) and totalled \$356 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 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, since then it has 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.³⁶ 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 purchase 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.

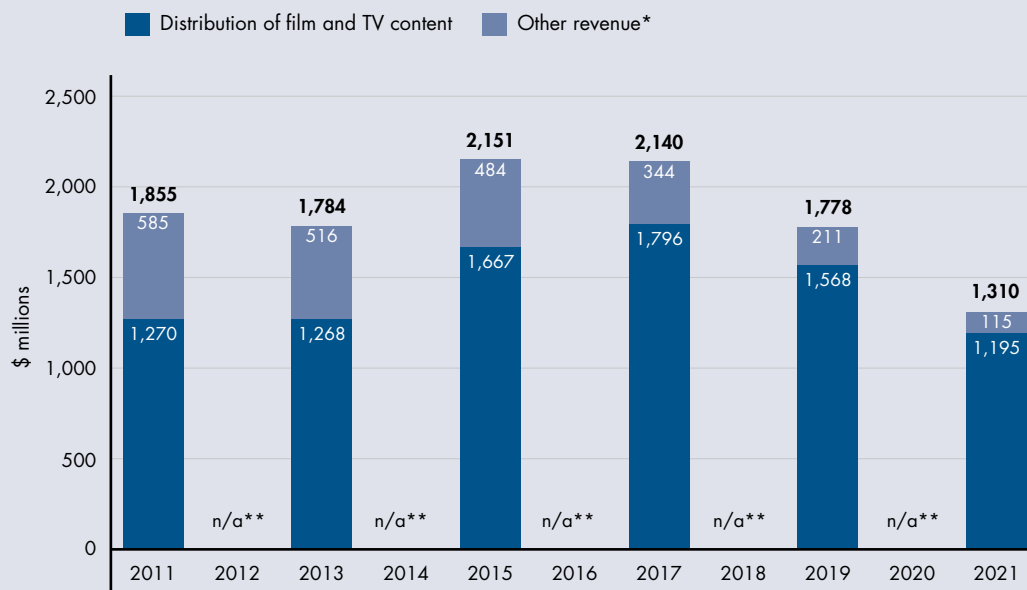
Although the revenue earned from Canadian content dropped between 2019 and 2021, it fell at a slower rate than overall industry revenue and thereby actually increased its market share from 13% in 2019 to 15.8% in 2021 (Exhibits 8-1 and 8-2).

Canadian distributors invest in Canadian films and television programs through minimum guarantees and advances on anticipated distribution revenues. In 2021/22, Canadian distributors invested an estimated \$356 million in Canadian films and television programs – down by 27.9% from 2016/17's 10-year peak of \$494 million but slightly above the 10-year average of \$353 million (Exhibit 8-3).

³⁶ 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.

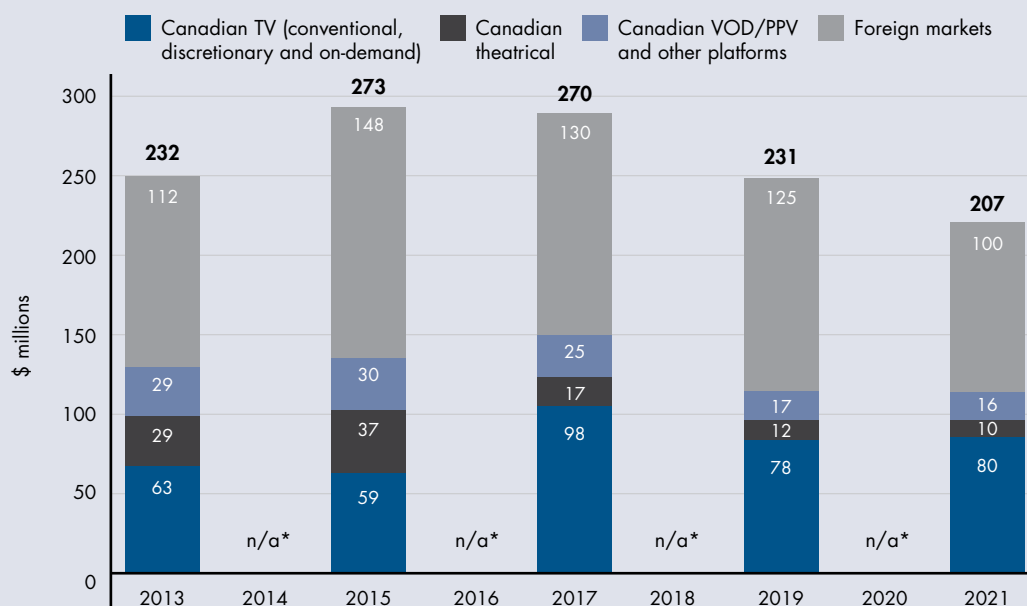
Note: Beginning with 2013, Statistics Canada adopted a new methodology for measuring total revenue in the film and video distribution industry. For that reason, the figures reported before and after 2012 may not be directly comparable for the purpose of time-series analysis.

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 and 2020.

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



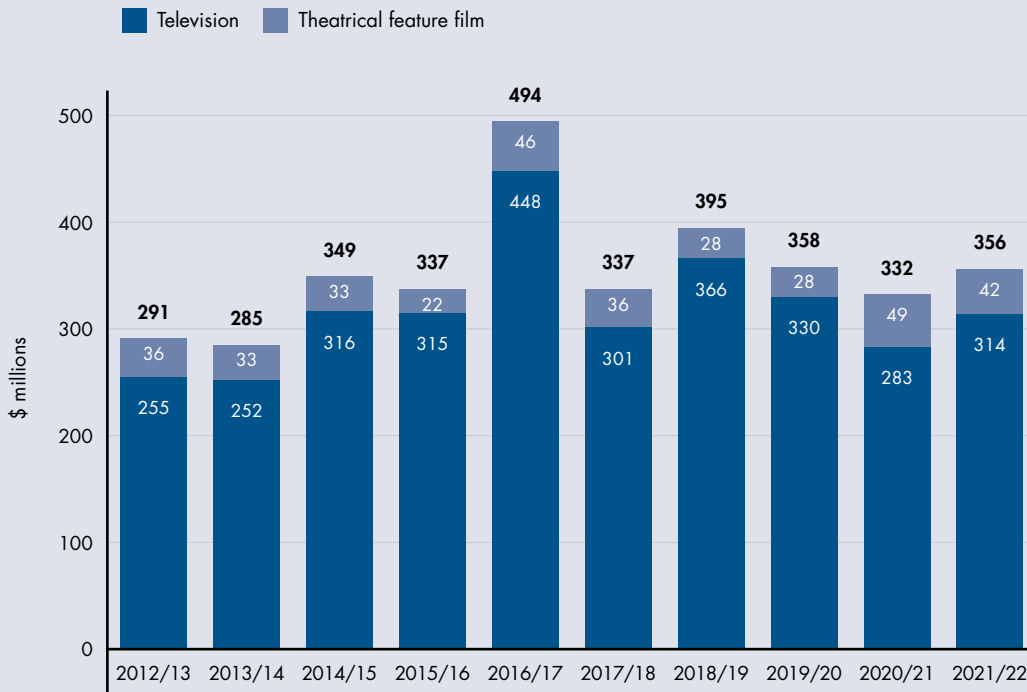
Source: Statistics Canada, Table 21-10-0074-01.

