



CMPA International Strategy Framework & Target Markets: 2023-2026

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About the Canadian Media Producers Association

The Canadian Media Producers Association is the national advocacy organization for independent producers, representing hundreds of companies engaged in the development, production and distribution of English-language content made for television, cinema and digital media channels. We work to promote the continued success of the Canadian production sector and to ensure a bright future for the diverse content made by our members for both domestic and international audiences.

About the Canadian industry

The Canadian screen-content industry is a robust sector that generates significant economic activity - in 2019/20, the Canadian media production industry reached CAD 9.32 billion in the total volume of film and television production¹. The export value in terms of the amount of foreign revenue collected by the production industry for sales reached CAD 6 billion.² In the same period, Canada's production industry generated 244,500 full-time jobs and CAD 12.24 billion in GDP for the Canadian economy.³

In 2020/21, despite the global pandemic, the Canadian industry remained strong. Overall, the sector saw a 5% year-over-year decrease in production volume which is remarkable given that that the industry world wide was brought to a halt for several months in 2020.⁴

Canadian screen content and companies in the international marketplace

To thrive in today's global marketplace, Canadian content needs to travel across our borders and onto international screens. Canadian production companies have been successful at forging an international reputation for delivering high quality programming, partnership and co-production expertise and production services. Canada has international co-production treaty agreements and memorandums of understanding with over 60 countries, with new treaties being negotiated continually.

Canada makes an excellent co-production partner, thanks to the following attributes of our country and our industry:

- Variety of financing sources, including federal and provincial tax credits
- Excellent location services and diverse locations/landscapes
- High-standard, full-service production and post-production facilities
- Experienced and highly skilled production crews and talent
- Physical and cultural proximity to the United States

¹ CMPA (2020), *PROFILE: Economic Report on the Screen-Based Media Production Industry in Canada*

² Ibid.

³ Ibid.

⁴ CMPA (2021), *PROFILE: Economic Report on the Screen-Based Media Production Industry in Canada*



Co-productions continue to be critical to ensure the vitality of the screen-content sector in Canada. These productions are important vehicles to strengthen international ties in the audiovisual sector and a way to promote and market Canadian talent abroad. They also enhance each partnering country's production capacity by drawing foreign investment and by facilitating project financing for works that might not otherwise be produced, thereby boosting production budgets, generating employment and developing local talent.

In the last 10 years, Canada's screen content producers partnered in more than 700 international co-productions with budgets totaling almost \$6 billion. The UK and France continue to be Canada's main co-production partners, with Australia, Ireland and Germany rounding out the list of main partners. With the top two partners comprising 65% of total budgets, there is ample room to increase activity outside of these two countries - especially with those that share a common language and trading link - while further solidifying and diversifying business opportunities.⁵

In terms of television pre-sales, the US and UK are Canada's most important markets. Between 2016-2017 and 2018-2019, pre-sales of CMF-funded television projects US pre-sales represented 66% of all pre-sales while the UK was the second most-important market for pre-sales of Canadian productions, representing 20% of all pre-sales. Ireland represented 10% while 3% of all pre-sales were made to France. Together, the top three countries captured 96% of all pre-sales.⁶

In the feature film world, more co-productions funded by Telefilm Canada were undertaken with France than any other coproducing partner. Of the 78 co-productions funded by Telefilm Canada, 20 had France as a coproducing partner. Ireland was the second most frequent coproducing partner of choice. Though involving fewer films, the total sales of projects coproduced with the UK achieved over \$95 million, exceeding the value of total sales of films coproduced with Ireland.⁷

The CMPA will focus on providing opportunities to members in key markets, but will also create initiatives that will assist Canadian producers in succeeding in emerging markets.

In addition to the activities outlined in this international business development strategy, the CMPA continues to monitor international trends and opportunities in markets that are not featured in our strategy but could provide beneficial partnership and sales opportunities for members.

⁵ CMPA (2019), *PROFILE: Economic Report on the Screen-Based Media Production Industry in Canada*

⁶ Communications MDR: Exporting Canadian Screen-based Productions in a Global Market: Trends, Opportunities and Future Directions (2020)

⁷ Ibid.

Past successes

The CMPA has been active in the international arena since the early 2000's, promoting the interests of its members by facilitating production opportunities and addressing any structural or policy issues to ensure that producers have access to business opportunities worldwide, including co-production partnerships, sales and pre-sales opportunities and pursuing foreign investment in their companies.

The CMPA has been and continues to be involved in the world's largest entertainment market and trade events in the entertainment industry, including the Cannes International Film Festival, Hong Kong Filmart, MIPCOM, Berlinale and Content London, among others.

The CMPA has also worked with government and private-sector partners to offer international missions to Australia, China, the UK, Ireland, the US, Germany, France to name a few. During the years of the pandemic, the CMPA continued to support members through virtual seminars and business to business meeting opportunities with a number of markets.

