



ECONOMIC IMPACTS OF *JOE PICKETT* SEASON TWO IN ALBERTA

**A REPORT FOR THE MOTION
PICTURE ASSOCIATION -
CANADA**

DECEMBER 2023



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EXECUTIVE SUMMARY

“Joe Pickett” is a Paramount TV series that follows a game warden and his family in the small rural town of Saddlestring and the surrounding wilderness of Yellowstone National Park. The show is based on characters created by novelist C.J. Box. The TV series was filmed in Okotoks and High River, Alberta, and generated considerable economic activity across the province. The show’s production also supported activity in a wide range of industries through its procurement, and as those employed by the production and those employed by its supply chain spent money in the wider economy.

This study, commissioned by the Motion Picture Association (MPA) – Canada, focuses on the second season of the show, and analyses the production’s total economic impacts in Alberta, Canada, in 2022/23, when the second season was filmed. The study also considers the wider impact on boosting Alberta’s economy. Assuming that previous and potential upcoming seasons have similar production budgets and spending patterns to that of Season Two, the economic impacts for each season are expected to be in line with those presented in this study.

In 2022/23, **production of Season Two of “Joe Pickett” resulted in total spending in Alberta of approximately C\$38.8 million.** Spending on wages and salaries for local production crew and other labour was the main expenditure item, making up 61% of the total expenditure at nearly C\$23.8 million. The remaining 39% of spending measured at C\$15.0 million and was spent with over 620 local suppliers of goods and services.

Oxford Economics calculates that expenditure by **the production of Season Two of “Joe Pickett” stimulated over C\$52.0 million in contribution to Alberta’s GDP in 2022/23.** We find that for every C\$1 million that the production’s own activities contributed to the economy, its expenditure supported a further C\$1.2 million along its supply chain and through the payment of wages.

We find that the expenditure undertaken by **the show’s production stimulated a total of 400 full time equivalent (FTE) jobs across Alberta in 2022/23.** For every 100 people the production directly employed, its expenditure stimulated another 49 jobs across the province.

C\$52m

Total contribution to Alberta’s GDP supported by Season Two of “Joe Pickett”

400 FTE

Jobs supported across Alberta as a result of Season Two of “Joe Pickett”

THE ECONOMIC IMPACT OF *JOE PICKETT* SEASON TWO IN ALBERTA

DIRECT IMPACT OF PRODUCTION



TOTAL IMPACT OF PRODUCTION



1. INTRODUCTION

“Joe Pickett” is an American neo-Western crime drama television series produced by Paramount that follows the life of a Wyoming game warden and his family. Although the series’ setting is the rural town of Saddlestring, Wyoming, the series was filmed on location in Alberta, Canada. The series premiered on December 6, 2021, and consisted of ten episodes. In February 2022, the series was renewed for a second season.

Oxford Economics was engaged by the Motion Picture Association – Canada to conduct an independent economic impact assessment

of the production of the most recent season of the show, Season Two, on Alberta’s economy. For the study, Oxford Economics used data from Paramount to estimate the economic impacts arising from the production of this season.

The broader impacts of the TV series are expected to persist as the studio produces additional seasons. Assuming that previous and upcoming seasons have similar production budgets and spending patterns to that of Season Two, the economic impacts for each season are expected to be in line with those presented in this study.



2. PRODUCTION SPENDING

When a TV show shoots on location, it brings with it jobs, revenue, and related infrastructure development. Physical productions provide an immediate boost to the local economy, fostering job creation and innovation in other industries across the production supply chain. In 2022/23, production of Season Two of “*Joe Pickett*” resulted in **total spending in Alberta of approximately C\$38.8 million.**

