

# PROFILE

2024

An 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 Department of Canadian Heritage, the Canada Media Fund, Telefilm Canada and the Association québécoise de la production médiatique.

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The Canadian Media Producers Association (CMPA), the Department of Canadian Heritage, the Canada Media Fund (CMF), Telefilm Canada, the Association québécoise de la production médiatique (AQPM) and Nordicity have collaborated to prepare *Profile 2024*. *Profile 2024* is the 28th edition of the annual economic report prepared by the CMPA and its various project partners over the years.

*Profile 2024* provides an analysis of economic activity in Canada's screen-based media production industry during the period of April 1, 2023 to March 31, 2024. It also provides comprehensive reviews of the historical trends in production activity between the fiscal years of 2014/15 and 2023/24.



**Ottawa**  
251 Laurier Avenue West, 11<sup>th</sup> Floor  
Ottawa, ON K1P 5J6  
Tel: 1-800-656-7440 / 613-233-1444  
ottawa@cmpa.ca  
cmpa.ca

**Toronto**  
1 Toronto Street, Suite 702  
Toronto, ON M5C 2V6  
Tel: 1-800-267-8208 / 416-304-0280  
toronto@cmpa.ca

**Vancouver**  
736 Granville Street, Suite 600  
Vancouver, BC V6Z 1G3  
Tel: 1-866-390-7639 / 604-682-8619  
vancouver@cmpa.ca

**Indira Balkissoon**  
*Coordinator, Business Affairs & Policy*

**Gamiela Fereg**  
*Senior Manager, Media Relations and Communications*

**Tracy Holloway**  
*Business Analyst and Special Projects*

**Patrick Smith**  
*Director, Regulatory Affairs*

**Alain Strati**  
*Senior Vice-President, Industry, Policy and General Counsel*



**Department of Canadian Heritage**  
25 Eddy Street  
Gatineau, QC K1A 0M5  
Tel: 1-866-811-0055 / 819-997-0055  
TTY/TDD: 819-997-3123  
PCH.info-info.PCH@canada.ca  
<https://www.canada.ca/en/canadianheritage.html>

**André Adams-Robenhymmer**  
*Policy Analyst, Audiovisual Policy and Partnerships*

**Mohamad Ibrahim Ahmad**  
*Statistics and Data Analytics Supervisor, CAVCO*

**Nerusa Balasubramaniam**  
*Junior Research Analyst, Audiovisual Policy and Partnerships*

**David Carlton**  
*Research Analyst, Indigenous, Digital and Public Service Media*

**Catherine Duhaime**  
*Policy Analyst, Audiovisual Policy and Partnerships*

**Vincent Fecteau**  
*Senior Research Analyst, Policy and Research*

**Rachel Gordon**  
*Policy and Research Analyst, Indigenous, Digital and Public Service Media*

**Susan Grainger**  
*Senior Policy Analyst, CAVCO*

**Annan Hadzimahovic**  
*Policy Analyst, Audiovisual Coproduction*

**Ishti Hossain**  
*Statistics and Data Analytics Junior Officer, CAVCO*

**Peter Mann**  
*Senior Policy Analyst, CAVCO*

**Jérôme Mercier**  
*Manager, Audiovisual Policy and Partnerships*

**Samra Panlaqui**  
*Statistics and Data Analytics Officer, CAVCO*



50 Wellington Street East, Suite 202  
Toronto, ON M5E 1C8  
Tel: 1-877-975-0766 / 416-214-4400  
info@cmf-fmc.ca  
cmf-fmc.ca

**Claire Nadia Caneus**  
*Senior Data Analyst, Strategic Reporting*

**Juhi Chakraverty**  
*Research Coordinator, Audience Research*

**Kelly-Ann Jones**  
*Senior Manager, Audience Research*

**Michael Mastantuono**  
*Senior Manager, Strategic Reporting*

**Kyle O'Byrne**  
*Director, Public Affairs*

Any opinions, findings, conclusions, or recommendations expressed in this material are those of the author and do not necessarily reflect the views of the Canada Media Fund.



360 St. Jacques Street, Suite 500  
Montréal, QC H2Y 1P5  
Tel: 1-800-567-0890 / 514-283-6363  
info@telefilm.ca  
telefilm.ca

**Liliana Espinosa**  
*Analyst, Policy and Business Intelligence*

**Feriel Grine**  
*Analyst, Policy and Business Intelligence*

**Mathieu Perreault**  
*Director, Strategic Development and Business Intelligence*

**Elisa Suppa**  
*Manager, ESG and Sustainability*

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1130, Sherbooke Street West, Suite 1600  
Montreal, QC H3A 2M8  
Tel: 514-397-8600  
info@aqpm.ca  
aqpm.ca

**Hélène Messier**  
*President and CEO*

**Annie Provencher**  
*Regulatory Affairs and Business Intelligence Manager*

**Anne-Valérie Tremblay**  
*Manager, Financing and Member Services*



**Dustin Chodorowicz**  
*Partner*

**Kristian Roberts**  
*CEO*

**Peter Lyman**  
*Senior Partner*

**Stephen Hignell**  
*Director*

**Nicole Matiation**  
*AV Sector Lead*

**Jocelyn Pogorbsky**  
*Manager*

**Louis Underwood**  
*Analyst*

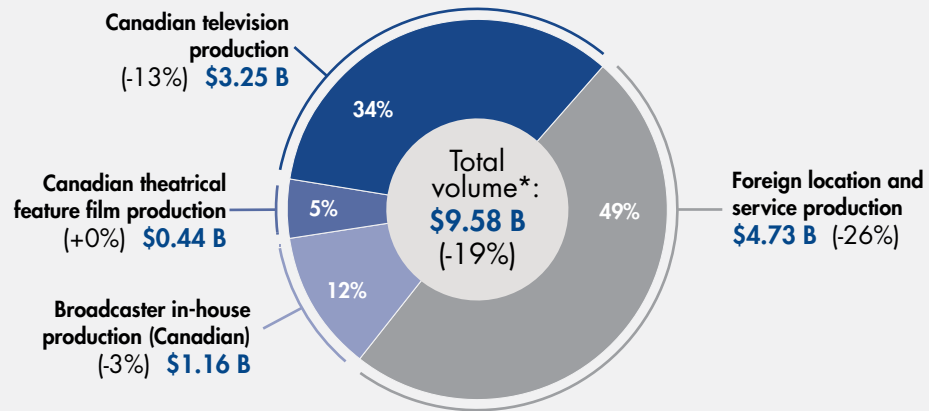
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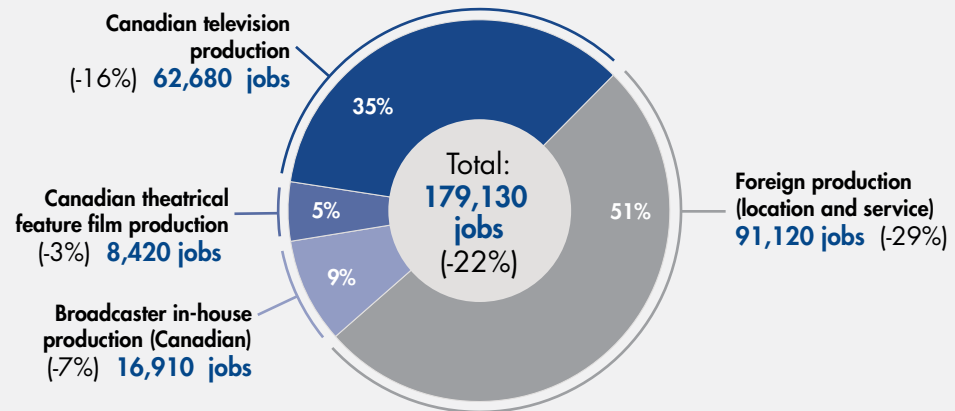
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# AT A GLANCE

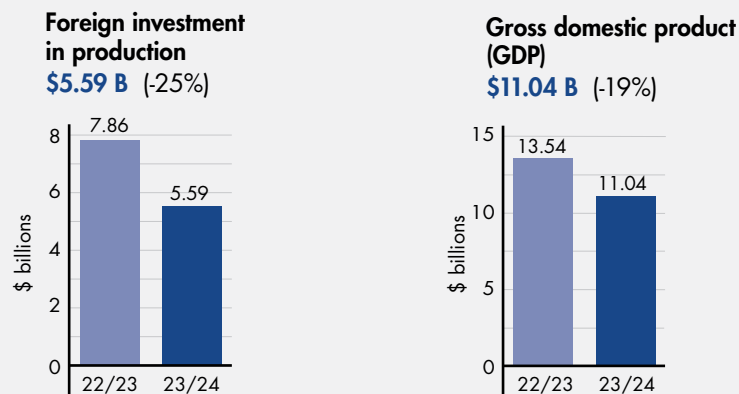
## Total film and television production in Canada



## Canadian jobs provided



## Canadian economic impact



Sources: **Canadian television production** and **Canadian theatrical feature film production**: Estimates based on data collected from the Canadian Audio-Visual Certification Office (CAVCO) and the Canadian Radio-television and Telecommunications Commission (CRTC).

**Broadcaster in-house (Canadian)**: Estimates based on data from CRTC and CBC/Radio-Canada.

**Foreign location and service (FLS) production**: Association of Provincial Television and Film Agencies (APTFA).

Note: Totals may not sum due to rounding.

\* Throughout this report, "volume" or "total volume" refers to the sum of production budgets.



# Introduction

Total production volume in the Canadian film and television industry decreased by 18.5% to \$9.58 billion in 2023/24. The extent of that impact was concentrated in certain segments of the production industry, as the volume in Canadian television production decreased 12.7% to \$3.25 billion and foreign location and services production decreased by 26.1% to \$4.73 billion.

The significant decrease was caused by a number of different factors. Canadian broadcasters are spending less, especially those operating in the English-language market. For one, they have wound down their overspending on Canadian programming, having now caught up on their underspend during the prior COVID 19 pandemic period. Moreover, their revenues are declining, and so will their expenditures on Canadian programming. Two lengthy labour strikes in the United States interrupted production activity in Canada and around the world. While the Hollywood strikes did have an immediate and significant negative impact on FLS production in 2023/24, their effect on Canada's volume of FLS production is expected to carry over into 2024/25. All of these impacts were compounded by ongoing inflationary pressures on pricing, further extending the decrease in production activity in real dollars.

These impacts were known at the time of the *Profile 2023* report, but could not be reflected in that report, as the data was limited to the 2022/23 fiscal year. While we outlined these concerns, including the reality that production activity was actually in decline, the data and that reality were not aligned. The same cannot be said now, as *Profile 2024* provides a much clearer picture of the state of affairs. Canadian broadcaster revenues are declining and will continue to negatively impact production activity. While labour strikes may not occur on a regular basis, there is an overall concern permeating throughout the production industry about the commissioning of content going forward.

The Canadian Radio-television Communications Commission (CRTC) continues to work through its multi-step review of the regulatory framework for the Canadian broadcasting system. As a result of the *Online Streaming Act*, that system will now also include contributions to Canadian programming from foreign online services as well as traditional broadcasters. An initial decision establishing a base contribution was released in June. However, the impact of that decision is at least delayed, as no contributions are required to be paid until August 2025. It is also in question, as numerous appeals in the Federal Court of Appeal have been filed by foreign online services. The CRTC has recently launched a consultation process regarding the definition of Canadian content and a policy framework for expenditure-based contributions to Canadian programming. The hearing itself will start in late March 2025. A third phase, reviewing the contribution proposals for broadcasters and online services, will not start until late in 2025.

With specific contribution decisions not in place until 2026, the potential impact of any such regulatory framework, including the potential for benefits to production activity, is still years away. In the interim, traditional broadcasters continue to pressure the CRTC for reductions in their Canadian programming contribution requirements, while foreign online services continue to generate increases in subscription revenues (and now advertising as well) without any specific and accountable contributions of their own. A revised framework holds the key for a better and more sustainable Canadian broadcasting system. While certainly a positive and critical process, its impact will be felt more over the medium and long term, and cannot address industry uncertainty in the immediate years ahead.

As is the case every year, *Profile 2024* provides a detailed overview of production activity with information compiled from federal and provincial agencies, as well as funding organizations like the Canada Media Fund and Telefilm Canada. The financial information concurs with the fiscal year of these agencies and organizations. As such, *Profile 2024* contains information from the start of April 2023 to the end of March 2024.

Over the years, publication dates for the *Profile* report have varied. In recent years, it was not published until the Spring of the following year. However, in an effort to provide the most current data possible, a target was set to publish the report much earlier. With the help and support of all the provincial and federal funding agencies, as well as our *Profile* partners, we have successfully moved up the publication date of the report. *Profile 2024* is now published in 2024. Going forward, the plan is to publish the report in the Fall of each year as the production activity data becomes available.

*Profile 2024* is the story of a downturn in production activity in Canada. That said, we look forward to a more successful sequel. Even amongst such market and industry uncertainty, we continue to believe that the production industry will remain an important contributor to Canadian culture and the Canadian economy.



# 1. Overview of the screen sector in Canada

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

1. **Canadian television production** 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).<sup>1</sup>
2. **Canadian theatrical feature film production** includes feature-length films made by independent production companies that are certified as Canadian content by CAVCO.
3. **Foreign location and service (FLS) production** largely consists of feature films and television programs filmed in Canada by foreign producers or by Canadian service providers.<sup>2</sup> For almost all of FLS projects, the copyright is held by non-Canadian producers.
4. **Broadcaster in-house production** 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.

Canada's film and television production industry is very much integrated into the global entertainment and media sector. The annual volume of production in segments 1 to 3 (listed above) is affected by the levels of foreign investment in the Canadian film and television production industry. The majority of this foreign investment in production (FIIP)<sup>3</sup> flows into the FLS production segment. However, significant investments are also made into the production of Canadian content. These investments include presales and distribution advances of Canadian programs that are exported and distributed in foreign territories by a wide variety of different distributors and/or services.

<sup>1</sup> 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 \$181.3 million in 2018/19, \$118.9 million in 2019/20, \$201.5 million in 2020/21, \$107.7 million in 2021/22, \$110.6 million in 2022/23 and \$115.1 million in 2023/24. For more information, see Box 1.

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

<sup>3</sup> Foreign investment in production (FIIP) includes the value of foreign broadcasters' and distributors' pre-sale financing, as well as the value of Canadian distributors' financing of Canadian television and theatrical feature film production, which is largely linked to Canadian distributors' ability to license that television and theatrical feature film content outside of Canada.

## Highlights from 2023/24



- Canadian theatrical feature film production remained unchanged at \$440 million.



- The total volume<sup>4</sup> of film and television production in Canada decreased by 18.5% to \$9.58 billion.
- On an inflation-adjusted real dollar basis, the total volume of film and television production in Canada decreased by 21.6% (measured in 2014 dollars).
- Canadian television production decreased by 12.7% to \$3.25 billion. A significant portion of that decrease is attributable to a steeper drop in English-language Canadian television production (17.1%).
- Broadcaster in-house production decreased by 3.3% to \$1.16 billion.
- FLS production decreased by 26.1% to \$4.73 billion.
- The value of foreign investment in production (FIIP) in Canada decreased by 24.8% to \$5.59 billion.
- The total gross domestic product (GDP) impact of film and television production in Canada decreased by 18.5% – from \$13.54 billion to \$11.04 billion.
- Film and television production in Canada generated employment for 179,130 Canadians in 2023/24 (including direct and spin-off impacts), a decline of 22.2% compared to 2022/23.
- The entire screen sector value chain (including film and television production, distribution, exhibition, television broadcasting and broadcasting distribution) generated employment for an estimated 271,195 jobs (17.1% decrease), \$14.41 billion in labour income (13.3% decrease) and \$19.18 billion in GDP (14.8% decrease) for the Canadian economy (both direct and spin-off impacts).<sup>5</sup>

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<sup>4</sup> "Volume" or "total volume" refers to the sum of production budgets.

<sup>5</sup> Direct economic impacts refer to the employment and gross domestic product (GDP) generated directly within Canada's film and television value chain. Spin-off economic impacts refer to the employment and GDP generated within other industries in the Canadian economy on account of the increased economic activity in the film and television value chain. See Methodology and Glossary for more information.

The 2023 Hollywood strikes<sup>6</sup> and lower contributions from private Canadian broadcasters<sup>7</sup> combined to drag down Canada's overall level of film and television production activity. The total volume of film and television production decreased by 18.5% from \$11.75 billion in 2022/23 to \$9.58 billion in 2023/24 (Exhibit 1-1).

On a real inflation-adjusted basis, Canada's total volume of film and television production was down by 21.6% in 2023/24 and 25.2% since reaching a real-dollar peak (measured in 2014 dollars) of \$10.2 billion in 2021/22 (Exhibit 1-2).<sup>8</sup>

**Canadian television production** decreased by 12.7% to \$3.25 billion in 2023/24 (Exhibit 1-1). Most of that decrease was in the English-language market, where television production fell by 17.1%, or \$457 million, to \$2.21 billion (Exhibit 3-2). Lower revenues and the ending of Canadian programming expenditures (CPE) surplus spending to make up for CPE shortfalls during prior pandemic-affected years were key factors in this drop, particularly in the English-language market.

**Canadian theatrical feature film production** was stable in 2023/24, as the volume of production remained unchanged at \$440 million (Exhibit 4-1). While the number of films dropped from 153 to 117 (Exhibit 4-2), average film budgets rose by 43% to \$4.2 million (Exhibit 4-4). Higher levels of film production in the fiction genre helped maintain volume at this level (Exhibit 4-5).

**FLS production** fell by 26.1% on account of the Hollywood strikes to \$4.73 billion in 2023/24 (Exhibit 6-1). Most of this decrease was in the television series sub-segment. The number of FLS television series fell by 36.2% and volume dropped by 30.8% or \$1.33 billion (Exhibit 6-1 and 6-2). FLS feature film production also dropped in 2023/24. But the decrease of 4.9% was nowhere near as steep as the drop experienced by FLS television production.

**Broadcaster in-house production** decreased by 3.3% to \$1.16 billion during the 2023 broadcasting year<sup>9</sup> (Exhibit 1-1). Spending by discretionary and on-demand services was virtually unchanged in 2023 (increasing by 0.4%), without the Olympics, a 23.3% drop in spending in the sports genre led to 6.4% decline in in-house spending at conventional television services (Exhibits 7-1 and 7-2).

Provinces and territories that have historically hosted a significant amount of FLS production bore the greatest share of the drop in overall production between 2022/23 and 2023/24. Ontario and British Columbia experienced the steepest drops in their total volume of film and TV production. Ontario's total production volume fell by \$1.23 billion, or 27.5% (Exhibit 1-5). Just over half of this drop was due to a 35.2% drop in Ontario's FLS production (Exhibit 6-4). Just under 40% of the total drop can be traced back to a 29.2% drop in the province's Canadian television production (Exhibit 3-13). Canadian theatrical feature film production and broadcaster in-house production was also lower in Ontario in 2023/24 (Exhibits 4-6 and 7-3). Overall, the steep decline in production in Ontario reflected its diversified production base, with significant levels of production in all segments – from Canadian content production to FLS production – and thereby its exposure to not only 2023 Hollywood strikes in 2023 but also the CPE normalization among English-Canadian private broadcasters.

British Columbia's total production volume was down by \$883 million or 27.2% in 2023/24 (Exhibit 1-5). Indeed, British Columbia experienced an even steeper drop in its FLS production, which fell by 36.5% or \$965 million, on account of the Hollywood strikes in 2023 (Exhibit 6-4). This drop in FLS production was offset by slightly higher levels of Canadian content production and broadcaster in-house production (Exhibits 2-10 and 7-3).

<sup>6</sup> During the 2023/24 fiscal year, Hollywood experienced two major multi-month strikes. Between May 2 and September 27, 2023, the Writers Guild of America (WGA) was on strike, and between July 14 and November 8, 2023, the Screen Actors Guild - American Federation of Television and Radio Artists (SAG-AFTRA) was on strike. During that time, most existing FLS production was paused, and new projects were shelved, leading to a significant decrease in FLS production in the US, Canada and globally during the 2023/24 fiscal year.

<sup>7</sup> As a result of lower revenues and given the ending of Canadian programming expenditures (CPE) surpluses to make up for CPE shortfalls during prior pandemic-affected years.

<sup>8</sup> This the monetary value of production spending in 2021/22 when measured in terms of the prices of labour, goods and services that prevailed in 2014 as opposed to 2021.

<sup>9</sup> September 1, 2022 to August 31, 2023

Quebec's focus on visual effects for FLS provided a cushion against the Hollywood strikes in 2023, as this type of digital production is much less dependent on writers and actors than scripted live action production and often occurs after physical production elements are completed. As a result, the province's FLS production dropped by only 7.9% – much less than the overall drop in FLS production of 26.8% in 2023/24 (Exhibit 6-4). Quebec also experienced lower levels of Canadian content production and broadcaster in-house production in 2023/24 (Exhibits 2-10 and 7-3), resulting in an overall production volume decline of \$186 million or 6% (Exhibit 1-5).

The Prairie Provinces and Territories region was the only region to record a year-over-year increase in 2023/24. Its overall production volume increased by \$90 million or 13.9% (Exhibit 1-5). The region was relatively exposed to CPE normalization and saw its Canadian television production drop by \$92 million or 24.9% (Exhibits 3-13). However, this was more than offset by increases in FLS, Canadian theatrical feature film production and broadcaster in-house production (Exhibits 4-6, 6-4 and 7-3).

In Atlantic Canada, FLS production increased by 18.9% or \$19 million in 2023/24 (Exhibit 6-4). Higher levels of Canadian content production in 2023/24 further helped lift the region's overall volume of film and television production by \$79 million or 32.6% (Exhibit 1-5).

Canada's screen sector value chain continued to be a major source of employment and economic activity in 2023/24, although its economic impact was lower than previous years due to the Hollywood strikes and the lower levels of Canadian content production. Including both direct and spin-off impacts, the screen sector value chain generated an estimated 271,195 jobs, \$14.41 billion in labour income and \$19.91 billion in gross domestic product (GDP) for the Canadian economy in 2023/24 (Exhibit 1-8). Out of this total impact, film and television production generated 179,130 jobs, \$9.01 billion in labour income and \$11.04 billion in GDP.

### Box 1 Online-first production

Prior to 2017, Canadian producers received the Canadian Film or Video Production Tax Credit (CPTC) only for audiovisual content that was certified by CAVCO and ultimately shown in Canada by a licensed broadcaster, in a movie theatre, or by release on Blu-ray or DVD, although that content could also be shown 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 released in Canada only on one of the many online platforms on CAVCO’s list of acceptable online services pursuant to [CAVCO Public Notice 2017-01](#).

As of May 14, 2024, this list included the services of CRTC-licensed broadcasters (e.g. CBC Gem, ICI Tou.tv, APTN lumi and CTV GO), and over 60 other CAVCO-approved online services (e.g., Crave, Netflix Canada, Amazon Prime Canada, YouTube channels, and 3 free ad-supported streaming television (FAST) channels).

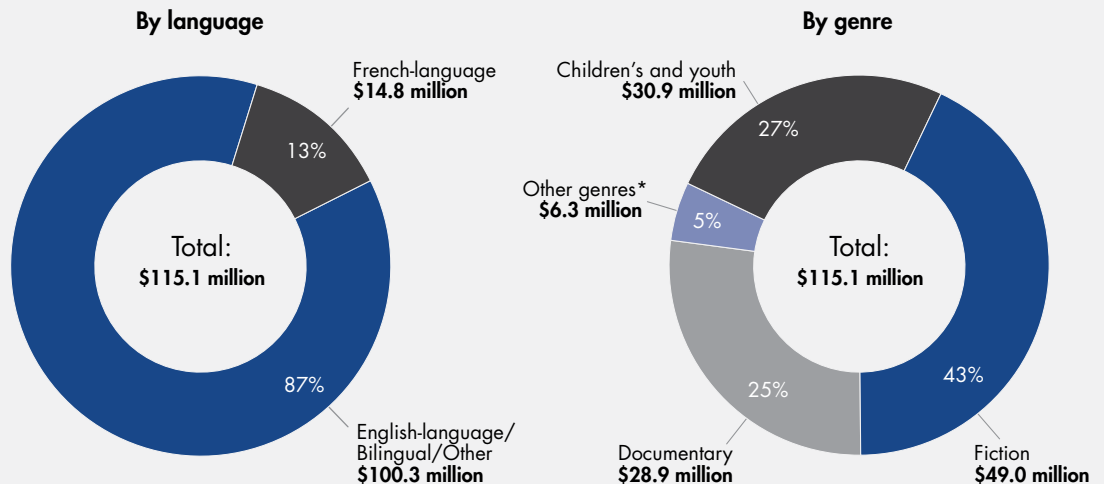
### Volume and number of Canadian online-first audiovisual content

	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24
Volume (\$M)	68.9	181.3	118.9	201.5	107.7	110.6	115.1
Number of projects	100	136	99	120	122	104	81
Average budget (\$000s)	689	1,333	1,201	1,679	883	1,063	1,421

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, 2023/24

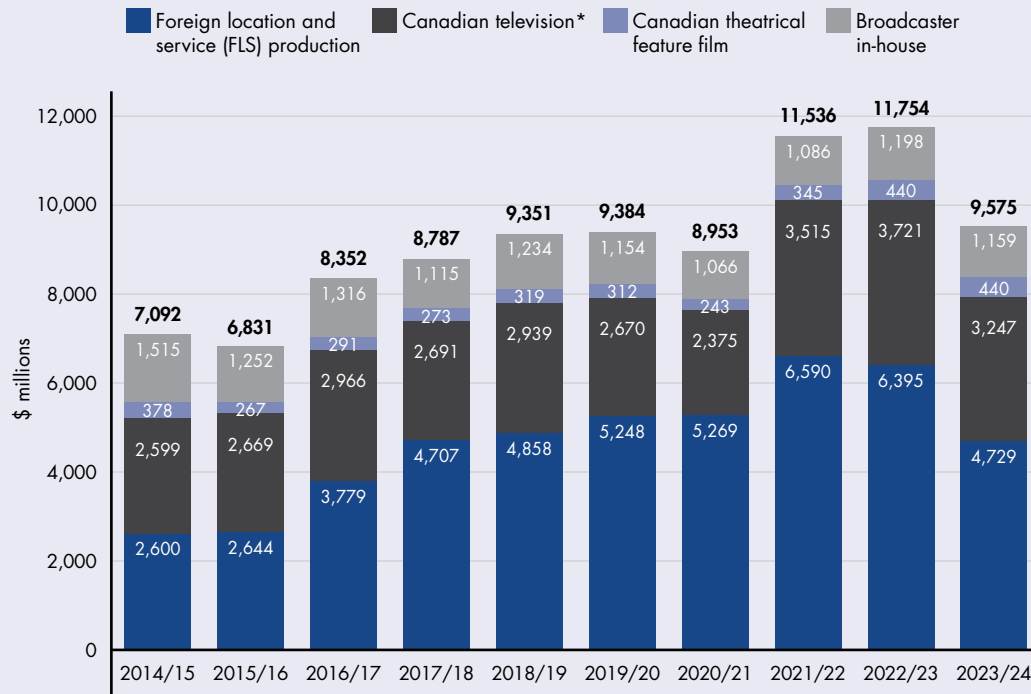


Source: Estimates based on data collected from CAVCO

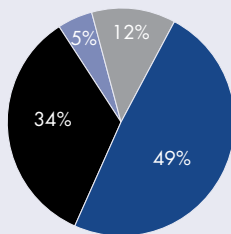
\* Includes lifestyle and human interest, and VAPA genres. Projects in these other genres have been combined to avoid disclosure of amounts for individual projects.

## FILM AND TELEVISION PRODUCTION IN CANADA

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



**Share 2023/24**



**Annual average growth rate**

Sector	2023/24	2014/15–2023/24
Foreign location and service	(26.1%)	6.9%
Canadian television*	(12.7%)	2.5%
Canadian theatrical feature film	0.0%	1.7%
Broadcaster in-house	(3.3%)	(2.9%)
<b>Average: all segments</b>	<b>(18.5%)</b>	<b>3.3%</b>

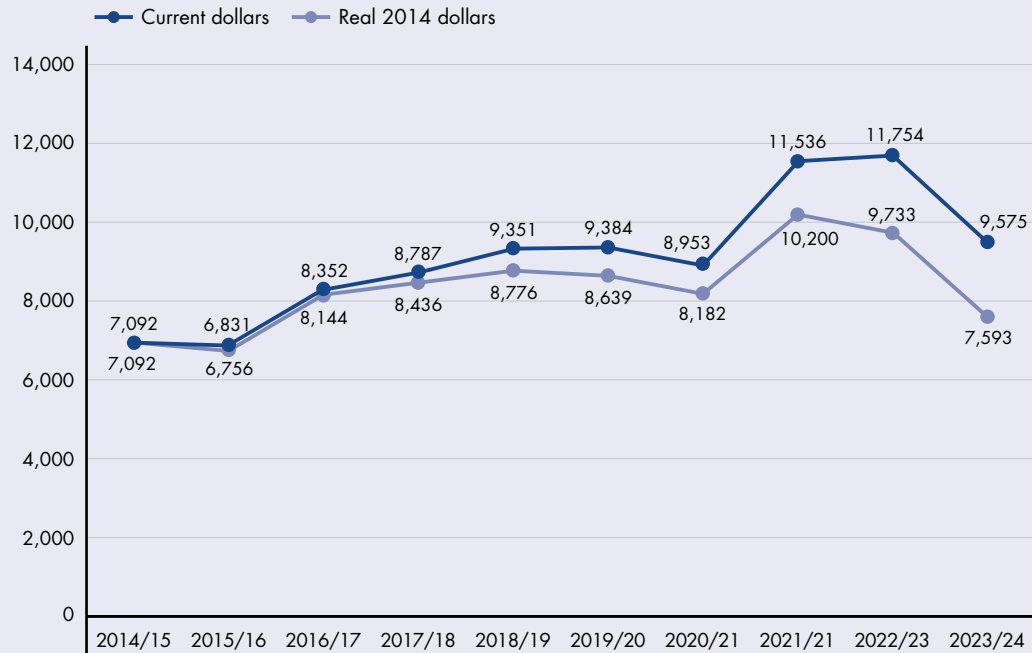
Sources: Estimates based on data collected from the Canadian Audio-Visual Certification Office (CAVCO), the Canadian Radio-television and Telecommunications Commission (CRTC), CBC/Radio-Canada and the Association of Provincial Television and Film Agencies.

Note: Some totals may not sum due to rounding. Due to the reclassification of the fiscal year for the start of principal photography by certain FLS projects, the volume of FLS production for British Columbia in 2022/23 has been revised downwards from \$3,104 million to \$2,644 million – a decrease of \$460 million. As a result, the total volume of film and television production in Canada in 2022/23 was also revised down from \$12,194 million to \$11,754 million. Without this revision, the total volume of film and television production in Canada in 2023/24 would have dropped by 21.4%. With the revision, the decrease is 18.5%.

\* 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 CAVCO Public Notice 2017-01. CAVCO reports that the total volume of online-first production was \$181.3 million in 2018/19, \$118.9 million in 2019/20, \$201.5 million in 2020/21, \$107.7 million in 2021/22, \$110.6 million in 2022/23 and \$115.1 million in 2023/24. Note that statistics for online-first production do not incorporate the CAVCO application-lag adjustment or the adjustment for CRTC-certified production.

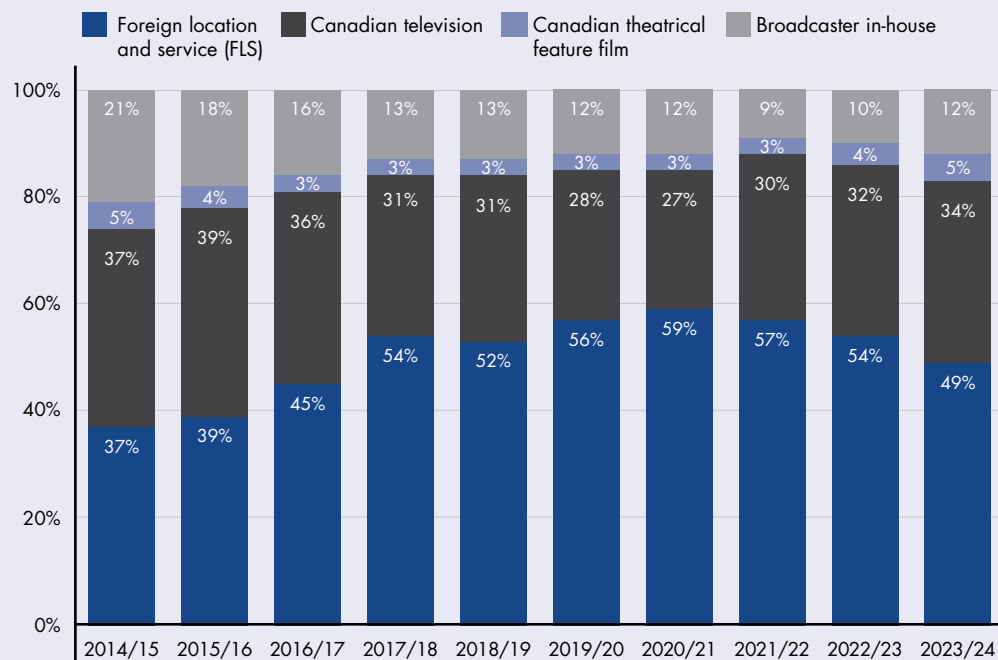


**Exhibit 1-1b Total volume of film and television production in Canada, (nominal vs. inflation-adjusted real 2014 dollars)**



Sources: Estimates based on data collected from CAVCO, CRTC, CBC/Radio-Canada, the Association of Provincial Television and Film Agencies and Statistics Canada.

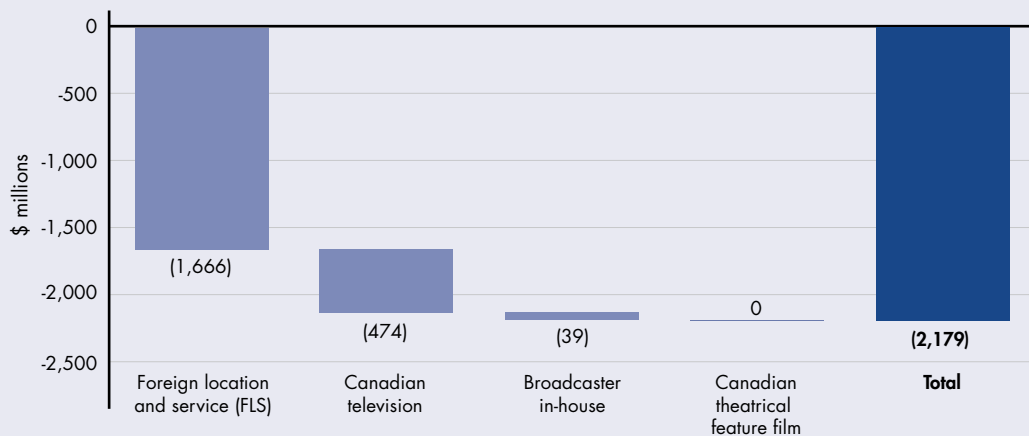
**Exhibit 1-2 Total volume of film and television production in Canada, share by segment**



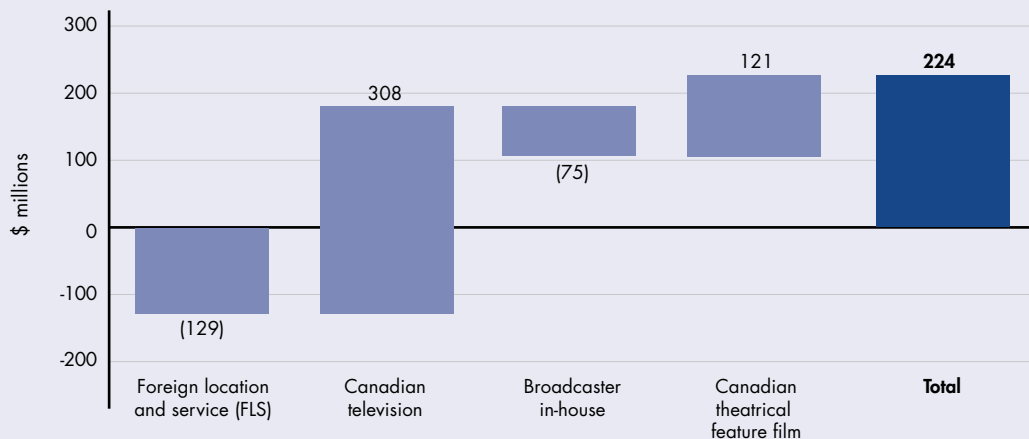
Sources: Estimates based on data collected from CAVCO, CRTC, CBC/Radio-Canada and the Association of Provincial Television and Film Agencies. Note: Some totals may not sum due to rounding.