The successes of international market presence and trade missions have demonstrated that by bridging the business and logistical gaps between Canada and foreign markets through missions and virtual opportunities, more production activity is generated, direct market intelligence is gathered and Canadian productions gain international visibility. Hundreds of new contacts have been created and member evaluation surveys have all reported positive business outcomes.

The CMPA's objectives in the international market

The CMPA's objectives center around five main areas:

1. Increase co-development and co-production opportunities
2. Increase international sales/export opportunities
3. Increase foreign investment in Canadian companies
4. Facilitate international networking opportunities
5. Enhance the visibility of CMPA members internationally

Overview and guiding principles

Each of the above objectives will be achieved through a number of initiatives carried out throughout the year, giving access to member companies from across the country of all sizes, working in all genres and creating for all platforms.

The strategy will provide a framework based on activities and events taking place over each fiscal year and will be inclusive of all markets, with a special focus on markets that are of most interest to our members and have been generating the most business opportunities for members.

The CMPA will also provide opportunities to explore markets Canadian companies haven't traditionally worked with. We will start this process by building partnerships with powerhouses such as Nigeria and South Africa, among others.

When engaging with non-European markets, the CMPA will work towards an approach that is inclusive, and based on equitable skills exchange, mentorship, and training.

In all our international activities whether it be trade missions we undertake abroad or hosting foreign delegations, we will work towards equitable representation from all communities within the CMPA membership. We will also work with our partners to ensure that they similarly work towards identifying and including stories and producers from equity-seeking and sovereignty-seeking communities, creating space to present them to Canadian producers for potential co-venture/co-production opportunities.

In addition to market-specific activities, the CMPA will be organizing general support activities that will provide market intelligence and help companies to compete in the global market through training and development.

The strategy can be broken down into six main areas of focus, as outlined below:

Co-production

- Organize in-person and virtual trade missions to help members explore markets of interest and familiarize themselves with incentives and opportunities, connect with potential partners
- Advise government on negotiating new treaties and renegotiating existing ones based on the evolving needs of the market
- Create and enhance existing online tools that facilitate matchmaking and collaboration
- Organize pitching opportunities

Provide market intelligence

- Develop tools utilizing existing market intelligence to help members identify the types of content that travel and the markets that are looking for the types of content they create

Training

- Provide online courses and masterclasses that will help members enhance their market potential and reach

International sales/export opportunities

- Build partnerships with foreign partners that will allow CMPA members to access decision-makers
- Assist members with developing export strategies



International networking opportunities

- Organize B2B meetings, information sessions and networking receptions at international events in both Canada and abroad
- Connect with visiting delegations in Canada

Enhance visibility

- Leverage partnerships to showcase members works at international events and international publications
- Provide a platform to members to showcase their projects

Activities and timelines

Event-related international activities

Please see a brief description of intended activities under Target Markets.

Ongoing support activities

Ongoing support activities will center around providing training, market intelligence, enhanced online resources, tools to showcase members' work and to facilitate networking.

The following activities are a collection of initiatives that the CMPA could undertake in every fiscal year, with slight variations and focus, providing bespoke opportunities CMPA members in every fiscal year.

Workshops and masterclasses

The CMPA will continue to work with experts internationally to create a series of online workshops and masterclasses. In the past, we have offered a variety of in-person and virtual training and professional development opportunities, including: [International Co-Production Accelerator Program](#), [International Roadmap Program](#), Optimizing your Digital Presence for Export, [Exporting Screen-Based Content and Services](#), [Crossing Borders: Canada-US Co-Venture Forum](#), to name a few recent examples.

Networking opportunities

The CMPA will work with its counterparts internationally to identify opportunities to create networking events at events internationally and in Canada. The events can include mixers and B2B meetings at physical events, online networking opportunities.

Target Markets

According to the recent study *Exporting Canadian Screen-based Productions in a Global Market: Trends, Opportunities and Future Directions*, the US, UK and France are key trading partners for **Canadian television and film**; the size of the US, UK and French audiovisual and feature film markets presents numerous opportunities for Canadian exporters.



The analysis of data in the study also shows that the US, the UK, France, Ireland and Germany are key export markets for Canadian films and television programs. Producers interviewed for the study also identified Australia and New Zealand as additional English-language markets of importance to Canadian companies.

For some producers and distributors, China represents an important territory to generate sales while others find it a challenging market to penetrate.

The primary markets for the top-selling Canadian **television programs** are the US, the UK, Ireland and France, followed by South Africa. The most important markets for the top-selling French-language programs were France and French-speaking European countries.

There continues to be demand for Canadian productions at higher budgets, but there is also a greater need to finance these productions through international pre-sales. Amongst the top territories sold were the UK, Germany, France, Spain and Australia.