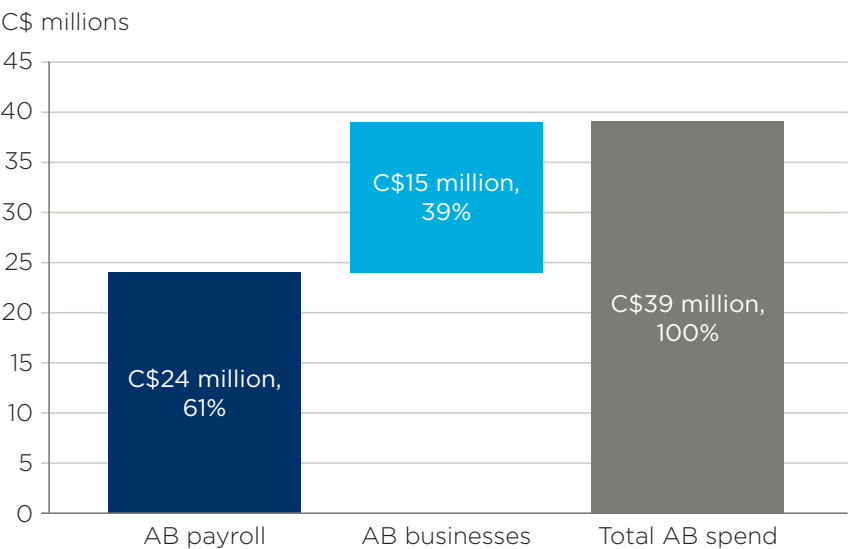
Spending on wages and salaries for local production crew and other labour was the main expenditure item, making up 61% of the total expenditure at almost C\$23.8 million (see Fig.1). The remaining 39% of spending measured at C\$15.0 million and was spent with over 620 local suppliers of goods and services.

C\$38.8m

Direct production expenditure in Alberta

Spending on production crew and qualifying labour was C\$23.8 million, while local spending on goods and services was C\$15.0 million.

Fig. 1: Production spend of Season Two of “*Joe Pickett*” in Alberta, by type



Source: Paramount, Oxford Economics

2.1 BUSINESS SPENDING

Season Two production spending engaged over 620 businesses all over Alberta. The areas that received the largest amounts in business spending were in the Calgary-Edmonton Corridor.

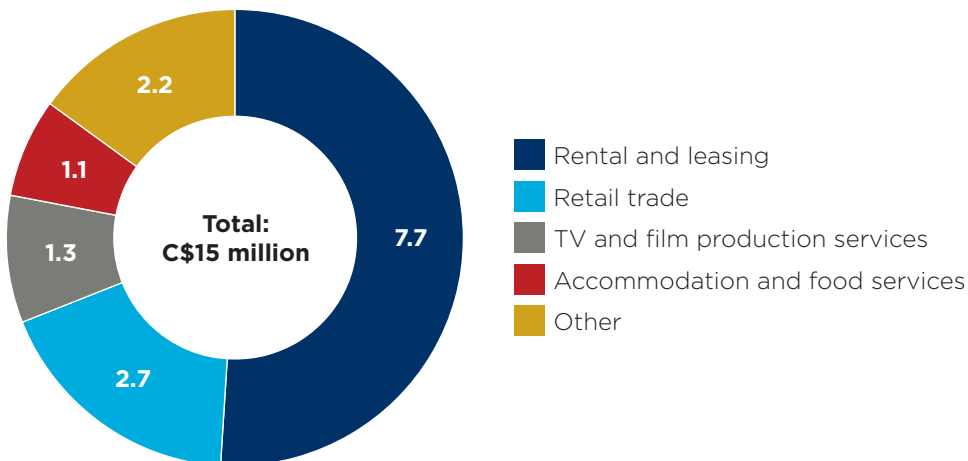
The production of TV shows typically relies on a

wide range of goods and services, engaging multiple local businesses across numerous industries (see Fig. 2). The largest category of spending (at over 51%) was with businesses within the rental and leasing industries, including studio and production equipment rentals. Approximately C\$2.7 million in spending went towards

local vendors engaged in retail trade. Another C\$1.3 million went towards businesses providing TV and film production services and related activities such as visual effects. Approximately 8% (or C\$1.1 million) of production related spending went towards accommodation and food services for cast and crew members.