**Exhibit 1-3 Sources of growth in the total volume of film and television production in Canada**

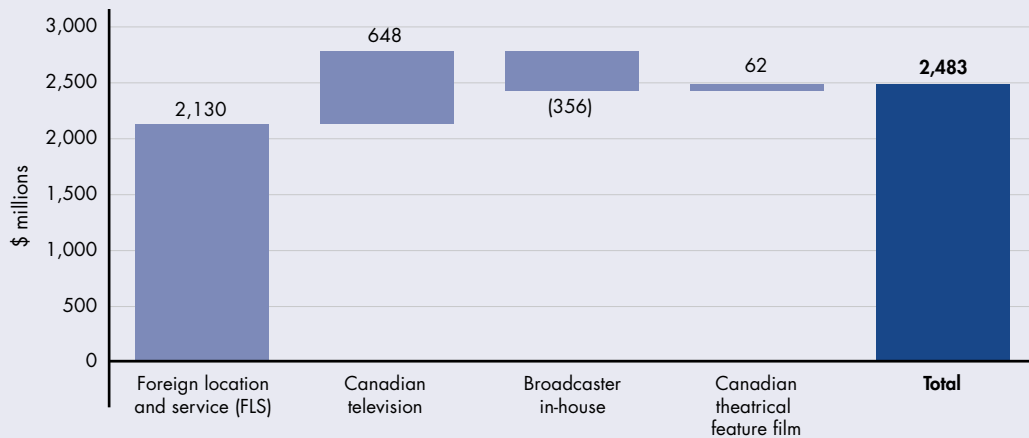
**2023/24**



**2018/19 to 2023/24**



**2014/15 to 2023/24**



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)	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24	2023/24 share of total	2023/24 change
Ontario	2,769	2,750	3,016	2,891	3,229	3,599	3,155	3,918	4,456	3,229	34%	(27.2%)
Quebec	1,582	1,429	1,759	1,761	2,003	2,281	2,045	2,952	3,084	2,897	30%	(6.0%)
British Columbia	2,243	2,133	2,957	3,556	3,452	2,820	3,199	3,540	3,253	2,369	25%	(27.2%)
Prairie Provinces and Territories*	377	361	429	395	525	531	406	884	650	741	8%	13.9%
Atlantic Canada**	120	157	193	183	141	153	147	244	312	338	4%	8.4%
<b>Total</b>	<b>7,092</b>	<b>6,831</b>	<b>8,352</b>	<b>8,787</b>	<b>9,351</b>	<b>9,384</b>	<b>8,953</b>	<b>11,536</b>	<b>11,754</b>	<b>9,575</b>	<b>100%</b>	<b>(18.5%)</b>

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 2024*. Due to the low number of projects (particularly theatrical feature film projects) in certain provinces and territories, production volume statistics are grouped by region to avoid disclosure of budgets for individual projects. 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

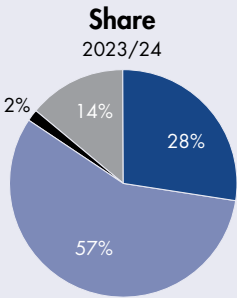
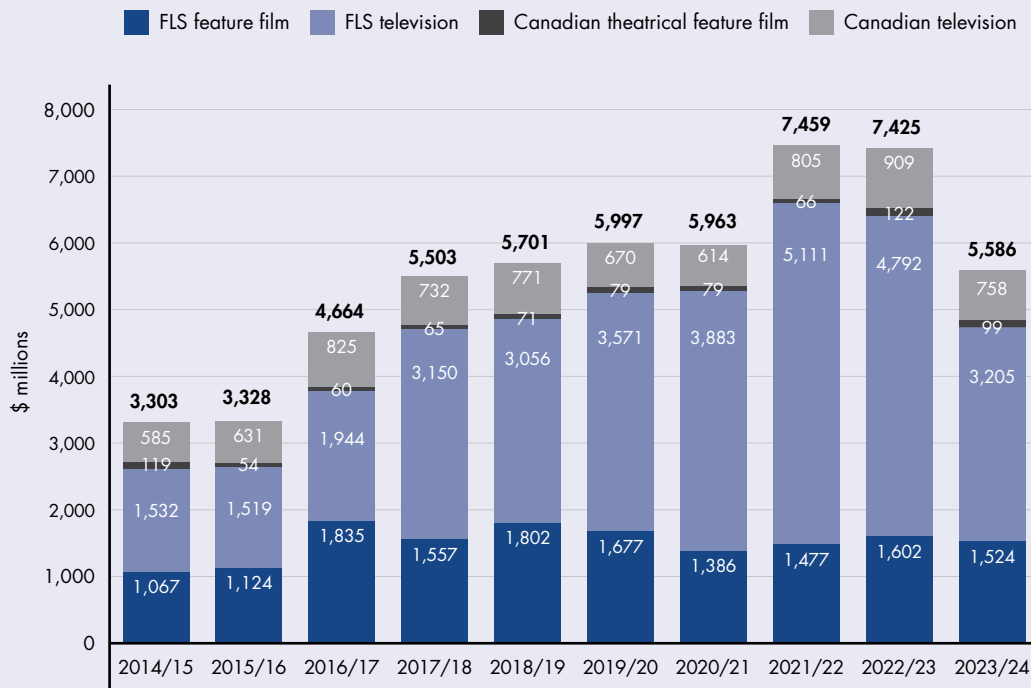
Foreign investment in production (FIIP) tracks the value of international financial participation in the film and television production industry in Canada. A major portion of that investment is FLS production. However, along with FLS production, significant investments are also made in the production of Canadian content. These types of investments include presales and distribution advances for Canadian content projects that are exported and distributed in foreign markets by a wide variety of distributors and/or services. These types of investments in the export of Canadian content totalled \$857 million in 2023/24.<sup>10</sup>

The vast majority of FIIP is generated by English-language content. In fact, out of the \$857 million in FIIP generated by Canadian content in 2023/24, French-language content accounted for only \$29 million (see data found Exhibits 3-18 and 4-7).

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 \$126 million in 2023 (Exhibit 8-2), meaning that foreign investments in Canadian content were worth just under \$1 billion.

<sup>10</sup> 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 1-5a Foreign investment in production in Canada, by segment and type**

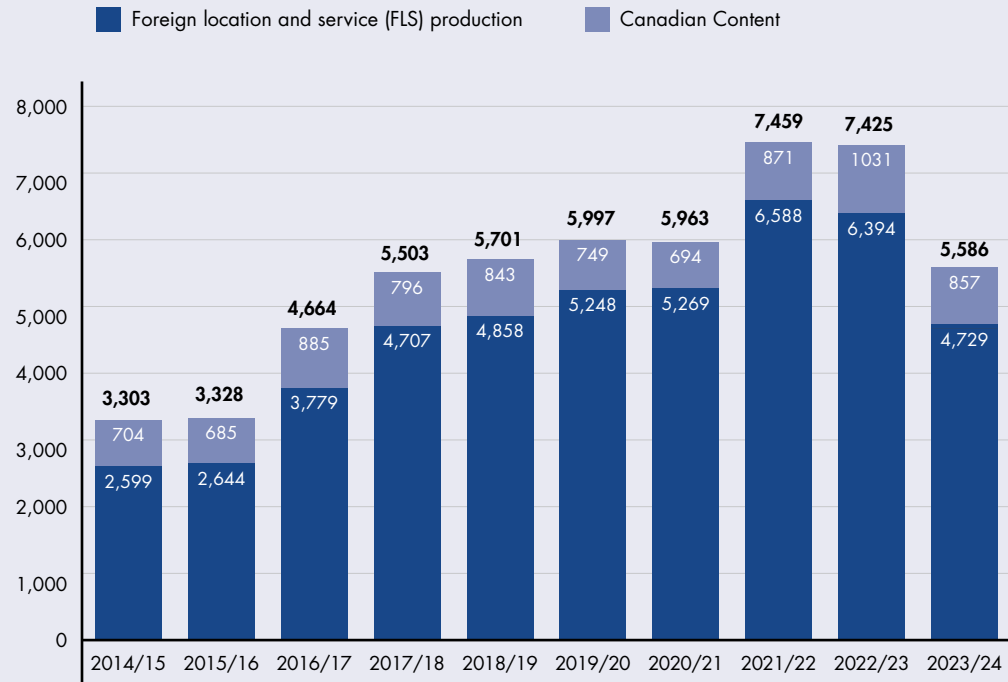


**Annual average growth rate**

Sector	2023/24	2014/15–2023/24
Canadian television	(16.6%)	2.9%
Canadian theatrical feature film	(18.9%)	(2.0%)
FLS television	(33.1%)	8.4%
FLS feature film	(4.9%)	4.0%
<b>Average: all segments</b>	<b>(24.8%)</b>	<b>6.0%</b>

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.

**Exhibit 1-5b FIIP, by Canadian content and foreign location and service production**



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	2022/23	2023/24
<b>Canadian television production</b>							
Direct	40,130	42,500	42,360	36,180	46,800	47,880	40,500
Spin-off	31,810	32,590	27,440	21,950	27,220	26,770	22,180
<b>Total</b>	<b>71,940</b>	<b>75,090</b>	<b>69,800</b>	<b>58,130</b>	<b>74,020</b>	<b>74,650</b>	<b>62,680</b>
<b>Canadian theatrical feature film production</b>							
Direct	4,110	4,580	4,980	3,780	4,680	5,580	5,400
Spin-off	3,250	3,580	3,250	2,240	2,690	3,140	3,020
<b>Total</b>	<b>7,360</b>	<b>8,160</b>	<b>8,230</b>	<b>6,020</b>	<b>7,370</b>	<b>8,720</b>	<b>8,420</b>
<b>FLS production</b>							
Direct	70,150	70,150	83,130	80,460	87,660	82,440	58,860
Spin-off	55,660	53,870	53,980	48,720	50,960	46,140	32,260
<b>Total</b>	<b>125,810</b>	<b>124,020</b>	<b>137,110</b>	<b>129,180</b>	<b>138,620</b>	<b>128,580</b>	<b>91,120</b>
<b>Broadcaster in-house production</b>							
Direct	11,760	12,660	11,540	10,080	8,960	9,630	8,960
Spin-off	13,220	13,660	11,870	9,860	8,400	8,620	7,950
<b>Total</b>	<b>24,980</b>	<b>26,320</b>	<b>23,410</b>	<b>19,940</b>	<b>17,360</b>	<b>18,250</b>	<b>16,910</b>
<b>Grand total</b>							
Direct	126,150	129,890	142,010	130,500	148,100	145,530	113,720
Spin-off	103,940	103,700	96,540	82,770	89,270	84,670	65,410
<b>Total</b>	<b>230,090</b>	<b>233,590</b>	<b>238,550</b>	<b>213,270</b>	<b>237,370</b>	<b>230,200</b>	<b>179,130</b>

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 Labour income and GDP impact of film and television production in Canada**

	2022/23			2023/24		
	Direct	Spin-off	Total	Direct	Spin-off	Total
<b>Labour income (\$ millions)</b>						
<b>Canadian content production</b>						
Canadian television production	2,121	1,393	3,514	1,851	1,205	3,056
Canadian theatrical feature film production	251	163	414	251	164	415
<b>Subtotal</b>	<b>2,372</b>	<b>1,556</b>	<b>3,928</b>	<b>2,102</b>	<b>1,369</b>	<b>3,471</b>
FLS production	3,645	2,401	6,046	2,695	1,753	4,449
Broadcaster in-house production	683	449	1,132	660	432	1,092
<b>Grand total</b>	<b>6,700</b>	<b>4,406</b>	<b>11,106</b>	<b>5,457</b>	<b>3,554</b>	<b>9,011</b>
<b>GDP (\$ millions)</b>						
<b>Canadian content production</b>						
Canadian television production	2,195	2,075	4,270	1,916	1,811	3,727
Canadian theatrical feature film production	260	243	503	260	243	503
<b>Subtotal</b>	<b>2,455</b>	<b>2,318</b>	<b>4,773</b>	<b>2,176</b>	<b>2,054</b>	<b>4,230</b>
FLS production	3,773	3,577	7,847	2,762	2,645	5,435
Broadcaster in-house production	707	709	1,416	684	686	1,370
<b>Grand total</b>	<b>6,935</b>	<b>6,604</b>	<b>13,539</b>	<b>5,650</b>	<b>5,385</b>	<b>11,035</b>

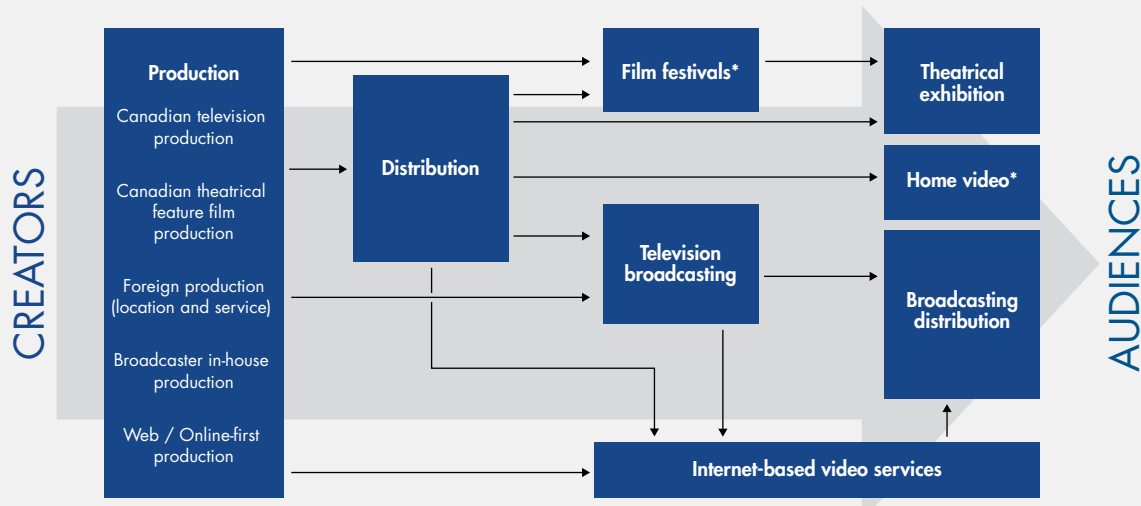
Sources: Estimates based on Nordicity research and data collected from CAVCO, CRTC, CBC/Radio-Canada, the Association of Provincial Television and Film Agencies, unions and guilds, Statistics Canada and Conference Board of Canada  
 Note: See *Notes on methodology* for a description of methodology.

**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 5,950 people, as well as \$362 million in labour income and \$630 million in GDP in 2023.
- The exhibition industry generated employment for 20,090 people, as well as \$630 million in labour income and \$1.18 billion in GDP in 2023.
- The television-broadcasting industry generated employment for 18,210, as well as \$1.31 billion in labour income and \$1.94 billion in GDP in 2023.
- The broadcasting distribution undertaking (BDU) industry generated employment for 47,815 people, as well as \$3.09 billion in labour income and more than \$4.41 billion in GDP in 2023.

**Box 2 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 the creative ideas of the screenwriter and director 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.

**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.

Most films are released first in the **theatrical exhibition** window, with a secondary release window on other platforms; however, that is not always the case. Some films may be simultaneously released in theatres and by **online undertakings** or **other Internet-based video services**, with either a common “day and date” release or a significantly shortened window following the theatrical release, or even have their first release on an online undertaking or other Internet-based video services. In these cases, the films can bypass the television broadcasting or theatrical exhibition industries altogether.

The **home video** market consists of the sales of physical video media. This market has experienced a steep decline in sales in recent years due to consumers’ adoption of online undertakings and other Internet-based video services to fulfil their on-demand viewing of films and television programs.

For television programming, content consumption often 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. However, online undertakings or other Internet-based video services have in recent years become an increasingly important platform for the first release of television programming, and in many cases, the exclusive platform for the release of many television programs.

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) services, which comprise the broadcasting distribution industry and are called 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 online undertakings and Internet-based video services, however, exhibit content directly to consumers over broadband Internet connections, thus bypassing Canadian BDUs.

Combining estimates of the economic impact from the most recent year of published data indicates that the screen sector value chain in Canada generated an estimated 271,195 jobs, \$14.41 billion in labour income and \$19.18 billion in GDP for the Canadian economy (both direct and spin-off impacts).

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

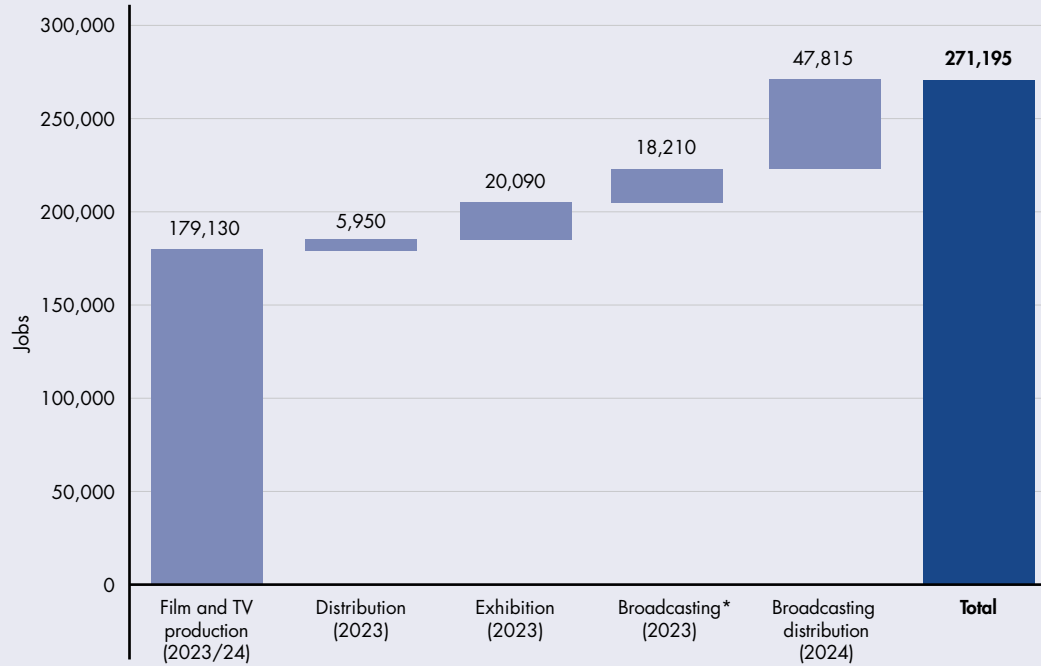
	Direct	Spin-off	Total
<b>Employment (jobs)</b>			
Film and TV production (2023/24)	113,720	65,410	179,130
Distribution (2023)	870	5,080	5,950
Exhibition (2023)	10,510	9,580	20,090
Broadcasting* (2023)	5,320	12,890	18,210
Broadcasting distribution (2023)	24,908	22,907	47,815
<b>Total</b>	<b>155,328</b>	<b>115,867</b>	<b>271,195</b>
<b>Labour income (\$ millions)</b>			
Film and TV production (2023/24)	5,457	3,554	9,011
Distribution (2023)	119	243	362
Exhibition (2023)	200	430	630
Broadcasting* (2023)	636	673	1,309
Broadcasting distribution (2023)	2,061	1,033	3,094
<b>Total</b>	<b>8,473</b>	<b>9,534</b>	<b>14,406</b>
<b>GDP (\$ millions)</b>			
Film and TV production (2023/24)	5,650	5,385	11,035
Distribution (2023)	204	426	630
Exhibition (2023)	379	798	1,177
Broadcasting* (2023)	865	1,072	1,937
Broadcasting distribution (2023)	2,552	1,853	4,405
<b>Total</b>	<b>9,650</b>	<b>9,534</b>	<b>19,184</b>

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.

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

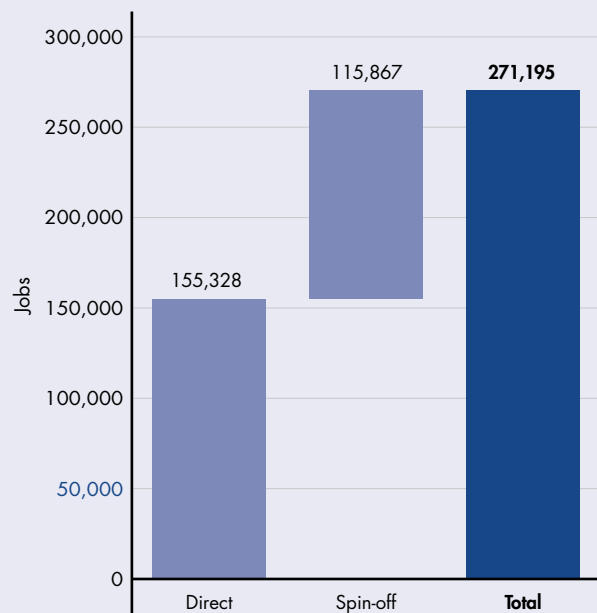
## SUMMARY OF EMPLOYMENT AND GDP IMPACTS

**Exhibit 1-9 Summary of total employment impact of screen sector value chain**



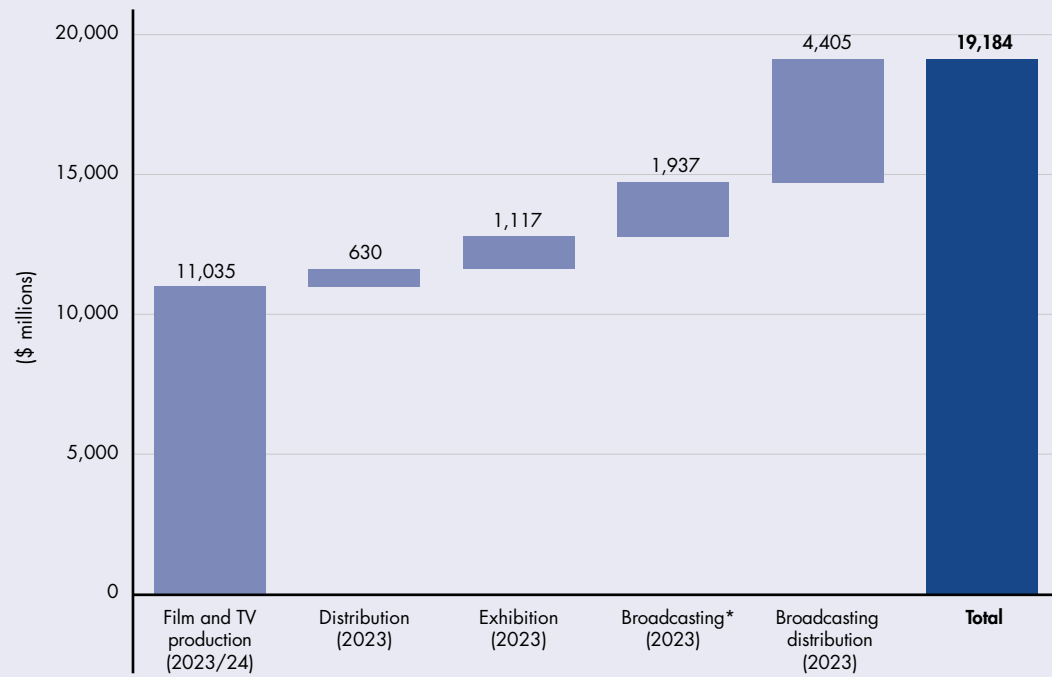
Sources: Estimates based on Nordicity research and data collected from CAVCO, CRTC, CBC/Radio-Canada, the Association of Provincial Television and Film Agencies, unions and guilds, Statistics Canada, Conference Board of Canada, the Movie Theatre Association of Canada (MTAC) and Cineplex Entertainment.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



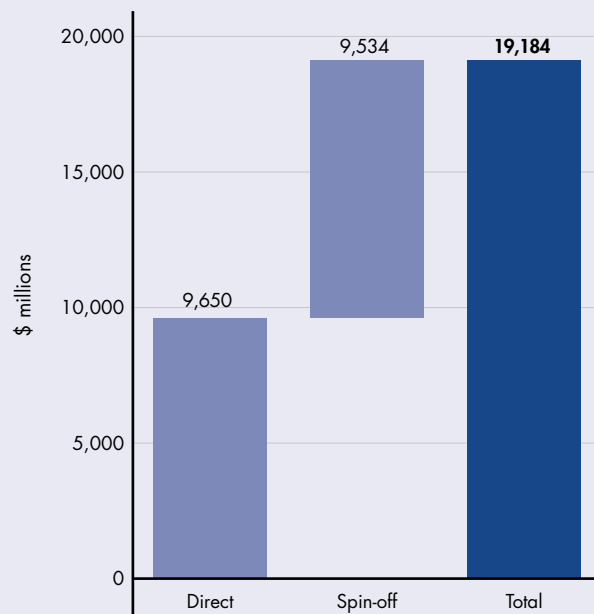
Sources: Estimates based on Nordicity research and data collected from CAVCO, CRTC, CBC/Radio-Canada, the Association of Provincial Television and Film Agencies, unions and guilds, Statistics Canada, Conference Board of Canada, the Movie Theatre Association of Canada (MTAC) and Cineplex Entertainment.

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

The Canadian content production segment experienced significant increases in production in 2021/22 and 2022/23, which raised annual volume well beyond pre-pandemic levels. However, it is important to note that those increases were 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 pandemic under-spend by August 31, 2023. Other factors included higher production cost inflation as well as additional public funding. For the period 2021/22 to 2023/24, the Canada Media Fund received \$80 million in additional funding from the federal government for equity, inclusion and diversity initiatives, as well as productions led by Indigenous and equity-deserving groups.<sup>11</sup> During the same three-year period, Telefilm Canada received an additional \$105 million in funding from the federal government, which helped support the growth in the theatrical feature film segment.

With large private Canadian broadcasters' CPE catch-up largely completed before the 2023/24 fiscal year, CPE levels will revert to normal levels in accordance with regulatory requirements. Moreover, given the declines in revenues in 2022/2023, overall commitments from large Canadian broadcasters were also lower. Taken together, CPE normalization and lower revenues are key factors that explain the decrease in Canadian television production activity in 2023/24.



- Fiction production increased by 1.7% to \$2.23 billion.
- Production in the variety and performing arts (VAPA) genre increased by 8.1% to \$187 million.



- Canadian content production decreased by 11.4% to \$3.69 billion.
- English-language production<sup>12</sup> decreased by 14.9% to \$2.57 billion.
- French-language production decreased by 2.3% to \$1.12 billion.
- Children's and youth production decreased by 41.2% to \$387 million.
- Documentary production decreased by 17.9% to \$444 million.
- Production of programs in the lifestyle and human interest genre<sup>13</sup> decreased by 25.8% to \$444 million.
- Animation production decreased by 55.2% to \$175 million.

<sup>11</sup> Canada Media Fund (2024). *Creating Change: An Evaluation of the CMF's Equity and Inclusion Initiatives*. P. 2.

<sup>12</sup> 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.

<sup>13</sup> Includes magazine programming and a small amount of programming that was previously allocated to the educational/instructional genre.



Lower levels of Canadian television production and a stable level of Canadian theatrical feature film production combined to result in an overall decrease in Canadian content production in 2023/24, with a focused and steeper decrease in the English-language television market. After reaching \$4.16 billion in 2022/23, the total volume of Canadian content production dropped by 11.4% to \$3.69 billion (Exhibit 2-1). This drop was driven entirely by a 12.7% decrease in Canadian television production, which fell to \$3.25 billion, from \$3.72 billion in 2022/23. Canadian theatrical feature film production was unchanged at \$440 million.

English-language Canadian content production experienced a much steeper drop in 2023/24 as private Canadian broadcasters completed their post-pandemic CPE catch-up. English-language Canadian content production dropped by 14.9% to \$2.57 billion (Exhibit 2-2).

Most genres mirrored the overall volume trend in Canadian content production. However, the fiction and variety and performing arts (VAPA) genres did buck the trend and actually grew in 2023/24.

- Production in the fiction genre increased by 1.7% to \$2.23 billion (Exhibit 2-4). This was entirely due to a 23.4% increase in the volume of theatrical feature films produced in the fiction genre, as the volume of television fiction production declined by 2.0% in 2023/24.
- The VAPA genre grew by 7.9% (Exhibit 2-4) due to higher levels of production in the French-language market (Exhibit 3-9).
- In the documentary genre, production volume was down by 17.9%, with significant drops in both television documentary and theatrical feature documentary production (Exhibit 2-4).
- Production volume in the lifestyle and human interest genre was down by 25.8% (Exhibit 2-4).

Looking across other genres, children's and youth programming experienced the most alarming drop in 2023/24. It fell by 41.2% in 2023/24 – from a 10-year high of \$658 million to \$387 million (Exhibit 2-4). This drop was on account of sharp falls in both television and theatrical feature film production. Children's and youth Canadian theatrical feature film production climbed to a 10-year high of \$96 million in 2022/23 before falling by two-thirds to \$32 million. In the Canadian television segment, the production of children's and youth programming actually rose by 7.9% in the French-language market, despite the fact that the average hourly budget dropped by 14.4% (Exhibit 3-10). But the production of English-language television production nearly halved from \$460 million in 2022/23 to \$244 million in 2023/24 (Exhibit 3-9).

After increasing to a 10-year high in 2022/23, animation production fell by over one-half (55.2%) in 2023/24, finishing the year at only \$175 million (Exhibit 2-8). Animation production for television was down by 51.3%, to \$153 million, while theatrical feature film animation production was down by 71.8% to \$22 million. However, this fall in theatrical feature film animation production followed a sharp jump in 2022/23, from \$17 million to \$78 million.

Coming out of the COVID-19 pandemic, a large portion of the rebound in Canadian content production in 2021/22 was propelled by Canadian broadcasters that were quickly restoring their investments in Canadian television programming, in order to adhere to their regulatory obligations. This continued in 2022/23, but was supplemented by increased levels of financing from Canadian distributors. They injected an additional \$163 million of financing into Canadian content production in 2023/23 (Exhibit 2-12). In 2023/24, this increase in Canadian distributor financing reversed itself, showing a decrease of \$165 million. This was accompanied by a \$127 million (21.7%) decrease in Canadian private broadcaster licence fees. In fact, financing from Canadian public broadcaster licence fees and the Canada Media Fund were the only two sources to increase year-over-year.

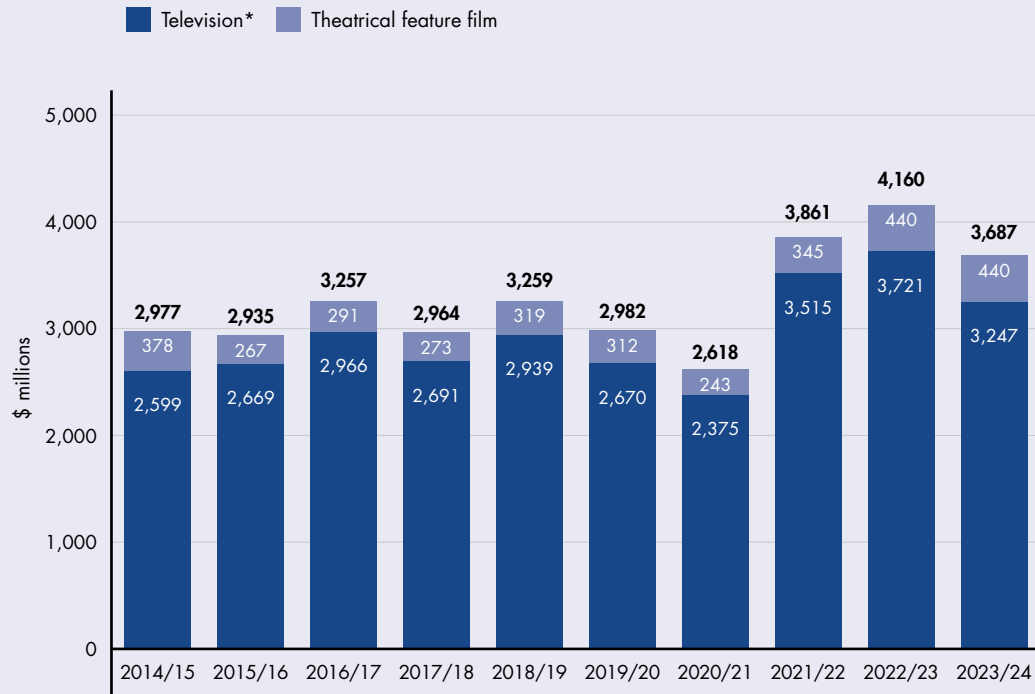
The normalization of CPE and the declines in English-language Canadian content production resulted in Ontario experiencing the steepest drop in volume compared to other regions. Its volume of production dropped by 26.6% – more than double the overall 11.4% drop in Canadian content (Exhibit 2-10). Despite this drop, Ontario maintained the largest share of Canadian content production, with 36%. Canadian content production in British Columbia increased by 14.0% to \$604 million (Exhibit 2-10).

Historically, the Canadian Audio-Visual Certification Office (CAVCO) classified each Canadian film and television program to the region where the lead producer was based. That meant that the entire spending or volume of films and television programs that were filmed (partially or completely) outside the lead producers' home province was only recorded in that single region. Similarly, the entire spending on a coproduction between producers in two different provinces or territories was only counted for the lead producers' province or territory. Beginning with *Profile 2024*, CAVCO also classifies the entire cost of a film or television project to the province or territory where the most days of filming took place (i.e., the largest share of filming activity). When measured on this basis, Ontario's share drops to 32% in 2023/24, which was equal to Quebec's share in that year, following the slight decrease in Quebec's share (Exhibit 2-11).

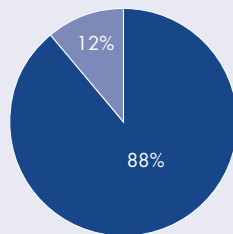
Based on the largest share of filming activity, British Columbia's 18% share of production volume was higher than its share of volume, at 16%, when based on the location of the lead producer (Exhibit 2-11). In Atlantic Canada, Canadian content production increased by 37%. When measured on the basis of the largest share of filming activity, Nova Scotia's share of volume, 9%, was also significantly higher than its 6% share of production by lead producer location.

## RELEASE MEDIUM

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



Share  
2023/24



Annual average growth rate

Sector	2023/24	2014/15–2023/24
Television*	(12.7%)	2.5%
Theatrical feature film	0.0%	1.7%
<b>Average: all segments</b>	<b>(11.4%)</b>	<b>2.4%</b>

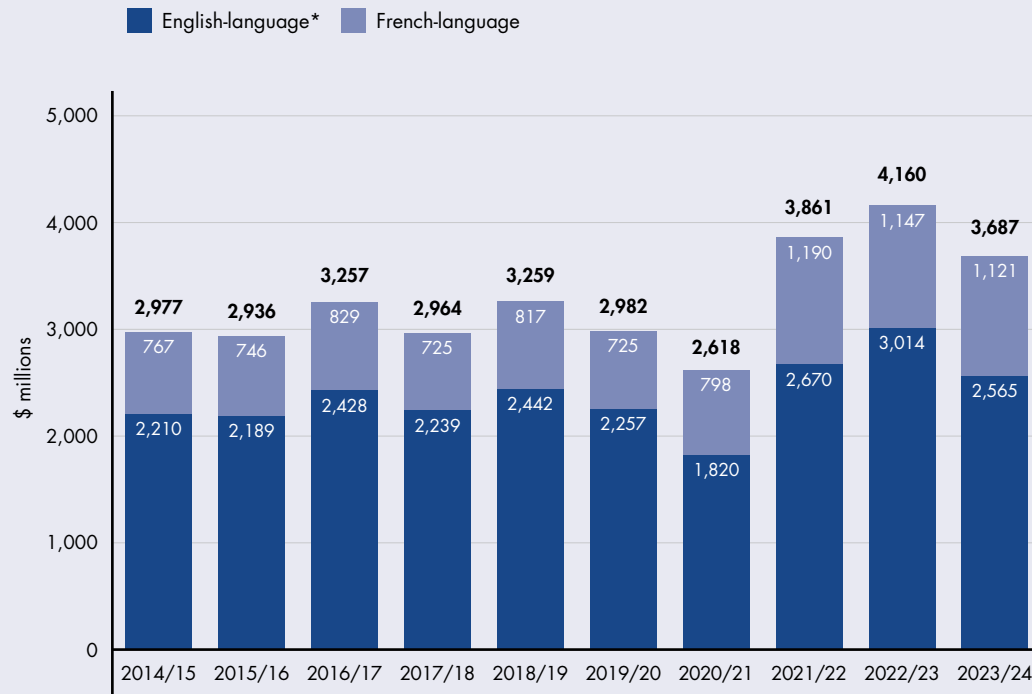
Source: Estimates based on data collected from CAVCO.