France is a coproducing partner of choice for Canadian **feature films**, followed by the UK and Ireland. The Top Five Coproducing Partners of Canadian Feature Films Included France, Ireland, the United Kingdom, Germany and Spain.⁸

Our strategy is built on further strengthening existing relationships and creating opportunities for members to work with partners we have a tradition of collaborating with and also with emerging markets where opportunities present themselves.

1. Established screen-content markets: France, Ireland, UK, US, Germany, Australia

France

France is internationally recognized as a trailblazer in the film and television industry, with box office revenues expected to rise from US \$1.5 billion in 2016 to US \$1.6 billion in 2021.⁹ France is not only the coproducing partner of choice for Canadian films, but it is also key trading partners for Canadian television and film and is in the top five markets for Canadian television exports.¹⁰

The country commands an established support structure through favourable tax and financial incentives and is a major catalyst for access to European, Latin American, and Asian markets.

⁸ Communications MDR: Exporting Canadian Screen-based Productions in a Global Market: Trends, Opportunities and Future Directions (2020)

⁹ PWC (2017) *Global Media and Entertainment Outlook 2017-2020* (<https://www.pwc.com/outlook>)

¹⁰ Communications MDR: Exporting Canadian Screen-based Productions in a Global Market: Trends, Opportunities and Future Directions (2020)

State and regulatory bodies such as the Centre national du cinéma et de l'image animée (CNC) and Sociétés de financement de l'industrie cinématographique et de l'audiovisuel (SOFICA) play indispensable roles in France's distinguished industry. The State upholds that a robust film and television industry is a cultural priority and provides strategic support to finance, distribute, promote, and export content. For nearly 70 years, Unifrance (administered by the CNC) has been a world-leader in providing support in selling French films in major international markets.

Canada and France have a long-standing, fruitful partnership celebrating 148 audiovisual treaty co-production projects between 2010-11 and 2019-20.¹¹ The total combined budgets of these co-productions amounted to CAD \$1,187 million, securing 47% of the share of co-production activity between Canada and partner countries.¹² France is the most important country to Canada for exporting feature films of all genres, and most especially animation productions.

France is a viable partner with a large potential audience for both French and English language productions. France's cinema market accounted for US\$1.6bn in 2017 and is estimated to grow to US\$1.8bn in 2022 at a 1.8% CAGR and France is the fourth-largest subscription TV market in Europe in terms of revenue. In addition, France has by far the largest, most-advanced IPTV market in Europe and is only behind China, the US and Russia in terms of subscriber numbers.¹³

France continues to be Europe's biggest market for non-Hollywood films, with between two and two-and-a-half times the number of European [including French] films opening there than studio pictures.¹⁴

Key events in the France of import to the Canadian screen-content industry include the *Anney International Animation Film Festival*, *MIPCOM*, *Cannes Film Festival*, *Series Mania* and *Sunny Side of the Doc*:

- France is a top European exporter of animation and continues to be catalyst for animation productions particularly through the *Anney International Animation Film Festival*, which holds a competition between cartoon films and various techniques such as animated drawings, cut-out papers, and modeling clay.
- MIPCOM, held in Cannes annually since 1985, is a robust trade show that is well represented by television studios and broadcasters. The event is comparable to a marketplace and is an indispensable opportunity to connect Canadian producers with international media buyer and sellers.

¹¹ CMPA (2019) *PROFILE: Economic Report on the Screen-Based Media Production Industry in Canada*.

¹² Ibid.

¹³ <https://www.pwcmediaoutlook.com/country/France>

¹⁴ Market Study France 2010-2017, published May 2018, by Split Screen for German Films https://www.german-films.de/fileadmin/mediapool/pdf/Marktanalyse/2018/France_2010-2017_MAI_2018_edit.pdf

- The *Cannes Film Festival* has been described as the most important film festival with respect to worldwide impact and garnered media attention. *Cannes* was founded with the purpose of raising the profile of films to develop cinema, boost the film industry, and celebrate ingenuity on a global scale. Cannes revels in celebrating the best filmmakers and emerging talent from all over the world, making attendance at the Festival key for creative entrepreneurs' global market strategies.
- *Series Mania International Festival* in Lilles, is an event that is becoming a frequented event amongst Canadian television producers. *Series Mania Forum*, the industry event accompanying the festival, is the meeting place for international players in the episodic television creation. Since 2018, Lille Transatlantic Dialogues is also the new forum for high-level meetings and exchanges dedicated to bringing together the main political, institutional, creative and economic players in TV and cultural sectors in Europe and the United States.
- Sunny Side of the Doc is a major international marketplace for documentary and specialist factual content across all platforms. Each year, the 4-day event brings together broadcasters, decision makers, financing bodies, distributors, content creators and producers from around the world to sell or buy projects and programmes, and to find coproduction partners from 50 countries.