Fig. 2: Spend on goods and services in Alberta, by industry

C\$ millions



Source: Paramount, Oxford Economics





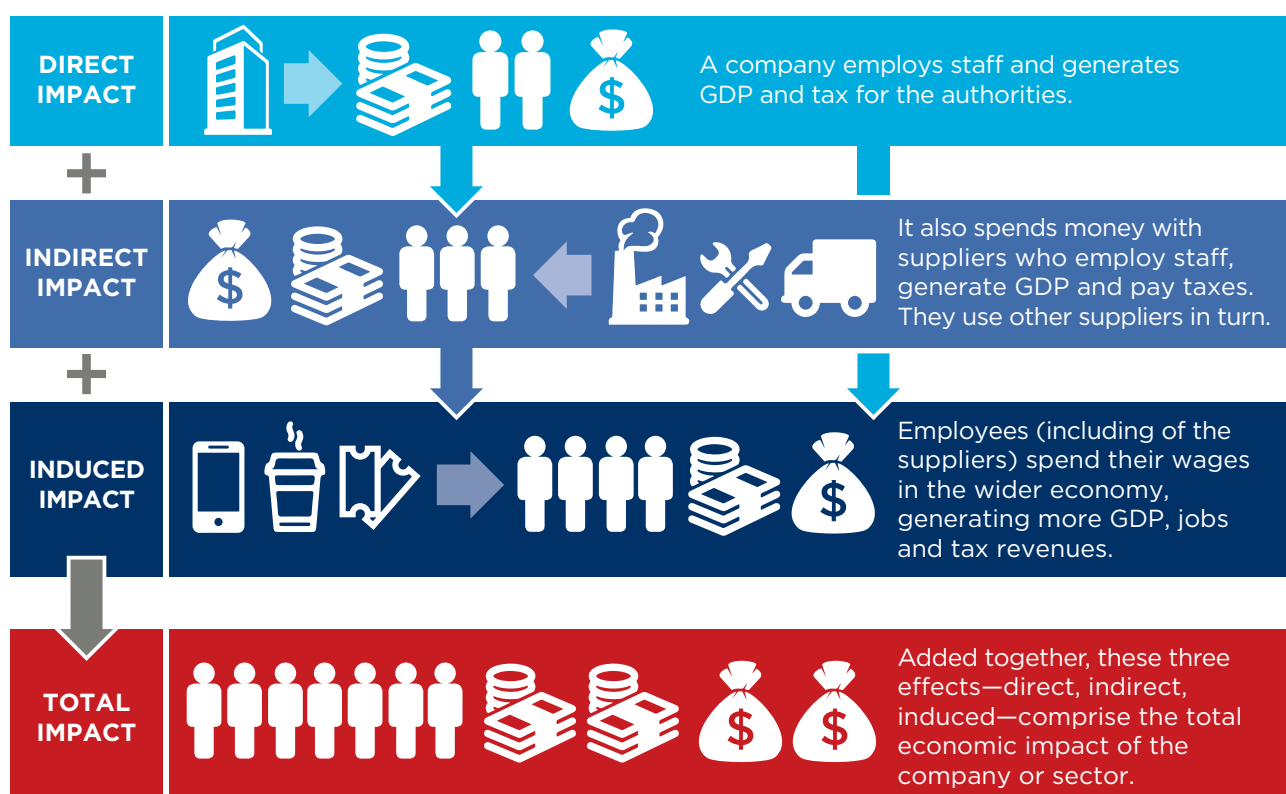
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3. ECONOMIC IMPACTS

3.1 CHANNELS OF IMPACT

The impact of the filming of Season Two of *“Joe Pickett”* on Alberta’s economy is calculated using an economic impact assessment. This

involves quantifying the production’s economic contribution at the provincial level across three channels of expenditure, where the total impact is the sum of the three channels.



