

HIGHLIGHTS FROM PROFILE 2016

Economic Report on the Screen-Based Media Production Industry in Canada

Profile 2016 is published by the Canadian Media Producers Association (CMPA) in collaboration with the Department of Canadian Heritage, Telefilm Canada, the Association québécoise de la production médiatique (AQPM) and Nordicity. Profile 2016 is the 20th edition of the annual economic report prepared by CMPA and its project partners.

TOTAL FILM AND TELEVISION PRODUCTION IN CANADA

The film and television production industry in Canada consists of four key segments: The Canadian Television Production segment, Canadian Theatrical Feature Film Production, Foreign Location and Service Production (FLS), and Broadcaster In-house Production.

In 2015-2016:

- The total volume of all film and television production in Canada decreased slightly to \$6.76 billion
- Film and television production in Canada employed 140,600 FTEs
- Film and television production in Canada generated \$8.5 billion in GDP for the Canadian economy
- The export value of film and television production in Canada was \$3.31 billion

FOREIGN LOCATION AND SERVICE (FLS) PRODUCTION IN CANADA

*“The foreign location and service (FLS) production sector comprises feature films and television programs filmed in Canada by foreign producers or Canadian service producers. The sector also includes the visual effects (VFX) work done by Canadian VFX studios for foreign films and television programs. For the majority of FLS projects, the copyright is held by non-Canadian producers; however, for approximately 10% of projects, the copyright is held by Canadians. During the past five years, Canada’s FLS production sector has contributed to numerous films that achieved successful global box office runs. Some recent Hollywood films that have either shot in Canada or had their VFX work done in Canada include *The Revenant*, *X-Men Apocalypse*, and *Suicide Squad*. Canada has also become a destination for the filming of many American television series and mini-series such as *12 Monkeys*, *The Flash* and *Legends of Tomorrow*, which have been commissioned by networks as well as online video streaming services.”*

- The total volume of FLS production in Canada in 2015-16 rose slightly to \$2.64 billion, an increase of 1.7% from 2014-15.

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- There were a total of 355 FLS production projects in Canada in 2015-16, a 27.2% increase.
- FLS production generated employment for 54,900 Canadians on a FTE basis, including 21,600 direct FTEs in film and television production and a further 33,300 spin-off FTEs.
- FLS production generated GDP of \$3.3 billion for the Canadian economy in 2015-16, and over \$2.5 billion in labour income.
- FLS Feature film production accounted for just over 36% of the sectors' total production volume in 2015/16, with 128 FLS feature films.
- FLS television production accounted for almost 44% of the sectors' total production volume in 2015/16, with 156 FLS television series.
- U.S. producers accounted for three-quarters of all FLS productions in Canada, which is fairly consistent with the average since 2007/08.

“After making substantial gains in 2014/15, FLS production rose very slightly in 2015/16, to \$2.64 billion. A slight decline in spending on foreign TV series filmed in Canada was offset by slight increases in feature film and other types of FLS production. Declines in the value of the Canadian dollar vis-à-vis the US dollar have typically stimulated FLS production in Canada (particularly given that over 70% of FLS production is US-driven). In 2015/16, however, the value of the Canadian dollar continued to decline, while FLS production was relatively flat. This atypical uncoupling of the value of the Canadian dollar and the volume of FLS production suggests other factors at play. These factors include increasing competition from other jurisdictions for FLS production activity: South Africa and numerous US states offer production incentives that rival those offered in Canada.”

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BY PROVINCE

▪ **ONTARIO:**

- **Total:** Ontario maintained its position as the leading province for total film and television production in Canada in 2015-16. Its total volume of production was \$2.6 billion, creating 48,830 direct and spin-off full-time equivalent jobs (FTEs).
- **FLS:** The total volume of FLS production increased to \$698 million in 2015/16, representing 26% of the national total.

▪ **BRITISH COLUMBIA (INCLUDING THE TERRITORIES):**

- **Total:** In 2015-16, the total volume of film and television production decreased slightly to just over \$2.15 billion, which accounted for a total of 44,460 direct and spin-off FTEs.
- **FLS:** The FLS production decreased by 5.9% to \$1.6 billion in 2015/16, representing 60% of the national total.

▪ **QUEBEC:**

- **Total:** Quebec was again the third largest province in terms of film and television production in 2015-16, and the only other province (aside from British Columbia and Ontario) with over \$1 billion in production volume. Its total volume decreased in 2015/16 to \$1.46 billion, with a total of 37,580 direct and spin-off FTEs.
- **FLS:** FLS productions increased slightly to \$282 million in 2015/16, representing 11% of the national total.

▪ **MANITOBA:**

- **Total:** The total volume of film and television production in Manitoba increased in 2015-16 to \$86 million from \$78 million the previous year, creating 1,330 FTE jobs in the province.
- **FLS:** 2015/16 saw an increase in FLS productions to \$42 million in 2015/16, up from \$11 million in 2014/15, representing 2% of the national total.

▪ **ALBERTA:**

- **Total:** The total volume of film and television production in Alberta in 2015-16 decreased slightly to \$246 million, creating 5,050 FTE jobs in the province.

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- **FLS:** FLS productions decreased over 50% to \$34 million in 2015/16, down from \$92 million in 2014/15, representing 1% of the national total.

- **NOVA SCOTIA:**
 - **Total:** The total volume of film and television production in Nova Scotia in 2015-16 increased to \$104 million from \$69 million in 2014-15, creating 2,270 FTE jobs in the province.

 - **FLS:** FLS productions increased to \$12 million in 2015/16.