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

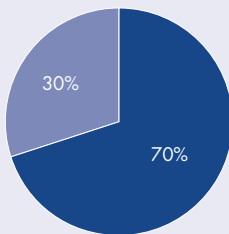
\* Includes 'online-first' audiovisual content that was first released on an online service. This includes 'online-only' audiovisual content that in the two years after completion, was released in Canada only on an acceptable online service pursuant to CAVCO Public Notice 2017-01. CAVCO reports that the total volume of online-first production was \$181.3 million in 2018/19, \$118.9 million in 2019/20, \$201.5 million in 2020/21, \$107.7 million in 2021/22, \$110.6 million in 2022/23 and \$115.1 million in 2023/24. Note that statistics for online-first production do not incorporate the CAVCO application-lag adjustment or the adjustment for CRTC-certified production.

## LANGUAGE

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



Share  
2023/24



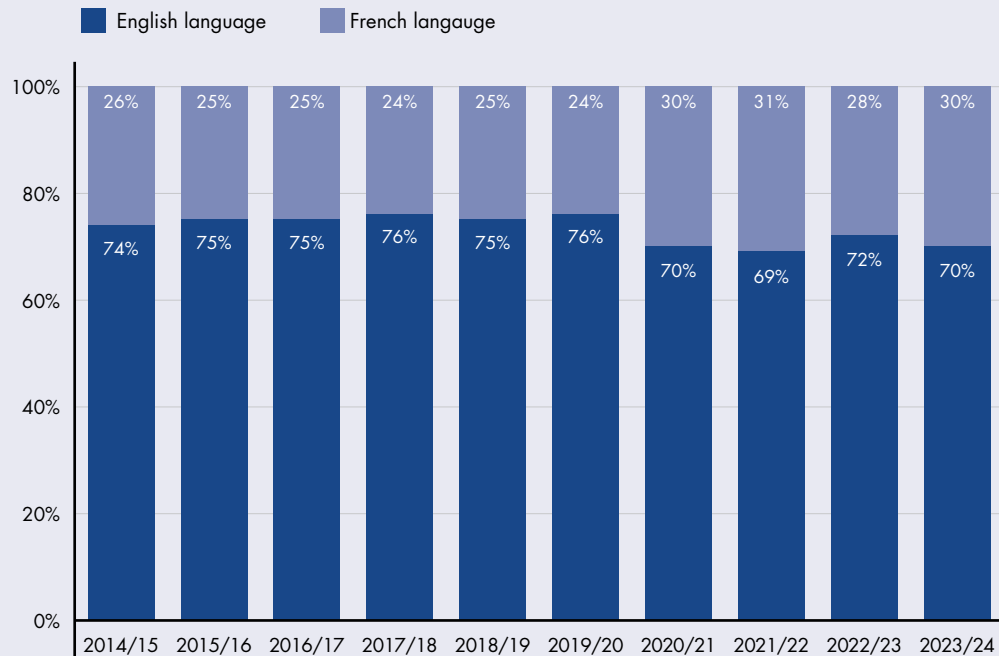
Annual average growth rate

Language	2023/24	2024/25– 2023/24
English-language*	(14.9%)	1.7%
French-language	(2.3%)	4.3%
<b>Average: all languages</b>	<b>(11.4%)</b>	<b>2.4%</b>

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 2014/15 and 2023/24 and which cannot be reported separately due to confidentiality issues arising from low production volume.

**Exhibit 2-3 Share of total volume of Canadian content 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 Canadian content production between 2014/15 and 2023/24 and which cannot be reported separately due to confidentiality issues arising from low production volume.

## GENRES

**Exhibit 2-4 Volume of Canadian content production, by genre and release medium\***

(\$ millions)	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24
<b>Fiction</b>										
Television	1,226	1,188	1,574	1,265	1,416	1,344	1,199	1,760	1,874	1,836
Theatrical feature film	295	179	253	205	269	245	167	268	316	390
<b>Total</b>	<b>1,521</b>	<b>1,366</b>	<b>1,827</b>	<b>1,470</b>	<b>1,685</b>	<b>1,589</b>	<b>1,366</b>	<b>2,028</b>	<b>2,190</b>	<b>2,226</b>
<b>Children's and youth</b>										
Television	467	552	459	516	531	444	333	509	562	355
Theatrical feature film	74	76	29	50	31	54	70	42	96	32
<b>Total</b>	<b>541</b>	<b>628</b>	<b>488</b>	<b>566</b>	<b>562</b>	<b>498</b>	<b>403</b>	<b>551</b>	<b>658</b>	<b>387</b>
<b>Documentary</b>										
Television	248	274	247	259	316	270	293	492	513	426
Theatrical feature film	7	10	10	19	19	12	7	36	28	18
<b>Total</b>	<b>255</b>	<b>284</b>	<b>257</b>	<b>278</b>	<b>335</b>	<b>282</b>	<b>300</b>	<b>528</b>	<b>541</b>	<b>444</b>
<b>Lifestyle and human interest**</b>										
<b>Total</b>	<b>542</b>	<b>553</b>	<b>564</b>	<b>497</b>	<b>599</b>	<b>495</b>	<b>406</b>	<b>607</b>	<b>599</b>	<b>444</b>
<b>VAPA</b>										
<b>Total</b>	<b>118</b>	<b>103</b>	<b>124</b>	<b>155</b>	<b>78</b>	<b>117</b>	<b>144</b>	<b>147</b>	<b>173</b>	<b>187</b>
<b>Grand total</b>	<b>2,977</b>	<b>2,935</b>	<b>3,257</b>	<b>2,964</b>	<b>3,259</b>	<b>2,982</b>	<b>2,618</b>	<b>3,861</b>	<b>4,160</b>	<b>3,687</b>

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 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 2-5 Number of Canadian content projects, by genre and release medium, 2023/24**

	Fiction	Children's and youth	Documentary	Lifestyle and human interest*	Variety and performing arts	All genres
<b>Number</b>						
Television programming	346	108	399	212	85	1,150
Theatrical feature films	99	7	16	–**	–**	122
<b>Total</b>	<b>445</b>	<b>115</b>	<b>415</b>	<b>212</b>	<b>85</b>	<b>1,272</b>
<b>Share of total</b>						
Television programming	78%	94%	96%	100%	100%	90%
Theatrical feature films	22%	6%	4%	0%	0%	10%
<b>Total</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>

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.

\*\* Due to low numbers of lifestyle and human interest, and VAPA productions in the theatrical market, theatrical project numbers have been merged into the fiction genre.

**Exhibit 2-6 Volume of Canadian content production, by genre and language, 2023/24**

	Fiction	Children's and youth	Documentary	Lifestyle and human interest*	Variety and performing arts	All genres
(\$ millions)						
English-language**	1,746	272	317	190	40	2,565
French-language	480	115	127	253	146	1,121
<b>Total</b>	<b>2,226</b>	<b>387</b>	<b>444</b>	<b>444</b>	<b>187</b>	<b>3,687</b>
<b>Share of total</b>						
English-language**	78%	70%	71%	43%	21%	70%
French-language	22%	30%	29%	57%	78%	30%
<b>Total</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>

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 2023/24 and cannot be reported separately due to confidentiality issues arising from low production volume.

**Exhibit 2-7 Volume of Canadian children's and youth television production, by language and category\***

(\$ millions)	2022/23			2023/24		
	Animation	Live Action	Total	Animation	Live Action	Total
English-language**	299	161	460	146	98	244
French-language	15	88	103	7	104	111
<b>Total</b>	<b>314</b>	<b>248</b>	<b>562</b>	<b>153</b>	<b>202</b>	<b>355</b>

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.

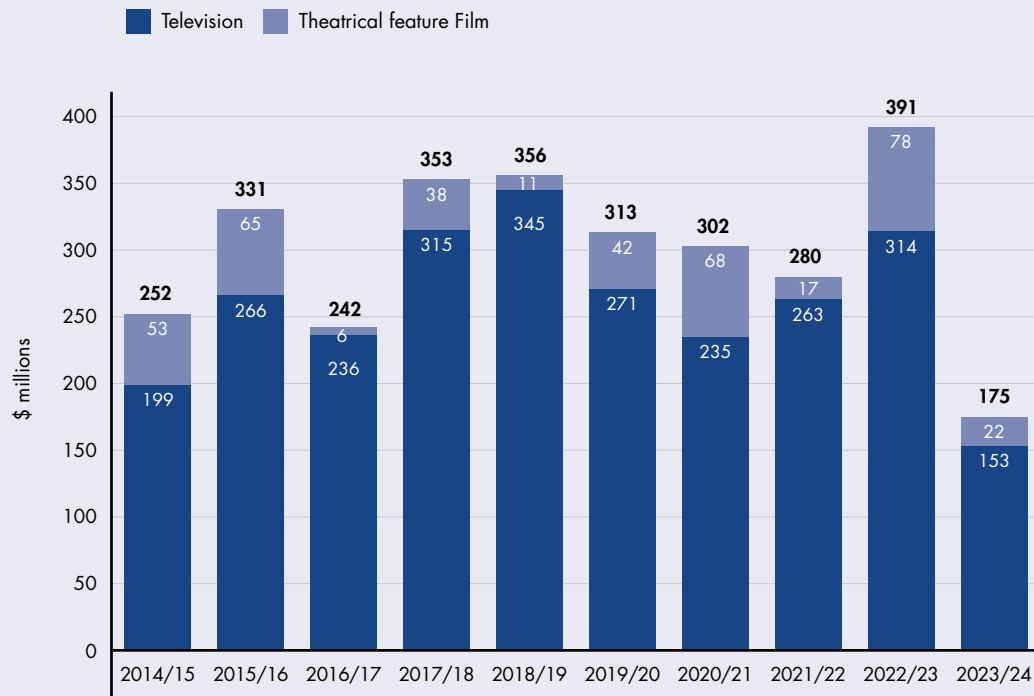
\* Due to data confidentiality, statistics can only be presented for television production and exclude theatrical feature film production.

\*\* 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 2023/24, and cannot be reported separately due to confidentiality issues arising from low production volume.



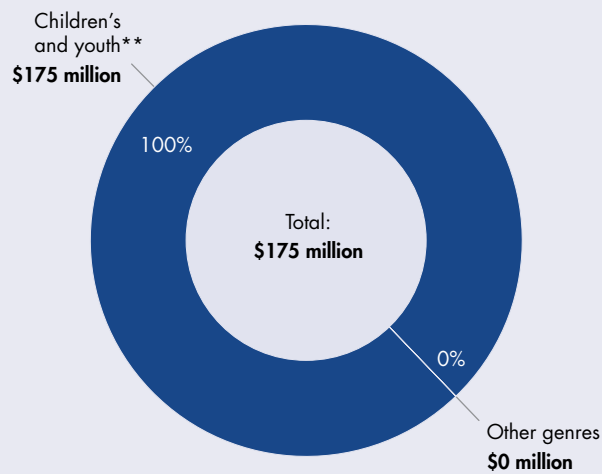
## ANIMATION

**Exhibit 2-8 Volume of Canadian animation production**



Source: Estimates based on data collected from CAVCO.  
 Note: Data includes an estimate of CRTC-certified television production

**Exhibit 2-9 Volume of Canadian animation production, by genre, 2023/24\***



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 100% of animation production released in the theatrical market in 2023/24 was in the children's and youth genre.

## REGION

**Exhibit 2-10 Total volume of Canadian content production, by region of lead producer\***

(\$ millions)	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24	2023/24 share of total	2023/24 change
Ontario	1,340	1,376	1,405	1,410	1,559	1,436	1,159	1,674	1,806	1,325	36%	(26.6%)
Quebec	977	869	1,048	838	936	867	876	1,273	1,257	1,201	33%	(4.5%)
British Columbia	470	463	549	430	549	385	400	611	530	604	16%	14.0%
Prairie Provinces and Territories**	121	130	145	147	133	216	117	196	408	340	9%	(16.7%)
Atlantic Canada***	70	98	111	139	81	78	66	107	159	217	6%	36.5%
<b>Total</b>	<b>2,977</b>	<b>2,935</b>	<b>3,257</b>	<b>2,964</b>	<b>3,259</b>	<b>2,982</b>	<b>2,618</b>	<b>3,861</b>	<b>4,160</b>	<b>3,687</b>	<b>100%</b>	<b>(11.4%)</b>

Sources: Estimates based on data collected from CAVCO.

Note: Statistics published by provincial funding agencies may differ from those in *Profile 2024*. Due to the low number of projects (particularly theatrical feature film projects) in certain provinces and territories, production volume statistics are grouped by region to avoid disclosure of budgets for individual projects. Please see *Notes on methodology* for additional information. Some totals may not sum due to rounding.

\* Based on province or territory where lead producer is based.

\*\* Alberta, Saskatchewan, Manitoba, Yukon, Nunavut and Northwest Territories.

\*\*\* Nova Scotia, Newfoundland and Labrador, New Brunswick and Prince Edward Island.

**Exhibit 2-11 Total volume of Canadian content production, by region of filming\***

(\$ millions)	2020/21	2021/22	2022/23	2023/24	2023/24 Share
Quebec	897	1,216	1,239	1,180	32%
Ontario	983	1,479	1,664	1,177	32%
British Columbia	411	681	614	675	18%
Prairie Provinces and Territories**	158	240	317	328	9%
Atlantic Canada***	169	244	327	326	9%
<b>Total</b>	<b>2,618</b>	<b>3,861</b>	<b>4,160</b>	<b>3,687</b>	<b>100%</b>

Sources: Estimates based on data collected from CAVCO.

Note: Statistics published by provincial funding agencies may differ from those in *Profile 2024*. Due to the low number of projects (particularly theatrical feature film projects) in certain provinces and territories, production volume statistics are grouped by region to avoid disclosure of budgets for individual projects. Please see *Notes on methodology* for additional information. Some totals may not sum due to rounding.

\* The entire cost of a film or TV project has been assigned to the province or territory with the highest number of filming days.

\*\* Alberta, Saskatchewan, Manitoba, Yukon, Nunavut and Northwest Territories.

\*\*\* Nova Scotia, Newfoundland and Labrador, New Brunswick and Prince Edward Island.

## FINANCING

**Exhibit 2-12 Financing for Canadian content production**

	2019/20		2020/21		2021/22		2022/23		2023/24	
	\$ millions	%	\$ millions	%	\$ millions	%	\$ millions	%	\$ millions	%
Private broadcaster licence fees	406	14%	293	11%	580	15%	582	14%	456	12%
Public broadcaster licence fees	313	10%	339	13%	407	11%	424	10%	454	12%
Federal tax credit <sup>1</sup>	295	10%	265	10%	388	10%	422	10%	378	10%
Provincial tax credits <sup>1</sup>	562	19%	487	19%	768	20%	824	20%	697	19%
Canadian distributors <sup>2</sup>	287	10%	360	14%	363	9%	526	13%	360	10%
Foreign pre-sales and advances <sup>3</sup>	463	16%	334	13%	508	13%	505	12%	497	13%
Canada Media Fund	276	9%	280	11%	288	7%	290	7%	303	8%
Telefilm Canada	70	2%	43	2%	84	2%	90	2%	83	2%
Other public <sup>4</sup>	130	4%	116	4%	216	6%	224	5%	194	5%
Other private <sup>5</sup>	176	6%	103	4%	258	7%	273	7%	265	7%
<b>Total</b>	<b>2,982</b>	<b>100%</b>	<b>2,619</b>	<b>100%</b>	<b>3,860</b>	<b>100%</b>	<b>4,160</b>	<b>100%</b>	<b>3,687</b>	<b>100%</b>

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 pre-sales and advances include broadcast licence fees, minimum guarantees, advances and other forms of financing from non-Canadian broadcasters, distributors or other organizations based outside of Canada, including streaming services, other VOD services, TV networks and public broadcasters.
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, with some provinces (i.e., Alberta and Manitoba) providing tax credits that are based on all production expenditures rather than solely on eligible labour costs. 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 30% 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 have 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, television pilots and online first production. 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.<sup>14</sup>

The Canadian television production segment experienced a relatively significant increase in production in 2021/22 and further growth in 2022/23, as indicated by the statistics in this section. However, a large portion of that increase reflected the rebound in production activity from the pandemic-induced lows experienced in 2020/21 and the CRTC requirement that large broadcasters catch up on any Canadian programming expenditures (CPE) under-spend during the pandemic period by the end of 2022/2023.

The total volume of production decreased by 12.7% to \$3.25 billion in 2023/24 (Exhibit 3-1), as the post-pandemic rebound and catch-up in Canadian television production came to a halt in 2023/24 and overall broadcaster revenues decreased. Indeed, all types of Canadian television production, including television series, television movies and single-episode programming, experienced decreases in 2023/24.

## Highlights from 2023/24



- The volume of Canadian television production in the VAPA genre increased by 7.5 %, which was entirely due to the 24.8% increase in volume of French-language VAPA programming, as English-language production actually declined by 29.3%.
- The average budget for English-language fiction programming increased by 10.4% to \$1.65 million per hour.
- The average budget for English-language lifestyle and human interest programming increased by 15.3% to \$430,000 per hour.
- The average hourly budgets for French-language lifestyle and human interest programming increased by 19.4%.
- The average hourly budgets for French-language VAPA programming increased by 29.5% to \$411,000 per hour.



- Canadian television production decreased by 12.7% to \$3.25 billion.
- The volume of Canadian television series production decreased by 9.7% to \$2.69 billion.
- The volume of Canadian TV movie production decreased by 27.5% to \$458 million.
- The volume of Canadian television production decreased in the fiction (2.0%), documentary (16.9%), children's and youth (36.9%), and lifestyle and human interest genres (25.8%).
- Canadian television animation production decreased by 51.4% to \$153 million.
- The volume of English-language television production decreased by 17.1% to \$2.21 billion.

<sup>14</sup> Statistics for the volume of broadcaster in-house production can be found in Section 7 of this report.

## Highlights from 2023/24 *continued*



- The average hourly budgets for English-language children's and youth, documentary, and VAPA programming decreased by 37.3%, 5.9% and 24.4% respectively.
- The volume of French-language television production decreased by 1.4% to \$1.02 billion.
- The average budget for French-language fiction programming decreased by 8.9% to \$780,000 per hour.
- The number of Canadian television series decreased by 13.5% from 863 to 747.
- The volume of television production supported by the Canada Media Fund (CMF) decreased by 2.9% to \$1.59 billion.
- The financial leverage of the CMF's Convergent Stream funding decreased to \$4.23 of third-party financing for every dollar of CMF funding.

After climbing to 919 in 2021/22, the number of Canadian television series experienced two consecutive years of decline (Exhibits 3-2). In 2023/24, the number of series dropped to 747, while volume dropped by 9.7% to \$2.69 billion (Exhibits 3-1).

The number of Canadian television movies dropped by 27.9%, from 330 to 238 in 2023/24. This was matched by a 27.5% decrease in volume to \$458 million (Exhibits 3-1 and 3-2). The volume production of other television content such as single-episode programming dropped by 8.0% to \$104 million, while the number of projects produced fell by a third – from 247 to 165.

The volume of English-language television production decreased by 17.1% to \$2.21 billion (Exhibit 3-3), after experiencing a higher rate of rebound and catch-up in 2021/22 and 2022/23. Not being as affected by the need to catch up on CPE, the drop in French-language production was much more muted, declining by only 1.4% to \$1.02 billion. However, this was the second consecutive year of decline, as French-language production had also decreased in 2022/23 by 1.2%. Production in other languages was down by 10% to \$18 million.

The fiction genre was the largest genre of television production in 2023/24 and one of the most resilient. Fiction production decreased by only 2%, or \$38 million, to \$1.84 billion (Exhibit 3-6).

The variety and performing arts (VAPA) genre was the only one to experience an increase in 2023/24 – growing by 8.1% to a 10-year high of \$187 million. The growth in VAPA production was entirely due to a 24.9% increase in French-language production, as English-language production actually dropped by 29.3%.

- The steepest drop was in the children's and youth genre, which dropped by 36.8% to \$355 million.
- Documentary production dropped by 16.9% to \$426 million.
- The production of lifestyle and human interest programming dropped by 25.9% to \$444 million.

The decreases in fiction production and lifestyle and human interest programming in 2023/24 were observed in both language markets.

However, the declines in other genres were, understandably, concentrated in English-language production.

- English-language children's and youth production fell by 47.0%, even while French-language production rose by 7.8% (Exhibit 3-9).
- English-language documentary production dropped by 24.4% while French-language production rose by 13.6%.

In the English-language market, hourly budgets were higher in the fiction and lifestyle and human interest genres, but lower in all other genres. Indeed, the average hourly budget in the fiction genre increased to \$1,645,000 (Exhibit 3-10). After climbing to \$1,545,000 in 2022/23, the average hourly budget for English-language children's and youth production fell by 37.3% to \$969,000. The average over the previous nine years was \$1,159,000. However, any increase in hourly budgets should be examined within the context of significant decreases in the number of projects, and, as a result, significant decreases in production activity. While the average median budget of English-language fiction increased, overall production decreased. That meant, of course, that the number of projects also decreased. In effect, budget increases are illusory if production activity contracted.

In the French-language market, hourly budgets increased in the lifestyle and human-interest (19.4% increase) and VAPA (29.7% increase) genres (Exhibit 3-10). In the fiction genre, the average hourly budget decreased by 9.0% to \$780,000. Average hourly budgets were also lower in the children's and youth genre (14.4% decrease) but virtually unchanged in the documentary genre (0.9% decrease).

In examining production trends over the past five years (2018/19 to 2023/24), the fiction genre was the most important driver of overall growth in Canadian television production. Its volume increased by \$420 million or 29.7% (Exhibit 3-8). The documentary and VAPA genres also grew between 2018/19 and 2023/24. The same pattern is evident over the past ten years (2014/15 to 2023/24). Fiction, documentary and VAPA all displayed growth, and fiction led the way with a \$610 million increase, or 49.7% growth.

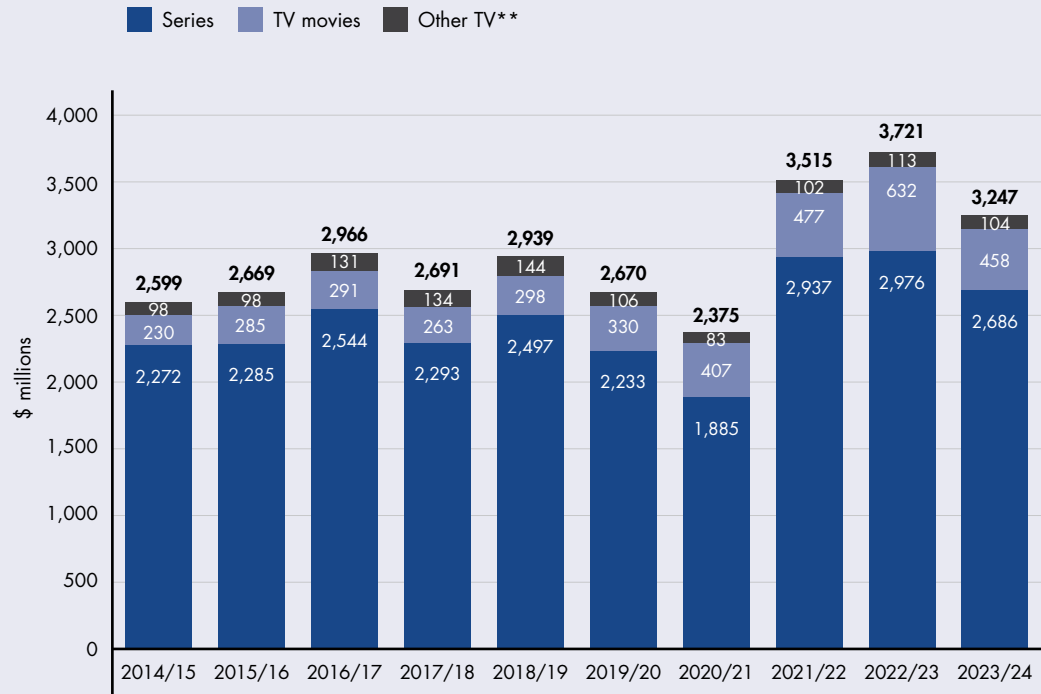
The CMF continued to be a major player in the Canadian television segment in 2023/24, disbursing \$303 million and supporting \$1.59 billion in Canadian television production – representing just under half (49%) of the total volume of Canadian television production in 2023/24 (Exhibits 3-1 and 3-14). This was the highest level of funding disbursed by the CMF over the past decade. However, the financing leverage of this funding declined, once again, in 2023/24. Whereas in 2022/23, every dollar of CMF Convergent Stream funding helped producers attract an additional \$4.63 in production financing from other sources, in 2023/24, the rate was \$4.23. Still, the CMF's rate of financing leverage in 2023/24 (\$4.23) was well above the average of \$3.92 observed over the previous nine years (2014/15 to 2022/23).

Historically, periods of growth and decline in Canadian television production have been closely linked to higher or lower levels of Canadian broadcast licence fees or foreign financing. While it was true that Canadian private broadcasters' licence fees were down by \$126 million in 2023/24, all other sources of financing, except the CMF and Canadian public broadcasters' licence fees, also decreased in 2023/24 (Exhibit 3-18).

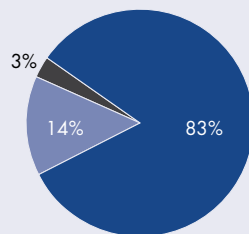
The overall declines in various sources of financing persisted in the English-language market. Canadian private broadcaster licence fees were down by \$84 million and Canadian public broadcaster licence fees were down by \$19 million (Exhibit 3-18). In the French-language market, however, Canadian public broadcaster licence fees rose by \$48 million and FIIP (i.e., foreign investment in production through foreign pre-sales, advances and Canadian distributors) increased by \$7 million to \$17 million – a 70% increase (Exhibit 3-18). This source of financing represents about 2% of total financing.

## TYPES

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



**Share**  
2022/23



**Annual average growth rate**

Type	2023/24	2014/15–2023/24
Series	(9.7%)	1.9%
TV movies	(27.5%)	8.0%
Other TV**	(7.8%)	0.7%
<b>Average: all types</b>	<b>(12.7%)</b>	<b>2.5%</b>

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 CAVCO Public Notice 2017-01. CAVCO reports that the total volume of online-first production was \$181.3 million in 2018/19, \$118.9 million in 2019/20, \$201.5 million in 2020/21, \$107.7 million in 2021/22, \$110.6 million in 2022/23 and \$115.1 million in 2023/24.

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

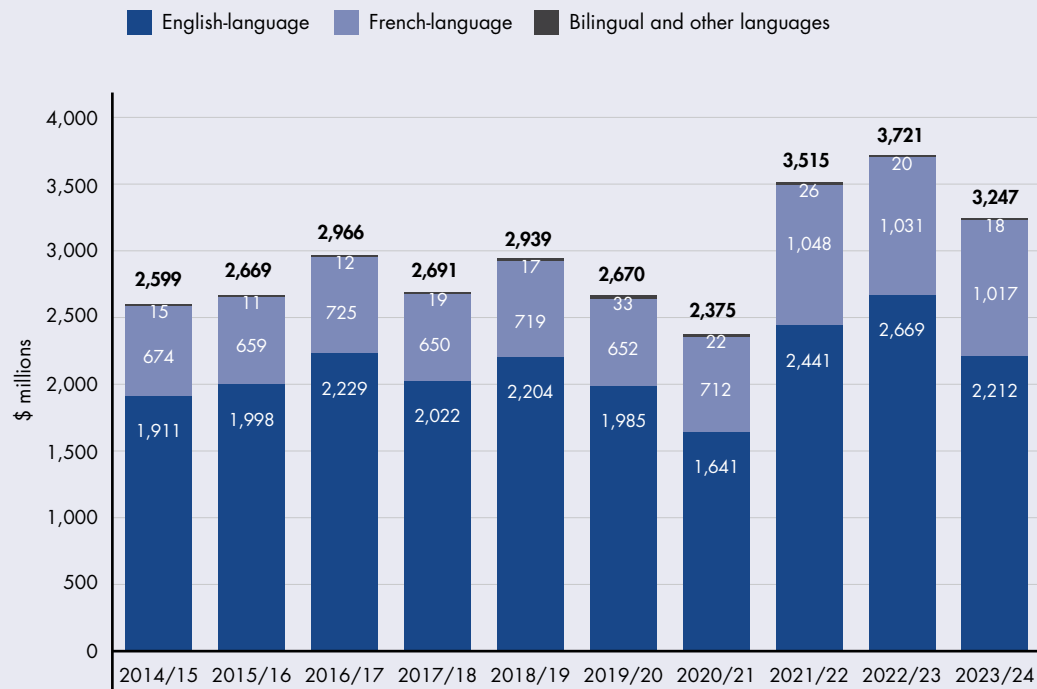
**Exhibit 3-2 Number of Canadian television projects, by type**

	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24
Series	813	836	853	827	896	694	644	919	863	747
TV movies	151	170	155	139	392	180	232	275	330	238
Other TV*	300	297	323	313	122	290	204	264	247	165
<b>Total</b>	<b>1,264</b>	<b>1,303</b>	<b>1,331</b>	<b>1,279</b>	<b>1,410</b>	<b>1,164</b>	<b>1,079</b>	<b>1,457</b>	<b>1,439</b>	<b>1,150</b>

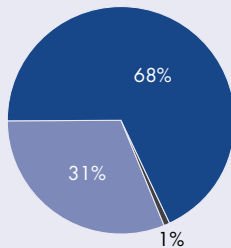
Source: Estimates based on data collected from CAVCO.  
 Note: Data includes an estimate of CRTC-certified television production.  
 \* Other TV category includes single-episode television programming and television pilots.

## LANGUAGE

**Exhibit 3-3 Volume of Canadian television production, by language**



**Share**  
2023/24



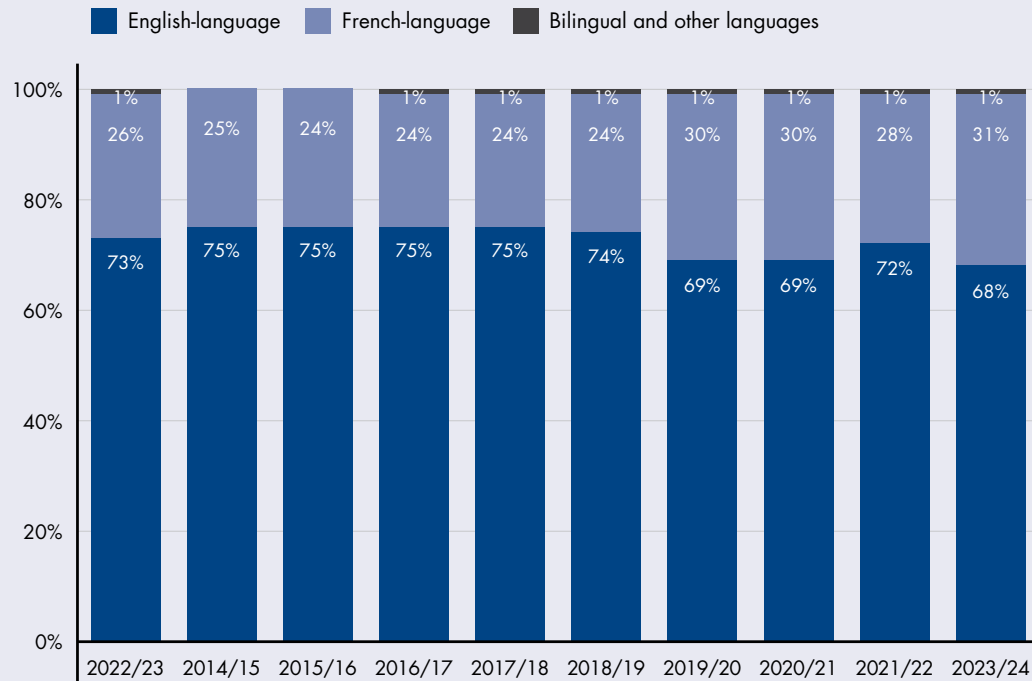
**Annual average growth rate**

Language	2023/24	2014/15–2023/24
English-language	(17.1%)	1.6%
French-language	(1.4%)	4.7%
Bilingual and non-official languages	(10.0%)	2.2%
<b>Average: all languages</b>	<b>(12.7%)</b>	<b>2.5%</b>

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 Share of total volume of Canadian television production, by language**



Source: Estimates based on data collected from CAVCO.

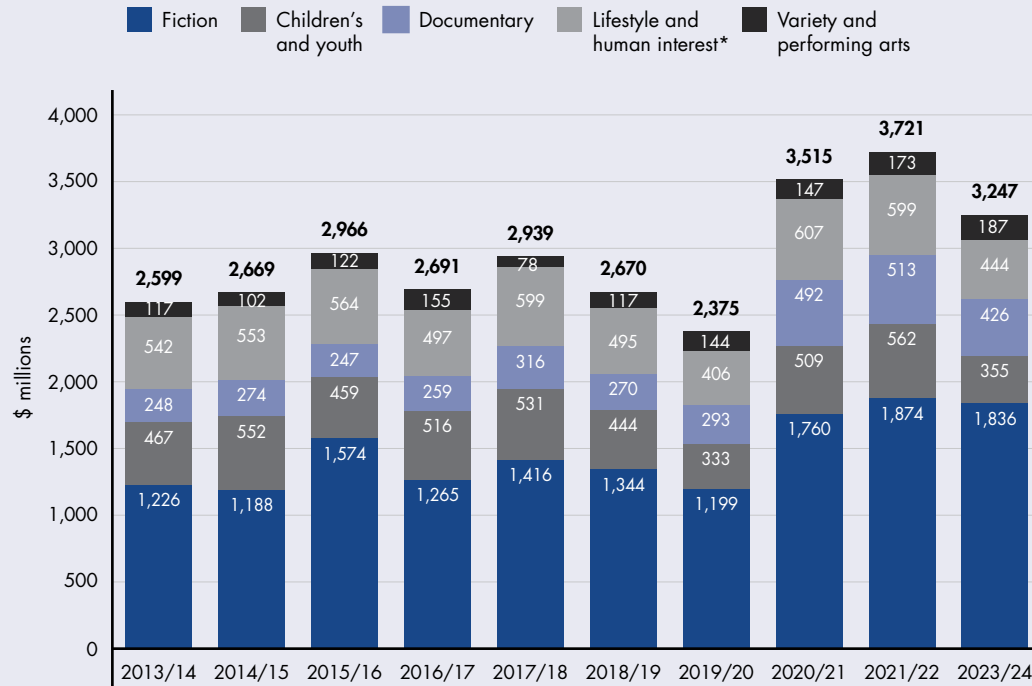
**Exhibit 3-5 Number of Canadian television projects, by language**

	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24
English-language	662	705	702	697	761	645	575	793	822	626
French-language	587	583	615	567	623	493	481	629	591	513
Bilingual and other languages	15	15	14	15	25	26	23	36	27	11
<b>Total</b>	<b>1,264</b>	<b>1,303</b>	<b>1,331</b>	<b>1,279</b>	<b>1,409</b>	<b>1,164</b>	<b>1,079</b>	<b>1,458</b>	<b>1,440</b>	<b>1,150</b>

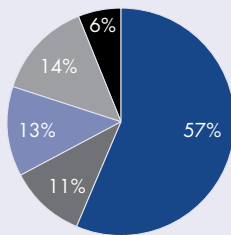
Source: Estimates based on data collected from CAVCO.