Source: Oxford Economics

C\$52m

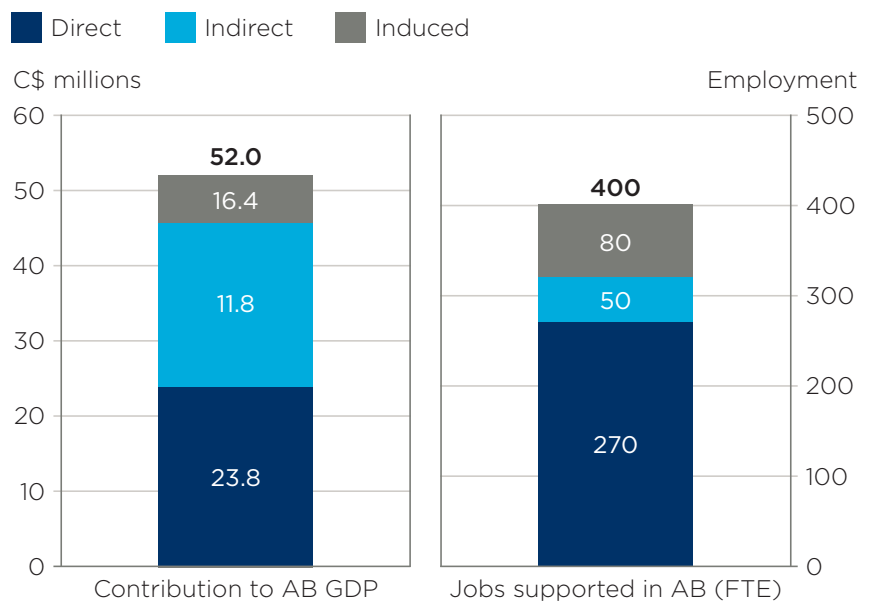
Total contribution to
Alberta's GDP supported by
Season Two of "*Joe Pickett*"

3.2 TOTAL IMPACT

Combining all channels of impact, we find that Season Two of "*Joe Pickett*" supported a C\$52.0 million contribution to Alberta's GDP in 2022/23. Approximately C\$23.8 million, or 46%, of this was generated by the production itself (direct). The local spending on

goods and services supported another C\$11.8 million along the supply chain (indirect), which represented 23% of the total.¹ The payment of wages by the production studios and local vendors in the show's supply chain (induced) stimulated a C\$16.4 million contribution to GDP, or 32% (Fig. 3).

Fig. 3: The total GDP and employment contribution supported by Season Two of "*Joe Pickett*" in Alberta by channel of impact



Source: Oxford Economics

¹ While production spending with Alberta based vendors totals approximately C\$15.0 million, these local vendors may spend some part of this with companies outside of Alberta, resulting in an estimated impact of C\$11.8 million.

For Season Two of “*Joe Pickett*,” for every C\$1 million in direct GDP generated by the production’s own activities, its expenditure supported a further C\$1.2 million in Alberta.²

The production of the show also had a significant impact on employment in the province. In 2022/23, Season Two of “*Joe Pickett*” supported a total FTE employment of 400 across Alberta. The TV series production itself employed an estimated 270 full time equivalent workers, or 67% of the total. The local spending on goods and services supported another 50 FTE jobs along the provincial supply chain or 13% of the total. A further 80 FTE jobs, or 20% of the total, were supported by the spending of wages across the

province by production crews and by employees of the show’s suppliers.

In 2022/23, for every 100 people the production directly employed on a full time equivalent basis, a further 49 FTE jobs were supported across the province through secondary effects.³

According to Paramount, Season Two of “*Joe Pickett*” is estimated to benefit from over C\$9.2 million in provincial level tax incentives. These incentives are estimated to have produced over C\$5.6 in GDP for every dollar of tax incentive received by the production.

The remainder of this section describes the three channels of impact in more detail.

400 FTE

**Jobs supported across Alberta
as a result of Season Two
of “*Joe Pickett*”**

² This GDP multiplier effect is calculated by dividing the total impact (C\$52.0 million) by the direct impact (C\$23.8 million) and subsequently subtracting 1.

³ This employment multiplier effect is calculated by dividing the total employment impact (400) by the direct employment impact (270) and subsequently subtracting 1.

3.3 DIRECT IMPACT

During the production period, Season Two of *“Joe Pickett”* directly employed an estimated 270 full time equivalent workers across Alberta.

We estimate that the *“Joe Pickett”* production made a C\$23.8 million direct contribution to the province’s GDP in 2022/23, which came from the payment of employee compensation to locally based staff.⁴