The CMPA intends to partner on the following activities in France with members of the International Business Development Group, lead by Telefilm Canada.

- MIPCOM
- Marche du Film during the Cannes International Film Festival
- International Animation Film Market (MIFA) at the Annecy International Animation Film Festival.

The goal of the partnership is to create enhanced visibility for Canadian participants, networking opportunities and a chance to showcase Canadian content.

INTENDED ACTIONS - FRANCE

Relationship building: Support members through our partnership with Telefilm at the events mentioned above. In addition, the CMPA will work with the Trade Commissioner Service in France to identify opportunities for collaboration at virtual and in-person events in Canada, France and internationally where French partners are present.

Promotion of the Canada-France co-production treaty: Work with the Trade Commissioner Service, the Embassy of France in Canada and Telefilm Canada to organize



opportunities to promote the new Canada – France coproduction treaty which was ratified in 2022.

Outbound mission: organize a delegation to Series Mania in March 2023

Ireland

Ireland’s film and television industry offers a highly developed infrastructure, backed by stable Irish government support. The audiovisual content production sector in Ireland is estimated to be worth €692 million¹⁵.

The Fís Éireann/Screen Ireland is the market’s main funding body. Its figures for the industry show that in 2019 Irish films, television and animation productions produced in Ireland had combined budgets of over €760 million and spent over €357 million on local employment and local goods and services. This 2019 figure represents an annual increase of 162% on 2018 spend and an increase of 256% since 2007¹⁶.

Ireland has co-produced with almost every European territory, as well as Canada, Australia and South Africa, and has a wealth of experienced co-producers across all media platforms. Section 481, the Irish tax incentive for TV and film, was recently extended to 2020. This incentive was increased on January 1, 2015 from 28% to 32% of a film’s Irish spend, precipitating a system change from investor-led funding to a tax credit and garnering expanded interest from Canadian producers to co-produce with Irish partners.

INTENDED ACTIONS - IRELAND

Relationship building: Work with the Trade Commissioner Service in Ireland to identify opportunities for collaboration at virtual and in-person events in Canada, Ireland and internationally where Irish partners are present.

Inbound mission: Work with Screen Ireland to bring in a delegation of Irish producers for Prime Time 2024.

¹⁵ A Report from Olsberg SPI with Nordicity: Economic Analysis of the Audiovisual Sector in the Republic of Ireland (2017)

¹⁶ <https://www.screenireland.ie/about/research-data>

UK

The UK television industry is a major international success story and a natural co-production partner for Canada. This market produces thousands of hours of content each year. In 2019 the industry generated a total spend of £1.95 billion, a 17% increase on the previous year's £1.84 billion and the second highest figure since these statistics were first recorded. The global theatrical market, which hit a new record in 2019, was worth just over \$42 billion with UK films earning \$10.3 billion, or a 24.6% share.¹⁷

The UK has consistently been Canada's top or second co-producing partner of choice in the past few decades. In the 2009/10-2018/19 period, the Canada-UK coproduction treaty has been the most used treaty with 164 productions.¹⁸ The UK is the second most-important market for the pre-sale of Canadian programs, generating almost CAD \$37 million in revenues in 2014-2015 and 2018-2019 in CMF funded television projects, and the total sales of feature film projects coproduced with the UK achieved over \$95 million over the same period.¹⁹

The UK government is very supportive of the industry, with improved lottery-sourced funding and tax concessions. Relaxation of the domestic and by extension international project certification process offers wider opportunities for international co-productions as they are now eligible for direct funding; approximately 25% of funded projects are international co-productions.

The UK was Canada's third largest export market in the world in 2017, with Canadian exports reaching CAD 17.7 billion, as well as being the largest destination for Canadian direct investment in Europe. This is in large part due to historical and cultural linkages. EDC position is open and is actively pursuing business in the country and the risk rating is very low. Both Canada and the UK have strongly stated their intentions to form a new trade agreement between the two parties if Britain's exit from the European Union results in a withdrawal from the Canada-European Union Comprehensive Economic and Trade Agreement.²⁰

The Canada – UK relationship is a very important one – the co-production treaty has been the most used one over the last 7 years, with over 100 productions.

Key events in the UK for the Canadian screen-content industry include *Content London and Focus*:

- *Content London* is a world-class event that features over 200 speakers in a variety of audio-visual roles including commissioners, producers, financiers, technologist,

¹⁷ *We are UK Film* (2019). (<http://www.weareukfilm.com/facts-and-stats>)

¹⁸ CMPA (2019) *PROFILE: Economic Report on the Screen-Based Media Production Industry in Canada*, pp.56

¹⁹ Communications MDR: Exporting Canadian Screen-based Productions in a Global Market: Trends, Opportunities and Future Directions (2020)

²⁰ <https://www.edc.ca/en/country-info/country/united-kingdom.html>

agents, and writers. The event delivers highly desired access to major global media players who, given the opportunity to connect with Canadian screen-content producers either at the event or in Canada, may develop business synergies.