## GENRES

Exhibit 3-6 Volume of Canadian television production, by genre



Share  
2023/24



Annual average growth rate

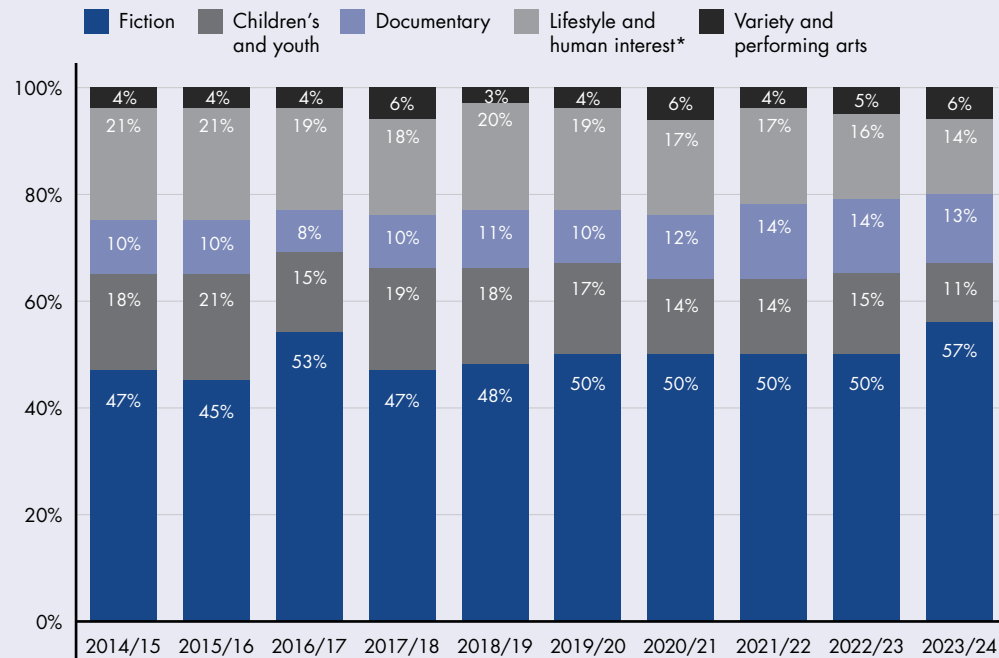
Genre	2023/24	2014/15–2023/24
Fiction	(2.0%)	4.6%
Children's and youth	(36.8%)	(3.0%)
Documentary	(17.0%)	6.2%
Lifestyle and human interest*	(25.9%)	(2.2%)
VAPA	8.1%	5.4%
<b>Average: all genres</b>	<b>(12.7%)</b>	<b>2.5%</b>

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 3-7a Shares of total volume of Canadian television production, by genre, all languages**

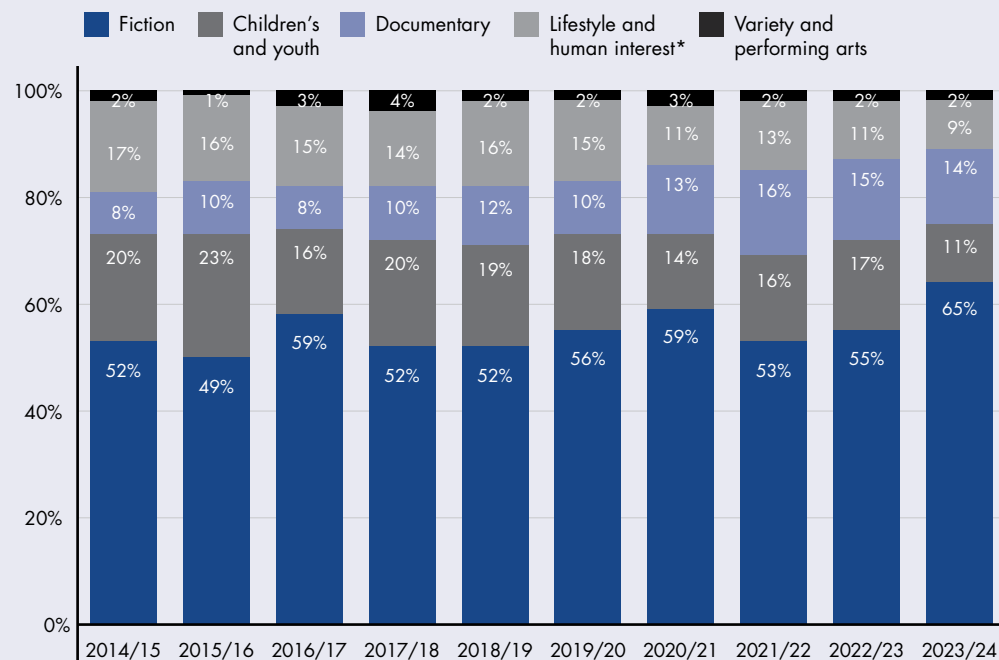


Source: Estimates based on data collected from CAVCO.

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 3-7b Shares of total volume of Canadian television production, by genre, English-language**

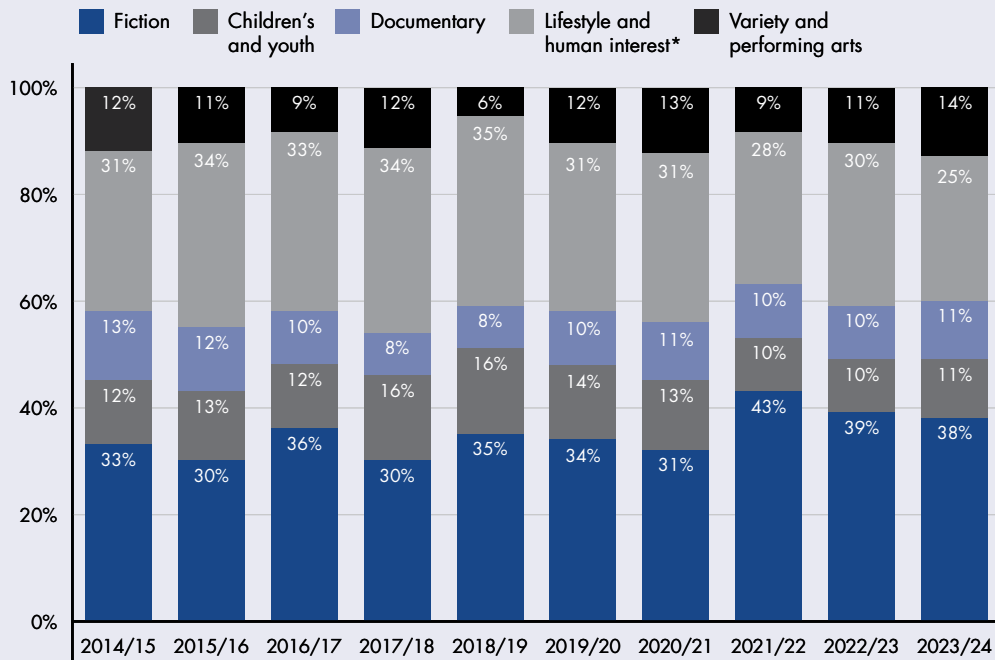


Source: Estimates based on data collected from CAVCO.

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

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

**Exhibit 3-7c Shares of total volume of Canadian television production, by genre, French-language**



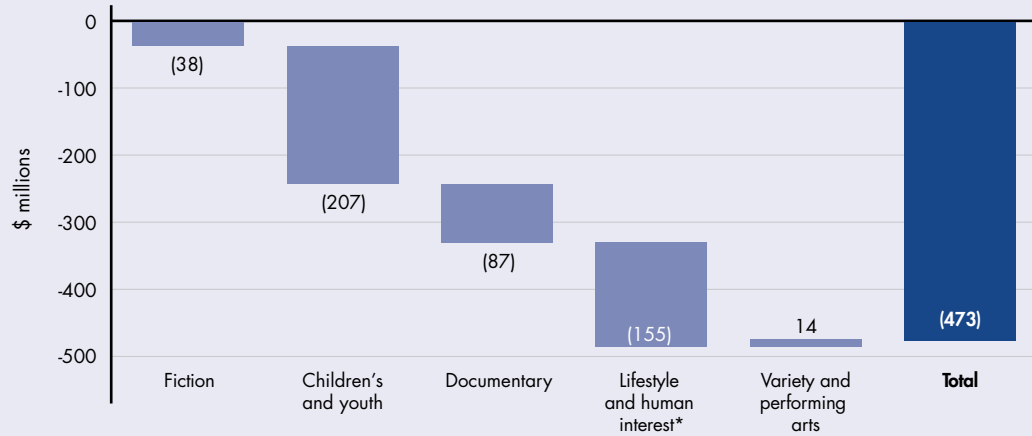
Source: Estimates based on data collected from CAVCO.

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

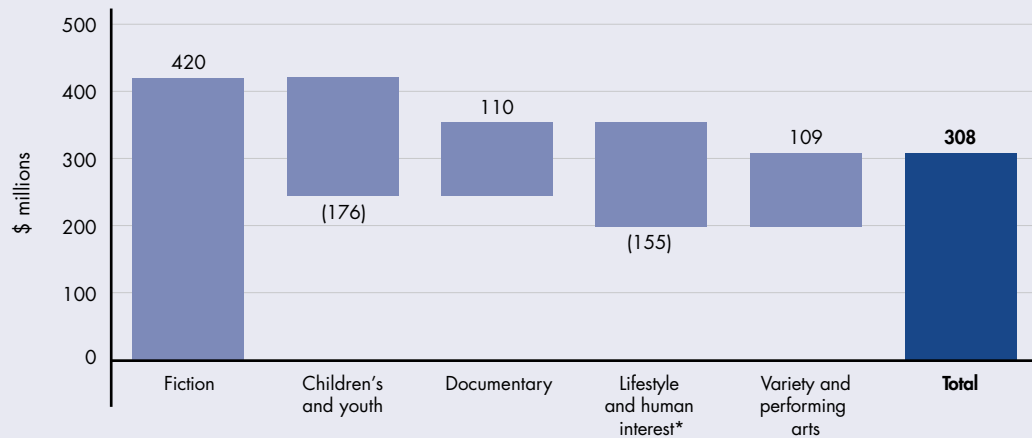
\* Includes magazine programming and a small amount of programming that was previously allocated to the educational/instructional genre.

**Exhibit 3-8 Contribution to growth in volume of production, by genre (\$ millions)**

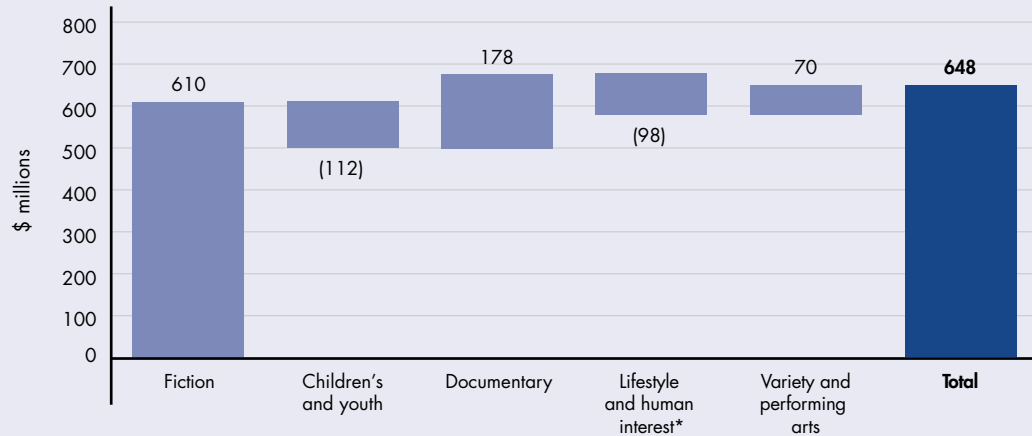
**One-year (2022/23 to 2023/24)**



**Five-year (2018/19 to 2023/24)**



**Ten-year (2014/15 to 2023/24)**



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 3-9 Volume of Canadian television production, by genre and language**

(\$ millions)	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24
<b>Fiction</b>										
English-language*	1,003	988	1,314	1,071	1,162	1,124	978	1,315	1,472	1,446
French-language	223	200	260	194	254	220	222	446	401	390
<b>Total</b>	<b>1,226</b>	<b>1,188</b>	<b>1,574</b>	<b>1,265</b>	<b>1,416</b>	<b>1,344</b>	<b>1,199</b>	<b>1,760</b>	<b>1,874</b>	<b>1,836</b>
<b>Children's and youth</b>										
English-language*	389	468	368	409	416	354	241	406	460	244
French-language	78	84	90	106	115	90	92	102	103	111
<b>Total</b>	<b>467</b>	<b>552</b>	<b>459</b>	<b>516</b>	<b>531</b>	<b>444</b>	<b>333</b>	<b>509</b>	<b>562</b>	<b>355</b>
<b>Documentary</b>										
English-language*	162	195	175	207	260	206	214	385	410	310
French-language	85	79	72	52	55	64	80	107	102	116
<b>Total</b>	<b>248</b>	<b>274</b>	<b>247</b>	<b>259</b>	<b>316</b>	<b>270</b>	<b>293</b>	<b>492</b>	<b>513</b>	<b>426</b>
<b>Lifestyle and human interest**</b>										
English-language*	333	329	326	277	345	293	182	310	291	190
French-language	209	224	238	220	254	202	223	298	308	253
<b>Total</b>	<b>542</b>	<b>553</b>	<b>564</b>	<b>497</b>	<b>599</b>	<b>495</b>	<b>406</b>	<b>607</b>	<b>599</b>	<b>443</b>
<b>Variety and performing arts</b>										
English-language*	37	29	58	76	36	40	49	52	56	40
French-language	79	73	64	79	42	77	95	95	117	146
<b>Total</b>	<b>117</b>	<b>102</b>	<b>122</b>	<b>155</b>	<b>78</b>	<b>117</b>	<b>144</b>	<b>147</b>	<b>173</b>	<b>186</b>

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 2014/15 and 2023/24 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 3-10 Average budgets, by genre

#### English-language production

\$000s per hour	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24
<b>Fiction</b>										
Average	1,240	1,298	1,401	1,307	1,316	1,381	1,354	1,420	1,490	1,645
Median	1,231	1,269	1,454	1,313	1,257	1,293	985	938	1,066	1,458
<b>Children's and youth</b>										
Average	855	1,073	1,190	1,018	1,471	975	1,402	904	1,545	969
Median	764	817	528	448	513	461	435	502	665	704
<b>Documentary</b>										
Average	307	333	348	355	380	412	331	345	405	381
Median	253	260	319	313	291	344	261	251	325	303
<b>Lifestyle and human interest*</b>										
Average	265	273	298	250	295	310	282	314	373	430
Median	223	232	240	178	212	249	210	231	291	326
<b>Variety and performing arts</b>										
Average	363	424	580	585	448	403	728	623	577	436
Median	248	258	323	408	300	242	419	387	508	351

#### French-language production

\$000s per hour	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24
<b>Fiction</b>										
Average	402	450	553	597	506	581	647	808	857	780
Median	342	417	564	575	488	575	652	744	786	742
<b>Children's and youth</b>										
Average	187	220	186	187	380	327	341	340	397	340
Median	143	159	142	134	144	187	191	257	299	283
<b>Documentary</b>										
Average	204	222	196	202	208	186	191	201	233	231
Median	179	190	168	170	173	167	164	175	199	175
<b>Lifestyle and human interest*</b>										
Average	119	73	93	105	102	107	111	120	129	154
Median	63	69	84	97	92	105	104	113	107	130
<b>Variety and performing arts</b>										
Average	229	261	226	236	273	252	303	353	317	411
Median	166	201	150	133	196	192	192	248	227	276

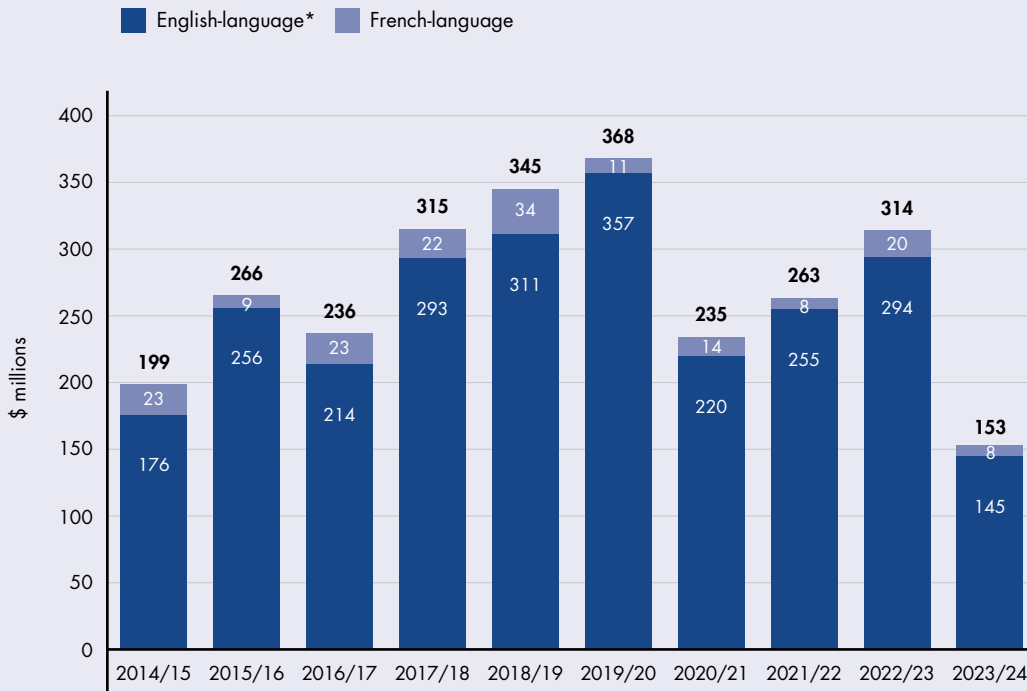
Source: Estimates based on data collected from CAVCO.

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 3-11 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 2014/15 and 2023/24 and cannot be reported on separately due to confidentiality issues arising from low production volume.

## CANADIAN CONTENT POINTS

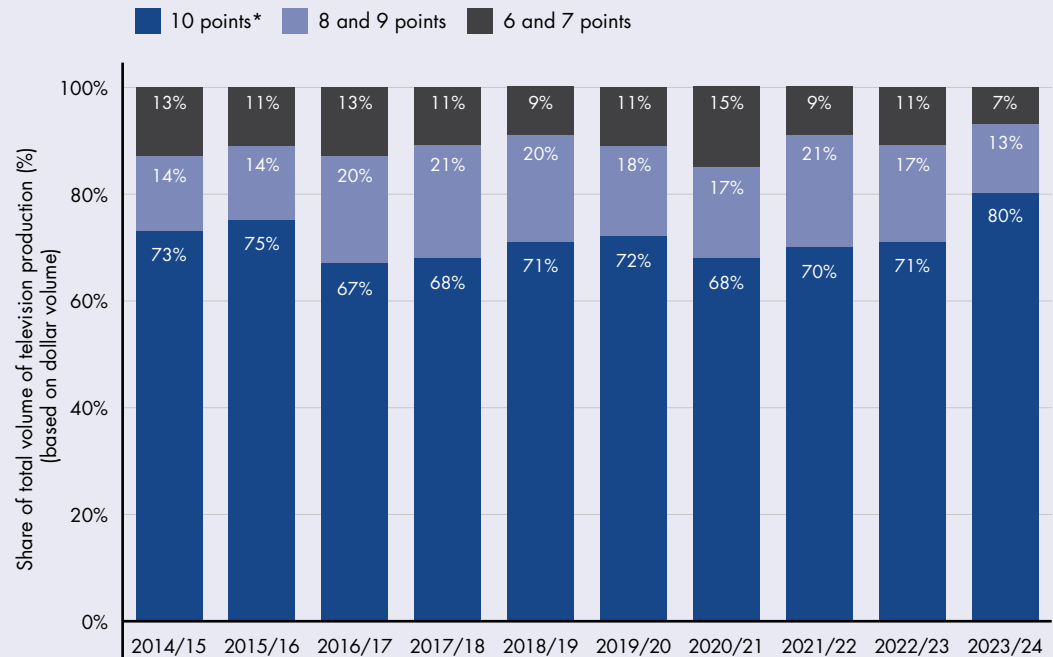
To certify television programs and films as Canadian content, CAVCO and the CRTC use similar evaluation tools based on assigning points to key creative production roles. Canadian broadcasters can use these certified films and television programs to meet their Canadian television exhibition and expenditure 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.<sup>15</sup> 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.<sup>16</sup> The significant majority of Canadian television programs obtain the maximum 10 Canadian content points and this share has remained relatively stable over the past decade. In 2023/24, 10 point production reached a 10 year high in terms of share at 80% of total Canadian television production (Exhibit 3-12).

<sup>15</sup> For more information on the Canadian content point scale and all other CPTC requirements, please see CAVCO's [CPTC Application Guidelines](#).

<sup>16</sup> 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 3-12 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 3-13 Volume of Canadian television production, by region\***

(\$ millions)	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24	2023/24 share of total	2023/24 change
Ontario	1,216	1,263	1,323	1,297	1,418	1,294	1,032	1,537	1,598	1,132	35%	(29.2%)
Quebec	774	762	895	703	798	725	784	1,101	1,087	1,062	33%	(2.3%)
British Columbia	426	429	512	420	527	378	380	590	513	570	18%	11.1%
Prairie Provinces and Territories**	114	122	127	138	119	199	115	184	369	277	9%	(24.9%)
Atlantic Canada***	70	93	109	133	78	73	64	103	154	206	6%	33.8%
<b>Total</b>	<b>2,599</b>	<b>2,669</b>	<b>2,966</b>	<b>2,691</b>	<b>2,939</b>	<b>2,670</b>	<b>2,375</b>	<b>3,515</b>	<b>3,721</b>	<b>3,247</b>	<b>100%</b>	<b>(12.7%)</b>

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 2024*. Due to the low number of projects (particularly theatrical feature film projects) in certain provinces and territories, production volume statistics are grouped by region to avoid disclosure of budgets for individual projects. 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.

\* Based on province or territory where lead producer is based.

\*\* 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, develops, finances and promotes the production of Canadian content and applications for all audiovisual media platforms.

In 2023/24, the CMF had an overall program budget of more than \$384 million.<sup>17</sup> During this period, it funded the production of screen-based media content across two streams: the Convergent Stream and the Experimental Stream. It also provided funding to a variety of industry development initiatives through its Sector Development funding program.

The CMF has moved away from the Convergent and Experimental Streams model, and starting in 2024/25 (*Profile 2025*) will instead separate programs across three pillars: Ideation, Creation, and Industry.

The CMF's Convergent Stream provided financial support to screen-based projects with television content and content or applications for at least one additional digital media platform. The Experimental Stream funded 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 4 (later in this section) provides data for the Experimental Stream.

CMF's Convergent Stream funding of \$303 million supported \$1.59 billion<sup>18</sup> in television production in 2023/24 and generated an estimated 30,700 jobs (including direct and spin-off impacts). The total employment impact in 2023/24 was down from 2022/23 due to the lower volume of supported production and the fact production cost inflation means that average wages are higher and fewer jobs are created for a given dollar volume of production.

While the CMF has experienced reduced revenues from BDUs in recent years due to decreasing subscriber levels, it has been able to maintain – and even increase – its funding levels thanks to interventions from the federal government. A stabilization fund was put into place in 2017 to compensate the CMF for decreases in BDU revenues to a maximum of \$42.5 million (this cap was reached in 2023/24). Additionally, since 2021/22, the CMF has received various additional short-term allocations from the federal government to invest in projects and initiatives by Indigenous and equity-deserving communities, as well as French-language content. These additional investments represented a total of \$40 million in 2023/24: \$30 million for projects and initiatives for Indigenous and equity-deserving groups and \$10 million for French-language content.<sup>19</sup>

While CMF funding rose by \$13 million in 2023/24, the total value of supported production budgets still decreased by \$47 million to \$1.59 billion (Exhibit 3-13), or 43% of Canadian content production (Exhibit 2-1). The total number of supported hours of production was higher in all genres except the drama (i.e., fiction) genre (Exhibit 3-15). As a result of the decrease in the total value of supported production budgets, the CMF's overall financial leverage also declined in 2023/24. Each dollar of CMF Convergent Stream funding helped to attract \$4.23 in additional financing, down from \$4.63 in 2022/23.

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<sup>17</sup> Source: Canada Media Fund. This includes initial 2023-24 budget of \$365.8 million plus additional funding of \$17.9M from the 2023 government commitment to support both the French language market and underrepresented communities.

<sup>18</sup> Source: Canada Media Fund, custom tabulations.

<sup>19</sup> Canada Media Fund (2023). P. 131. In 2022/23, the Government of Canada increased its annual funding of the CMF by \$4.5 million to offset the decline in revenue from BDUs. The Government of Canada also provided the CMF with \$20 million, annually, in new funding for equity-deserving communities.

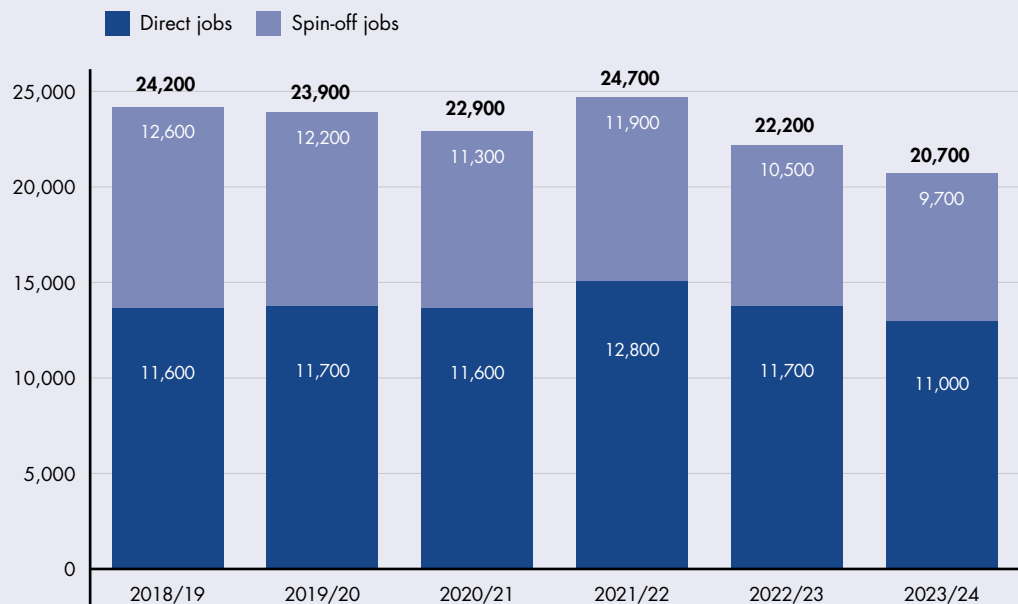
**Exhibit 3-14 Volume of Canadian television production with CMF contributions**



Source: CMF.

\* Other financing includes contributions from production companies, broadcasters, distributors and government sources other than CMF.

**Exhibit 3-15 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 3-16 Number of CMF-supported hours of television production, by genre**

	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24
Documentary	925	1,041	1,045	831	959	1,051	1,035	1,142	990	1,025
Children's and youth	799	763	688	697	516	547	546	463	404	485
Drama (i.e. fiction)	700	757	728	724	727	760	674	947	908	856
Variety and performing arts	354	398	418	452	393	415	360	317	305	312
<b>Total</b>	<b>2,778</b>	<b>2,959</b>	<b>2,878</b>	<b>2,704</b>	<b>2,595</b>	<b>2,773</b>	<b>2,615</b>	<b>2,869</b>	<b>2,607</b>	<b>2,678</b>

Source: CMF.

Note: Some totals may not sum due to rounding.

**Exhibit 3-17 CMF contribution to television production, by genre**

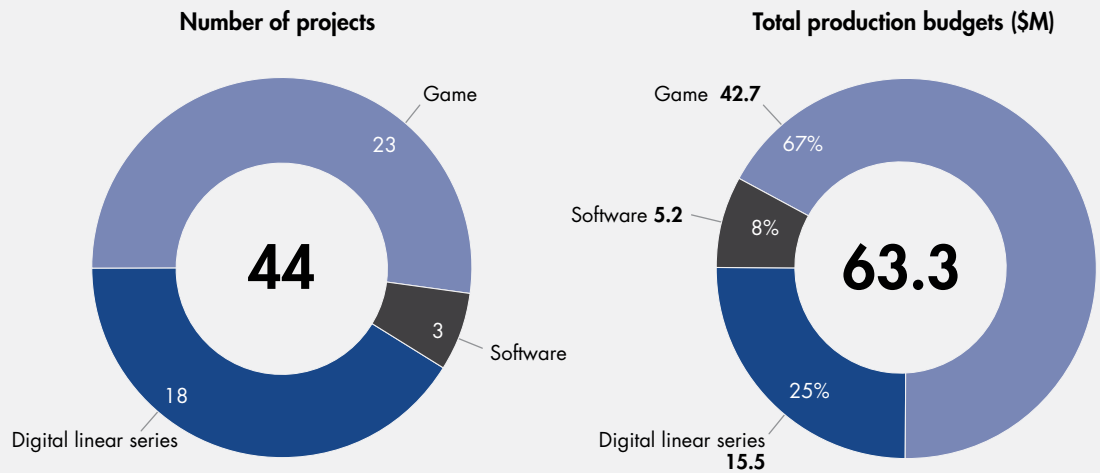
	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24
<b>(\$ millions)</b>										
Documentary	59	65	69	58	64	69	64	76	69	80
Children's and youth	56	54	39	37	33	38	37	41	40	33
Drama (i.e. fiction)	158	153	151	151	153	150	154	157	166	172
Variety and performing arts	13	13	19	15	13	18	26	14	16	18
<b>Total</b>	<b>286</b>	<b>286</b>	<b>278</b>	<b>260</b>	<b>262</b>	<b>276</b>	<b>281</b>	<b>289</b>	<b>290</b>	<b>303</b>
<b>Share of total</b>										
Documentary	21%	23%	25%	22%	24%	25%	23%	26%	24%	26%
Children's and youth	20%	19%	14%	14%	13%	14%	13%	14%	14%	11%
Drama (i.e. fiction)	55%	53%	54%	58%	58%	54%	55%	54%	57%	57%
Variety and performing arts	5%	5%	7%	6%	5%	7%	9%	5%	6%	6%
<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: CMF.

Note: Some totals may not sum due to rounding.

#### Box 4 CMF-supported Experimental Stream digital media production, 2023/24

The Experimental Stream funds the creation of innovative digital media content and software applications. In 2023/24, the Experimental Stream provided \$36.5 million in funding to 44 projects with total production budgets of \$63.3 million.<sup>20</sup>



Source: CMF

## FINANCING

### Exhibit 3-18 Financing of Canadian television production

	2019/20		2020/21		2021/22		2022/23		2023/24	
	\$ millions	%	\$ millions	%	\$ millions	%	\$ millions	%	\$ millions	%
<b>All Canadian television production</b>										
Private broadcaster licence fees	405	12%	292	12%	579	16%	580	16%	454	14%
Public broadcaster licence fees	311	14%	338	14%	405	12%	422	11%	451	14%
Federal tax credit <sup>1</sup>	277	11%	250	10%	368	10%	395	11%	350	11%
Provincial tax credits <sup>1</sup>	504	19%	443	19%	699	20%	738	20%	609	19%
Canadian distributors <sup>2</sup>	260	13%	305	13%	332	9%	438	12%	326	10%
Foreign pre-sales and advances <sup>3</sup>	410	13%	309	14%	473	13%	471	13%	432	13%
CMF <sup>4</sup>	276	12%	280	12%	288	8%	290	8%	303	9%
Other public <sup>5</sup>	98	3%	82	3%	156	4%	172	5%	126	4%
Other private <sup>6</sup>	130	3%	77	3%	216	6%	215	6%	195	6%
<b>Total</b>	<b>2,670</b>	<b>100%</b>	<b>2,376</b>	<b>100%</b>	<b>3,515</b>	<b>100%</b>	<b>3,682</b>	<b>100%</b>	<b>3,246</b>	<b>100%</b>

(Continued next page)

<sup>20</sup> Statistics may differ from those reported in the CMF Annual Report for two reasons: (i) statistics reported in *Profile 2024* 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 2024* include international treaty 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.

Exhibit 3-18 Financing of Canadian television production (continued)

English-language production <sup>7</sup>	2019/20		2020/21		2021/22		2022/23		2023/24	
	\$ millions	%	\$ millions	%	\$ millions	%	\$ millions	%	\$ millions	%
Private broadcaster licence fees	253	13%	139	8%	262	11%	280	10%	196	9%
Public broadcaster licence fees	140	7%	155	9%	213	9%	207	8%	188	8%
Federal tax credit <sup>1</sup>	203	10%	173	10%	253	10%	278	10%	231	10%
Provincial tax credits	403	20%	333	20%	542	22%	579	22%	458	21%
Canadian distributors <sup>2</sup>	255	13%	301	18%	326	13%	429	16%	314	14%
Foreign pre-sales and advances <sup>3</sup>	407	20%	309	19%	462	19%	470	17%	426	19%
CMF <sup>4</sup>	188	9%	188	11%	195	8%	197	7%	199	9%
Other public <sup>5</sup>	85	4%	36	2%	71	3%	106	4%	85	4%
Other private <sup>6</sup>	85	4%	30	2%	144	6%	142	5%	133	6%
<b>Total</b>	<b>2,018</b>	<b>100%</b>	<b>1,664</b>	<b>100%</b>	<b>2,467</b>	<b>100%</b>	<b>2,689</b>	<b>100%</b>	<b>2,230</b>	<b>100%</b>

French-language production	2019/20		2020/21		2021/22		2022/23		2023/24	
	\$ millions	%	\$ millions	%	\$ millions	%	\$ millions	%	\$ millions	%
Private broadcaster licence fees	153	23%	152	21%	317	30%	300	29%	258	25%
Public broadcaster licence fees	172	26%	184	26%	191	18%	215	21%	263	26%
Federal tax credit <sup>1</sup>	74	11%	77	11%	115	11%	117	11%	120	12%
Provincial tax credits <sup>1</sup>	101	15%	109	15%	158	15%	159	15%	151	15%
Canadian distributors <sup>2</sup>	4	1%	4	1%	7	1%	9	1%	11	1%
Foreign pre-sales and advances <sup>3</sup>	2	<1%	<1	<1%	10	1%	1	<1%	6	1%
CMF <sup>4</sup>	88	13%	92	13%	93	9%	93	9%	104	10%
Other public <sup>5</sup>	13	2%	46	6%	86	8%	66	6%	41	4%
Other private <sup>6</sup>	45	7%	47	7%	72	7%	73	7%	62	6%
<b>Total</b>	<b>652</b>	<b>100%</b>	<b>712</b>	<b>100%</b>	<b>1,048</b>	<b>100%</b>	<b>1,031</b>	<b>100%</b>	<b>1,017</b>	<b>100%</b>

TV movies	2020/21		2021/22		2022/23		2023/24	
	\$ millions	%	\$ millions	%	\$ millions	%	\$ millions	%
Private broadcaster licence fees	8	2%	9	2%	19	3%	12	3%
Public broadcaster licence fees	<1	<1%	2	<1%	4	1%	3	1%
Federal tax credit <sup>1</sup>	43	10%	48	10%	65	10%	47	10%
Provincial tax credits <sup>1</sup>	97	24%	112	23%	147	23%	105	23%
Canadian distributors <sup>2</sup>	93	23%	104	22%	129	20%	105	23%
Foreign pre-sales and advances <sup>3</sup>	146	36%	155	33%	210	33%	148	32%
CMF <sup>4</sup>	3	1%	8	2%	15	2%	12	3%
Other public <sup>5</sup>	6	2%	15	3%	17	3%	14	3%
Other private <sup>6</sup>	11	3%	23	5%	26	4%	14	3%
<b>Total</b>	<b>407</b>	<b>100%</b>	<b>477</b>	<b>100%</b>	<b>632</b>	<b>100%</b>	<b>458</b>	<b>100%</b>

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 pre-sales and advances include broadcast licence fees, minimum guarantees, advances and other forms of financing from non-Canadian broadcasters, distributors or other organizations based outside of Canada, including streaming services, other VOD services, TV networks and public broadcasters.
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 3-19 Financing of Canadian television production, by genre, 2023/24**

All languages	Fiction	Children's and youth	Documentary	Lifestyle and human interest <sup>1</sup>	VAPA	All genres
<b>Amount (\$M)</b>						
Private broadcaster licence fees	144	13	82	168	47	454
Public broadcaster licence fees	204	54	37	101	53	451
Federal tax credit <sup>2</sup>	195	37	44	51	22	350
Provincial tax credits <sup>2</sup>	357	88	80	56	28	609
Canadian distributors <sup>3</sup>	204	64	48	8	1	326
Foreign pre-sales and advances <sup>4</sup>	351	42	28	7	2	432
CMF <sup>5</sup>	172	33	80	–	18	303
Other public <sup>6</sup>	78	13	14	13	10	126
Other private <sup>7</sup>	128	11	13	37	6	195
<b>Total</b>	<b>1,835</b>	<b>356</b>	<b>427</b>	<b>443</b>	<b>188</b>	<b>3,247</b>
<b>Share of total financing</b>						
Private broadcaster licence fees	8%	4%	19%	38%	25%	14%
Public broadcaster licence fees	11%	15%	9%	23%	28%	14%
Federal tax credit <sup>2</sup>	11%	10%	10%	12%	12%	11%
Provincial tax credits <sup>2</sup>	19%	25%	19%	13%	15%	19%
Canadian distributors <sup>3</sup>	11%	18%	11%	2%	1%	10%
Foreign pre-sales and advances <sup>4</sup>	19%	12%	7%	2%	1%	13%
CMF <sup>5</sup>	9%	9%	19%	–	10%	9%
Other public <sup>6</sup>	4%	4%	3%	3%	5%	4%
Other private <sup>7</sup>	7%	3%	3%	8%	3%	6%
<b>Total</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>

English-language production <sup>8</sup>	Fiction	Children's and youth	Documentary	Lifestyle and human interest <sup>1</sup>	VAPA	All genres
<b>Amount (\$M)</b>						
Private broadcaster licence fees	68	6	51	52	20	196
Public broadcaster licence fees	112	7	20	45	2	188
Federal tax credit <sup>2</sup>	151	25	31	20	5	231
Provincial tax credits <sup>2</sup>	295	66	61	32	6	458
Canadian distributors <sup>3</sup>	198	64	44	8	–	314
Foreign pre-sales and advances <sup>4</sup>	348	42	28	7	–	426
CMF <sup>5</sup>	116	20	56	–	7	199
Other public <sup>6</sup>	58	6	8	11	2	85
Other private <sup>7</sup>	99	7	11	15	1	133
<b>Total</b>	<b>1,444</b>	<b>244</b>	<b>310</b>	<b>190</b>	<b>42</b>	<b>2,230</b>
<b>Share of total financing</b>						
Private broadcaster licence fees	5%	3%	16%	27%	47%	9%
Public broadcaster licence fees	8%	3%	6%	24%	5%	8%
Federal tax credit <sup>2</sup>	10%	10%	10%	10%	11%	10%
Provincial tax credits <sup>2</sup>	20%	27%	20%	17%	14%	21%
Canadian distributors <sup>3</sup>	14%	26%	14%	4%	–	14%
Foreign pre-sales and advances <sup>4</sup>	24%	17%	9%	3%	–	19%
CMF <sup>5</sup>	8%	8%	18%	–	17%	9%
Other public <sup>6</sup>	4%	2%	3%	6%	5%	4%
Other private <sup>7</sup>	7%	3%	4%	8%	2%	6%
<b>Total</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>

(Continued next page)

Exhibit 3-19 Financing of Canadian television production, by genre, 2023/24 (continued)

<b>French-language production</b>	<b>Fiction</b>	<b>Children's and youth</b>	<b>Documentary</b>	<b>Lifestyle and human interest<sup>1</sup></b>	<b>VAPA</b>	<b>All genres</b>
<b>Amount (\$M)</b>						
Private broadcaster licence fees	76	7	32	116	28	258
Public broadcaster licence fees	93	47	17	56	51	263
Federal tax credit <sup>2</sup>	45	12	13	32	18	120
Provincial tax credits <sup>2</sup>	63	22	19	24	23	151
Canadian distributors <sup>3</sup>	6	–	3	–	1	11
Foreign pre-sales and advances <sup>4</sup>	3	–	–	1	2	6
CMF <sup>5</sup>	56	13	24	–	11	104
Other public <sup>6</sup>	20	7	6	2	8	41
Other private <sup>7</sup>	29	4	2	22	5	62
<b>Total</b>	<b>390</b>	<b>112</b>	<b>116</b>	<b>253</b>	<b>146</b>	<b>1,017</b>
<b>Share of total financing</b>						
Private broadcaster licence fees	19%	6%	27%	46%	19%	25%
Public broadcaster licence fees	24%	42%	14%	22%	35%	26%
Federal tax credit <sup>2</sup>	11%	11%	11%	13%	12%	12%
Provincial tax credits <sup>2</sup>	16%	20%	17%	10%	15%	15%
Canadian distributors <sup>3</sup>	2%	–	3%	–	1%	1%
Foreign pre-sales and advances <sup>4</sup>	–	–	–	–	–	<1%
CMF <sup>5</sup>	14%	12%	21%	–	8%	10%
Other public <sup>6</sup>	5%	6%	5%	1%	5%	4%
Other private <sup>7</sup>	7%	4%	2%	9%	3%	6%
<b>Total</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>

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 pre-sales and advances include broadcast licence fees, minimum guarantees, advances and other forms of financing from non-Canadian broadcasters, distributors or other organizations based outside of Canada, including streaming services, other VOD services, TV networks and public broadcasters.
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.<sup>21</sup> Recent examples of notable Canadian theatrical feature films, filmed during 2023/24, include *Une langue universelle*, *The Shrouds*, *Rumours*, *Nos Belles-Sœurs* and *Bergers*.