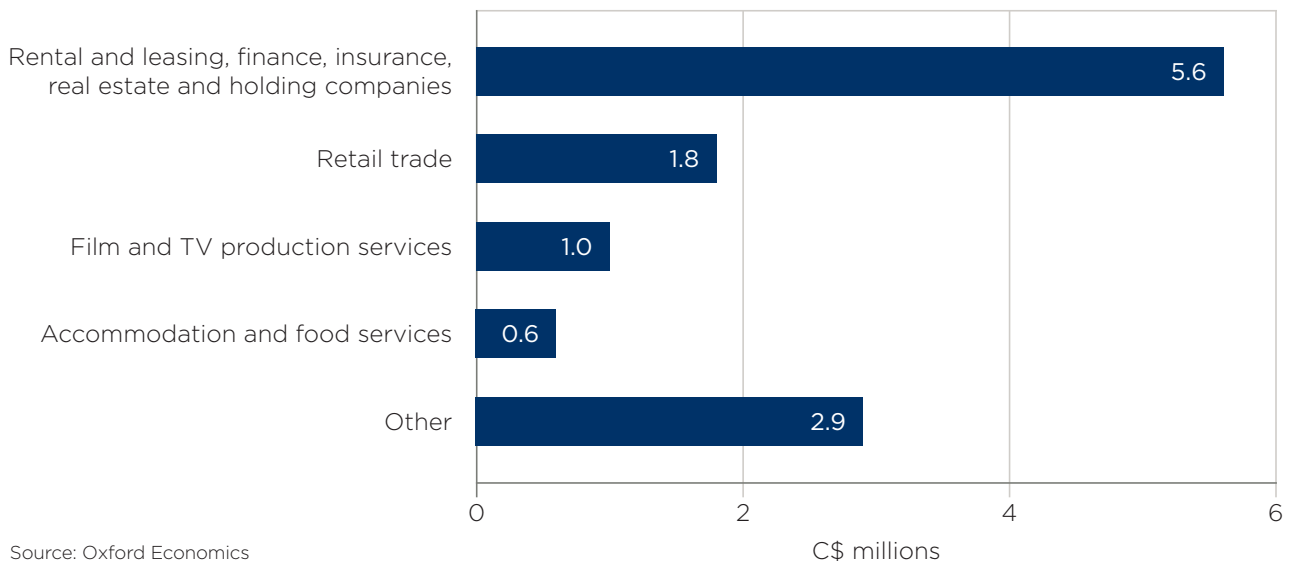
3.4 INDIRECT IMPACT

The production’s positive contribution to Alberta’s economy, however, extends past the contribution it makes directly through its own operations. This is related to the purchases of goods and services made from other firms in order to produce the show. This spending stimulates additional economic activity along the supply chain. This is referred to as the *indirect* impact.

Oxford Economics calculated that the procurement associated with *“Joe Pickett”* Season Two stimulated a C\$11.8 million contribution to the province’s GDP along the domestic supply chain.

Nearly two thirds of this indirect impact (at 62%) was in rental & leasing, and retail services, where the show’s supply chain stimulated a GDP contribution of C\$5.6 million (47%) and C\$1.8 million (15%), respectively (Fig. 4).

Fig. 4: GDP contribution stimulated by the procurement of goods and services from local suppliers, by industry



⁴ The contribution to GDP generated by a company or a project can be calculated as the sum of its surplus (profits) and employee compensation. This approach, known as the income approach, is consistent with the principles of national accounting. For the purposes of this study, we take a conservative approach to this calculation and focus on the employee compensation of local workers, excluding the profits associated with the production in our calculation of direct contribution to Alberta’s GDP.

The show's expenditure on inputs of goods and services from locally based suppliers also stimulated 50 full time equivalent jobs in Alberta.

3.5 INDUCED IMPACT

During the production period, local labour was paid C\$23.8 million in gross wages and salaries. In addition to this, the people whose jobs are stimulated by local spending on goods and services are