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 and 2020.

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 and audiences

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.³⁷
- **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.

Highlights from 2021/22



- Broadcasting industry revenue increased by 4.2% to \$6.6 billion.
- Revenue at private conventional broadcasters increased by 6.9%.
- Revenue at CBC/Radio-Canada's conventional services increased by 14.6%.
- Revenue at provincial educational broadcasters increased by 4.8%.
- Canadian programs accounted for five of the top 10 programs on Canadian television during the 2021/22 broadcast season (up from two programs in 2020/21).
- In the French-language market, Canadian programs' audience share increased slightly during the 2020/21 broadcast season – from 70% to 71%.
- In the English-language market, Canadian children's and youth programs' audience share increased during the 2020/21 broadcast season – from 45% to 59%.



- Revenue at discretionary and on-demand services was virtually unchanged at \$3.9 billion.
- All of the top 10 Canadian-produced programs during the 2021/22 broadcast season were in the French-language market.



- In the English-language market, Canadian programs' audience share at peak viewing decreased to 18% during the 2020/21 broadcast season³⁸ – from 21% during the 2019/20 broadcast season.

³⁷ The vast majority of Canadian households now receive conventional television signals via cable television, DTH satellite television or IPTV providers.

³⁸ Aggregate audience statistics by country of origin (and genre) are only available on a one-year lagged basis due to the time required for program coding.

All sub-segments of the Canadian television broadcasting industry experienced recoveries in revenue in 2021. Collectively these increases lifted total revenue across Canada's television broadcasting industry, by 4.2% in the 12 months to August 31, 2021, as it climbed to \$6.6 billion (Exhibit 9-1). However, total revenue in the television broadcasting industry in 2021 was still 12.1% lower than the peak of \$7.56 billion reached in 2014.

Looking specifically at the discretionary and on-demand services sub-segment – the largest within the Canadian television broadcasting industry – revenues were virtually unchanged, increasing by 0.8% or \$31 million to \$3.96 billion (Exhibit 9-1). Discretionary and on-demand services' advertising revenue recovered by \$169 million, or 15.6%, to \$1.25 billion.³⁹ Advertising revenue was still 3.7% lower than the pre-pandemic level of \$1.30 billion reached during the 2019 broadcast year.⁴⁰

This recovery in advertising revenue was partially offset by a drop in subscriber revenue. It fell by \$129 million, or 4.7%, in 2021.⁴¹ The drop in 2021 was the continuation of a long-term decline in discretionary and on-demand services subscriber revenue. In the face of cord-cutting – and general competition from Internet-based video services for Canadian households' entertainment spending – subscriber revenue within Canada's discretionary and on-demand services sub-segment has experienced year-over-year declines since 2016.⁴²

The recovery in advertising spending in 2021, following the pandemic, led to a 6.9% increase in revenue within the private conventional sub-segment. Total revenue rose by \$92 million to \$1.42 billion (Exhibit 9-1).

CBC/Radio-Canada also benefited from the advertising market recovery and the postponed 2021 start to the 2020 Tokyo Summer Olympics. CBC/Radio-Canada's advertising revenue increased by \$58 million, or 33.2%, to \$232 million in 2021.⁴³ CBC/Radio-Canada's parliamentary appropriation increased by \$63 million in 2021, and thereby also made a significant contribution to raising CBC/Radio-Canada's overall revenue by 14.6% to \$1.06 billion (Exhibit 9-1).

At the provincial level, revenues for educational broadcasters increased by \$9 million, or 4.8%, to \$198 million – an eight-year high (Exhibit 9-1).

Over the 2020/21 broadcast season, Canadian programming's share of the peak-period audience in the French-language market increased slightly to 71% – matching the 10-year high reached in 2018/19 (Exhibit 9-7). French-language television programs continued to dominate the list of the top 10 Canadian-produced television series aired in Canada (across both language markets) during the 2021/22 broadcast season – holding all 10 of the top 10 spots for the second consecutive year (Exhibit 9-3). The most viewed Canadian series in the broadcast year was the French-language police drama series, *District 31*, with an average minute audience (AMA) of 1.8 million.

In the English-language market, Canadian programming's share of the peak-period audience fell to match the 10-year low of 18% (Exhibit 9-6). The most-watched English-language program was *Transplant* (1.1 million AMA).

³⁹ CRTC (2022c), *Discretionary and On-Demand Services: Statistical and Financial Summaries, 2017-2021*.

⁴⁰ Ibid.

