



## HIGHLIGHTS FROM PROFILE 2018

Profile 2018 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 2018 is the 22<sup>nd</sup> edition of the annual economic report prepared by CMPA and its project partners. Read the complete report at <https://cmpa.ca/profile/>.

### 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 2017-2018, Total Film and Television Production in Canada:

- Hit an all-time high in production volume of **\$8.9 billion** (+6%)
- Employed **179,000 FTEs** (+4%)
- Generated **\$12.8 billion** in GDP for the Canadian economy (+6%)

### FOREIGN LOCATION AND SERVICE (FLS) PRODUCTION IN CANADA

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 majority of FLS projects, the copyright is held by non-Canadian producers; however, for approximately 5% to 10% of projects, the copyright is held by Canadians.

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 *Overboard*, *Molly's Game* and *X-Men: Dark Phoenix*. Canada has also become a destination for the filming of many American television series and mini-series such as *The Handmaid's Tale*, *The Man in the High Castle*, and Tom Clancy's *Jack Ryan*, which have been commissioned by US networks as well as online video streaming services.

- The largest contributions to the economic impact of film and television production in Canada came from foreign location and services (FLS) production.
- The **total volume of FLS production** in Canada increased by 26% to an all-time high of **\$4.77 billion**.
- The sector accounted for **95,700 FTEs jobs for Canadians**, including 37,600 direct FTEs in film and television production and a further 58,100 production related FTEs.
- The sector generated **\$5.12 billion in labour income** and **\$6.88 billion in GDP** for the Canadian economy.
- The number of FLS productions increased by 18.5% – from 400 to 474.
- 204 FLS television series were shot in Canada, up from 137. The total volume of FLS television series production increased by 65%, from \$1.72 billion to \$2.84 billion.
- The five provinces hosting the largest volumes of FLS production in 2016/17 all experienced an increase in production volume in 2017/18.
- The copyright for 77% of FLS projects was held by persons or companies based in the US, up from 71% in 2016/17.

## BY PROVINCE

### BRITISH COLUMBIA

The total production volume was **\$3.5 billion** (40% of national share), creating **71,140** direct and production related FTEs.

FLS production in British Columbia increased by 31.5% to **\$3.04 billion** representing 63.7% of the national total.

### ONTARIO

The total production volume was **\$2.89 billion** (32% of national share), creating **51,580** direct and production related FTEs.

FLS production in Ontario increased by 3.2% to **\$910 million**, representing 19.1% of the national total.

### QUEBEC

The total production volume was **\$1.8 billion** (20% of national share), creating **44,910** direct and production related FTEs.

FLS production in Quebec increased by 64.9% to **\$666 million** representing 14% of the national total.

### ALBERTA

The total production volume was **\$255 million**, creating **5,350** direct and production related FTEs.

FLS productions increased to **\$55 million**, up from \$54 million in 2016/17, representing 1.1% of the national total.

### MANITOBA

The total production volume was **\$158 million**, creating **2,350** direct and production related FTEs.

FLS productions increased to **\$89 million**, up from \$70 million in 2016/17, representing 1.9% of the national total.

## KEY CHARTS

**Box 1 Foreign location and service production by type\***

	Feature film		TV series		TV other**		Total	
	No.	Volume (\$M)	No.	Volume (\$M)	No.	Volume (\$M)	No.	Volume (\$M)
<b>British Columbia</b>								
2016/17	95	1,194	77	976	45	141	217	2,311
2017/18	89	876	122	1,903	78	261	289	3,040
<b>Ontario</b>								
2016/17	26	209	39	610	20	63	85	882
2017/18	25	192	46	649	12	69	83	910
<b>Quebec</b>								
2016/17	50	365	10	33	6	7	66	404
2017/18	48	445	26	197	10	23	84	666

Source: Association of Provincial Funding Agencies.