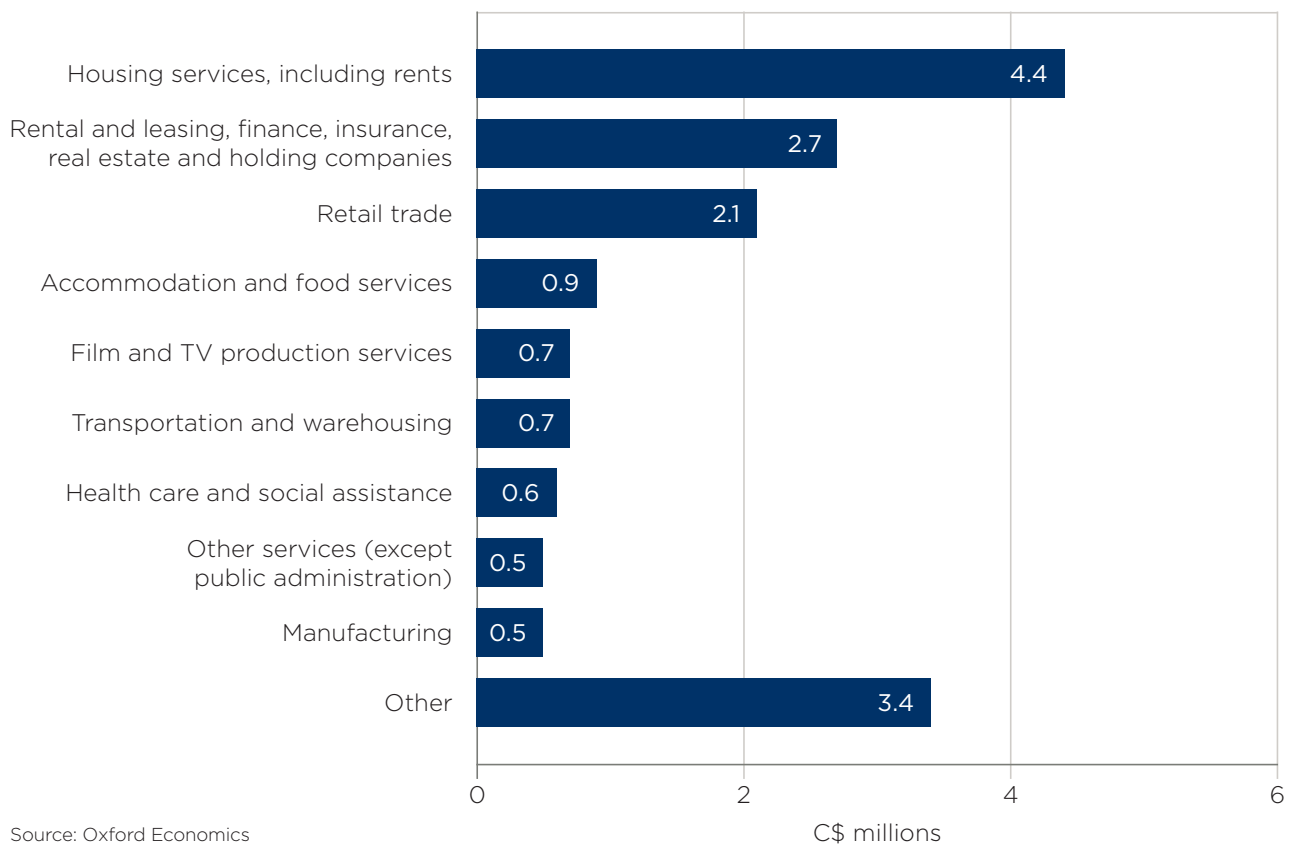
also paid additional wages and salaries.

Production crews, and workers employed throughout the supply chain, spend a proportion of their wages at retail, leisure, and other outlets across the province. This stimulates economic activity and employment at these firms, but also along their supply chains. This is referred to as the show's *induced* impact.

We estimate the wage-financed spending of local production crews and workers at locally based suppliers stimulated a C\$16.4 million contribution to Alberta's GDP during the production period (Fig. 5).

We estimate the wage financed consumer spending of production crews and workers within the show's supply chain supported 80 full time equivalent jobs across Alberta in 2022/23.

Fig. 5: GDP contribution stimulated by the payment of wages to locally based workers, by industry





4. WIDER IMPACTS

In addition to the economic impacts that arise through production spending, television series such as *Joe Pickett* can produce impacts that extend beyond the jobs and GDP they support. The second season of *Joe Pickett* was filmed primarily in the Calgary region, Alberta from July 2022 to January 2023.

Calgary's film and TV industry has gained international recognition, having hosted a number of A-list Hollywood productions and local indie films. In 2023, the city made MovieMaker's list of Best Cities to Live and Work as a Moviemaker, placing eighth among the Top 25 cities in North America.⁵ In 2022, Calgary Economic Development facilitated

144 film, TV and digital media entertainment projects and over 1,100 filming permits.