- *Focus*, The Meeting Place for International Production opens its doors to all the creative screen industries – including film, TV, advertising, animation and games – and it is the only UK trade event where attendees can meet content makers, film commissions, production services and locations providers from over seventy countries. Delegates can discover filming incentives, locations and services to maximise screen value, as well as organise meetings with exhibiting organisations using the online scheduler. The free registration includes the packed content programme. Featuring a roster of expert speakers, who will address the key opportunities and challenges concerning the production industry today.

INTENDED ACTIONS – UK

Outbound mission: To *Content London* in December 2024, 2025, 2026 working with the High Commission of Canada in the UK to host a variety of activities that focus on generating business development opportunities for Canadian producers.

US

The United States is the leading exporter of screen-based content in the world. In 2018 the US generated \$24.1 billion in film and television exports, resulting in a trade surplus of \$14.4 billion. The US comprises the largest worldwide market for gross box office sales, amounting to almost \$16.8 billion in 2018. The US and its coproducing partners were responsible for 17 of the top 20 grossing films worldwide in 2018. US films accounted for 56% of the share of the theatrical market in Europe in 2017. American studio films represented 19 of the top 20 films in terms of European box office sales.²¹

The US is a key trading partner and export market for Canadian television and film and is one of primary markets for the top-selling Canadian television programs. According to the interviewees in the CMPA commissioned study *Exporting Canadian Screen-based Productions in a Global Market: Trends, Opportunities and Future Directions*, the US market tops the list for their ability to generate revenues from sales to distributors, broadcasters and VOD services in that country. The US market is said to be critical to backstop financing for a production. and affords the most valuable license fees for both scripted and unscripted content sales to linear broadcasting and VOD services. Many producers interviewed for the study point to the increasing importance of the US market due to expanding opportunities on US-based SVOD

²¹ Communications MDR: Exporting Canadian Screen-based Productions in a Global Market: Trends, Opportunities and Future Directions (2020)

and AVOD services which, some interviewees, consider to be the equivalent to opening up new territories in terms of the overall volume of demand for content that such services represent.²²

Key events in the US of import to the Canadian screen-content industry include *South by Southwest (SXSW)*, the *American Film Market (AFM)* and *Kidscreen*:

- *SXSW* presents an unmatched opportunity to learn and network with media professionals across cultural industries. With a focus on discoverability in interactive, film, and music industries, this conference leads the way in exploring up-coming media trends that will shape the future of the audio-visual industry.
- The *AFM* is held each year in Santa Monica, California and attracts more than 7,000 film industry professional from more than 70 different countries. This marketplace is an indispensable opportunity to network, sell, finance, and acquire films. The main focus of the *AFM* is to facilitate production and distribution deals.
- *Kidscreen* is the best attended and most relevant event for executives in kids' entertainment. This event allows creative minds to engage in critical dialogue concerning key industry issues with programmers, buyers, producers, distribution, licensors, retailers, marketers, digital media managers and even toy companies present.

INTENDED ACTIONS - US

Initiative: Work with Canadian and US industry partners to host the *L.A. Pre-Sale Pitch Sessions* in 2024.

Relationship building: Work with the Trade Commissioner Service in Los Angeles and New York to identify opportunities for collaboration at virtual and in-person events in Canada, the US and internationally where US partners are present.

Germany

The country's market size (population 82.7 million in 2016), economic and political stability and very highly accommodating business environment make it a very attractive country for exporters. EDC position is open and is actively pursuing business in the country. Risk rating is very low.²³

²² Communications MDR: Exporting Canadian Screen-based Productions in a Global Market: Trends, Opportunities and Future Directions (2020)

²³ <https://www.edc.ca/en/country-info/country/germany.html>

By 2022, the total cinema revenue is predicated to reach USD \$1.4 billion, up at a 1.2% CAGR from 2017.²⁴ After falling in 2016, box office revenue in 2017 increased by 3.2% to USD \$1.2 billion.²⁵ Germany's strong regional film funds and cash-rebate incentives along with experienced, multilingual crews and impressive landscapes repeatedly draw international productions.²⁶ The TV market in Germany is mature and is expected to surpass the UK as Western Europe's leading TV subscription industry.²⁷ In 2017, TV revenue reached USD \$5.8 billion and is forecasted to reach USD \$6.5 billion by 2022. Germany's license-fee income is the second-highest in world, accounting for 45.4% of total traditional TV market income.²⁸