## Highlights from 2023/24



- Theatrical feature film production in English<sup>22</sup> increased by 3.4% to \$335 million.
- The total volume of theatrical feature film production in the fiction genre increased by 23.3% to \$390 million.
- The share of theatrical feature films with a budget of more than \$5 million increased from 17% to 29%



- Canadian theatrical feature film production volume remained unchanged at \$440 million.



- Theatrical feature film production in French decreased by 9.6% to \$104 million.
- Although total projects do vary from year to year, Canadian producers made 117 theatrical feature films in 2023/24, down from 153 in 2022/23.
- The number of English-language theatrical feature films decreased by 19.1% from 110 to 89.
- The number of theatrical feature films made in French decreased by 34.9%, from 43 to 28.
- The number of theatrical feature films in the fiction genre decreased from 111 to 95.
- The share of theatrical feature films with a budget between \$1 million and \$2.5 million decreased from 33% to 29%.
- The share of theatrical feature films with a budget between \$2.5 million and \$5 million decreased from 28% to 23%.

<sup>21</sup> 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.

<sup>22</sup> 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 2022/23.

The volume of Canadian theatrical feature film production remained steady at \$440 million in 2023/24 (Exhibit 4-1). Indeed, with an additional \$105 million in federal government funding between 2021/22 and 2023/24, Telefilm Canada has been able to increase its financial support of theatrical feature film production, which has translated into higher volumes in recent years.<sup>23</sup> The federal government has extended this additional funding with \$100 million over the 2024/25 and 2025/26 fiscal years.<sup>24</sup>

The number of films produced in 2023/24 dropped from 153 to 117 – the lowest level of output in the past decade, outside the pandemic-affected 2020/21 fiscal year (Exhibit 4-2). Production volume remained stable due to the significant increase in the average production budget – from \$2.9 million in 2022/23 to \$4.2 million in 2023/24 (Exhibit 4-4).

Whereas the strong rebound in theatrical feature film production in 2021/22 was shared across both language markets, the growth in the past two fiscal years – 2022/23 and 2023/24 – has been concentrated in English-language production. The total volume of English-language theatrical feature film production increased by 59.6% in 2022/23 and a further 3.4% in 2023/24 (Exhibits 4-1 and 4-2).

These increases in the English-language market offset the declines in output and volume experienced in the French-language market. The number of French-language theatrical feature films dropped from 50 in 2021/22 to 28 in 2023/24 – a 44.0% drop. The corresponding volume of production dropped by 26.6% over that same two-year period, decreasing from \$142 million to \$104 million (Exhibits 4-1 and 4-2).

### Box 5 Telefilm Canada

As a Partner of Choice, Telefilm Canada is a Crown corporation dedicated to the success of Canada's audiovisual industry, fostering access and excellence by delivering programs that support cultural resonance and audience engagement. With a lens of equity, inclusivity and sustainability, Telefilm bolsters dynamic companies and a range of creative talent at home and around the world. Telefilm also makes recommendations regarding the certification of audiovisual coproduction treaties to the Minister of Canadian Heritage, and administers the programs of the Canada Media Fund. Launched in 2012, the Talent Fund raises private donations which principally support emerging talent.

In 2023/24, Telefilm Canada provided \$138.8 million in ongoing financial support to Canada's audiovisual sector.<sup>25</sup> This included \$106.5 million in support of the audiovisual industry (e.g. production, development, theatrical documentary programs) and \$32.3 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).<sup>26</sup>

Theatrical feature film production in 2023/24 also displayed an increased focus on the fiction genre, as opposed to documentary or children's and youth films. Although the number of fiction films produced declined from 111 in 2022/23 to 95 in 2023/24, total volume rose by 23.4% to an all-time high of \$390 million (Exhibit 4-5). Fiction accounted for 81.2% of all films made (i.e. output) and 88.6% of the total volume of theatrical feature film production. Films made in the documentary, children's and youth, and other genres experienced a 47.6% drop in output and a 59.7% drop in volume in 2023/24.

Ontario and Quebec accounted for three-quarters of Canadian theatrical feature film production in 2023/24 (Exhibit 4-6). Both provinces experienced year-over-year declines in production volume, even though the overall level was unchanged. Meanwhile, theatrical feature film production in the rest of Canada rose by 74.2%, with increases in British Columbia (100.0% increase), the Prairie Provinces and Territories (61.5% increase), and Atlantic Canada (83.3% increase).

<sup>23</sup> Department of Canadian Heritage (2024), "Supporting the audiovisual sector through Telefilm Canada," *Canada.gc.ca*, January 31, 2024; and Telefilm Canada (2023), *Maximizing Impact, A Step Forward: 2022-2023 Annual Report*, p. 16.

<sup>24</sup> Department of Canadian Heritage (2024), "Supporting the audiovisual sector through Telefilm Canada," *Canada.gc.ca*, January 31, 2024.

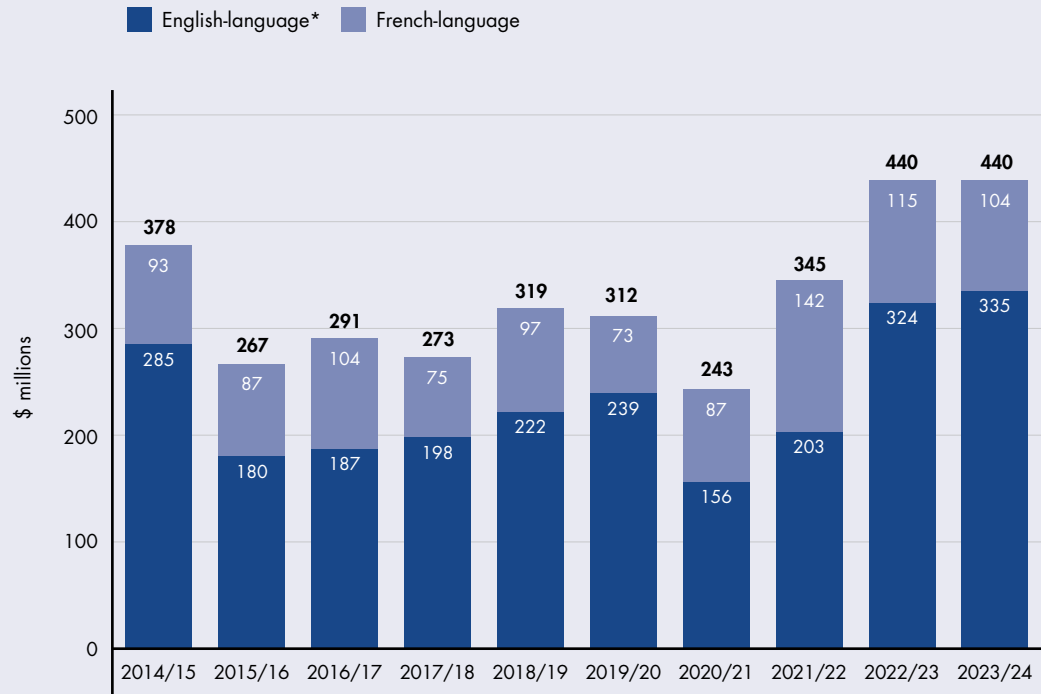
<sup>25</sup> Telefilm Canada.

<sup>26</sup> Ibid.

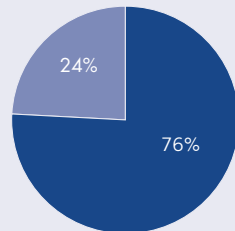
Historically, the key drivers of the year-to-year fluctuations in the volume of Canadian theatrical feature film production have been the annual levels of international treaty coproduction and foreign investment in production (FIIP), which is made up of film financing from foreign sources and Canadian distributors.<sup>27</sup> In 2023/24, however, the record volume of theatrical feature film production was maintained despite an overall drop in FIIP. Across both language markets, FIIP decreased from \$122 million to \$99 million (Exhibit 4-7a). This drop in FIIP was offset by higher levels of other public funding (\$11 million increase) and other private funding (\$12 million increase). Despite the overall drop, FIIP in the French-language increased from \$9 million in 2022/23 to \$12 million in 2023/24 (Exhibit 4-7c).

## LANGUAGE

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



**Share**  
2023/24



**Annual average growth rate**

Language	2023/24	2014/15–2023/24
English-language*	3.4%	1.8%
French-language	(9.6%)	1.3%
<b>Average: all languages</b>	<b>0.0%</b>	<b>1.7%</b>

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 2023/24, and with the French-language market for 2013/14 to 2015/16.

<sup>27</sup> 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.

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

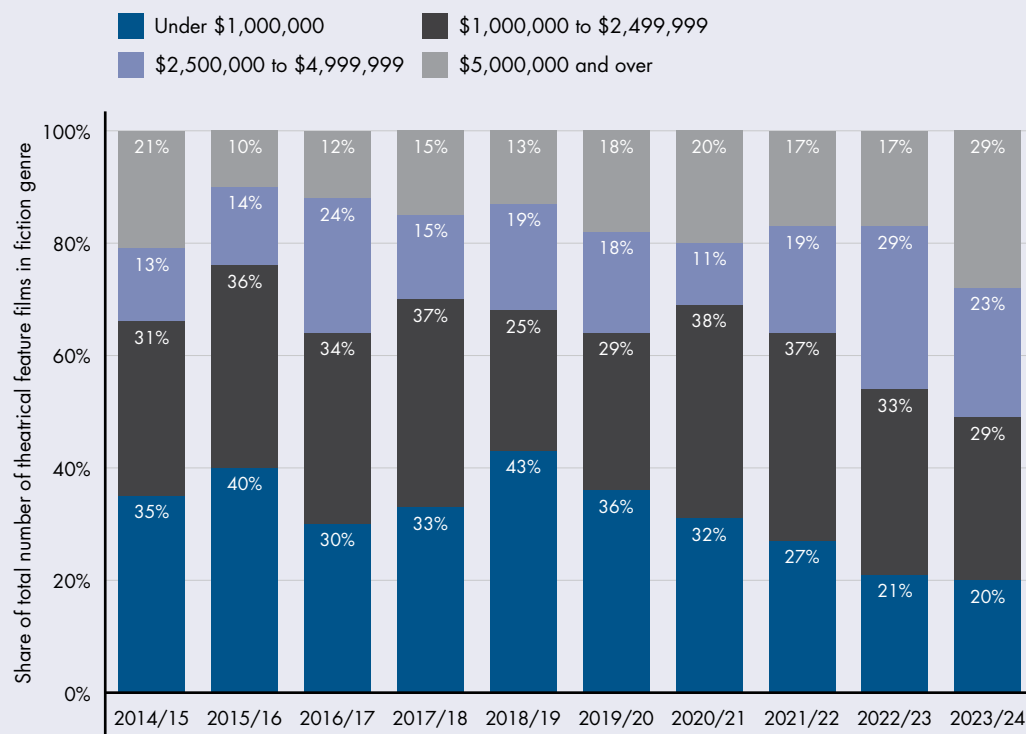
	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24
English-language/ Bilingual/Other*	89	84	81	82	108	95	47	98	110	89
French-language*	42	38	42	40	40	41	27	50	43	28
<b>Total</b>	<b>131</b>	<b>122</b>	<b>123</b>	<b>122</b>	<b>148</b>	<b>136</b>	<b>74</b>	<b>148</b>	<b>153</b>	<b>117</b>

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 2023/24, and with the French-language market for 2013/14 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)	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24
<b>English-language</b>										
Average	3.5	1.8	2.6	2.8	2.2	2.5	2.7	2.4	2.7	4.2
Median	1.4	1.0	1.6	1.3	1.2	1.2	1.2	1.5	1.9	2.4
<b>French-language</b>										
Average	2.4	2.2	3.4	2.2	3.2	2.6	3.5	3.5	3.4	4.0
Median	1.3	1.8	2.4	1.7	3.0	1.9	2.2	2.6	3.1	2.7
<b>All languages*</b>										
Average	3.1	2.0	2.8	2.6	2.5	2.5	3.0	2.7	2.9	4.2
Median	1.3	1.3	1.8	1.4	1.6	1.3	1.6	2.0	2.2	2.5

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**

	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24
<b>Volume (\$ millions)</b>										
Fiction	295	179	253	205	269	245	167	268	316	390
Other genres*	83	88	39	69	50	66	76	78	124	50
<b>Total</b>	<b>378</b>	<b>267</b>	<b>291</b>	<b>273</b>	<b>319</b>	<b>312</b>	<b>243</b>	<b>345</b>	<b>440</b>	<b>440</b>
<b>Number of films</b>										
Fiction	94	91	90	80	110	104	56	98	111	95
Other genres*	37	31	33	42	38	32	18	50	42	22
<b>Total</b>	<b>131</b>	<b>122</b>	<b>123</b>	<b>122</b>	<b>148</b>	<b>136</b>	<b>74</b>	<b>148</b>	<b>153</b>	<b>117</b>

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)	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24	2023/24 share of total	2023/24 change
Ontario	124	113	82	113	141	142	127	137	209	193	44%	(7.7%)
Quebec	203	107	153	135	138	142	93	172	170	139	32%	(18.2%)
British Columbia	44	34	37	10	22	7	20	21	17	34	8%	100.0%
Prairie Provinces and Territories**	7	8	18	9	14	17	2	11	39	63	14%	61.5%
Atlantic Canada***	0	5	2	6	3	4	2	4	6	11	2.5%	83.3%
<b>Total</b>	<b>378</b>	<b>267</b>	<b>291</b>	<b>273</b>	<b>319</b>	<b>312</b>	<b>243</b>	<b>345</b>	<b>440</b>	<b>440</b>	<b>100%</b>	<b>(0.0%)</b>

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 2023*. Due to the low number of projects (particularly theatrical feature film projects) in certain provinces and territories, production volume statistics are grouped by region to avoid disclosure of budgets for individual projects. 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.

\* Based on province or territory where lead producer is based.

\*\* 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	2019/20		2020/21		2021/22		2022/23		2023/24	
	\$ millions	%	\$ millions	%	\$ millions	%	\$ millions	%	\$ millions	%
Private broadcaster licence fees	2	1%	1	1%	2	1%	2	1%	2	<1%
Public broadcaster licence fees	2	1%	1	<1%	2	1%	2	<1%	3	1%
Federal tax credit <sup>1</sup>	19	6%	15	6%	20	6%	27	6%	27	6%
Provincial tax credits <sup>1</sup>	57	18%	45	19%	69	20%	86	20%	88	20%
Canadian distributors <sup>2</sup>	27	9%	55	22%	31	9%	87	20%	35	8%
Foreign pre-sales and advances <sup>3</sup>	52	17%	25	10%	36	10%	34	8%	64	15%
Telefilm Canada	70	22%	43	18%	84	24%	90	20%	83	19%
Other public <sup>4</sup>	35	11%	33	14%	60	17%	52	12%	68	15%
Other private <sup>5</sup>	48	15%	26	11%	42	12%	58	13%	70	16%
<b>Total</b>	<b>312</b>	<b>100%</b>	<b>243</b>	<b>100%</b>	<b>345</b>	<b>100%</b>	<b>440</b>	<b>100%</b>	<b>440</b>	<b>100%</b>

English-language, bilingual format and non-official languages <sup>6</sup>	2019/20		2020/21		2021/22		2022/23		2023/24	
	\$ millions	%	\$ millions	%	\$ millions	%	\$ millions	%	\$ millions	%
Private broadcaster licence fees	2	1%	<1	<1%	1	1%	1	<1%	2	1%
Public broadcaster licence fees	2	1%	<1	<1%	1	1%	2	<1%	2	1%
Federal tax credits <sup>1</sup>	17	7%	12	8%	16	8%	24	7%	24	7%
Provincial tax credit <sup>1</sup>	43	18%	27	17%	41	20%	64	20%	66	20%
Canadian distributors <sup>2</sup>	21	9%	49	31%	20	10%	80	25%	23	7%
Foreign pre-sales and advances <sup>3</sup>	51	21%	23	14%	33	16%	33	10%	64	19%
Telefilm Canada	41	17%	26	17%	57	28%	60	18%	55	16%
Other public <sup>4</sup>	20	8%	3	2%	4	2%	11	3%	34	10%
Other private <sup>5</sup>	42	18%	17	11%	29	14%	50	15%	64	19%
<b>Total</b>	<b>239</b>	<b>100%</b>	<b>156</b>	<b>100%</b>	<b>203</b>	<b>100%</b>	<b>324</b>	<b>100%</b>	<b>335</b>	<b>100%</b>

French-language	2019/20		2020/21		2021/22		2022/23		2023/24	
	\$ 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 <sup>1</sup>	2	3%	3	3%	4	3%	3	3%	3	3%
Provincial tax credit <sup>1</sup>	15	20%	18	21%	28	20%	23	20%	22	21%
Canadian distributors <sup>2</sup>	6	8%	6	7%	10	7%	8	7%	12	11%
Foreign pre-sales and advances <sup>3</sup>	0	0%	2	3%	3	4%	1	1%	0	0%
Telefilm Canada	29	40%	17	20%	27	19%	30	26%	28	27%
Other public <sup>4</sup>	14	20%	33	38%	56	39%	41	36%	34	33%
Other private <sup>5</sup>	7	9%	9	10%	13	9%	8	7%	6	5%
<b>Total</b>	<b>73</b>	<b>100%</b>	<b>87</b>	<b>100%</b>	<b>142</b>	<b>100%</b>	<b>115</b>	<b>100%</b>	<b>104</b>	<b>100%</b>

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 pre-sales and advances include broadcast licence fees, minimum guarantees, advances and other forms of financing from non-Canadian broadcasters, distributors or other organizations based outside of Canada, including streaming services, other VOD services, TV networks and public broadcasters.
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.<sup>28</sup> 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 2023/24



- English-language feature film treaty coproduction increased by 24.1% to \$170 million in total budgets, including \$12 million in other languages.
- Canadian share of budgets for French-language coproductions are third-highest in the past 10 years at \$28 million.
- The total budgets of Canada's feature film treaty coproductions increased by 5.7% to \$224 million.



- UK and France continued to be Canada's leading coproduction partners between 2014/15 and 2023/24. The UK was the leading television treaty coproduction partner. France was the leading partner for feature films.



- Canada participated in 57 treaty coproductions – down from 59 in 2022/23.
- The total budgets of Canada's treaty coproductions decreased by 8.4% to \$340 million.
- English-language treaty coproduction decreased by 2.8% to \$277 million in total budgets, even when including \$12 million of other language production.
- French-language treaty coproduction decreased by 26.7% to \$63 million in total budgets.
- The median project budget for feature film treaty coproductions decreased from \$4.4 million to \$3.4 million.
- The total budgets of television treaty coproductions decreased by 27.7% to \$115 million.
- The total number of television treaty coproductions decreased from 24 to 20.
- The total number of documentary television coproductions decreased from 14 to 10, while volume fell by nearly half to \$25 million.

<sup>28</sup> A list of these agreements can be found on Telefilm Canada's website at <https://telefilm.ca/en/coproduction/international-treaties>.

After two consecutive fiscal years of growth, Canada's overall volume of treaty coproduction (i.e. total global budgets) declined in 2023/24. After increasing by 57.9% between 2020/21 and 2022/23, it dropped by 8.4% to \$340 million in 2023/24 (Exhibit 5-1). The Canadian share of those total budgets declined at a slower rate, 6.0%, to \$158 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. Additionally, 2020/21 and 2021/22 were negatively impacted by the COVID-19 pandemic and 2022/23 was the first full fiscal year post-pandemic, which caused higher activity due to backed up coproductions that could not be completed in the preceding two years. For those reasons, it is not uncommon for volume increases to be followed by decreases, or vice-versa, as was experienced between 2020/21 and 2023/24. That being said, since reaching \$473 million in 2016/17, the annual volume of Canada's treaty coproduction has been on a downward trend (Exhibit 5-1). Since 2016/17, the annual volume has experienced a year-over-year decline in five of seven years. Overall, the total volume of Canada's treaty coproduction in 2023/24 (\$340 million) was 28.1% lower than the 10-year peak in 2016/17 (\$473 million).

Lower levels of both television and feature film treaty coproduction contributed to the decline in 2023/24. In television treaty coproduction, all genres (drama, documentary, and children's and youth) experienced decreases in volume, with the steepest decrease (47.9%) in the documentary genre (Exhibit 5-7). The number of television treaty coproduction documentaries also declined from 14 to 10. The vast majority of Canada's television treaty coproduction in 2023/24 was concentrated in English-language production, accounting for 92.2% of Canada's overall volume of television treaty coproduction in 2023/24 (Exhibit 5-6).

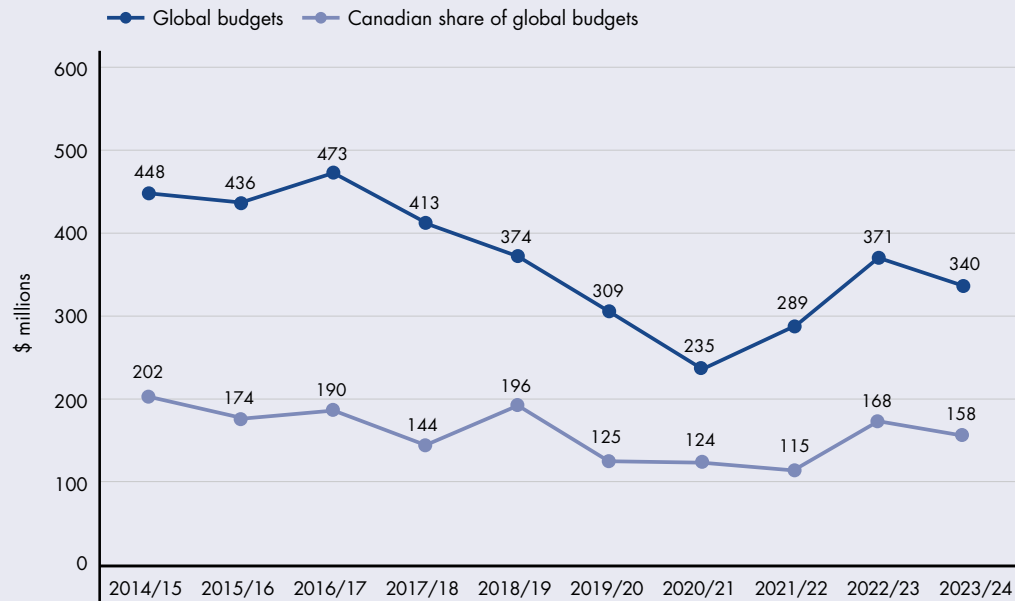
The only notable area of growth in treaty coproduction in 2023/24 was in the English feature film sub-segment. The number of English-language feature film treaty coproductions increased from 20 to 23, while volume rose by 15.3% to \$158 million (Exhibit 5-9). In the French-language sub-segment, however, the number of feature films fell from 15 to 7 in 2023/24 and volume fell by 28.0% to \$54 million. The overall volume of feature film treaty coproduction increased by 5.7% to \$224 million, with the overall number of films also increased slightly from 35 to 37.

Looking across both television and feature film production, English-language treaty coproduction volume was down by 7.4% to \$264 million, while French-language coproduction was down by 26.3% to \$63 million (Exhibit 5-2).



## ALL RELEASE WINDOWS

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



Source: Telefilm Canada.

Note: Statistics as of April 2024.

\* 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**

	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24**
<b>English-language</b>										
Canadian share of budgets (\$M)	182	141	179	132	185	114	116	93	136	130
Foreign share of budgets (\$M)	225	214	240	226	142	144	88	115	149	147
<b>Total budgets (\$M)</b>	<b>407</b>	<b>355</b>	<b>419</b>	<b>358</b>	<b>327</b>	<b>258</b>	<b>204</b>	<b>208</b>	<b>285</b>	<b>277</b>
Number of projects	50	31	43	35	44	35	31	41	42	46
<b>French-language</b>										
Canadian share of budgets (\$M)	21	33	11	12	11	11	9	22	32	28
Foreign share of budgets (\$M)	20	47	43	42	37	39	20	59	54	35
<b>Total budgets (\$M)</b>	<b>41</b>	<b>80</b>	<b>54</b>	<b>55</b>	<b>47</b>	<b>51</b>	<b>28</b>	<b>81</b>	<b>86</b>	<b>63</b>
Number of projects	14	17	10	21	12	9	7	12	17	11
<b>All languages</b>										
Canadian share of budgets (\$M)	202	174	190	144	196	125	125	115	168	158
Foreign share of budgets (\$M)	245	262	283	269	278	183	108	174	203	182
<b>Total budgets (\$M)</b>	<b>448</b>	<b>436</b>	<b>473</b>	<b>413</b>	<b>374</b>	<b>309</b>	<b>233</b>	<b>289</b>	<b>371</b>	<b>340</b>
Number of projects	64	48	53	56	56	44	38	53	59	57

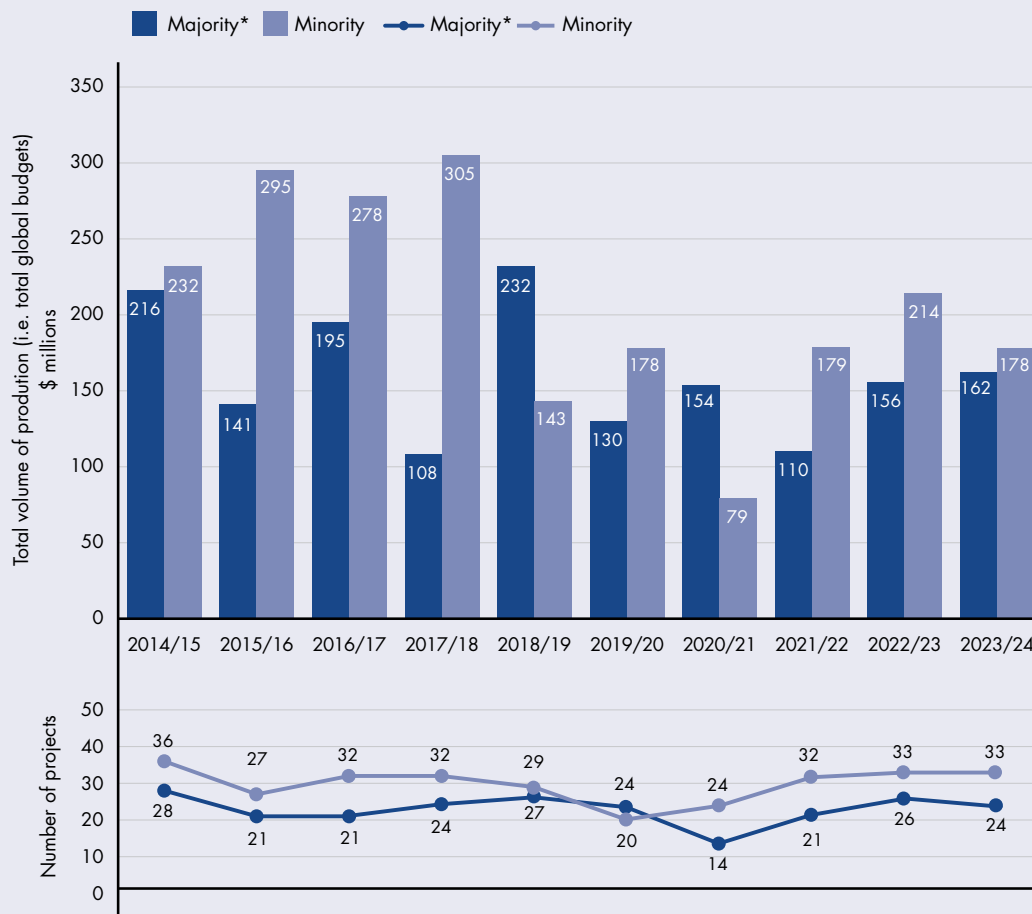
Source: Telefilm Canada.

Note: Some totals may not sum due to rounding. Statistics as of April 2024.

\* 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).

\*\* English-language totals for 2023/2024 include projects in the 'other' language category.

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



Source: Telefilm Canada.

Note: Statistics as of April 2024.

\* 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)**

(\$ millions)	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24
<b>By language</b>										
English-language	2.7	5.1	4.2	2.2	3.8	6.0	2.6	3.4	4.2	4.1
French-language	1.7	3.5	1.7	1.0	3.0	2.0	3.2	3.4	5.1	3.6
<b>By medium</b>										
Television	2.0	1.6	1.7	1.3	2.6	3.4	2.6	3.6	4.2	4.1
Feature film	5.7	5.5	6.2	4.1	3.9	3.6	6.8	3.3	4.4	3.4
<b>All projects</b>	<b>2.6</b>	<b>4.1</b>	<b>3.1</b>	<b>1.8</b>	<b>3.8</b>	<b>3.6</b>	<b>2.8</b>	<b>3.4</b>	<b>4.4</b>	<b>3.6</b>

Source: Telefilm Canada.

Note: Statistics as of April 2024.

**Exhibit 5-5 Audiovisual treaty coproduction partner countries, 2014/15 to 2023/24**

	Number of projects	Total global budgets (\$ millions)	Canadian share of total global budgets	
			\$ millions	%
France	129	920	351	38%
United Kingdom	111	678	346	51%
Ireland	38	742	263	35%
Germany	33	219	115	53%
Israel	21	42	27	64%
Belgium	19	144	81	56%
Australia	18	123	66	54%
New Zealand	15	73	26	36%
South Africa	12	51	23	44%
Italy	11	39	12	32%
Switzerland	10	24	14	56%
Hungary	9	167	78	46%
Other Bipartite	68	232	117	51%
Multipartite*	34	230	80	35%
<b>Total</b>	<b>528</b>	<b>3,684</b>	<b>1,598</b>	<b>43%</b>

Source: Telefilm Canada.

Note: Statistics as of April 2024. The numbers of the countries listed above do not include participation in multipartite coproductions.

\*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**

	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24
<b>English-language</b>										
Canadian share of budgets (\$M)	104	107	97	87	76	46	63	--	--	31
Foreign share of budgets (\$M)	170	175	174	192	63	99	55	--	--	75
<b>Total budgets (\$M)</b>	<b>274</b>	<b>282</b>	<b>271</b>	<b>279</b>	<b>139</b>	<b>145</b>	<b>118</b>	<b>--</b>	<b>--</b>	<b>106</b>
Number of projects	35	23	26	20	18	15	23	--	--	16
<b>French-language</b>										
Canadian share of budgets (\$M)	5	2	7	7	4	3	1	--	--	4
Foreign share of budgets (\$M)	7	3	18	10	13	3	4	--	--	5
<b>Total budgets (\$M)</b>	<b>12</b>	<b>5</b>	<b>25</b>	<b>17</b>	<b>17</b>	<b>6</b>	<b>5</b>	<b>--</b>	<b>--</b>	<b>9</b>
Number of projects	7	4	8	16	5	4	4	--	--	4
<b>All languages</b>										
Canadian share of budgets (\$M)	109	108	104	94	80	49	65	42	64	35
Foreign share of budgets (\$M)	177	178	193	202	76	102	58	69	95	80
<b>Total budgets (\$M)</b>	<b>286</b>	<b>287</b>	<b>297</b>	<b>296</b>	<b>156</b>	<b>151</b>	<b>123</b>	<b>111</b>	<b>159</b>	<b>115</b>
Number of projects	42	27	34	36	23	19	27	20	24	20

Source: Telefilm Canada.

Note: Some totals may not sum due to rounding. Statistics as of April 2024.

\* 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).

\*\* Statistics cannot be disclosed due to the low number of projects.

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

	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24
<b>Total global budgets (\$ millions)</b>										
Drama (i.e. fiction)	184	185	222	223	52	98	36	24	47	34
Documentary	63	23	35	33	45	17	32	14	48	25
Children's and youth	39	78	39	40	58	35	55	73	64	56
<b>Total</b>	<b>286</b>	<b>287</b>	<b>297</b>	<b>296</b>	<b>156</b>	<b>151</b>	<b>123</b>	<b>111</b>	<b>159</b>	<b>115</b>
<b>Number of projects</b>										
Drama (i.e. fiction)	8	5	7	4	–**	6	7	5	6	4
Documentary	27	16	21	27	16	8	14	7	14	10
Children's and youth	7	6	6	5	–**	5	6	8	4	6
<b>Total</b>	<b>42</b>	<b>27</b>	<b>34</b>	<b>36</b>	<b>23</b>	<b>19</b>	<b>27</b>	<b>20</b>	<b>24</b>	<b>20</b>
<b>Average project budgets (\$ millions)</b>										
Drama (i.e. fiction)	23.0	37.1	31.7	55.8	–**	16.3	5.1	4.8	7.9	8.5
Documentary	2.3	1.5	1.7	1.2	2.8	2.2	2.3	2.0	3.4	2.5
Children's and youth	5.5	13.0	6.5	8.0	–**	7.0	9.1	9.1	15.9	9.3
<b>All genres</b>	<b>6.8</b>	<b>10.6</b>	<b>8.7</b>	<b>8.2</b>	<b>6.8</b>	<b>7.9</b>	<b>4.6</b>	<b>5.6</b>	<b>6.6</b>	<b>5.8</b>

Source: Telefilm Canada.

Note: Some totals may not sum due to rounding. Statistics as of April 2024.

\* 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).

\*\* Statistics cannot be disclosed due to the low number of projects.

### Exhibit 5-8 Audiovisual treaty coproduction partner countries, television segment, 2014/15 - 2023/24

	Number of projects	Total global budgets (\$ millions)	Canadian share of total global budgets	
			\$ millions	%
United Kingdom	83	495	236	48%
France	66	332	116	35%
Ireland	16	551	137	25%
Germany	15	32	12	37%
Australia	15	111	62	56%
New Zealand	13	47	12	26%
Israel	8	17	12	71%
South Africa	5	26	7	28%
Hungary	5	124	57	46%
Belgium	4	42	24	58%
Other Bipartite	25	79	36	46%
Multipartite	17	126	38	30%
<b>Total</b>	<b>272</b>	<b>1,981</b>	<b>749</b>	<b>38%</b>

Source: Telefilm Canada.