Advancement in the film and TV industries helps elevate Calgary's brand as an "iconic city" and create long-term prosperity, a priority set out in the city's economic strategy "Calgary in the New Economy."⁶ Annually, over 3,200 creative industries post-secondary graduates from Mount Royal University, Southern Alberta Institute of Technology (SAIT), the University of Calgary and Bow Valley College feed the homegrown talent pipeline, joining more than 24,000 people employed in the creative industries sector.

In 2021, the Government of Alberta removed the

cap that limited film and television productions to a maximum \$10 million tax credit claim. This incentive positioned Calgary as a competitive production jurisdiction and played a role in attracting several other major productions such as *The Last Of Us*, *Fargo*, *Fraggle Rock*, *Heartland*, *High School*, *Prey*, and *Under the Banner of Heaven*.

The ongoing success of *Joe Pickett* and other shows filmed locally allows for the economies of Calgary and its surrounding towns to not only rebound after setbacks from the pandemic, but also to grow consistently and meaningfully in a way that ripples through the broader economy.

⁵ Calgary Economic Development, "Calgary rises to eighth best city to live and work as a moviemaker," 2023, accessed March 2023.

⁶ Calgary Economic Development, "Calgary in the New Economy," 2022, accessed March 2023.



APPENDIX: METHODOLOGY

The impact of the filming of Season Two of “*Joe Pickett*” on Alberta’s economy is calculated using an economic impact assessment. This involves quantifying the production’s economic contribution to the region across three channels of expenditure. The channels of impact are:

- **Direct impact** relates to the employment and economic activity generated at the filming locations across Alberta.
- **Indirect impact** captures the economic activity stimulated by the procurement of inputs of goods and services from the locally based supply chain.
- **Induced impact** comprises the wider economic benefits that arise from the payment of wages by the television series, and the firms in its local supply chains, to staff who spend a proportion of this income in local retail, leisure, and other outlets.

The total impact is the sum of the three channels. This enables us to build a picture of the series’ overall contribution to the region across two key metrics:

- The gross value-added contribution to Alberta’s GDP.⁷
- Full time equivalent employment

The results are presented on a gross basis, ignoring any displacement of activity from other firms or activities. Additionally, the results do not consider what the resources currently used by the show’s production, or stimulated by its expenditure, could alternatively produce in their second most productive usage.

Data on the direct impact of “*Joe Pickett*” Season Two—including the show’s contribution to GDP and jobs created—were provided directly by Paramount. Direct GDP contribution in the region is taken to be equal to local employee compensation.

To estimate the indirect and induced GDP impacts of the show, Oxford Economics used the 2019 Statistics Canada input-output (IO) table for Alberta (the latest available). A basic domestic IO table gives a snapshot of an economy at a given point in time. The model shows the major spending flows from “final demand” (i.e., consumer spending, government spending, investment, and exports to the rest of the world); intermediate spending patterns (i.e., what each sector buys from every other sector—the supply chain in other words); how much of that spending stays within the domestic/ provincial economy; and the distribution of income between employment income and other income (mainly profits). In essence, an IO table shows who buys what from whom in the economy.

To estimate the indirect impact, we used vendor-level information on the amount spent and type of goods and services purchased from local businesses over the course of the production. In order to calculate the induced impact, we took the figures for wages paid to workers, as provided by Paramount, and then allocated those to the sectors where they would have spent those wages in line with the proportions in the Alberta IO table. We then used those figures to show how many dollars of GDP the show’s production supported in the Alberta economy for every C\$1 of direct GDP contribution, and how many jobs were stimulated across the province for each 100 people directly employed by the production.

⁷ Where GDP is the main indicator of economic activity in Alberta. It is used to measure the rate of growth or decline of the economy, and when it enters a recession.

ABOUT OXFORD ECONOMICS

Oxford Economics was founded in 1981 as a commercial venture with Oxford University's business college to provide economic forecasting and modelling to UK companies and financial institutions expanding abroad. Since then, we have become one of the world's foremost independent global advisory firms, providing reports, forecasts and analytical tools on more than 200 countries, 250 industrial sectors, and 7,000 cities and regions. Our best-in-class global economic and industry models and analytical tools give us an unparalleled ability to forecast external market trends and assess their economic, social and business impact.

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