Germany has one of the most developed OTT video markets in the world. There are over 60 OTT services operating in German making this country the second largest OTT video market in Europe.²⁹ In terms of revenue, Germany has the sixth largest OTT video market worldwide, and is expected to grow as broadband infrastructure further improves.³⁰

The Canada – Germany co-production treaty has been the third most used one between 2010- and 2017.³¹ After the US, the most lucrative territories for international sales of Canadian screen-based content are in Europe. The most important of these are the larger TV markets include Germany as one of the three top countries.³²

Key events in Germany for the Canadian screen-content industry include the *Berlin International Film Festival (Berlinale)*:

- Held in one of the most vibrant cities in the world and with 500,000 admissions and 20,000 professions attending each year, *Berlinale* has the largest public attendance of any annual film festival.³³ Its *European Film Market (EFM)* has been described as "an international marketplace, a compass for the new film year and a platform for innovation and change."³⁴ Over 4200 journalists produce media coverage in over 110 countries during the *Berlinale* and *EFM*.³⁵ Germany, and in particular the *Berlinale* and *EFM*, are critical to the prosperity and innovation of the international film market.

²⁴ <https://www.pwcmediaoutlook.com/country/GERMANY>

²⁵ Ibid.

²⁶ World of Locations, Malta Film Commission, November 2017-April 2018, Print.

²⁷ Ibid.

²⁸ Ibid.

²⁹ Ibid.

³⁰ Ibid.

³¹ Communications MDR: Exporting Canadian Television Globally – Trends, Opportunities and Future Directions. May 2017.

³² Communications MDR: Exporting Canadian Screen-based Productions in a Global Market: Trends, Opportunities and Future Directions (2020)

³³ https://www.berlinale.de/en/das_festival/festivalprofil/profil_der_berlinale/index.html

³⁴ Ibid.

³⁵ Ibid.

INTENDED ACTIONS - GERMANY

Outbound mission: Working with the Trade Commissioner Service in Berlin, the CMPA will organize a Canada – Germany Audiovisual Business Development Day in February 2024 in Berlin during Berlinale/European Film Market.

Inbound mission: Work with the Trade Commissioner Service to bring in a delegation of German producers for Prime Time 2025.

Australia

The shared language and the similar regulatory and policy environment and audiovisual support system and structural landscape makes Australia a natural partner for Canada.

The Canada – Australia co-production treaty has been in the top five most used treaties in the last 10 years, with 24 projects with the global budget of \$53 million.³⁶

After almost three decades of continuous economic expansion, Australia experienced its first official and brief recession in 2020 due to the COVID-19 pandemic.³⁷ Despite the economic downturn and box office revenues and production activity plummeting³⁸, the industry picked up and Australia's production boom grew to a record \$1.47bn (A\$2.29bn) spent on drama features and series in the year to June 2022. A record \$977m (A\$1.51bn) was spent on Australian titles and \$503m (A\$777) on international productions during the 12-month period from 2021-2022.³⁹

The CMPA has a close working relationship with its sister organization Screen Producers Australia (SPA) and have a history of collaboration over two CMPA missions to Screen Forever, a SPA mission to Prime Time in Ottawa and other activities at international festivals and markets, most recently at Content London 2022 where 40 Canadian and Australian producers and industry professionals gathered at a dinner to exchange ideas and explore co-production opportunities.

INTENDED ACTIONS - AUSTRALIA

Outbound mission: Working with SPA, the CMPA intends to bring a delegation of producers to Screen Forever in 2024.

³⁶ CMPA (2021) *PROFILE: Economic Report on the Screen-Based Media Production Industry in Canada*.

³⁷ <https://www.edc.ca/en/country-info/country/australia.html>

³⁸ PWC Media Outlook 2022-2027 <https://mediaoutlook.pwc.com/commentaries/SEG-FILM/AUSTRAL>

³⁹ George, Sandy. "Australian Film and TV Drama Production Tops \$2bn for the First Time." Screen Daily, 2022 November 10, <https://www.screendaily.com/news/australian-film-and-tv-drama-production-tops-2bn-for-the-first-time/5176400.article>.

Inbound mission: Work with the Screen Producers Australia to bring in a delegation of Australian producers for Prime Time 2025.

Ongoing: CMPA will continue to explore networking and B2B meeting opportunities with Australian producers at key festival and market events, as well as share industry trends and shifts in landscape information with SPA colleagues.

2. Emerging co-production markets: South Africa

South Africa

South Africa has a bustling film industry and has been forecasted as a market to watch by PWC in the firm's 2017-2021 *Global Media and Entertainment Outlook* report. In 2016, South Africa reached a century high record with the release of 28 domestic productions, six more than the previous year.⁴⁰ Growth in production volume has been largely attributed to the weak rand, scenic shooting locations and favourable weather conditions, a sophisticated workforce and a competitive rebate system.⁴¹

South Africa's industry has grown over 85% in the last 5 years and is now one of the top locations for film, television and commercials. Their industry is expected to continue to grow, with revenue estimated to rise to US \$239 million by 2021.