Note: Some totals may not sum due to rounding. Statistics as of April 2024.

\* 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**

	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24*
<b>English-language</b>										
Canadian share of budgets (\$M)	77	35	–**	45	109	68	53	53	75	98
Foreign share of budgets (\$M)	55	39	–**	35	79	45	33	48	62	72
<b>Total budgets (\$M)</b>	<b>133</b>	<b>73</b>	<b>–**</b>	<b>79</b>	<b>188</b>	<b>113</b>	<b>86</b>	<b>101</b>	<b>137</b>	<b>170</b>
Number of projects	15	8	–**	15	26	20	8	22	20	30
<b>French-language</b>										
Canadian share of budgets (\$M)	16	31	–**	6	7	8	8	20	29	24
Foreign share of budgets (\$M)	13	45	–**	31	23	37	15	56	46	30
<b>Total budgets (\$M)</b>	<b>29</b>	<b>76</b>	<b>–**</b>	<b>37</b>	<b>30</b>	<b>45</b>	<b>23</b>	<b>76</b>	<b>75</b>	<b>54</b>
Number of projects	7	13	–**	5	7	5	3	11	15	7
<b>All languages</b>										
Canadian share of budgets (\$M)	93	66	87	51	116	77	61	73	104	123
Foreign share of budgets (\$M)	69	83	90	66	102	81	48	105	108	101
<b>Total budgets (\$M)</b>	<b>161</b>	<b>149</b>	<b>177</b>	<b>117</b>	<b>218</b>	<b>158</b>	<b>109</b>	<b>178</b>	<b>212</b>	<b>224</b>
Number of projects	22	21	19	20	33	25	11	33	35	37

Source: Telefilm Canada.

Note: Some totals may not sum due to rounding. Statistics as of April 2024.

\* 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).

\*\* Statistics cannot be disclosed due to the low number of projects.

\*\*\* English-language totals for 2023/2024 include projects in the 'other' language category.

**Exhibit 5-10 Audiovisual treaty coproduction partner countries, theatrical feature film segment, 2014/15 - 2023/24**

	Number of projects	Total global budgets (\$ millions)	Canadian share of total global budgets	
			\$ millions	%
France	63	589	236	40%
United Kingdom	28	183	110	60%
Ireland	22	191	126	66%
Germany	18	187	103	55%
Belgium	15	102	57	55%
Israel	13	25	15	59%
Switzerland	9	24	13	56%
Italy	8	9	5	48%
South Africa	7	25	15	60%
Hungary	4	43	20	47%
Denmark	4	33	16	48%
Cuba	4	13	9	72%
Other Bipartite	44	175	82	47%
Multipartite*	17	104	42	41%
<b>Total</b>	<b>256</b>	<b>1,704</b>	<b>849</b>	<b>50%</b>

Source: Telefilm Canada.

Note: Statistics as of April 2024. Some totals may not sum due to rounding. The numbers of the countries listed above do not include participation in multipartite coproductions.

\* 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 providers. This includes the visual effects (VFX) work done by Canadian VFX studios for foreign films and television programs. For almost all of FLS projects, the copyright is held by non-Canadian producers.

In recent years, Canada's FLS production segment has contributed to numerous films released globally. Some recent Hollywood films that have either been shot in Canada or had their VFX work done in Canada include *Tron: Ares*, *Heretic* and *Trap*.

Canada has also become a destination for the filming of many television series commissioned by US studios, networks or subscription video on demand (SVOD) services. Some recent series include the latest seasons of *The Last of Us*, *Fargo* and *Reacher*.

**2023 Hollywood strikes:** During the 2023/24 fiscal year, Hollywood experienced two major multi-month strikes. Between May 2 and September 27, 2023, the Writers Guild of America (WGA) was on strike, and between July 14 and November 8, 2023, the Screen Actors Guild - American Federation of Television and Radio Artists (SAG-AFTRA) was on strike. These strikes led to a significant decrease in FLS production in the US, Canada and globally during the 2023/24 fiscal year.

## Highlights from 2023/24



- The total volume of FLS production in Canada decreased by 26.1% from \$6.65 billion to \$4.73 billion.
- The total number of FLS productions decreased from 640 to 444.
- The total volume of FLS television series production decreased by 30.8% to \$2.99 billion.
- The number of FLS television series shot in Canada decreased from 345 to 220.
- The total volume of FLS feature film production decreased by 4.9% to \$1.52 billion.
- The number of FLS feature films shot in Canada decreased from 190 to 162.
- The total volume of other<sup>29</sup> FLS television production decreased by 54.9% to \$211 million.
- The number of other FLS television projects decreased from 105 to 62.

<sup>29</sup> 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 the COVID-19 pandemic, a general global slowdown in the growth of commissioning combined with the Hollywood writers and actors strikes led to a decline in FLS production in 2023/24. The total volume of FLS production fell by 26.1% to \$4.73 billion – its lowest level since 2016/17 (Exhibit 6-1).

In recent years, Canada's FLS production segment has been supported by the continued global demand for original content from US studios, foreign broadcasters and subscription video-on-demand (SVOD) services, such as Netflix, Amazon Prime Video, Disney+ and Apple TV+. However, in 2023, production by these SVOD services was paused due to the Hollywood strikes. While that caused a significant decrease in terms of production volume in 2023/24, their total impact may have been understated this year, and will instead carry forward to an extent as production information is provided and counted in subsequent years. While these foreign studios and SVOD services are likely to continue to base a number of their series and feature film productions in Canada, overall production activity is not as robust and has not yet recovered to pre-strikes levels.

The production of other television content (i.e. television movies, specials and single-episode programming) – much of which would be destined for SVOD services – climbed to \$828 million in 2021/22 before reverting to \$468 million in 2022/23 (Exhibit 6-1). In 2023/24 the production of this type of FLS content fell by a further 54.9% to \$211 million, as the number of projects fell by 41.0% to 62 (Exhibit 6-2).

The production of FLS television series also fell in 2023/24. A total of 220 FLS television series were shot in Canada in 2023/24, down from 345 in 2022/23 (Exhibit 6-2). The filming of these 220 television series generated \$2.99 billion in production spending in 2023/24, down by 30.8% (Exhibit 6-1).

The Hollywood strikes appeared to have had less of an effect on FLS feature film production in Canada in 2023/24. This may in part be due to production-accounting methods and Canada's attraction as a place for VFX production

- The total value of entire film production is recorded against the first day of principal photography. So even if a FLS feature film started during the 2023/24 fiscal year, but was then paused, its production volume would still be recorded for the fiscal year.
- Conversely, a FLS feature that may have been delayed due to the Hollywood strike but managed to start principal photography before March 31, 2024, would be counted towards the 2023/24 fiscal year even if most of the filming took place during the 2024/25 fiscal year.
- In addition, VFX work for many films could proceed without actors or writers.

The number of FLS feature films shot in Canada in 2023/24 did drop by 14.7%, from 190 to 162. However, the total volume of production generated by these films was only down by 4.9%, from \$1.60 billion to \$1.52 billion. (Exhibits 6-1 and 6-2).

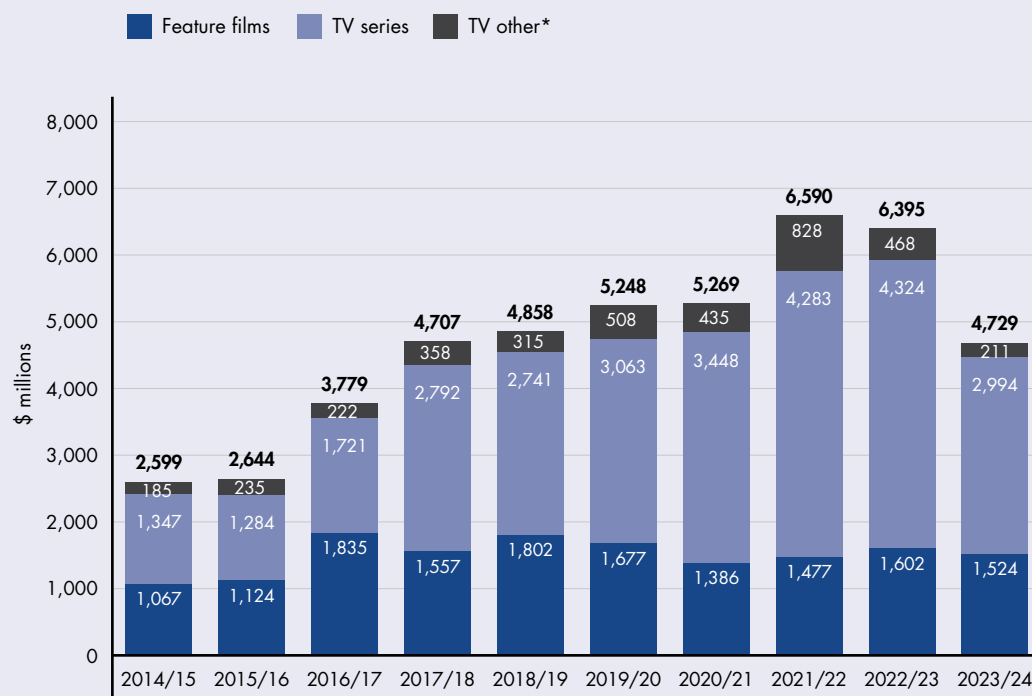
Even though there was a 26.1% drop in the overall volume of FLS production in Canada in 2023/24, the experience of different provinces and territories varied significantly. Some provinces and territories even recorded year-over-year increases (Exhibit 6-4). Indeed, provinces and territories that have historically hosted a significant amount of live action FLS television production bore the greatest share of the overall drop in FLS production between 2022/23 and 2023/24.

- **British Columbia** remained Canada's leading province for FLS production, although its volume of FLS production fell by 36.5% or \$965 million to \$1.68 billion in 2023/24.
- **Quebec** FLS production sector displayed relatively more resilience in the face of the 2023/24 strikes. This was likely on account of the province's popularity as a destination for FLS VFX production. Quebec's volume of FLS production decreased by only 7.9%, or \$122 million, to \$1.42 billion. As a result of this resilience, Quebec moved past Ontario as Canada's second-largest centre for FLS production.
- **Ontario** experienced a similar drop to British Columbia. Its volume of FLS production fell by 35.2%, or \$698 million, to \$1.28 billion. As a result, Ontario slipped from Canada's second largest FLS production centre to its third largest FLS production centre in 2023/24.
- **Alberta** actually experienced a near-tripling of its FLS production in 2023/24, as its total volume grew from \$49 million to \$192 million in 2023/24. The filming of several American television series in Alberta, including *The Last of Us*, *The Abandons* and *Billy the Kid Season 2* helped lift Alberta's volume of FLS production in 2023/24.

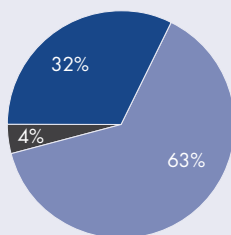
- **Manitoba**, like Alberta, managed to expand its volume of FLS production in 2023/24. The province’s volume of FLS production increased by 10% to \$66 million. According to Manitoba Film & Music, the Hollywood strikes did hinder the recovery of FLS production in the province from a five-year low in 2022/23 to historical levels. The FLS productions that did manage to film in Manitoba in 2023/24 were able to allocate a larger portion of their budgets within the province, thereby, cushioning the impact of the strikes to some extent.
- **Nova Scotia** was not immune to the Hollywood strikes in 2023. Its volume of FLS production declined by 32.2%, from \$118 million to \$80 million in 2023/24.
- **Newfoundland and Labrador** was also able to expand its FLS production from zero in 2022/23 to \$5 million in 2023/24.
- Across **The Territories**, a total of \$4 million was spent on FLS production in 2023/24. The same overall volume as in 2022/23.

## TOTAL PRODUCTION AND TYPES

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



Share  
2023/24



Annual average growth rate

Type	2022/23	2013/14–2022/23
Feature films	(4.9%)	4.0%
TV series	(30.8%)	9.3%
TV other*	(54.9%)	1.4%
<b>Average: all types</b>	<b>(26.1%)</b>	<b>6.9%</b>

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**

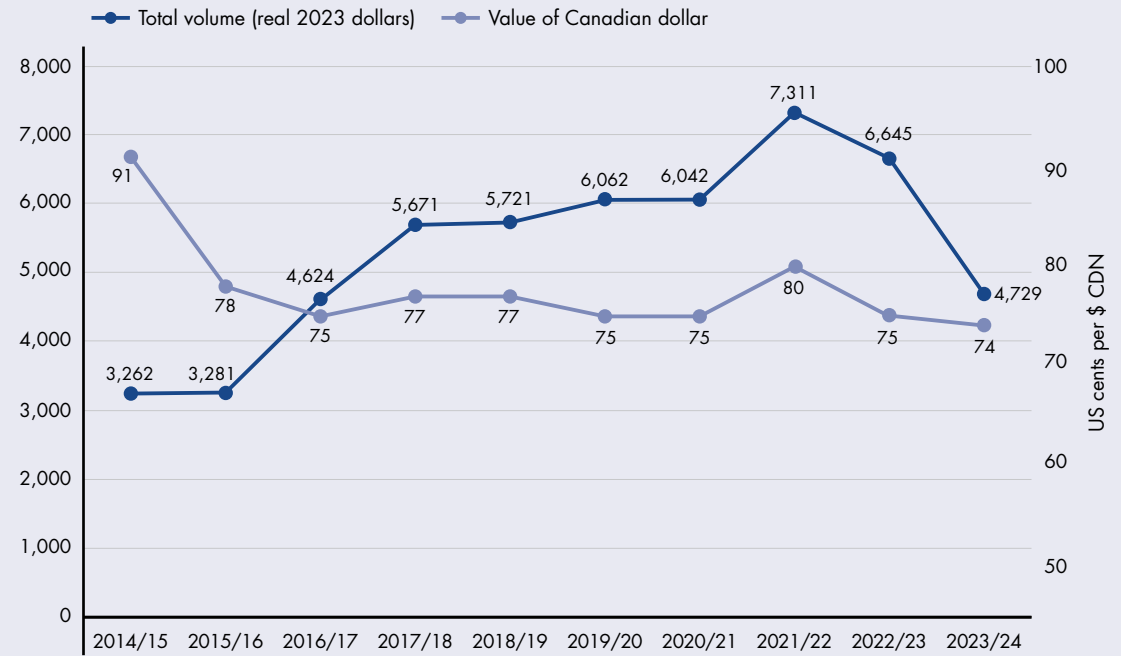
	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24
Feature films	111	128	186	167	164	166	141	154	190	162
TV series	115	156	137	209	208	224	277	326	345	220
TV other*	53	71	77	104	93	131	93	131	105	62
<b>Total</b>	<b>279</b>	<b>355</b>	<b>400</b>	<b>480</b>	<b>465</b>	<b>521</b>	<b>511</b>	<b>611</b>	<b>640</b>	<b>444</b>

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 (FLS) 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)	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24	2023/24 share of total	2023/24 change
British Columbia*	1,672	1,574	2,311	3,040	2,816	2,347	2,719	2,848	2,644	1,679	36%	(36.5%)
Quebec	275	282	404	666	771	1,142	922	1,421	1,540	1,418	30%	(7.9%)
Ontario	545	698	882	869	985	1,541	1,426	1,672	1,981	1,283	27%	(35.2%)
Alberta	92	34	54	31	86	0	68	441	49	192	4%	291.8%
Nova Scotia	n/a	12	39	12	26	40	46	91	118	80	2%	(32.2%)
Manitoba	11	42	70	89	167	171	84	105	60	66	1%	10.0%
Newfoundland and Labrador	0	0	0	0	0	0	0	8	0	5	<1%	-
Territories**	3	3	18	1	7	8	4	3	4	4	<1%	0.0%
Saskatchewan	0	0	0	0	1	0	0	0	0	0	0%	-
New Brunswick	1	0	0	0	0	0	n/a	0	0	0	0%	-
Prince Edward Island	<1	0	0	0	0	0	n/a	0	0	0	0%	-
<b>Total</b>	<b>2,599</b>	<b>2,644</b>	<b>3,779</b>	<b>4,707</b>	<b>4,858</b>	<b>5,248</b>	<b>5,269</b>	<b>6,590</b>	<b>6,395</b>	<b>4,729</b>	<b>100.0%</b>	<b>(26.1%)</b>

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 2024*. 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

	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24
<b>Number of projects</b>										
United States	197	261	304	364.5	365	409	404	526.5	560	386
Other foreign	57	67	72.5	77.5	69	72	72.5	55.5	62	45
Canada*	25	27	23.5	38	31	40	34.5	29.0	18	13
<b>Total</b>	<b>279</b>	<b>355</b>	<b>400</b>	<b>480</b>	<b>465</b>	<b>521</b>	<b>511</b>	<b>611</b>	<b>640</b>	<b>444</b>
<b>Share of total</b>										
United States	71%	74%	76%	76%	78%	79%	79%	86%	88%	86%
Other foreign	20%	19%	18%	16%	15%	14%	14%	9%	10%	11%
Canada*	9%	8%	6%	8%	7%	8%	7%	5%	3%	3%
<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 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 (Canadian)

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 2023 broadcasting year, running from September 1, 2022 to August 31, 2023.

## Highlights from 2023



- Spending on in-house production by discretionary and on-demand services increased by 0.4% to \$558 million.
- Spending on the in-house production of news programming increased by 2.8% to \$729 million.



- The total volume of in-house production decreased by 3.3% to \$1.16 billion.
- Conventional broadcasters’ spending on in-house production decreased by 6.4% to \$601 million.
- Spending on the in-house production of sports programming decreased by 23.3% to \$257 million.

After rebounding to above \$1.1 billion in the 2022 broadcasting year, broadcasters' in-house production spending declined by 3.3% to \$1.16 billion during the 2023 broadcasting year (Exhibit 7-1). This decline was entirely concentrated in the conventional television sub-segment, as spending on in-house production in the discretionary and on-demand services sub-segment actually increased albeit by under 1.0%.

Within the discretionary and on-demand services sub-segment, spending was up by 0.4% to \$558 million (Exhibit 7-1). Within the conventional television sub-segment (including private conventional broadcasters, CBC/Radio-Canada and provincial educational broadcasters), spending was down by \$41 million, or 6.4% (Exhibit 7-1). This decrease reflects the fact that 2022 included higher levels of spending on sports programming in 2022 on account of CBC/Radio-Canada's carriage of the 2022 Beijing Winter Olympics.<sup>30</sup> Indeed, across conventional, as well as discretionary and on-demand sub-segments, overall spending on the in-house production of sports programming decreased by 23.3% to \$257 million in 2023 (Exhibit 7-2). Meanwhile, spending on news programming increased by 2.8% to \$729 million, maintaining a relatively static level over the 5-year period. Spending on other genres also rose by 12.3% to \$173 million.

Broadcaster in-house production remained very concentrated in Ontario and Quebec in 2023. These two provinces, which are home to the vast majority of Canada's television broadcasting industry, accounted for 78% of Canada's total volume of broadcaster in-house production (Exhibit 7-3). This was higher than the share of Canadian television production made by independent and broadcaster-affiliated producers external to broadcasters in these two provinces, at 68% (Exhibit 3-13).

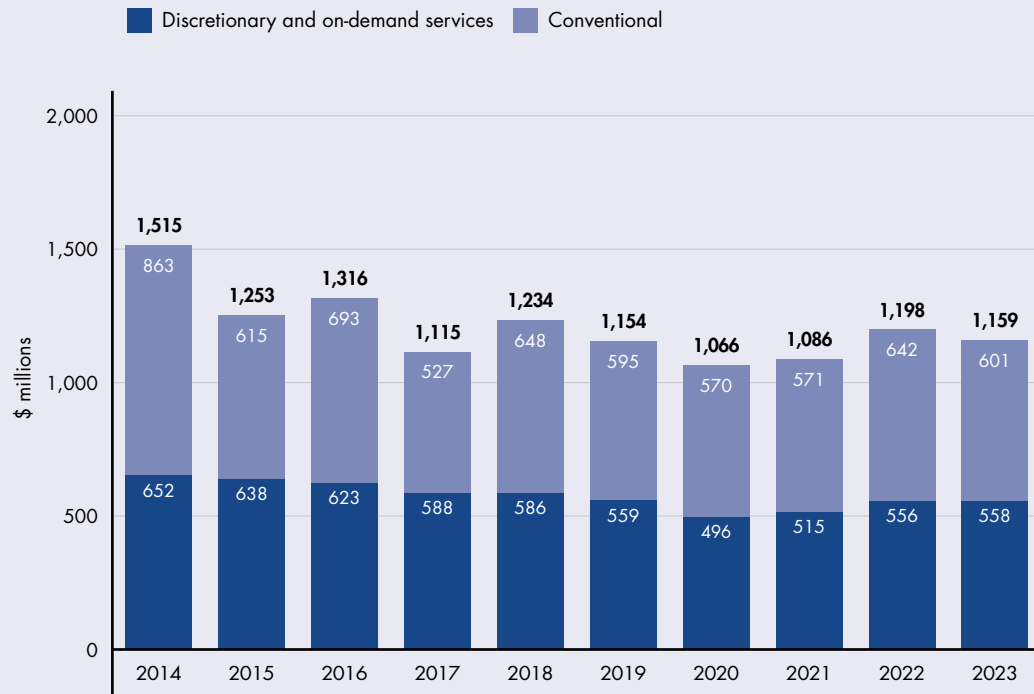
Over the longer-term, the volume of broadcaster in-house production has also experienced a decline. In 2023, broadcaster in-house production volume was still 23.5% lower than the 10-year peak of \$1.52 billion reached in 2014 (Exhibit 7-1).

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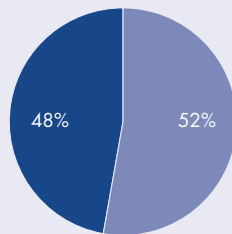
<sup>30</sup> Calculations based on data from CRTC (2023b). *Conventional Television: Statistical and Financial Summaries, 2018-2022*. CRTC (2022b). *Conventional Television: Statistical and Financial Summaries, 2017-2021*.

## PRODUCTION VOLUME

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



**Share**  
2023



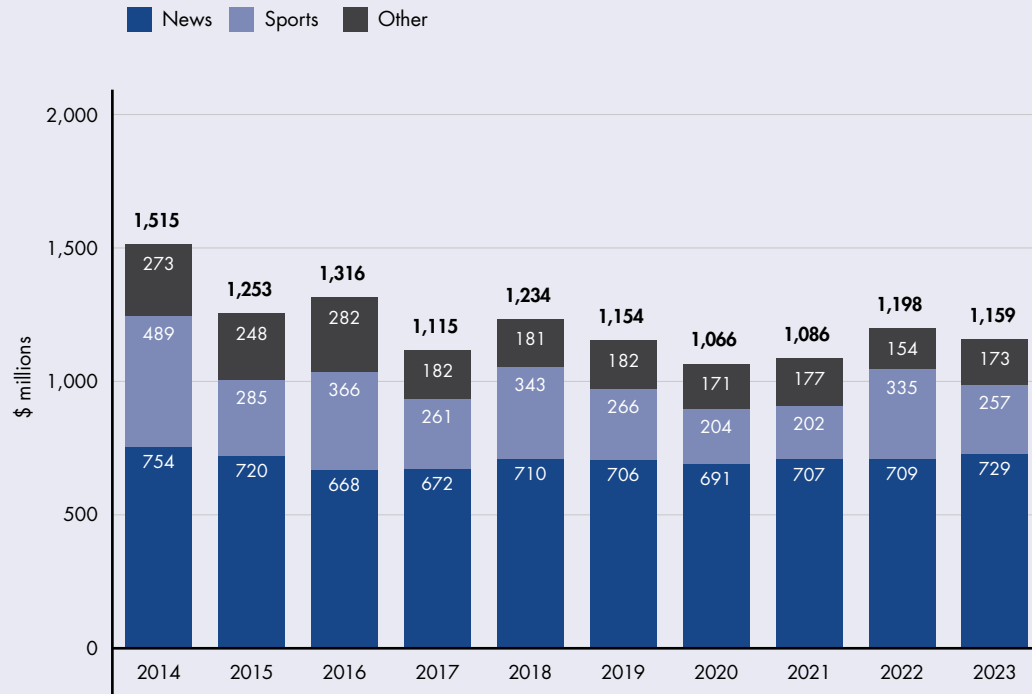
**Annual average growth rate**

Sub-segment	2023	2014–2023
Discretionary and on-demand services	0.4%	(1.7%)
Conventional	(6.4%)	(3.9%)
<b>Average: all sub-segments</b>	<b>(3.3%)</b>	<b>(2.9%)</b>

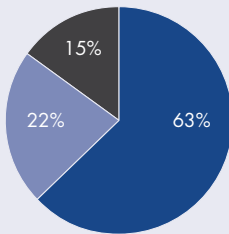
Sources: Estimates based on data collected from CRTC.  
Note: Some totals may not sum due to rounding.

## GENRES

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



Share  
2023



Annual average growth rate

Genre	2022	2013–2022
News	2.8%	(0.4%)
Sports*	(23.3%)	(6.9%)
Other	12.3%	(4.9%)
<b>Average: all genres</b>	<b>(3.3%)</b>	<b>(2.9%)</b>

Sources: Estimates based on data collected from CRTC.  
 Note: Some totals may not sum due to rounding.  
 \* Excludes amounts paid for rights to sports programming

## REGION

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

(\$ millions)	2014	2015	2016	2017	2018	2019	2020	2021	2022	2022	2023 share of total
Ontario	885	677	729	612	686	622	570	571	669	621	54%
Quebec	331	279	307	258	296	272	247	257	287	279	24%
Alberta	91	94	88	80	83	87	85	85	82	88	8%
British Columbia	101	97	96	87	87	89	80	81	79	86	7%
Manitoba	29	30	28	25	26	27	26	33	26	27	2%
Saskatchewan	27	27	24	20	20	21	21	21	20	21	2%
Nova Scotia	27	26	23	16	17	18	17	18	17	17	1%
New Brunswick	11	11	10	8	9	9	9	10	9	9	1%
Newfoundland and Labrador	10	9	8	7	7	7	7	8	7	8	1%
Prince Edward Island	2	2	2	1	1	1	2	2	1	2	<1%
Territories*	3	2	1	1	1	1	1	1	1	1	<1%
<b>Total</b>	<b>1,515</b>	<b>1,253</b>	<b>1,316</b>	<b>1,115</b>	<b>1,234</b>	<b>1,154</b>	<b>1,066</b>	<b>1,086</b>	<b>1,198</b>	<b>1,159</b>	<b>100%</b>

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 2023*. 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 Elevation Pictures and Immina Films, 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, 2020 and 2022. The most recent year of published data is 2023. Data for distributor 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 2023/24



- Revenue of the total Canadian distribution industry increased by 14.9% between 2021 and 2023 to a total of \$1.59 billion.
- Revenue from the distribution of Canadian films and television programs increased by 3.1% in 2023 (compared with 2021) to a total of \$230 million.
- Sales of Canadian films and television programs to foreign markets in 2023 increased by 16.7% (compared with 2021) to a total of \$126 million.



- Revenue from the distribution of Canadian films and television programs accounted for 14.4% of total industry revenue in 2023 – down from 16.1% in 2021.
- Canadian distributors' investment in Canadian films and television programs in 2022/23 decreased by 31.6% (compared with 2022/23) and totalled \$360 million.



While total revenue within the Canadian film and television distribution industry was over \$2 billion as recently as 2017, between 2017 and 2021, it fell by over one-third (Exhibit 8-1). Between 2021 and 2023, however, total revenue recovered by 14.9% to \$1.59 billion.

According to Statistics Canada, the rebound in revenue between 2021 and 2023 was largely due to key distribution channels such as theatres and film festivals recovering to pre-pandemic levels of capacity utilization, following below-capacity operation during the COVID-19 pandemic and in the subsequent two years.<sup>31</sup>

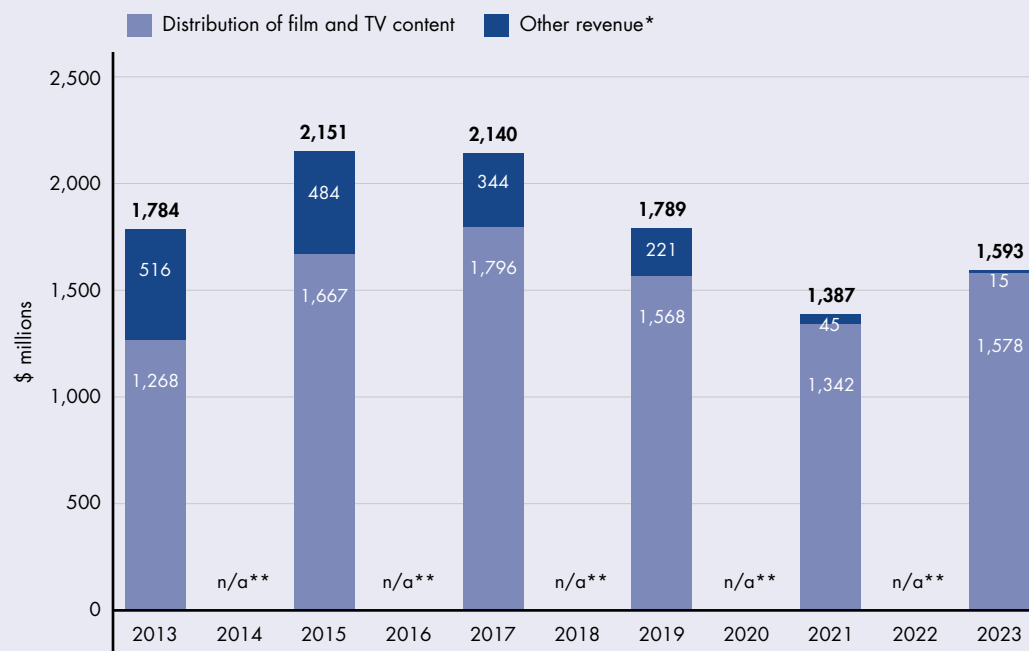
Total revenue from the distribution of film and television content increased by 17.6% between 2021 and 2023. Canadians' decreasing purchase of pre-recorded physical media led to a 66.7% drop in revenue in 2023. These other revenues were worth only \$15 million in 2023, or just under 1% of the industry (Exhibit 8-1).

The revenue earned by Canadian distributors from Canadian content also increased between 2021 and 2023, from by \$223 million to \$230 million (Exhibit 8-2). Canadian content revenue from domestic television, theatres, video-on-demand services, and other platforms actually declined between 2021 and 2023, from \$115 million to \$104 million. However, the revenue earned from the distribution of Canadian content in foreign markets increased by 16.7% to \$126 million in 2023.

Canadian distributors invest in Canadian films and television programs through minimum guarantees and advances on anticipated distribution revenues. In 2023/24, Canadian distributors invested an estimated \$360 million in Canadian films and television programs. This represented a decrease of 31.5% compared to 2022/23, when Canadian distributors' investment reached a 10-year high of \$526 million (Exhibit 8-3).

## 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.

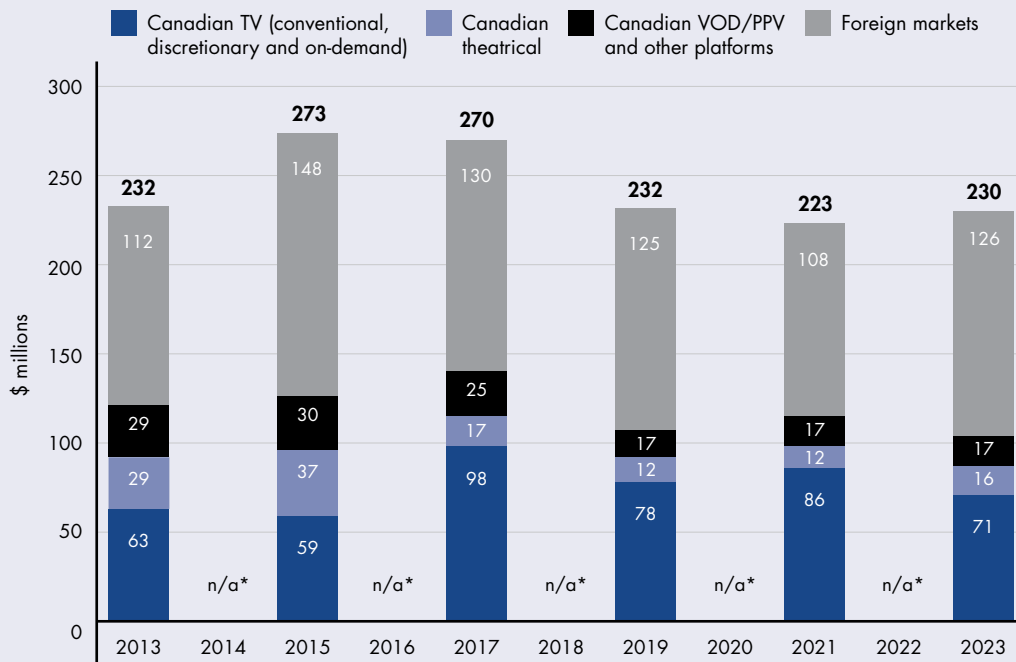
n/a: No data available.

\* As of 2011, Statistics Canada only publishes data on a biennial basis. For that reason, no data is available for 2014, 2016, 2018, 2020 and 2022.

\*\* Includes revenue from the wholesaling of pre-recorded video, production of audiovisual works for outright sale, contract production of audiovisual works, and other sources.

<sup>31</sup> Statistics Canada (2024), "The film and video distribution industry bounces back in 2023," *The Daily*, October 3, 2024.

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



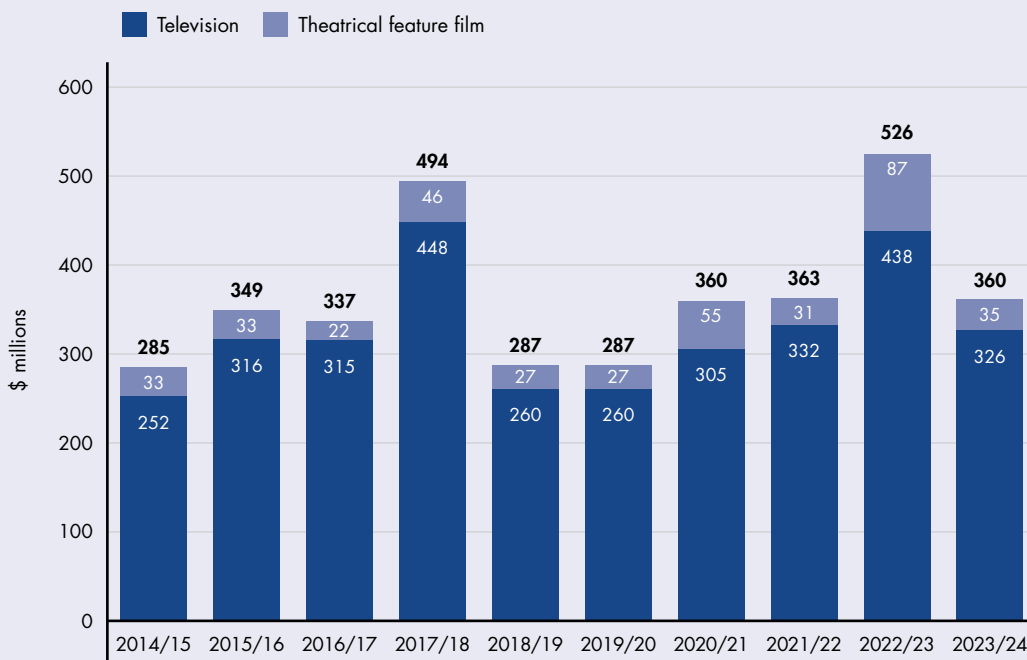
Source: Statistics Canada, Table 21-10-0074-01.

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 2014, 2016, 2018, 2020 and 2022.

## 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

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.<sup>32</sup>
- **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-segments, 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.

Contributions to Canadian programming from Canadian private broadcasters are based on three specific requirements and calculated on prior year revenues. Unlike private broadcasters, contributions for CBC/ICI Radio-Canada are calculated on the basis of total programming expenses.

- Canadian Programming Expenditures (CPE) refer to all of the broadcaster spending on Canadian content and includes spending in all categories such as news, sports, dramas, documentaries, reality and lifestyle/factual.
- Programs of National Interest (PNI) is a sub-group of CPE. It is a more specific requirement, focused on contributions to identified categories of programming (e.g., dramas, comedies, documentaries and film).
- For broadcast groups, a minimum amount of PNI expenditures must be spent on independently-produced Canadian programs.