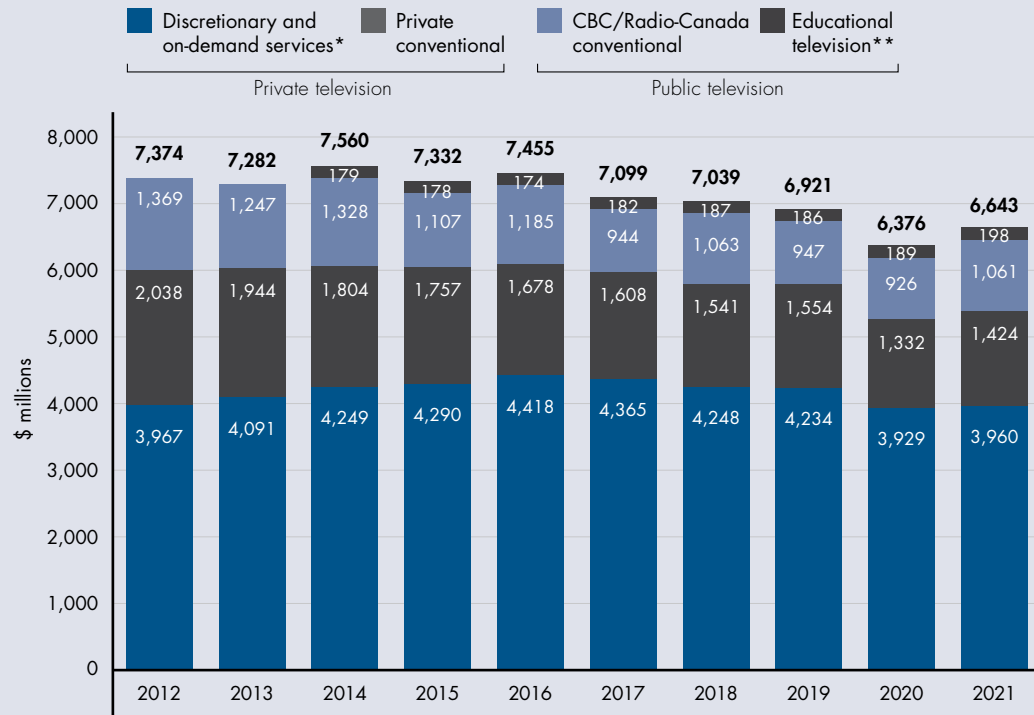
⁴¹ Ibid.

⁴² CRTC (2022c) and CRTC (2020), *Discretionary and On-Demand Services: Statistical and Financial Summaries, 2015-2019*.

⁴³ CRTC (2022b).

REVENUE

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



Source: Nordicity estimates based on data from CRTC.

Note: Some totals may not sum due to rounding.

* Includes revenue earned by discretionary services owned by CBC/Radio-Canada.

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

TOP TELEVISION PROGRAMS

The following section presents statistics on the top-rated programs on television in Canada. The lists of top 10 television programs are drawn from Numeris's database of audience statistics for the 2021/22 broadcast season (September 1, 2021 to August 31, 2022) and includes programs in the CMF-supported genres (i.e. fiction, children's and youth, documentary and VAPA). In cases where the same title ranks in multiple occurrences, only the audience level of the top-ranking instance has been used.

TOP-RATED TELEVISION PROGRAMS

Exhibit 9-2 Top 10 television series in Canada, 2021/22 broadcast season*

Program (country of origin)	Average Minute Audience (000s)
1. <i>District 31</i> (Canada)	1,818
2. <i>Chanteurs masqués</i> (Canada)	1,726
3. <i>CSI: Vegas</i> (US)	1,674
4. <i>9-1-1: Lone Star</i> (US)	1,652
5. <i>The Good Doctor</i> (US)	1,597
6. <i>Star académie 2022 - Le variété</i> (Canada)	1,569
7. <i>9-1-1</i> (US)	1,566
8. <i>Le bonheur</i> (Canada)	1,542
9. <i>The Rookie</i> (US)	1,494
10. <i>Révolution</i> (Canada)	1,432

Source: CMF Research (Numeris), 2022.

* Television series include all television projects with more than three episodes televised during a single broadcast season.

Exhibit 9-3 Top 10 Canadian-produced television series, 2021/22 broadcast season*

Program	Average Minute Audience (000s)
1. <i>District 31</i>	1,818
2. <i>Chanteurs masqués</i>	1,726
3. <i>Star académie 2022 - Le variété</i>	1,569
4. <i>Le bonheur</i>	1,542
5. <i>Révolution</i>	1,432
6. <i>Discussions avec mes parents</i>	1,362
7. <i>Léo</i>	1,278
8. <i>Toute la vie</i>	1,201
9. <i>En direct de l'univers</i>	1,163
10. <i>Les bracelets rouges</i>	1,137

Source: CMF Research (Numeris), 2022.

* Television series include all television projects with more than three episodes televised during a single broadcast season.

ENGLISH-LANGUAGE MARKET

Exhibit 9-4 Top 10 Canadian television series in the English-language market, 2021/22 broadcast season*

Program	Average Minute Audience (000s)
1. <i>Transplant</i>	1,123
2. <i>Murdoch Mysteries</i>	822
3. <i>Hudson and Rex</i>	805
4. <i>Canada's Got Talent 2022</i>	765
5. <i>Family Law</i>	728
5. <i>Departure</i>	728
6. <i>Son of Critch</i>	705
7. <i>Children Ruin Everything</i>	642
8. <i>Jann</i>	582
9. <i>Coroner</i>	579
10. <i>Still Standing</i>	517

Source: CMF Research (Numeris), 2022.

* Television series include all television projects with more than three episodes televised during a single broadcast season.

FRENCH-LANGUAGE MARKET

Exhibit 9-5 Top 10 Canadian television series in the French-language market, 2021/22 broadcast season*

Program	Average Minute Audience (000s)
1. <i>District 31</i>	1,818
2. <i>Chanteurs masqués</i>	1,726
3. <i>Star académie 2022 - Le variété</i>	1,569
4. <i>Le bonheur</i>	1,542
5. <i>Révolution</i>	1,432
6. <i>Discussions avec mes parents</i>	1,362
7. <i>Léo</i>	1,278
8. <i>Toute la vie</i>	1,201
9. <i>En direct de l'univers</i>	1,163
10. <i>Les bracelets rouges</i>	1,137

Source: CMF Research (Numeris), 2021.

* Television series include all television projects with more than three episodes televised during a single broadcast season.

AUDIENCE SHARE

This section includes aggregate statistics on Canadian programming's audience share in each of the CMF-supported genres (i.e. fiction, children's and youth, documentary and VAPA). These statistics are only available on a one-year-lagged basis, and therefore, report audience shares for the 2020/21 broadcast season (September 1, 2020 to August 31, 2021).