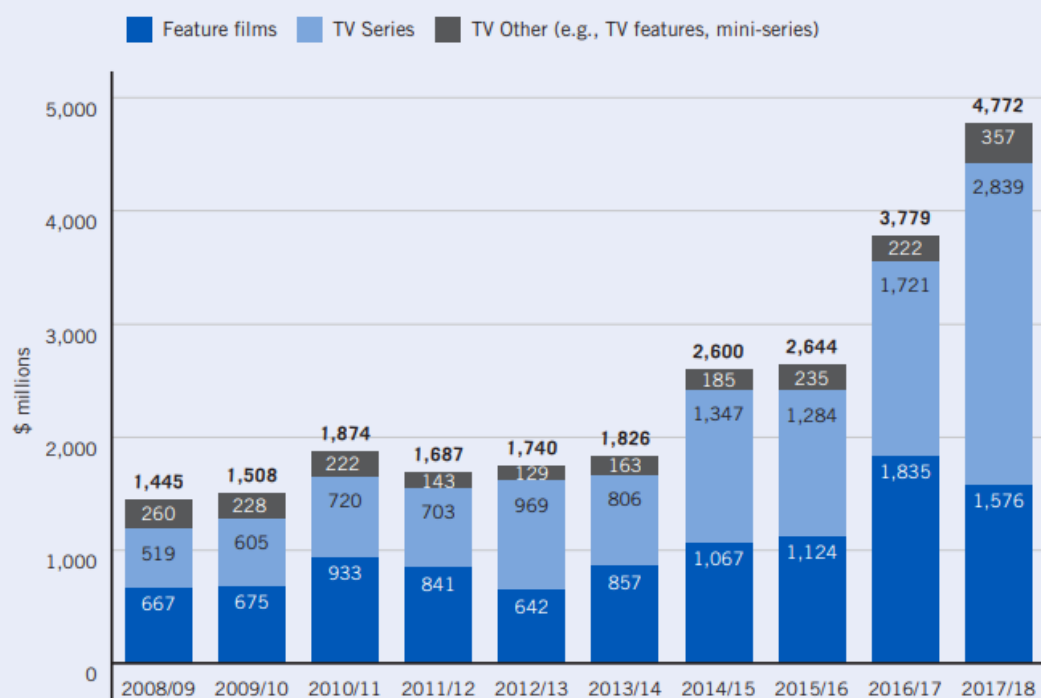
Note: Some totals may not sum due to rounding.

\* Due to data confidentiality, only statistics for British Columbia, Ontario and Quebec are reported.

\*\* 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 TV mini-series.

## TOTAL PRODUCTION AND TYPES

**Exhibit 7 - 1 Volume of foreign location and service production, by type**



Source: Association of Provincial Funding Agencies.

Note: Some totals may not sum due to rounding.

\* 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 TV mini-series.

**Exhibit 7 - 2 Annual number of foreign location and service projects, by type**

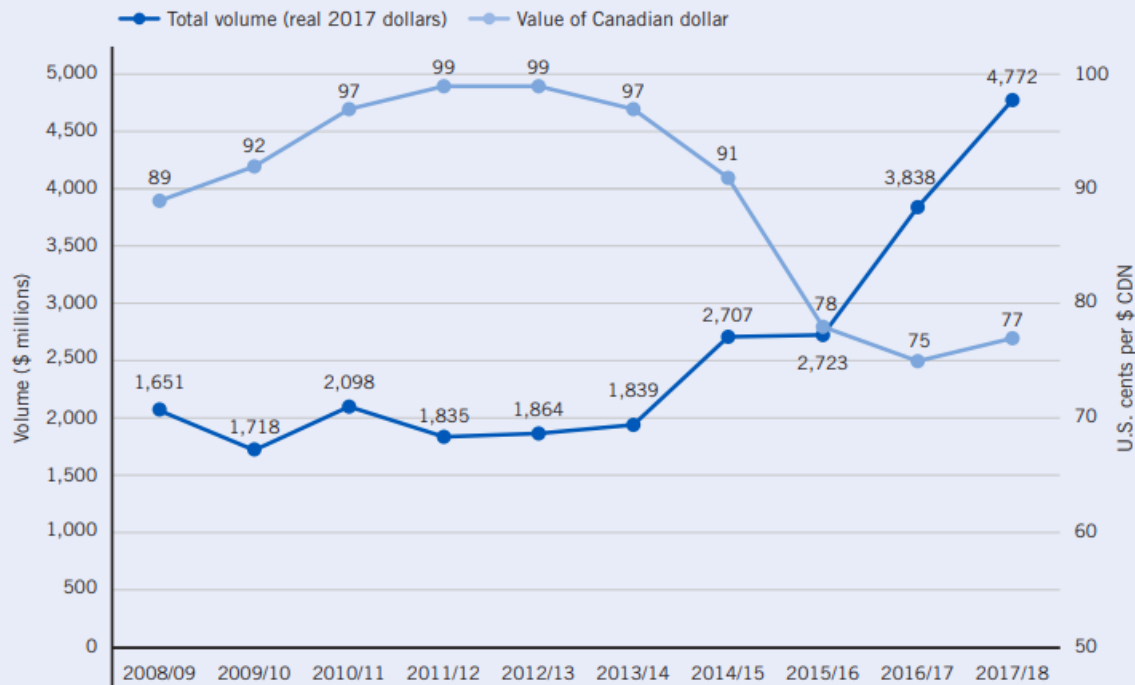
	2008/09	2009/10	2010/11	2011/12	2012/13	2013/14	2014/15	2015/16	2016/17	2017/18
Feature films	89	53	66	99	93	91	111	128	186	167
TV series	57	61	76	78	85	92	115	156	137	204
TV other*	71	67	81	58	42	51	53	71	77	103
<b>Total</b>	<b>217</b>	<b>181</b>	<b>223</b>	<b>235</b>	<b>220</b>	<b>234</b>	<b>279</b>	<b>355</b>	<b>400</b>	<b>474</b>