Two additional alluring features of South Africa's screen-based industry are their incentives to grow the film industry, and state-of-the-art infrastructures to support production activity. Canadian content fares well in South Africa and Canadian producers claim that the Canada-South Africa co-productions are among the "easiest to set up".⁴²

With consumer spending on media and entertainment forecasted to triple in the country by 2020, it is indispensable to continue to foster business relationships with, and opportunities in, this market.

INTENDED ACTIONS – SOUTH AFRICA

Outbound mission: To *FAME Week Africa* in September 2023

Inbound mission: Host a South African screen-content delegations in February 2024 at the CMPA's annual conference *Prime Time*.

⁴⁰ European Audiovisual Observatory (2017). *FOCUS 2017 – World Film Market Trends*.

⁴¹ CMF Trends (2017). *Your Market Is Everywhere – South Africa*.

⁴² Ibid.

3. Markets on our radar: India, Nigeria

The CMPA may host and/or attend exploratory meetings at major international events to gauge mutual interest in co-production and other business opportunities with each of the markets outlined below.

India

In 2014, Canada and India ratified an international audiovisual co-production treaty. As the largest producer of films in the world in terms of the number of projects, India is now coming onto the global film production scene. Over the last 3 years, India continues to steadily release a large number of domestic features, with 1903 films certified in 2016.⁴³ More recently, the Government of India has implemented several initiatives to attempt to liberalize regulations relating to foreign film policy, including fiscal benefits, film festivals and awards, and facilitating the shooting of films.⁴⁴

According to PricewaterhouseCoopers' *Indian Entertainment and Media Industry report*, India's E&M sector showed strong growth in 2016, with revenues rising from CAD \$15 billion in 2015 to CAD \$17.7 billion - a year-on-year increase of 20%. This growth was achieved in spite of a relative slowdown in the broader economy. In 2015, the Indian market generated US \$1.5 billion in domestic box office sales.⁴⁵ KPMG projects that the Indian film industry will reach INR 219.8 billion in 2018.

Home entertainment is booming (where the much lower cost of accessing audiences on DVD and VOD is a significant factor), especially with respect to animation and documentary content consumption. Regardless of Indian preferences to watch films in local languages, India presents a number of opportunities for Canadian film, television and digital content producers that merit further exploration, including access to a solid talent pool at reduced costs, and access to private sector financing. Having a presence in the Indian market on a longer term and ongoing basis is vital for Canada to exploit these opportunities.

Main industry trends include emerging sources of revenue, increased collaboration with international studios, the rise of 3D cinema, the advent of digital cinema and the growth of multiplexes. Recent Canadian-Indian deals have focused on the genres of children's programming, animation, and both scripted and unscripted lifestyle programming.⁴⁶

Key events in India for the Canadian screen-content industry include the *GOA Film Bazaar* :

⁴³ European Audiovisual Observatory (2017) *FOCUS 2017 – World Film Market Trends*.

⁴⁴ KPMG (2016) *Film Financing and TV Programming: A Taxation Guide*.

⁴⁵ De Rosa, M. & Burgess, M. (2017) *Exporting Canadian Feature Films in Global Markets*.

⁴⁶ CMF (2017). *Your Market Everywhere – India*.

- Held in Goa, India since 2007, *Film Bazaar* is South Asia's largest film market. It has become a major meeting point for international film buyers and sellers looking to enhance creative and financial collaboration between global film communities.

INTENDED ACTIONS - INDIA

Inbound mission: Host India screen-content delegations in February 2024 at the CMPA's annual conference *Prime Time*.

Nigeria

Nigeria is Africa's most populous country, and one of the continent's largest economies. Its primary source of income is oil but due to the financial crisis of 2008-09, followed by the drop in the price of oil, its economic growth has been diversified⁴⁷ to include the entertainment industry.