Exhibit 9-6 Television audience share of Canadian programming, English-language market, peak viewing period

	2011/12	2012/13	2013/14	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21
Drama (i.e. fiction)	16%	17%	17%	16%	15%	16%	12%	13%	15%	15%
Children's and youth	46%	49%	49%	50%	56%	52%	48%	34%	45%	59%
Documentary	45%	49%	48%	49%	50%	52%	47%	48%	46%	39%
Variety and performing arts	22%	13%	13%	18%	20%	22%	9%	15%	19%	19%
All CMF-supported genres	23%	24%	24%	23%	23%	24%	18%	19%	21%	18%

Source: CMF Research (Numeris), 2022.

Exhibit 9-7 Television audience share of Canadian programming, French-language market, peak viewing period

Broadcast season	2011/12	2012/13	2013/14	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21
Drama (i.e. fiction)	46%	48%	49%	52%	51%	53%	49%	55%	57%	57%
Children's and youth	73%	74%	66%	66%	62%	54%	63%	55%	70%	72%
Documentary	72%	72%	73%	73%	72%	74%	76%	94%	81%	79%
Variety and performing arts	92%	91%	94%	95%	96%	97%	91%	99%	99%	99%
All CMF-supported genres	61%	62%	62%	64%	64%	66%	62%	71%	70%	71%

Source: CMF Research (Numeris), 2022.

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 digital distribution platforms, the theatrical exhibition industry remains an important window for the release of feature films in Canada. There were over 2,700 theatre screens and 22 million tickets sold in Canada in 2020. Over 96 million tickets were sold in 2018 (the most recent complete year of full operations for which published admissions data is available).⁴⁴

Highlights from 2022



- Theatrical exhibition industry revenue increased by 71% to \$1.39 billion, from the pandemic-suppressed level observed in 2021.
- Total box office receipts increased by 95% to \$669 million.
- The number of Canadian feature films released in Canadian theatres increased from 92 to 129.⁴⁵



- Canadian films' box office revenue in Canada decreased to \$12 million.
- Canadian films' share of the Canadian box office decreased to 1.8%.
- In the French-language market, Canadian films' box office decreased to \$9.7 million and their share dropped to 12.2%.
- In the English-language market, Canadian films' box office decreased to \$2.1 million, and their share dropped to 0.4%.

⁴⁴ Statistics Canada (2019), Table 21-10-0180-01.

⁴⁵ 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 2022 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, the total box office in 2022 (\$669 million) was still two-thirds of where it was in 2019 (\$1.01 billion), just prior to the onset of the COVID-19 pandemic in Canada (Exhibit 10-3).

This lack of a full recovery in the box office was consistent with other markets such as the US, where box office revenue finished 2022 at approximately 70% of its pre-pandemic level.⁴⁶ At the beginning of 2022, the Omicron variant led to capacity limits at theatres in Canada, which stifled attendance.⁴⁷ Despite some global box office hits, such as *Top Gun: Maverick*, in the spring, the second half of 2022 had fewer global hits than expected. Furthermore, there has been a clear shift in audience expectations, with many former theatre-goers leaning on online subscription video-in-demand (SVOD) services to replace their 'new-release' theatre experience.⁴⁸

In Canada, total box office revenue rose by 95% in 2022 (Exhibit 10-3), helping to lift the industry's total revenue (including food and beverage sales, advertising and other revenue) by 71% to \$1.39 billion (Exhibit 10-1). While the overall box office and industry revenue continued to improve in 2022, Canadian films' box office performance fell in both percentage and absolute terms. Canadian films earned a total of \$12 million at the Canadian box office in 2022, down from \$18 million in 2021 (Exhibit 10-3). As a result, Canadian films' box office share fell to a 10-year low of 1.8% (Exhibit 10-4).

Canadian films' weak box office performance was observed in both language markets. In the French-language market, Canadian films' box office revenue declined by 10.2% to \$9.7 million (Exhibit 10-6), dragging their share down to 12.2%. In the English-language market, Canadian films' box office revenue dropped by just over two-thirds to \$2.1 million. Share fell from a 10-year high of 2.3% in 2021 to 0.4% in 2022. The weakened box office performance of Canadian films in 2022 compared to 2021 was, in part, due to the fact that one film, *Paw Patrol: The Movie*, lifted the 2021 box office numbers.

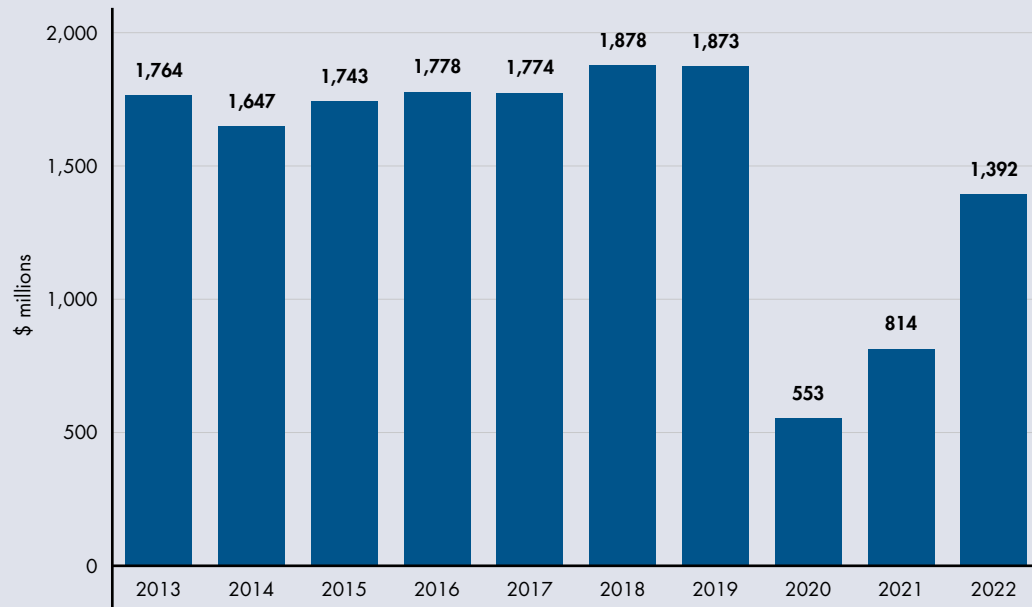
⁴⁶ Lang, B. and Rubin, R. (2022), "Variety, December 29, 2022. Gower Street (2023), "Gower Street estimates 2022 global box office hit \$25.9 billion," Gower. st., January 5, 2023.