The financial statistics relating to total broadcasting industry revenues and total Canadian programming expenditures (CPE) cover up to the 2023 broadcasting year, running from September 1, 2022 to August 31, 2023. Canadian programming expenditures (CPE), programs of national interest (PNI) and independent production spending statistics from the large private television ownership groups are available from the 2023 broadcasting year, and information for these groups, from that year, is set out in this section.

<sup>32</sup> The vast majority of Canadian households now receive conventional television signals via cable television, DTH satellite television or IPTV providers.

## Highlights from 2022/2023



- Total industry spending on CPE increased by 1.0% to \$3.22 billion.
- CPE spending by Discretionary - Other services increased 18.3% to \$653 million.
- CPE spending by Private Conventional stations increased 6.15% to \$799 million.
- CPE spending by large broadcast ownership groups increased by 13.7% to \$2 billion in 2022, with 28.3% of the respective increase in CPE coming from National news and sports services.
- Spending on Programs of National Interest (PNI)<sup>33</sup> by English-language broadcast groups, including CBC, increased slightly by 2.1% to \$364 million. The increase was much higher from French-language broadcast groups, from \$222 million to \$259 million in 2023, or 16.45%.
- As a share of prior year revenue, CPE and PNI spending by Radio-Canada increased in 2023 from 52.0% to 55.2% and 18.6% to 22.3%, respectively.
- Spending by large English-language broadcast groups on Canadian independent production increased by 14.6% in 2023 to \$299 million, while CBC increased by 5.1% to \$187 million.
- Spending by large French-language broadcast groups on Canadian independent production increased by 23.8% in 2023 to \$250 million, while Radio-Canada increased by 5.3% to \$138 million.



- Broadcasting industry revenue decreased by 6.6% to \$6.32 billion in the 2023 broadcasting year.
- Revenue at private conventional broadcasters in 2023 decreased by 7.2% to \$1.39 billion.
- Revenue at CBC/Radio-Canada's conventional services also decreased in 2023, by 9.2%.
- Revenue at Discretionary Services (other than News and Sports) continued to decrease. After falling by 3.4% to \$2.1 billion in 2022, levels decreased again by 7.2% to \$1.9 billion in 2023.
- Revenue at National news and sports services decreased by 3.2% to \$1.73 billion.
- CPE at CBC/Radio-Canada decreased by 10.54% to \$508 million.

As has been noted in prior chapters, broadcasters underspent on Canadian programming during the pandemic period. They were then required by the CRTC to makeup that underspend by the end of the 2023 broadcast year. CPE results in 2023 reflected the additional expenditures spent over and above annual contribution levels, to catchup on any prior year CPE underspending. A return to annual contribution levels and a decrease in revenues should have resulted in a decrease in CPE for the 2023/24 broadcast year. But that year was just completed, and the information has not yet been published by the CRTC. It will form part of the information for this chapter in next year's Profile 2025 report.

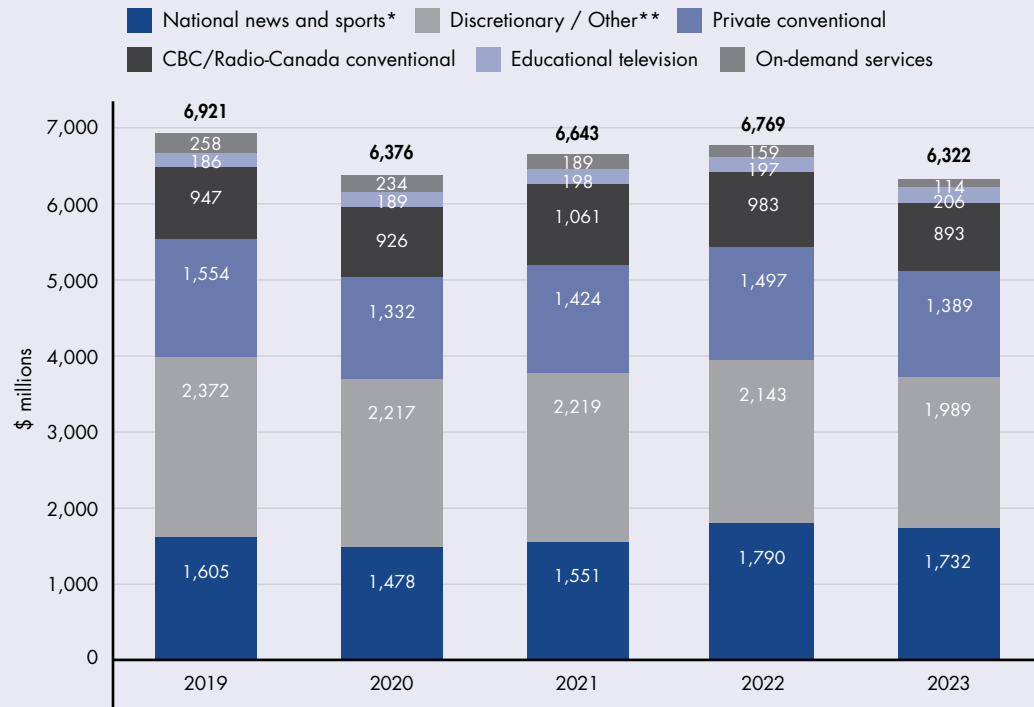
<sup>33</sup> Includes Canadian drama and comedy; long-form documentary; English-language awards shows; and French-language music, dance and variety programming.

## BROADCASTER REVENUES

Lower revenue in almost every segment of Canada’s broadcasting industry during the 2023 broadcasting year (September 1, 2022 to August 31, 2023) and led to the overall Canadian television broadcasting industry decreasing its revenue by 6.6% to \$6.32 billion (Exhibit 9-1). Total revenue in Canada’s television broadcasting industry in 2023 experienced the lowest level in the last five years, with lower levels than the of \$6.38 billion reached in 2020.

Looking specifically at the discretionary services segment – the largest within the Canadian television broadcasting industry – overall revenues decreased below \$2 billion for the first time in five years, to \$1.99 in 2023 (Exhibit 9-1).

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



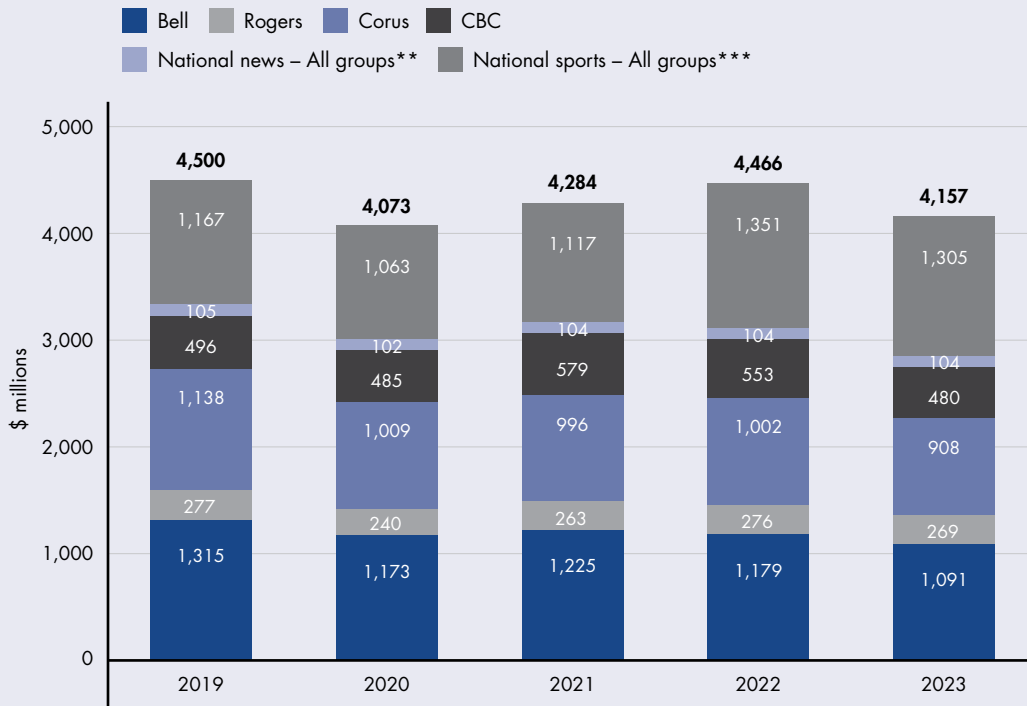
Source: Data from the CRTC’s *Statistical and Financial Summaries*.

Note: Some totals may not sum due to rounding.

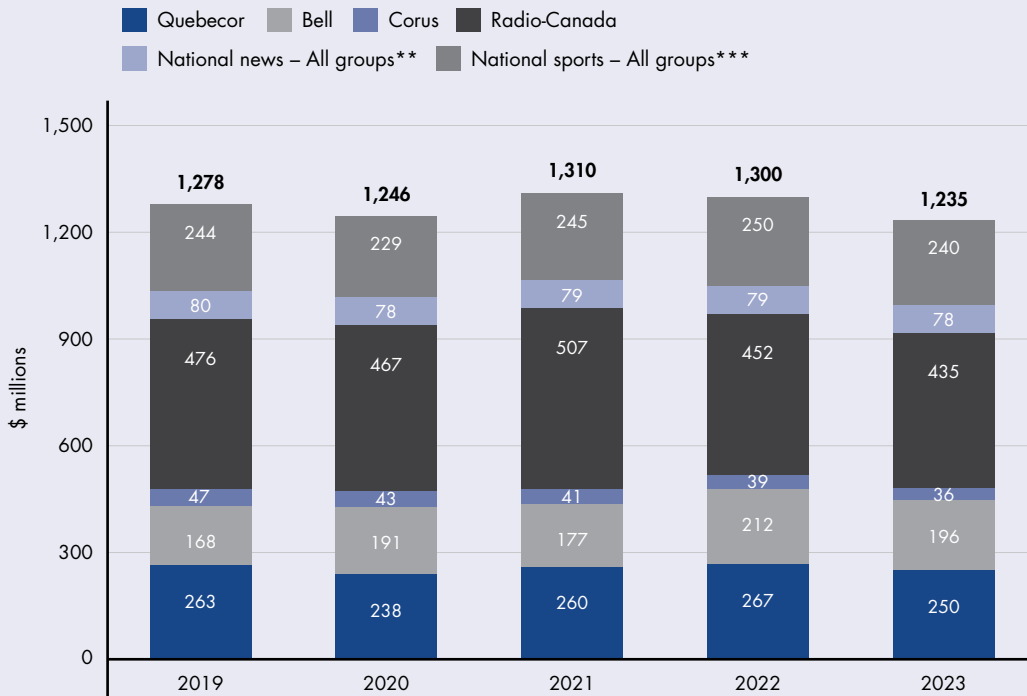
\* Includes the following discretionary services: CTV News Channel, CBC New Network, TSN, Sportsnet, Sportsnet One, LCN, ICI RDI, TVA Sports and RDS.

\*\* Includes revenue earned by discretionary services owned by CBC/Radio-Canada, other than National News services (i.e., CBC News Network and ICI RDI).

**Exhibit 9-2a Total revenue, by English-language broadcasting group\***



**Exhibit 9-2b Total revenue, by French-language broadcasting group\***



Source: CRTC, data from the *Aggregate Annual Returns* filed by the Broadcasting Groups.

Note: Some totals may not sum due to rounding.

\*CRTC designated groups.

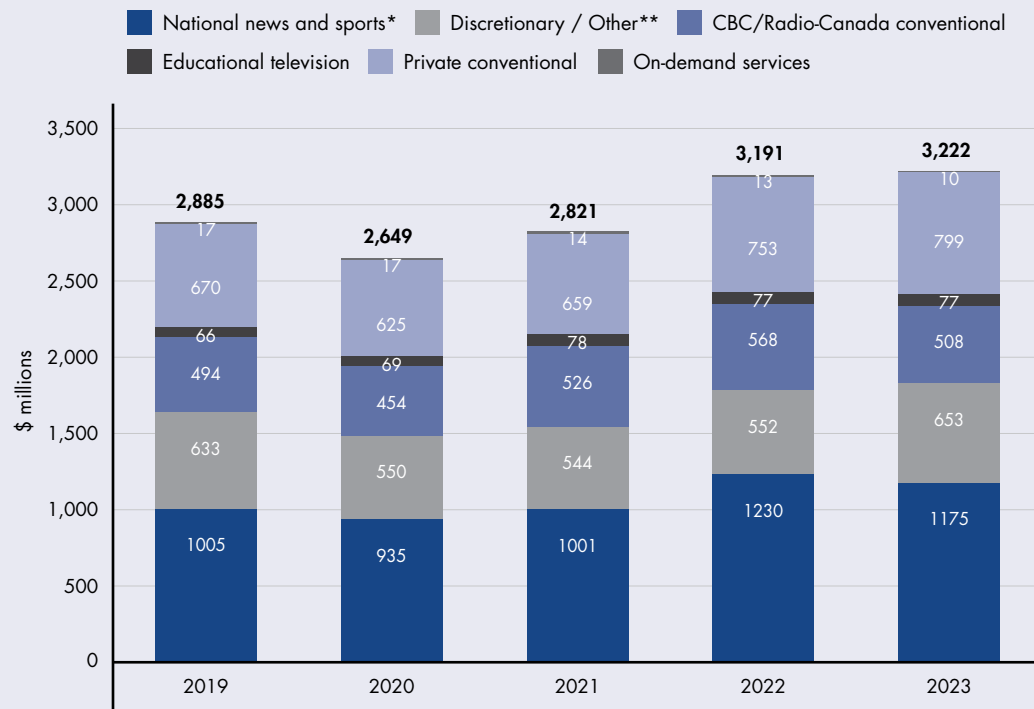
\*\*Includes the following discretionary services: CTV News Channel, CBC News Network, LCN and ICI RDI.

\*\*\* Includes the following discretionary services: TSN, Sportsnet, Sportsnet One, RDS and TVA Sports.

## BROADCASTER PROGRAMMING EXPENDITURES

The broadcasting system in Canada is comprised of various elements that aid the creation and distribution of Canadian programming. The CRTC, through expenditure requirements, mandates broadcasters contribute to Canadian programming. These requirements are referred to as Canadian programming expenditures (CPE) and ensure that investment is made directly in the production of Canadian programming. Nearly all licensed private Canadian television broadcasters must assign a minimum percentage of their previous broadcast year revenue to Canadian programming. The required percentages vary for each broadcaster, based on its size and role within the system.

**Exhibit 9-3 Total Canadian programming expenses (CPE), by service segment**



Source: Data from the CRTC's *Statistical and Financial Summaries*.

Note: Some totals may not sum due to rounding.

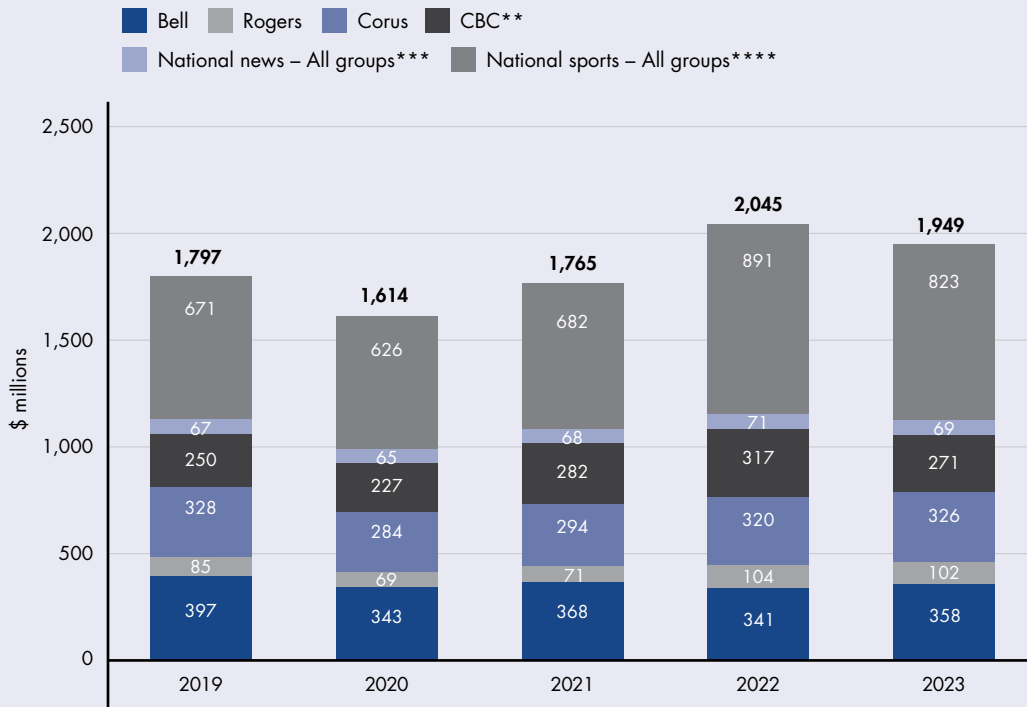
\* Includes the following discretionary services: CTV News Channel, CBC New Network, TSN, Sportsnet, Sportsnet One, LCN, ICI RDI, TVA Sports and RDS.

\*\* Includes revenue earned by discretionary services owned by CBC/Radio-Canada, other than National News services (i.e., CBC News Network and ICI RDI).

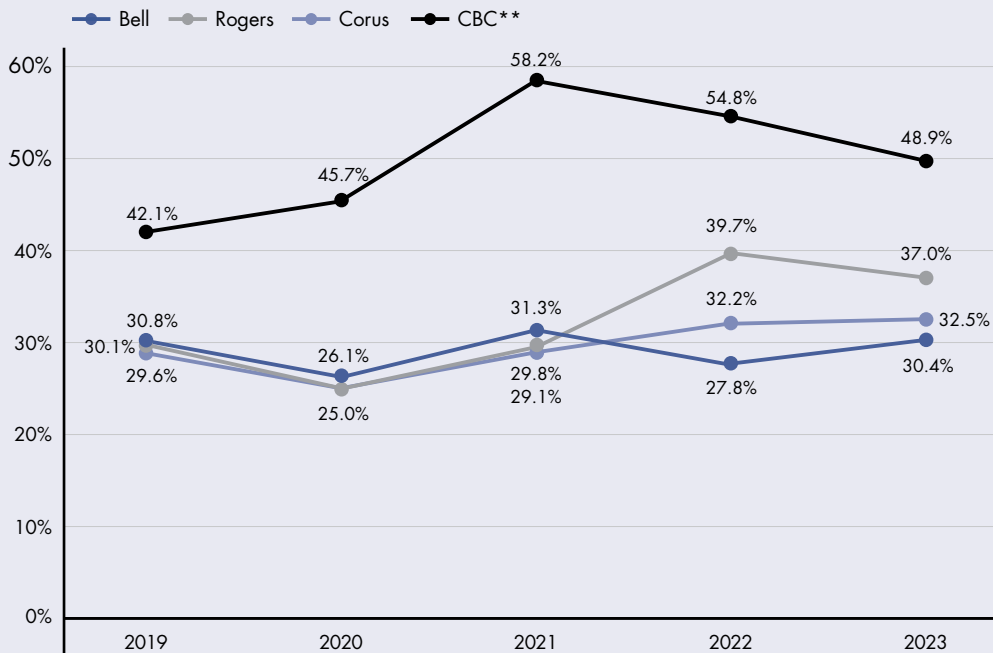
The following data focuses on the large English- and French-language ownership groups. Current CPE requirements for large English-language private television ownership groups are set at 30% and include Bell Media Inc. (Bell), Corus Entertainment Inc. (Corus), and Rogers Media Inc. (Rogers). French-language private television ownership groups range from 26% to 45% and include Bell Media Inc. (Bell), Corus Entertainment Inc. (Corus), and Quebecor Media Inc (Quebecor).<sup>34</sup>

<sup>34</sup> CRTC (2024). Broadcasting Notice of Consultation CRTC 2024-288.

**Exhibit 9-4a i) Total Canadian programming expenses (CPE) by English-language broadcasting group\***



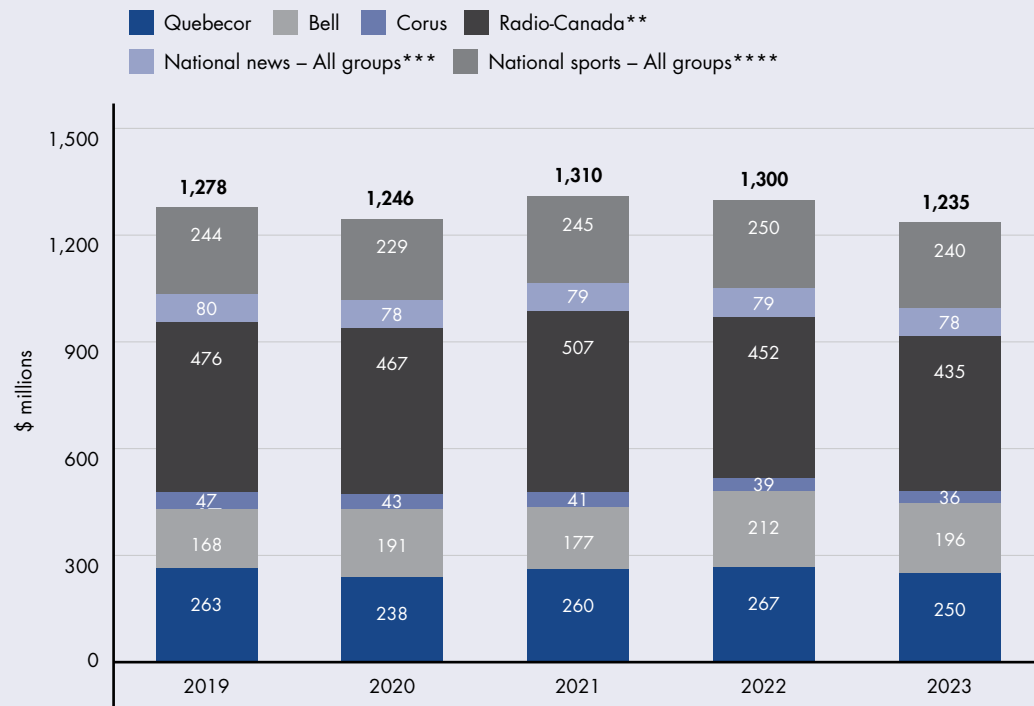
**Exhibit 9-4a ii) CPE as a share of (previous year) revenue, by English-language broadcasting group\***



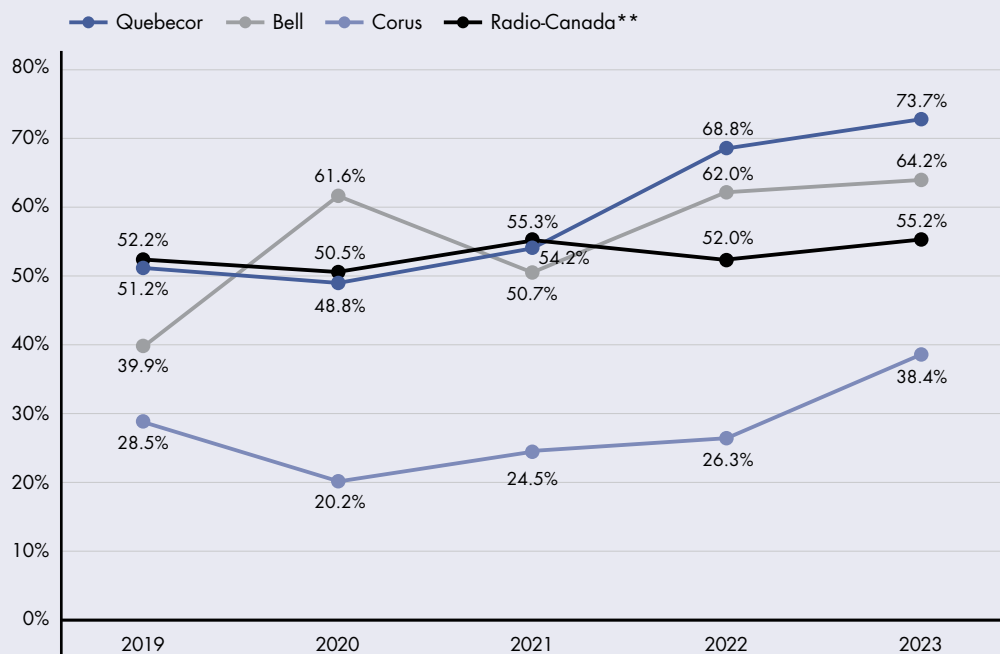
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**Exhibit 9-4b i) Total Canadian programming expenses (CPE) by French-language broadcasting group \***



**Exhibit 9-4b ii) CPE a share of (previous year) revenue, by French-language broadcasting group\***



Source: Data from the Aggregate Annual Returns filed by the Broadcasting Groups.

Note: Some totals may not sum due to rounding.

\*CRTC designated groups.

\*\*While the CBC and Radio-Canada are not designated groups, the respective numbers for Conventional TV and discretionary services (excluding National News services) are provided for comparison purposes.

\*\*\*Includes the following discretionary services: CTV News Channel, CBC News Network, LCN and ICI RDI.

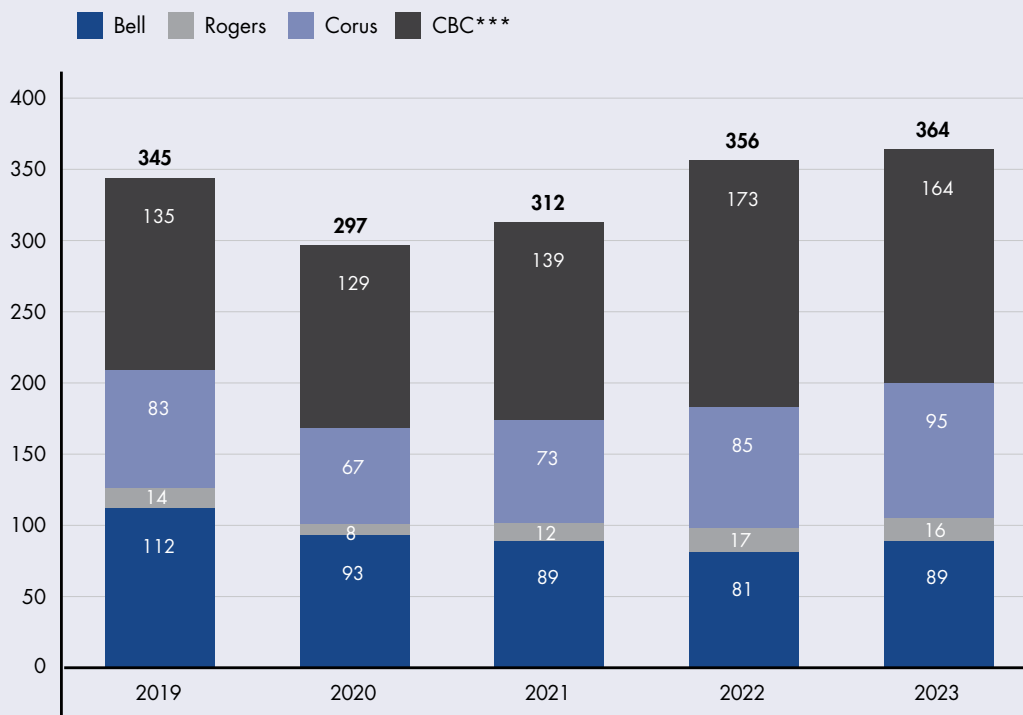
\*\*\*\* Includes the following discretionary services: TSN, Sportsnet, Sportsnet One, RDS and TVA Sports.

## PROGRAMS OF NATIONAL INTEREST AND INDEPENDENT PRODUCTION

A subsection of CPE is known as programs of national interest (PNI), and therefore PNI spending counts towards broadcasters CPE requirements. PNI expenditures includes programming that has been identified as risky to produce and difficult to monetize. PNI in the English-language market include long-form documentaries, drama and comedy programs, and award shows. In the French-language market, it is the equivalent program categories with the addition of music, dance and variety shows.

As with CPE, current PNI expenditure requirements are based on a percentage of gross revenues of the previous broadcast year. For the large English-language private television ownership groups PNI requirements range from 5% to 7.5%. The large French-language private television ownership groups range from 15% to 18%.<sup>35</sup> At least 75% of the PNI spending requirement is to be produced by independent production companies.

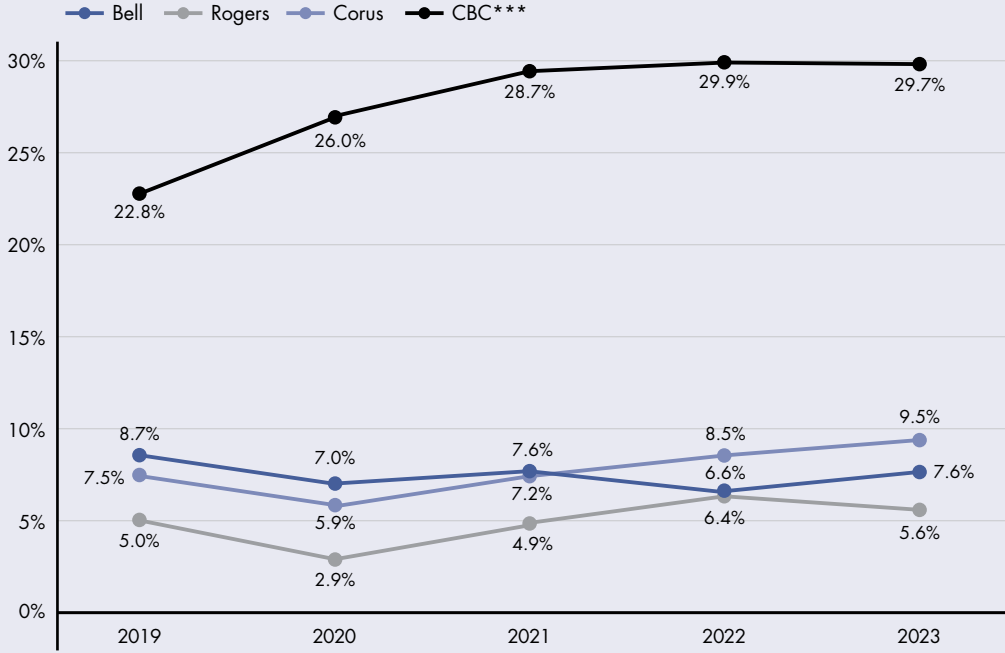
**Exhibit 9-5a i) Programs of national interest\* (PNI), by English-language broadcasting group\*\***



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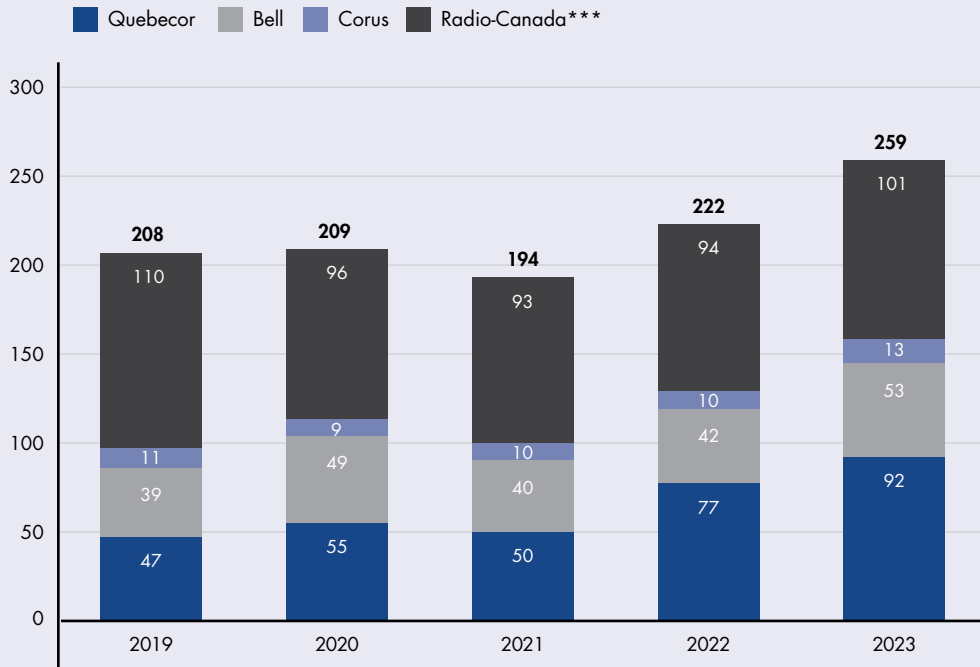
35 CRTC (2024). Broadcasting Notice of Consultation CRTC 2024-288.

**Exhibit 9-5a ii) PNI as a share of (previous year) revenue, by English-language broadcasting group\*\***

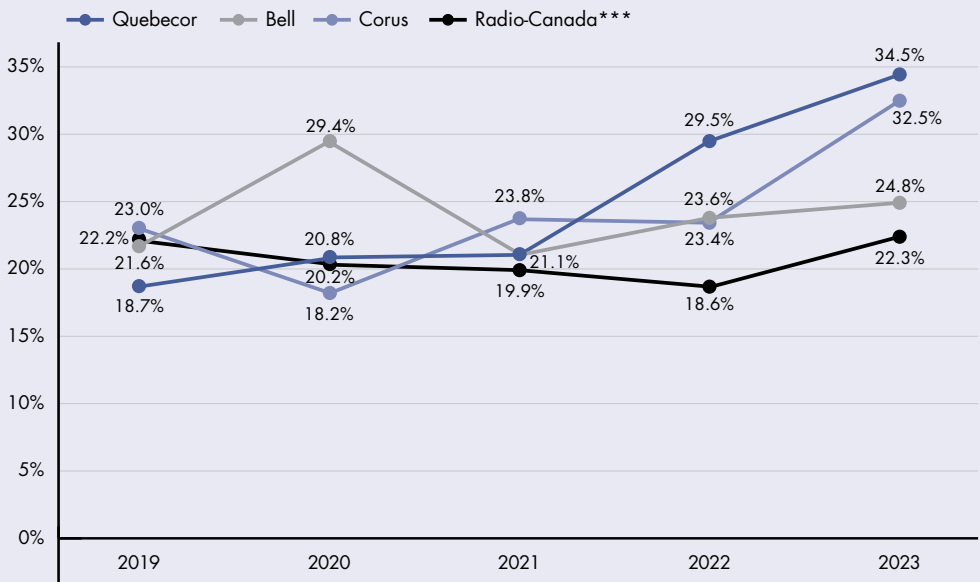


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**Exhibit 9-5b i) Programs of national interest\* (PNI), by French-language broadcasting group\*\***



**Exhibit 9-5b ii) PNI as a share of (previous year) revenue, by French-language broadcasting group\*\***



Source: CRTC, data from the *Aggregate Annual Returns* filed by the Broadcasting Groups.

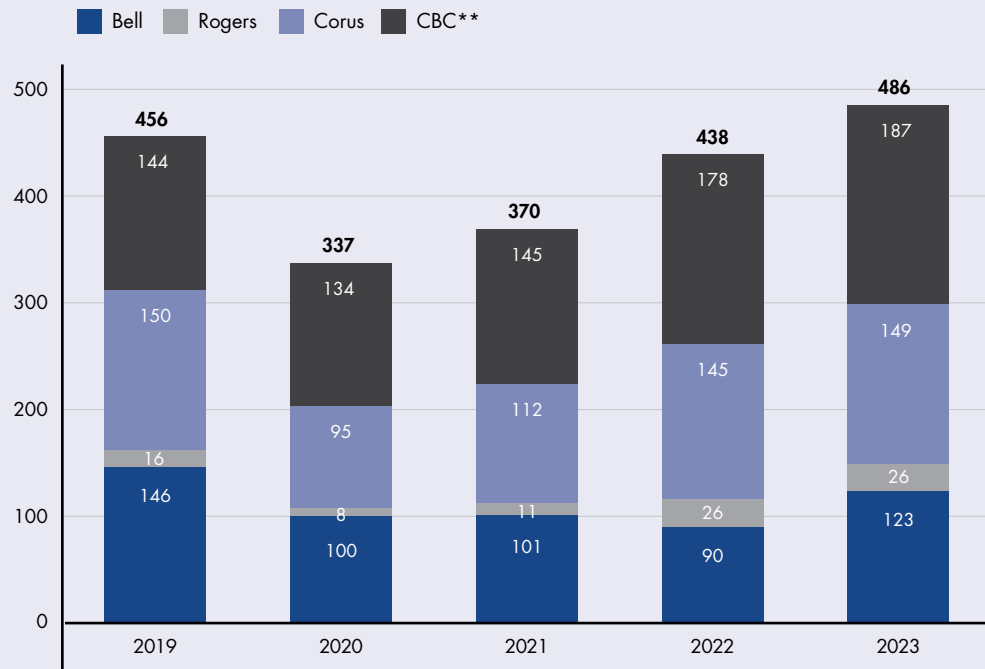
Note: Some totals may not sum due to rounding.