Canada does not have a co-production treaty with Nigeria; however, exploring collaboration opportunities with this rapidly growing and maturing market would be advantageous from a financial and creative perspective. The country's film industry is second largest in the world, only surpassed by India's Bollywood, generating US \$7 billion, employing 1 million people and producing over 2,500 movies per year. Box office revenue is forecast to keep on rising, increasing at a CAGR of 8.0% over the forecast period from US \$79 million in 2016 to US \$116 million in 2021.⁴⁸ According to journalist Emily Witt, author of *Nollywood: The Making of a Film Empire*, Nigeria is positioned to become a "global brand much like the films of Bollywood or Kung Fu movies."⁴⁹

While most movies are generally low budget and are backed by private investors, Nigeria's creative industries enjoy government support in the form of initiatives to reduce financial burdens on new investments, and encourage both foreign and local investments into the film industry. The government also lends support to the industry in fighting piracy.⁵⁰ With their increased presence at MIPCOM and AFM, Nigeria is working on strengthening its relationships with Europe and North America.⁵¹

⁴⁷ CIA World Factbook (<https://www.cia.gov/library/publications/the-world-factbook/geos/ni.html>)

⁴⁸ PWC (2017) *Global Media and Entertainment Outlook 2017-2020* (<https://www.pwc.com/outlook>)

⁴⁹ PBS News Hour: *Inside Nollywood, the booming film industry that makes 1,500 movies a year.*

(<https://www.pbs.org/newshour/arts/inside-nollywood-the-booming-film-industry-that-makes-1500-movies-a-year>)

⁵⁰ The Guardian: *Nigeria: FG's Support for Creative Industry Paying Off, Says Mohammed.*

(<http://allafrica.com/stories/201712130538.html>)

⁵¹ Variety. *AFM: Nigerian Film Industry Looks to Work With Hollywood Partners.*

<http://variety.com/2017/film/spotlight/afm-nigerian-film-industry-looks-to-work-with-hollywood-partners-1202606939/>

Key events in Nigeria for the Canadian screen-content industry include the *Africa International Film Festival (AFRIFF)*:

- *AFRIFF* celebrates African Cinema and the positive socio-economic impact that a budding film industry can have for third world and developing economies. *AFRIFF* is Nigeria's prime event for encouraging international screen-content partnerships.

INTENDED ACTION

Relationship building: The CMPA will continue to work with the Pan African Chamber of Commerce to pursue opportunities within the market.

APPENDIX

Timeline	Market	Intended action
March-23	France	Outbound mission: organize a delegation to Series Mania in March 2023
September-23	South Africa	Outbound mission: To FAME Week Africa in September 2023
December-23	UK	Outbound mission: To Content London in December 2023, 2024, 2025 working with the High Commission of Canada in the UK to host a Canada – UK Business Development Day.
February-24	Ireland	Inbound mission: Work with Screen Ireland to bring in a delegation of Irish producers for Prime Time 2024.
February-24	Germany	Outbound mission: Working with the Trade Commissioner Service in Berlin, the CMPA will organize a Canada – Germany Audiovisual Business Development Day in February 2024 in Berlin during Berlinale/European Film Market.
February-24	South Africa	Inbound mission: Host a South African screen-content delegations in February 2024 at the CMPA’s annual conference Prime Time.
February-24	India	Inbound mission: Host India screen-content delegations in February 2024 at the CMPA’s annual conference Prime Time.
May-24	Australia	Outbound mission: Working with SPA, the CMPA intends to bring a delegation of producers to Screen Forever in 2024.
August-24	US	Initiative: Work with Canadian and US industry partners to host the L.A. Pre-Sale Pitch Sessions in 2024.
December-24	UK	Outbound mission: To Content London in December 2023, 2024, 2025 working with the High Commission of Canada in the UK to host a Canada – UK Business Development Day.
February-25	Australia	Inbound mission: Work with the Screen Producers Australia to bring in a delegation of Australian producers for Prime Time 2025.
February-25	Germany	Inbound mission: Work with the Trade Commissioner Service to bring in a delegation of German producers for Prime Time 2025.
December-25		Outbound mission: To Content London in December 2023, 2024, 2025 working with the High Commission of Canada in the UK to host a Canada – UK Business Development Day.
Ongoing	Australia	Ongoing: CMPA will continue to explore networking and B2B meeting opportunities with Australian producers at key festival and market events, as well as share industry trends and shifts in landscape information with SPA colleagues.
Ongoing	France	Relationship building: Support members through our partnership with Telefilm at the events mentioned above. In addition, the CMPA will work with the Trade Commissioner Service in France to identify opportunities for collaboration at virtual and in-person events in Canada, France and internationally where French partners are present.



Ongoing	France	Promotion of the Canada-France co-production treaty: Work with the Trade Commissioner Service and the Embassy of France in Canada to organize opportunities to promote the new Canada – France coproduction treaty which is scheduled to be ratified in 2022.
Ongoing	Ireland	Relationship building: Work with the Trade Commissioner Service in Ireland to identify opportunities for collaboration at virtual and in-person events in Canada, Ireland and internationally where Irish partners are present.
Ongoing	US	Relationship building: Work with the Trade Commissioner Service in Los Angeles and New York to identify opportunities for collaboration at virtual and in-person events in Canada, the US and internationally where US partners are present.
Ongoing	Nigeria	Relationship building: The CMPA will continue to work with the Pan African Chamber of Commerce to pursue opportunities within the market.