⁴⁷ Vlesing, E. (2021), "Canada Tightens Movie Theater Restrictions Amid Omicron Surge", *The Hollywood Reporter*, December 23, 2021.

⁴⁸ Lee, B. (2022), "Box office blues: why are so many films bombing this season?," *The Guardian*, December 2, 2022.

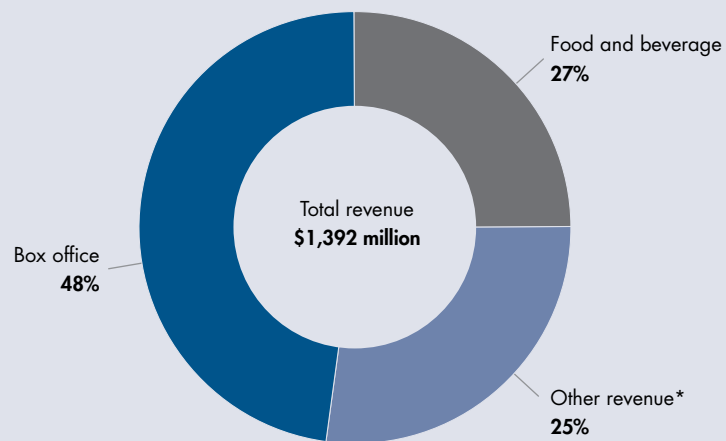
TOTAL REVENUE

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 the Movie Theatre Association of Canada (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 fora for industry practitioners to engage with each other and filmmakers. With the onset of the COVID-19 pandemic, most festivals accelerated their pivoting towards digital engagement with audiences and delegates – either exclusively or in combination with live events.

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 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, and imagineNATIVE Film + Media Arts Festival; and popular genre festivals, such as Montreal's Fantasia International Film Festival, which continue to attract crowds.

In 2021/22, as part of its support of the promotion of Canadian films, Telefilm Canada provided financial support to 141 Canadian film festivals and 75 industry events and initiatives in Canada.⁴⁹ These 141 festivals represent the major events in Canada and many have adopted hybrid formats with both live and online screenings. In addition, there are numerous smaller, regional festivals that operate without much public support. Of the 141 supported film festivals, 111 were in the regions and 51 focused on diversity and inclusion.⁵⁰

A total of 135 Canadian films 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 2022/23.⁵¹

As part of \$3.9 million in financial support for national and international promotional activities, Telefilm Canada also supported Canadian films screening or marketed at 36 international festivals, markets and events.⁵²

⁴⁹ Telefilm Canada (2022), *A New Spirit of Collaboration: 2021-2022 Annual Report*, p. 9.

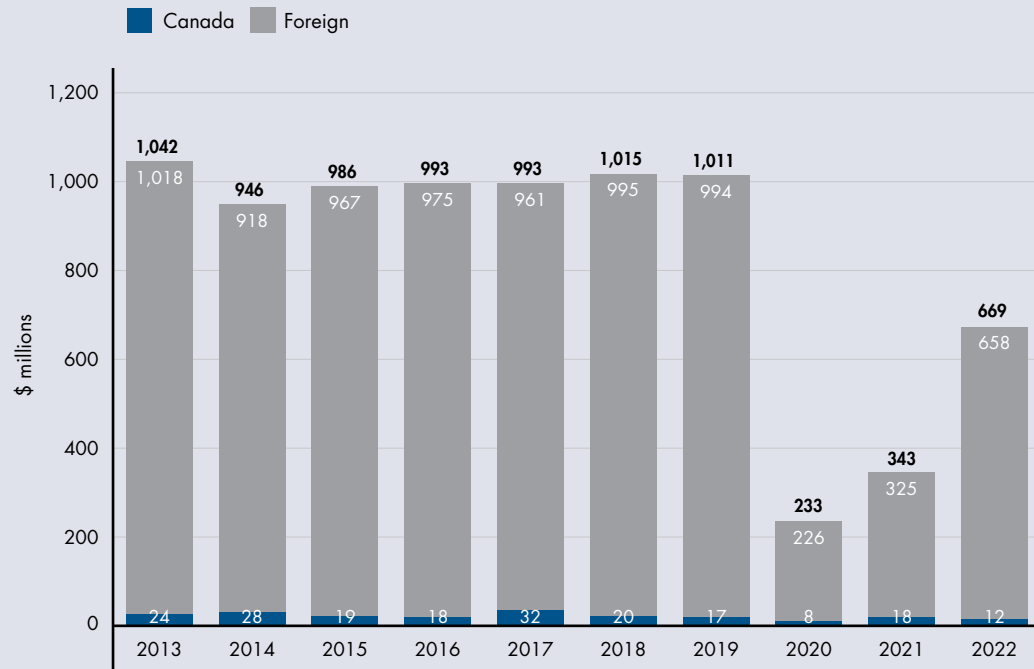
⁵⁰ Telefilm Canada (2022), p. 49.

⁵¹ Telefilm Canada (2022), p. 36.

⁵² Ibid.