Source: Association of Provincial Funding Agencies.

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

\* 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 TV mini-series.

**Exhibit 7 - 3 Volume of foreign location and service production (real dollars vs. value of Canadian dollar)**



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

## REGION

**Exhibit 7 - 4 Volume of foreign location and service production, by province and territory**

(\$ millions)	2008/09	2009/10	2010/11	2011/12	2012/13	2013/14	2014/15	2015/16	2016/17	2017/18	2017/18 share of total
British Columbia	900	1,092	1,364	1,102	1,076	1,080	1,672	1,574	2,311	3,040	63.7%
Ontario	206	225	224	382	399	446	545	698	882	910	19.1%
Quebec	211	122	240	157	212	147	275	282	404	666	14.0%
Manitoba	2	15	11	8	23	47	11	42	70	89	1.9%
Alberta	20	7	4	13	4	88	92	34	54	55	1.1%
Nova Scotia	80	43	31	22	25	17	n/a	12	39	12	<1%
Territories*	6	0	1	3	2	2	3	3	18	1	<1%
New Brunswick	10	0	n/a	n/a	0	0	1	0	0	0	0.0%
Prince Edward Island	n/a	n/a	n/a	n/a	0	0	<1	0	0	0	0.0%
Saskatchewan	9	n/a	0	1	1	0	0	0	0	0	0.0%
Newfoundland and Labrador	0	0	0	0	0	0	0	0	0	0	0.0%
<b>Total</b>	<b>1,445</b>	<b>1,508</b>	<b>1,874</b>	<b>1,687</b>	<b>1,740</b>	<b>1,826</b>	<b>2,600</b>	<b>2,644</b>	<b>3,779</b>	<b>4,772</b>	<b>100.0%</b>

Source: Association of Provincial Funding Agencies.

Note: Statistics published by provincial funding agencies may differ from those in *Profile 2018*. Please see Notes on Methodology for additional information. Some totals may not sum due to rounding.

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

\* Territories include Yukon, Nunavut and Northwest Territories.

## COUNTRY

**Exhibit 7 - 5 Number of foreign location and service projects, by country of copyright**

	2008/09	2009/10	2010/11	2011/12	2012/13	2013/14	2014/15	2015/16	2016/17	2017/18
<b>Number of projects</b>										
United States	158	139	194	185	171	177	197	261	304	363
United Kingdom	4	4	4	5	3	7	33	16	39	19
France	1	1	7	8	9	7	3	12	20	12
Germany	4	4	1	2	1	4	2	3	4	7
Other	14	18	1	8	9	13	19	36	28	33
Canada*	36	15	16	27	27	26	25	27	32	38
<b>Total</b>	<b>217</b>	<b>181</b>	<b>223</b>	<b>235</b>	<b>220</b>	<b>234</b>	<b>279</b>	<b>355</b>	<b>427</b>	<b>472</b>
<b>Share of total</b>										
United States	73%	77%	87%	79%	78%	76%	71%	74%	71%	77%
United Kingdom	2%	2%	2%	2%	1%	3%	12%	5%	9%	4%
France	<1%	1%	3%	3%	4%	3%	1%	3%	5%	3%
Germany	2%	2%	<1%	1%	<1%	2%	1%	1%	1%	1%
Other	6%	10%	<1%	3%	4%	6%	7%	10%	7%	7%
Canada*	17%	8%	7%	11%	12%	11%	9%	8%	7%	8%
<b>Total</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>

Source: Association of Provincial Funding Agencies.

\* 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.