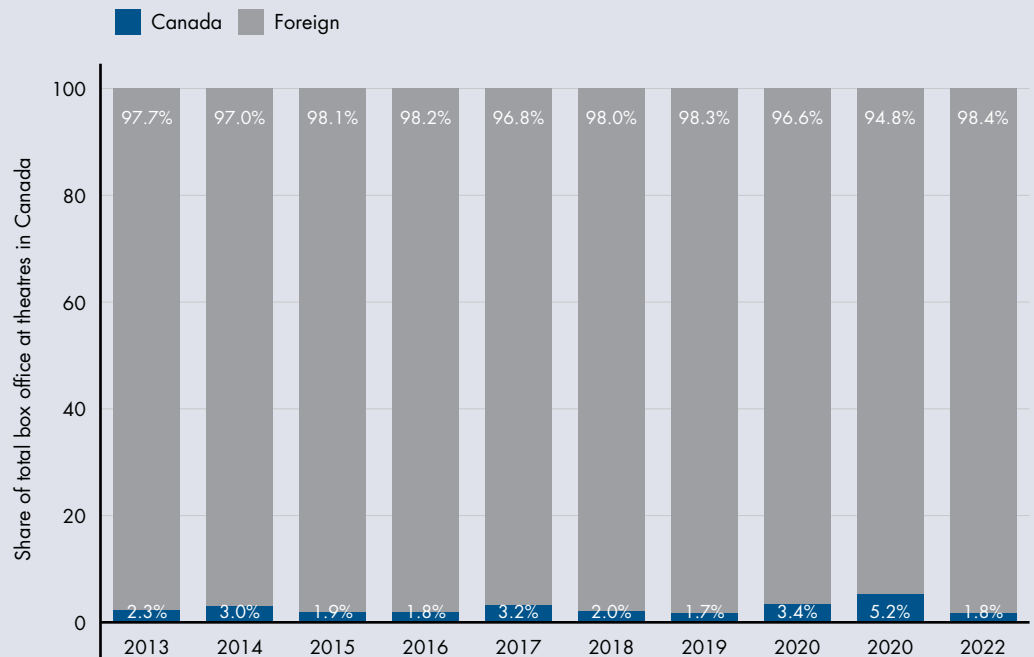
NATIONAL BOX OFFICE TRENDS

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



Source: MTAC.

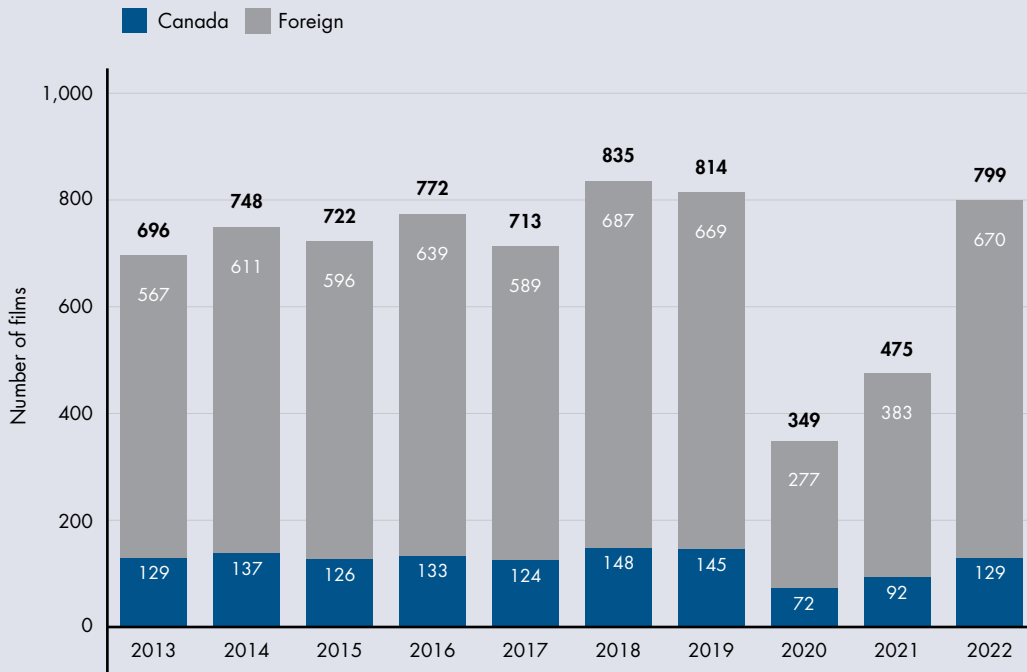
Exhibit 10-4 Shares of total box office revenue in Canada, by origin of production



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 2022 only include the number of films released in Canadian theatres for the first time in 2022.

BOX OFFICE BY LANGUAGE MARKET

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

French-language market	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022
\$ millions										
Box office of Canadian feature films	12.6	12.1	13.8	10.3	23.6	15.8	14.0	6.0	10.8	9.7
Box office of foreign feature films	126.7	108.4	115.2	108.7	103.9	101.6	105.4	28.3	38.4	69.7
Total box office of feature films	139.3	120.5	129.0	119.0	127.5	117.4	119.4	34.3	49.2	79.4
Canadian feature films' share	9.0%	10.0%	10.7%	8.7%	18.5%	13.5%	11.7%	17.5%	22.1%	12.2%
Number of feature films playing in theatres in Canada										
Canadian	97	91	84	104	95	112	111	68	79	95
Foreign	301	280	280	291	289	318	345	236	212	262
Total	398	371	364	395	384	430	456	304	291	357
Ratio of foreign to Canadian feature films	3.1	3.1	3.3	2.8	3.0	2.8	3.1	3.5	2.7	2.8
English-language market										
\$ millions										
Box office of Canadian feature films	11.2	16.3	4.9	7.4	8.6	4.6	3.1	1.7	6.9	2.1
Box office of foreign feature films	891.8	809.1	852.2	866.4	857.3	893.1	888.7	196.9	287.0	587.9
Total box office of feature films	903.0	825.3	857.1	873.8	865.9	897.7	891.8	198.6	293.9	590.0
Canadian feature films' share	1.2%	2.0%	0.6%	0.8%	1.0%	2.0%	0.3%	0.9%	2.3%	0.4%
Number of feature films playing in theatres in Canada										
Canadian	111	121	102	113	113	120	132	87	85	136
Foreign	867	870	803	973	949	1,058	1,084	774	702	1,039
Total	978	991	905	1,086	1,062	1,178	1,216	861	787	1,175
Ratio of foreign to Canadian feature films	7.8	7.2	7.9	8.6	8.4	8.8	8.2	8.9	8.3	7.6

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, 2022

Title	Box office receipts* (\$ millions)	Original language of production
1. <i>Le loup et le lion</i>	0.52	English-French
2. <i>Crimes of the Future</i>	0.30	English
3. <i>Peace by Chocolate</i>	0.18	English-Arabic
4. <i>Scarborough</i>	0.10	English
5. <i>All My Puny Sorrows</i>	0.08	English
6. <i>Guitar Lessons</i>	0.08	English
7. <i>Marlene</i>	0.06	English
8. <i>Fire of Love</i>	0.06	English-French
9. <i>Drinkwater</i>	0.05	English
10. <i>Run Woman Run</i>	0.04	English

Source: MTAC.

* Box office receipts earned between January 1 and December 31, 2022. 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, 2022

Title	Box office receipts* (\$ millions)	Original language of production
1. <i>23 Décembre</i>	1.76	French
2. <i>Confessions</i>	1.38	French-English
3. <i>Tu te souviendras de moi</i>	0.82	French
4. <i>Au revoir le bonheur</i>	0.75	French
5. <i>Norbourg</i>	0.74	French
6. <i>Arlette!</i>	0.65	French
7. <i>Arsenault & Fils</i>	0.46	French
8. <i>Niagara</i>	0.44	French
9. <i>Le loup et le lion</i>	0.33	English-French
10. <i>Lignes de fuite</i>	0.32	French

Source: MTAC.

* Box office receipts earned between January 1 and December 31, 2022. 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, 2022

Title	Box office receipts* (\$ millions)	Country of origin
1. <i>Top Gun: Maverick</i>	56.69	US
2. <i>Doctor Strange in the Multiverse of Madness</i>	35.83	US
3. <i>Avatar: The Way of Water</i>	32.73	US
4. <i>The Batman</i>	31.62	US
5. <i>Thor: Love and Thunder</i>	30.80	US-Australia
6. <i>Black Panther: Wakanda Forever</i>	30.67	US
7. <i>Minions: The Rise of Gru</i>	29.75	US
8. <i>Jurassic World Dominion</i>	23.48	US-Malta
9. <i>Spider-Man: No Way Home</i>	21.92	US
10. <i>Uncharted</i>	14.60	US

Source: MTAC.

* Box office receipts earned between January 1 and December 31, 2022. 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, 2022

Title	Box office receipts* (\$ millions)	Country of origin
1. <i>Top Gun: Maverick</i>	7.20	US
2. <i>Avatar: The Way Of Water</i>	5.18	US
3. <i>Minions: The Rise Of Gru</i>	5.10	US
4. <i>Jurassic World Dominion</i>	3.44	US-Malta
5. <i>Thor: Love And Thunder</i>	3.16	US-Australia
6. <i>Spider-Man: No Way Home</i>	2.72	US
7. <i>Doctor Strange in the Multiverse of Madness</i>	2.49	US
8. <i>Black Panther: Wakanda Forever</i>	2.35	US
9. <i>Uncharted</i>	2.17	US
10. <i>Sonic the Hedgehog 2</i>	2.15	US-Japan

Source: MTAC.

* Box office receipts earned between January 1 and December 31, 2022. 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 2021



- IPTV subscribers increased to 4.3 million.



- The number of BDU subscribers declined by 3% to 9.9 million.
- BDU revenues declined by 3.3% to \$7.8 billion.
- BDUs' contributions to the creation of Canadian programming decreased by 2.9% to \$397 million.

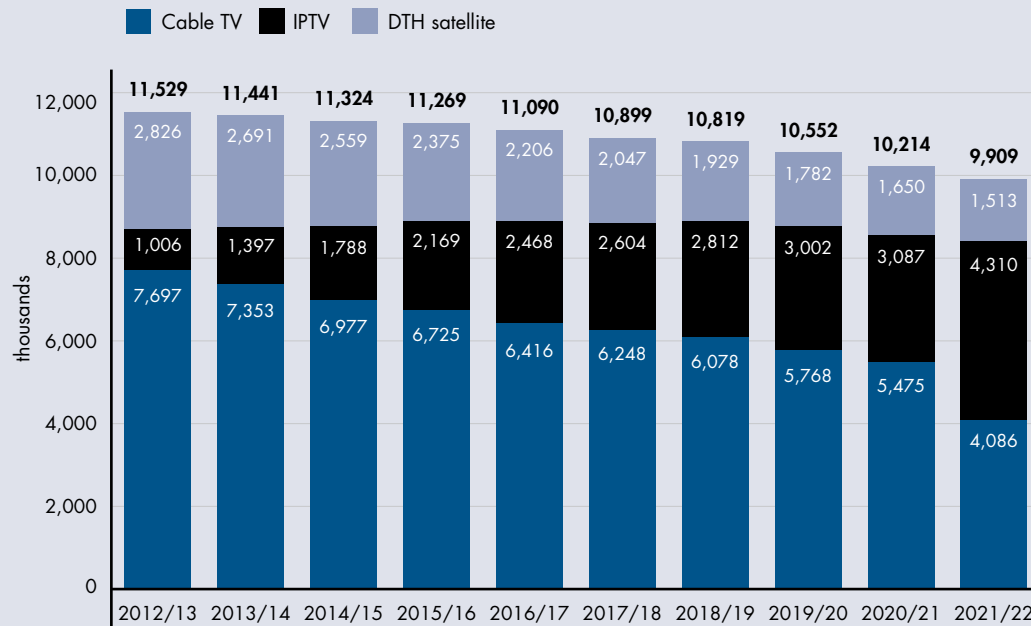
Canada’s BDU industry continued to experience a significant rate of cord-cutting in 2021, albeit slightly slower than in 2020. According to statistics from the Canadian Radio-television and Telecommunications Commission (CRTC), the number of subscriptions to Canadian BDU services peaked at 11,529,000 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 2021, the BDU industry shed 305,000 subscribers, or 3% of the subscriber base at the end of 2020.

The continued cord-cutting in 2020 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 2021, the total revenue earned by Internet-based video services in Canada increased by 17.2% to \$4.6 billion.⁵³ Between 2014 and 2021, these services’ revenue grew at an annual average rate of 24.8%.⁵⁴ SVOD services, such as Netflix, Amazon Prime Video, Disney+, Crave, Club illico, Gem, ICI Tou. tv and Sportsnet Now, accounted for \$2.4 billion in revenue in 2021; AVOD services such as YouTube accounted for \$1.8 billion; and TVOD services such iTunes accounted for \$321 million.⁵⁵

Through their contributions to the Canada Media Fund (CMF), independent production funds and the funding of local programming, BDUs support the creation of Canadian content. In 2021, BDUs’ contributions to creation of Canadian programming decreased by 2.9% to \$397 million (Exhibit 11-3). This overall decrease included a 2.2% decrease in contributions to the CMF; a 4.4% decrease in contributions to local expression (i.e. community programming and locally reflective news) and a 4.3% decrease in contributions to the Independent Local News Fund. Meanwhile, BDUs’ contributions to independent production funds were virtually unchanged at \$43 million in 2021, but still one-third lower than the level (\$65 million) they stood at as recently as 2015.

BDU SUBSCRIBERS AND REVENUE

Exhibit 11-1 Number of BDU subscribers*



Source: CRTC.

Note: Some totals may not sum due to rounding.

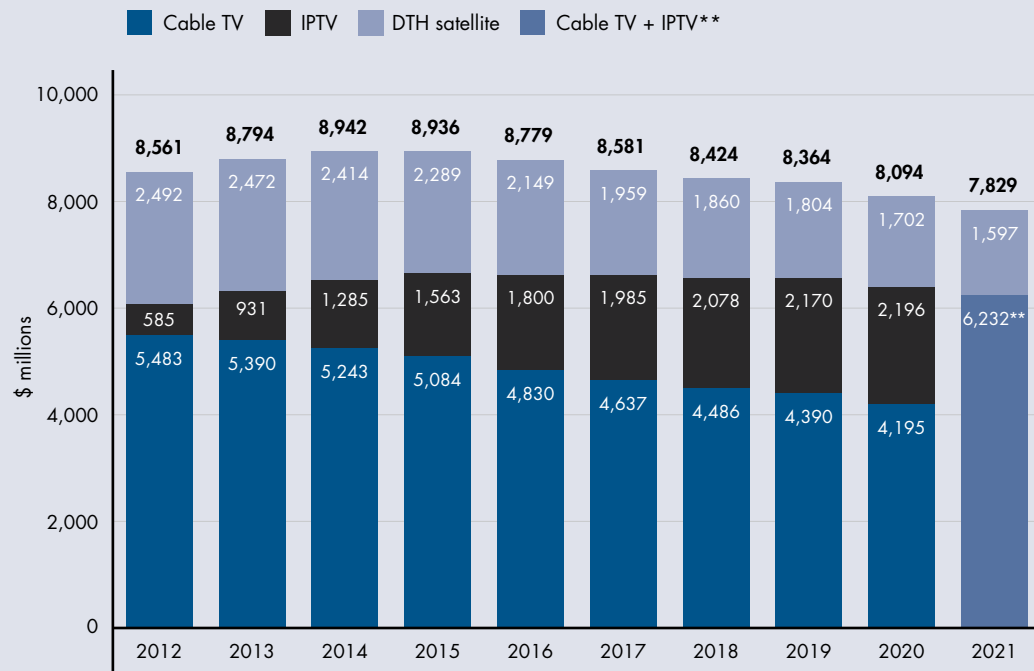
* Excludes BDUs not required by regulations to report financial and operating data to the CRTC.

⁵³ CRTC (2022d), *Communications Market Report 2022*, Table TV-T9.

⁵⁴ Ibid.

⁵⁵ 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 only reports the total revenue for cable TV and IPTV subscribers on a combined basis.

INVESTMENT IN CANADIAN PROGRAMMING

Exhibit 11-3 BDUs' investments in Canadian programming

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
CMF	209	216	219	219	215	206	193	191	189	185
Independent production funds	62	61	64	65	63	58	46	45	44	43
Local Programming Improvement Fund	112	75	40	0	0	0	0	0	0	0
Local Expression										
Licensee's own community channel	—*	—*	—*	—*	—*	—*	112	106	107	105
Community programming in other markets operated by the licensee	—*	—*	—*	—*	—*	—*	3	2	1	1
Locally reflective news programming	—*	—*	—*	—*	—*	—*	48	49	47	43
Subtotal	122	141	152	153	154	154	162	156	156	149
Independent Local News Fund (ILNF)	0	0	0	0	0	0	22	21	21	20
Total	505	493	475	437	431	417	422	414	409	397

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,⁵⁶ Nordicity applied the following gross-up factors to the raw production data supplied by CAVCO:

- 2019/20: 2.9%
- 2020/21: 5.4%
- 2021/22: 11.0%

These rates were based on historical rates of under-coverage observed in the CAVCO statistics over the past decade, with particular weight given to the rates of under-coverage observed in recent years.⁵⁷

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 2022* for the previous three years (2018/19, 2019/20 and 2020/21) 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 2022* 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 has been included in the statistics for Canadian television production. In *Profile 2022*, data for theatrical short films has been included in Canadian television production for all years – 2012/13 through 2021/22.

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.

⁵⁶ 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.

⁵⁷ 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 2021/22 than in earlier years.

Canada Media Fund

The statistics reported for the CMF include data for Convergent Stream production supported by the CMF.

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 2022* 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 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 location and service (FLS) production 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 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 2021/22 was \$77,094. 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).

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%).

Average FTE salary in the film and television production sector

	2012/13	2013/14	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22
Average FTE cost	\$55,476	\$56,935	\$58,016	\$58,607	\$59,445	\$60,396	\$62,389	\$64,074	\$67,213	\$77,094

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, *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 \$55,037.

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).

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, multipoint distribution services (MDS) and Internet protocol TV (IPTV) services 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. Launched on April 1, 2010.
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 or the CMF.

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 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 location and service (FLS) production in Canada.
Foreign 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.
Full-time equivalents (FTEs)	A measurement of employment that converts the number of part-time workers or any workers working less than a full work year into the equivalent number of full-time workers.
Gross domestic product (GDP)	Refers to the monetary value of the unduplicated value-added generated by 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 and TVOD 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 (e.g. cable-TV or DTH satellite) or over the Internet.
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 the Internet.

Telefilm Canada

A Crown corporation established by the Government of Canada in 1968 with a mandate to invest in the production of Canadian films. Telefilm Canada now administers most of the federal government's programs for supporting the Canadian film industry. 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).