\* Includes Canadian drama and comedy; long-form documentary; English-language award shows; and French-language music, dance and variety programming.

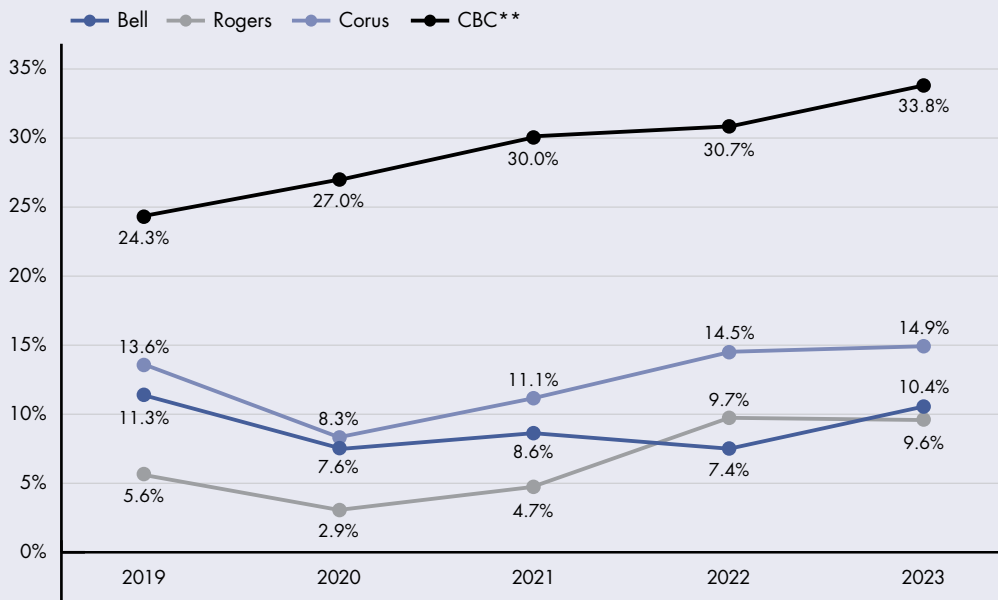
\*\* CRTC designated groups.

\*\*\* PNI totals for CBC and Radio-Canada are estimates based in part on CRTC data and will also include expenditures from National News services (i.e., CBC News Network and ICI RDJ).

**Exhibit 9-6a i) Canadian broadcaster spending on independent production by English-language broadcasting group\***

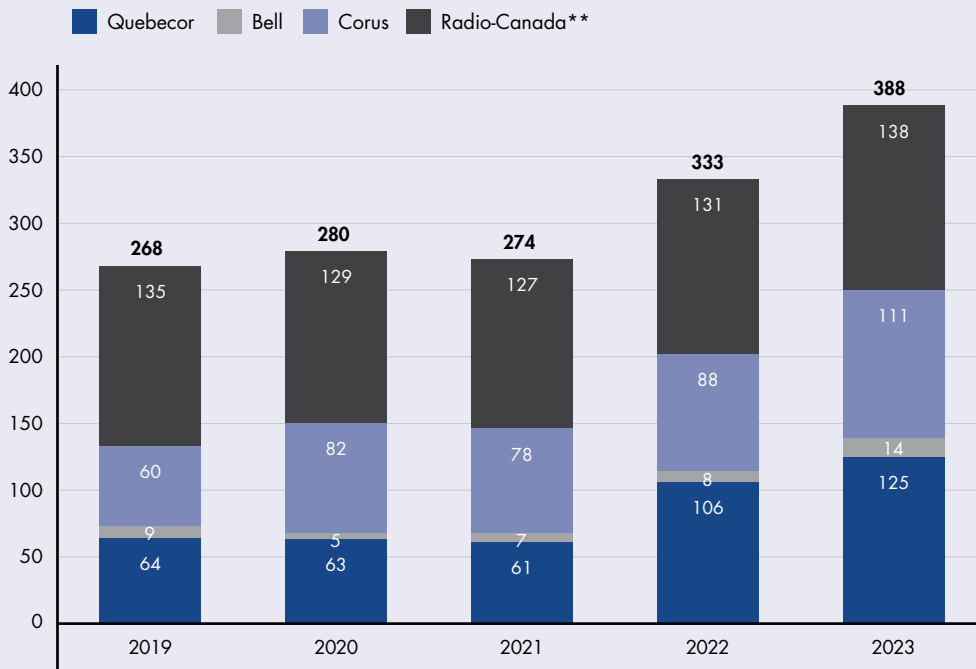


**Exhibit 9-6a ii) Canadian broadcaster spending on independent production as a share of (previous year) revenue, by English-language broadcasting group\***

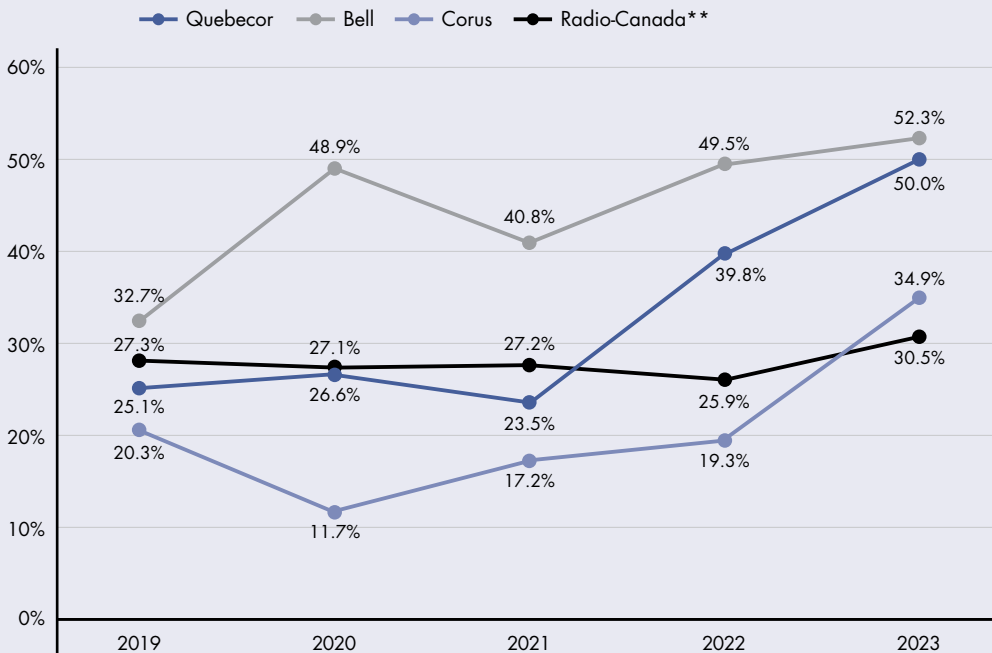


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**Exhibit 9-6b i) Canadian broadcaster spending on independent production, by French-language broadcasting group\***



**Exhibit 9-6b ii) Canadian broadcaster spending on independent production as a share of (previous year) revenue, by French-language broadcasting group\***



Source: Data from the *Aggregate Annual Returns* filed by the Broadcasting Groups.

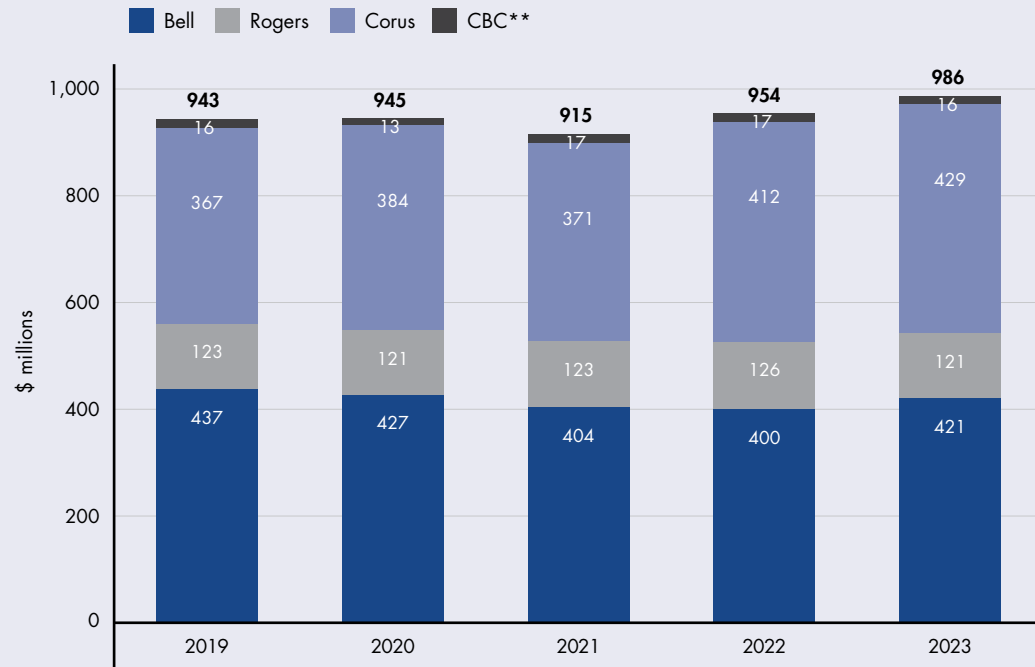
Note: Some totals may not sum due to rounding.

\* CRTC designated groups.

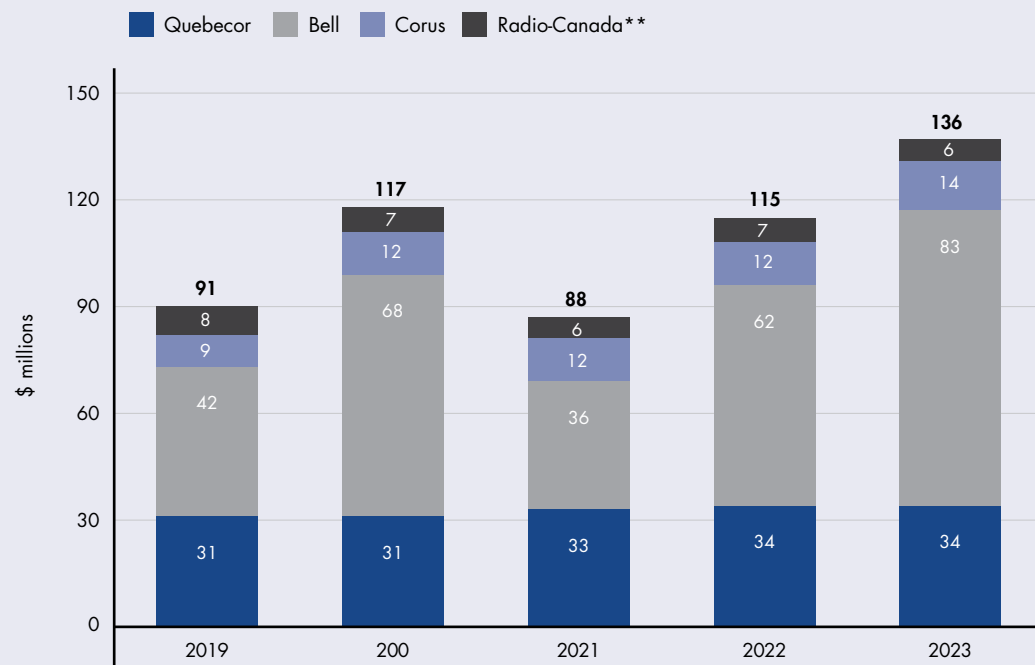
\*\* While the CBC and Radio-Canada are not designated groups, the respective numbers for Conventional TV and discretionary services (excluding National News services) are provided for comparison purposes.

## CANADIAN AND NON-CANADIAN PROGRAMMING EXPENDITURES

**Exhibit 9-7a Total Non-Canadian programming expenses by English-language broadcasting group\***



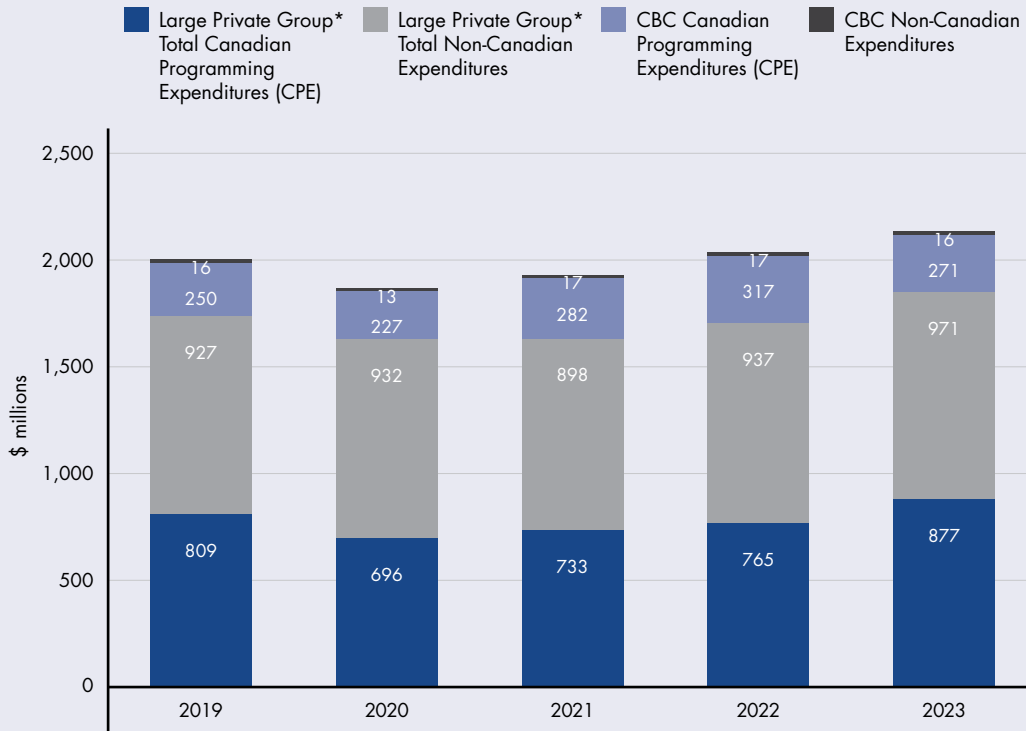
**Exhibit 9-7b Total Non-Canadian programming expenses by French-language broadcasting group\***



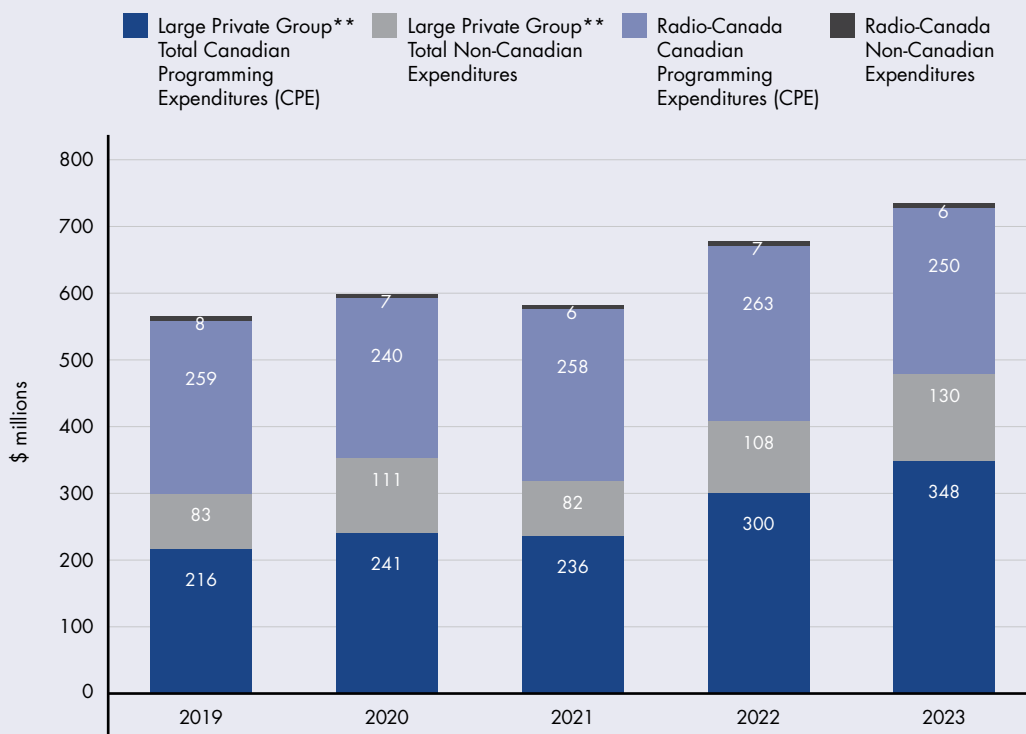
\* CRTC designated groups.

\*\* While the CBC and Radio-Canada are not designated groups, the respective numbers for Conventional TV and discretionary services (excluding National News services) are provided for comparison purposes.

**Exhibit 9-8a Total programming expenses by English-language broadcasting group**



**Exhibit 9-8b Total programming expenses by French-language broadcasting group**



Source: Data from the *Aggregate Annual Returns* filed by the Broadcasting Groups.

\*Large private English broadcasting groups include: Bell, Rogers and Corus.

\*\*Large private French broadcasting groups include: Quebecor, Bell and Corus.



# 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 distribution platforms, the theatrical exhibition industry remains an important window for the release of feature films in Canada. There were 2,677 theatre screens and over 56 million tickets sold in Canada in 2022 (the most recent year of data published by Statistics Canada).<sup>36</sup> Over 96 million tickets were sold in 2018 (the most recent complete year of full operations pre-pandemic for which published admissions data is available).<sup>37</sup>

## Highlights from 2023



- Theatrical exhibition industry revenue increased by 14.2% to \$1.66 billion, from the pandemic-suppressed level observed in 2022.
- Total box office receipts increased by 32.9% to \$889 million.
- Canadian films' box office revenue in Canada increased 148.3% to \$29 million.
- Canadian films' share of the Canadian box office increased to 3.3%.
- In the French-language market, Canadian films' box office revenue increased to \$18.7 million and their share rose to 17.5% share.
- In the English-language market, Canadian films' box office revenue increased to \$10.6 million, and their share rose to 1.4% share.



- The number of Canadian feature films released in Canadian theatres was virtually unchanged in 2023, declining from 129 to 128.<sup>38</sup>



- Canadian new-release films' share of total new release in Canadian theatres decreased 16.1% to 14.0%.

<sup>38</sup> 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.

<sup>36</sup> Statistics Canada (2023). Table 21-10-0180-01.

<sup>37</sup> Statistics Canada (2019). Table 21-10-0180-01.

Canada's theatrical exhibition industry continued to recover in 2023 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, although the Canadian box office in 2023 (\$889 million) increased by 32.9% compared to 2022, it was still 12.1% below where it was in 2019 (\$1.01 billion), just prior to the onset of COVID-19 pandemic in Canada (Exhibit 10-3).

The experience of the Canadian theatrical box office in 2023 was consistent with global trends. Globally, the releases of *Barbie* and *Oppenheimer* in summer 2023 helped bring mass audiences back to cinemas in many countries. However, while the global box office revenue is estimated to have increased by approximately 30% compared to 2022, it was still expected to finish the year 15% lower than pre-pandemic levels (i.e. the average of global box office in 2017 to 2019).<sup>39</sup>

In Canada, total box office revenue rose by 32.9% in 2023 (Exhibit 10-3), helping to lift the industry's total revenue (including food and beverage sales, advertising and other revenue) by 14.2% to \$1.66 billion (Exhibit 10-1). As the overall box office and industry revenue continued to improve in 2023, Canadian films' box office performance improved at a slightly faster pace, allowing Canadian films to increase their market share. Canadian films earned a total of \$29 million in 2023, up from \$12 million in 2022, lifting their share of the box office from 1.8% to 3.3% (Exhibits 10-3 and 10-4).

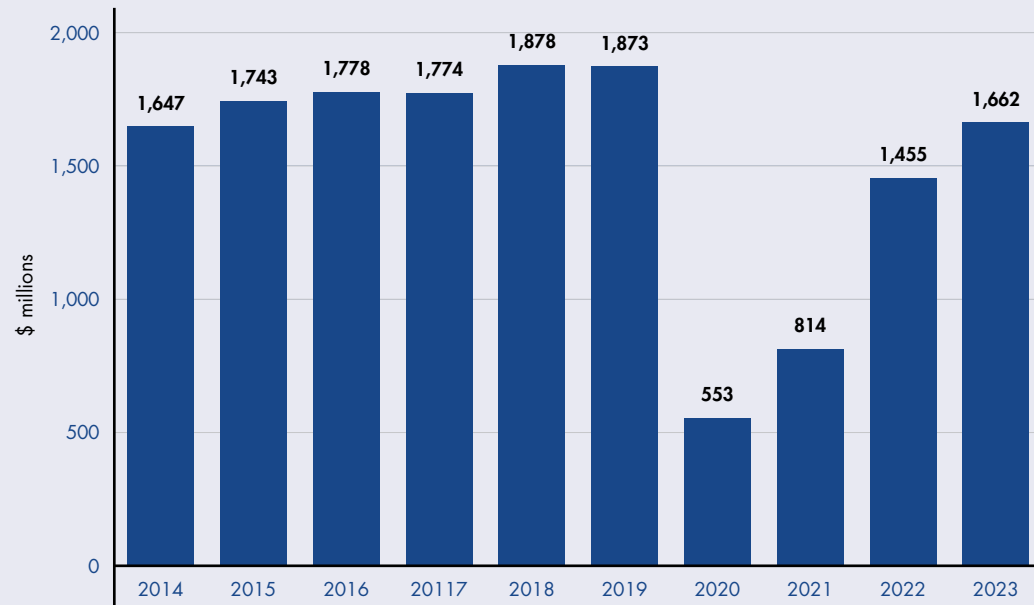
Canadian films' improved box office performance was observed in both language markets. In the French-language market, seven Canadian films earned over \$1 million in Canada in 2023, helping to nearly double Canadian films' total domestic box office revenue to \$18.7 million and lifting their share to 17.5% (Exhibit 10-6). In the English-language market, *Paw Patrol: The Mighty Movie* and *BlackBerry*, helped lift Canadian films' box office revenue to \$10.6 million – the highest level since 2014. Canadian films' box office share in the English-language market increased to 1.4%, from only 0.4% in 2022.

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<sup>39</sup> Gower Street Analytics (2024). "Gower Street Analytics estimates 2023 global box office hit \$33.9 billion." January 4, 2024.

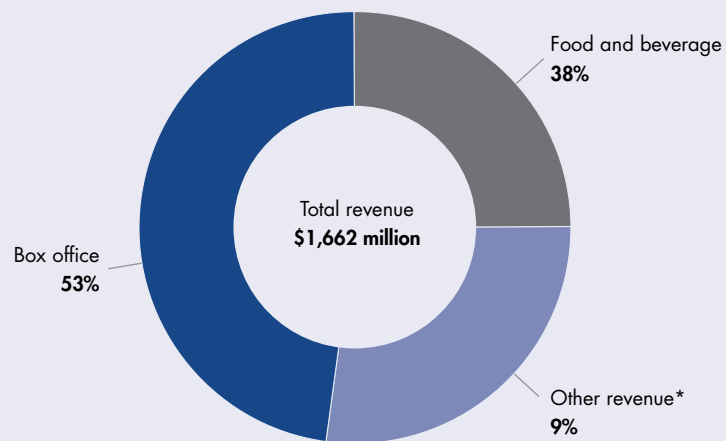
## TOTAL REVENUE

**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, 2023**



Sources: Nordicity estimates based on data from 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 forum for industry practitioners to engage with each other and filmmakers. During the COVID-19 pandemic, most festivals accelerated their pivoting towards digital engagement with audiences and delegates, either exclusively or in combination with live events. However, in 2023, most festivals resumed their live audience programming, while maintaining their digital programming as well.

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

In 2023/24, as part of its support for the promotion of Canadian films, Telefilm Canada provided \$8.4 million in financial support to 102 Canadian film festivals and 73 industry events and initiatives in Canada.<sup>40</sup> Of the 102 supported film festivals, 56 were in the regions<sup>41</sup> and 33 focused on diversity and inclusion.<sup>42</sup>

As part of \$8.5 million in financial support for national and international promotional activities, Telefilm Canada also supported Canadian films screening or marketed at 41 international festivals, markets and events.<sup>43</sup>

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<sup>40</sup> Source: Telefilm Canada.

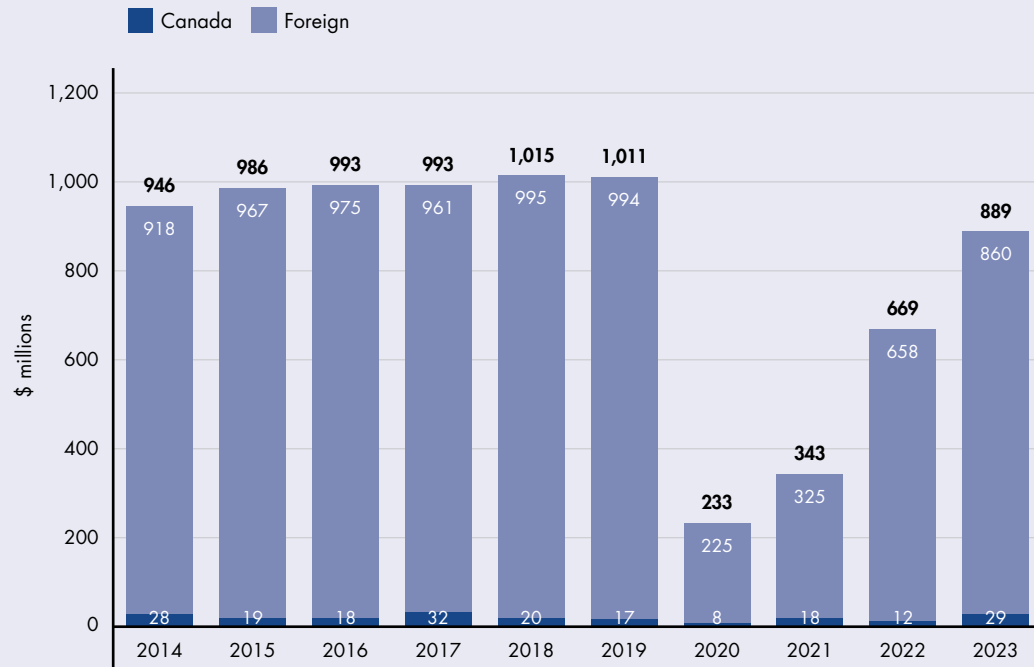
<sup>41</sup> All areas outside of 150 km from downtown Montreal or Toronto.

<sup>42</sup> Source: Telefilm Canada.

<sup>43</sup> Source: Telefilm Canada.

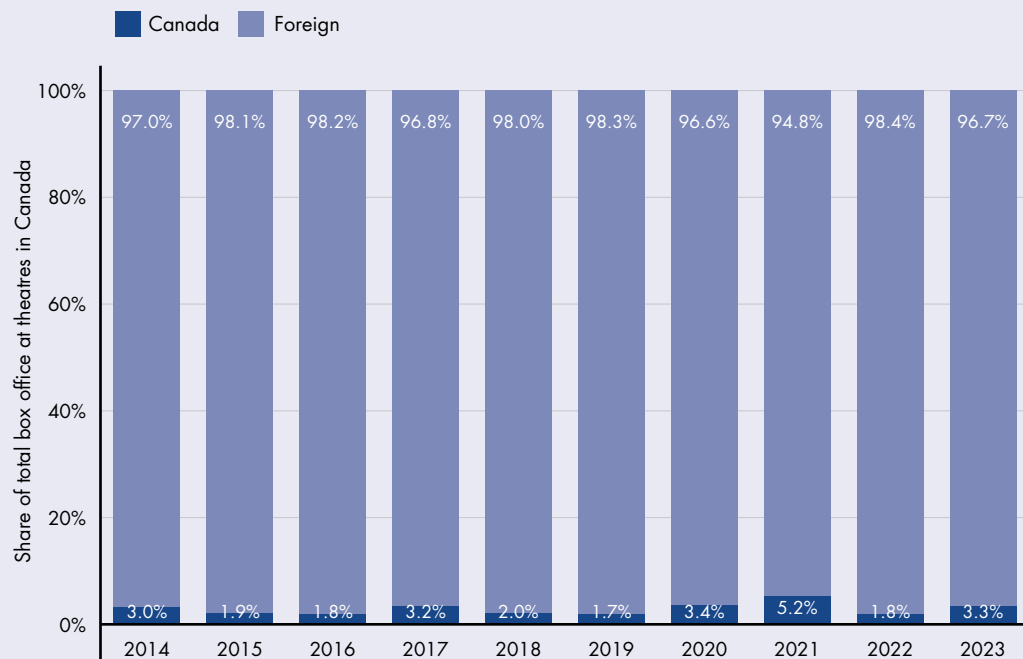
## NATIONAL BOX OFFICE TRENDS

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



Source: MTAC.

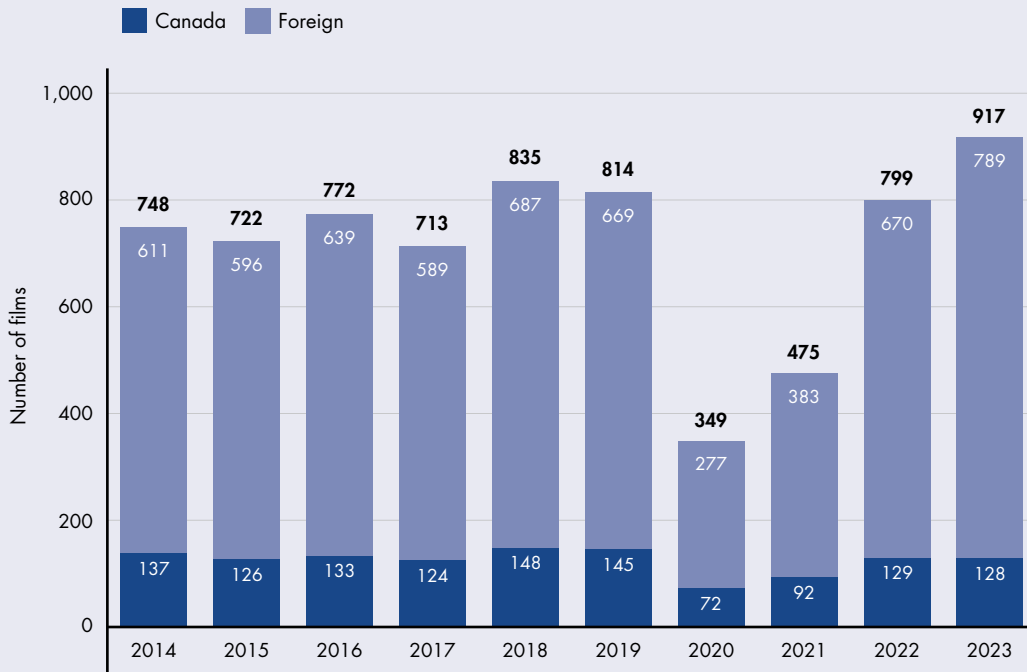
**Exhibit 10-4 Share of total box office revenue in Canada, by origin of production**



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 2023 only include the number of films released in Canadian theatres for the first time in 2023.

## BOX OFFICE BY LANGUAGE MARKET

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

<b>English-language market</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>	<b>2017</b>	<b>2018</b>	<b>2019</b>	<b>2020</b>	<b>2021</b>	<b>2022</b>	<b>2023</b>
<b>\$ millions</b>										
Box office of Canadian films presented in English	16.3	4.9	7.4	8.6	4.6	3.1	1.7	6.9	2.1	10.6
Box office of foreign films presented in English	809.1	852.2	866.4	857.3	893.1	888.7	196.9	287.0	587.9	771.7
Total box office of films presented in English	825.3	857.1	873.8	865.9	897.7	891.8	198.6	293.9	590.0	782.3
Canadian films' share	2.0%	0.6%	0.8%	1.0%	2.0%	0.3%	0.9%	2.3%	0.4%	1.4%
<b>Number of films</b>										
Canadian films playing in Canadian theatre	121	102	113	113	120	132	87	85	136	156
Foreign films playing in Canadian theatre	870	803	973	949	1,058	1,084	774	702	1,039	1,261
Total films playing in Canadian theatre	991	905	1,086	1,062	1,178	1,216	861	787	1,175	1,417
Ratio of foreign to Canadian films	7.2	7.9	8.6	8.4	8.8	8.2	8.9	8.3	7.6	8.1
<b>French-language market</b>										
<b>\$ millions</b>										
Box office of Canadian films presented in French	12.1	13.8	10.3	23.6	15.8	14.0	6.0	10.8	9.7	18.7
Box office of foreign films presented in French	108.4	115.2	108.7	103.9	101.6	105.4	28.3	38.4	69.7	88.4
Total box office of films presented in French	120.5	129.0	119.0	127.5	117.4	119.4	34.3	49.2	79.4	107.1
Canadian films' share	10.0%	10.7%	8.7%	18.5%	13.5%	11.7%	17.5%	22.1%	12.2%	17.5%
<b>Number of films</b>										
Canadian films playing in Canadian theatre	91	84	104	95	112	111	68	79	95	117
Foreign films playing in Canadian theatre	280	280	291	289	318	345	236	212	262	283
Total films playing in Canadian theatre	371	364	395	384	430	456	304	291	357	400
Ratio of foreign to Canadian films	3.1	3.3	2.8	3.0	2.8	3.1	3.5	2.7	2.8	2.4

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, 2023

Title	Box office receipts* (\$ millions)	Original language of production
1. <i>Paw Patrol: The Mighty Movie</i>	5.95	English
2. <i>Blackberry</i>	1.08	English
3. <i>Infinity Pool</i>	0.54	English
4. <i>La légende du Papillon</i>	0.36	French-English
5. <i>Bones of Crows</i>	0.33	English-Cree
6. <i>Toupie et binou, le film</i>	0.31	French
7. <i>Katak, le brave beluga</i>	0.30	French
8. <i>Brother</i>	0.16	English
9. <i>I Like Movies</i>	0.14	English
10. <i>Skinamarink</i>	0.11	English

Source: MTAC.

\* Box office receipts earned between January 1 and December 31, 2023. 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, 2023

Title	Box office receipts* (\$ millions)	Original language of production
1. <i>Le temps d'un été</i>	2.18	French
2. <i>Testament</i>	1.73	French
3. <i>Les hommes de ma mère</i>	1.71	French
4. <i>Paw Patrol: The Mighty Movie</i>	1.53	English
5. <i>Katak, le brave beluga</i>	1.48	French
6. <i>Ru</i>	1.36	French
7. <i>Simple comme Sylvain</i>	1.01	French
8. <i>Le plongeur</i>	0.95	French
9. <i>La cordonnère</i>	0.72	French
10. <i>Coco ferme</i>	0.58	French

Source: MTAC.

\* Box office receipts earned between January 1 and December 31, 2023. 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, 2023**

Title	Box office receipts* (\$ millions)	Country of origin
1. <i>Barbie</i>	64.82	US-UK
2. <i>The Super Mario Bros. Movie</i>	51.72	US-Japan
3. <i>Oppenheimer</i>	37.98	US-UK
4. <i>Avatar: The Way of Water</i>	37.91	US
5. <i>Spider-Man: Across the Spider-Verse</i>	32.36	US
6. <i>Guardians of the Galaxy Vol. 3</i>	29.34	US-New Zealand
7. <i>Mission: Impossible - Dead Reckoning Part One</i>	21.15	US
8. <i>John Wick: Chapter 4</i>	20.25	US-Germany
9. <i>Ant-Man and the Wasp: Quantumania</i>	19.43	US-Australia
10. <i>Taylor Swift: The Eras Tour</i>	16.33	US

Source: MTAC.

\* Box office receipts earned between January 1 and December 31, 2023. 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, 2023**

Title	Box office receipts* (\$ millions)	Country of origin
1. <i>Avatar: The Way of Water</i>	8.68	US
2. <i>The Super Mario Bros. Movie</i>	8.39	US-Japan
3. <i>Barbie</i>	5.75	US-UK
4. <i>Elemental</i>	2.81	US
5. <i>Oppenheimer</i>	2.78	US-UK
6. <i>Guardians of the Galaxy Vol. 3</i>	2.48	US-New Zealand
7. <i>Puss in Boots: The Last Wish</i>	2.47	US
8. <i>Mission: Impossible - Dead Reckoning Part One</i>	2.42	US
9. <i>Indiana Jones and the Dial of Destiny</i>	2.40	US
10. <i>Le temps d'un été</i>	2.18	Canada

Source: MTAC.

\* Box office receipts earned between January 1 and December 31, 2023. 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 2023



- IPTV subscribers increased by 10% to 6.1 million.



- The number of BDU subscribers declined by 2.5% to 9.4 million.
- BDU revenues declined by 5.3% to \$7.0 billion.
- BDUs' contributions to the creation of Canadian programming decreased by 4.1% to \$374 million.

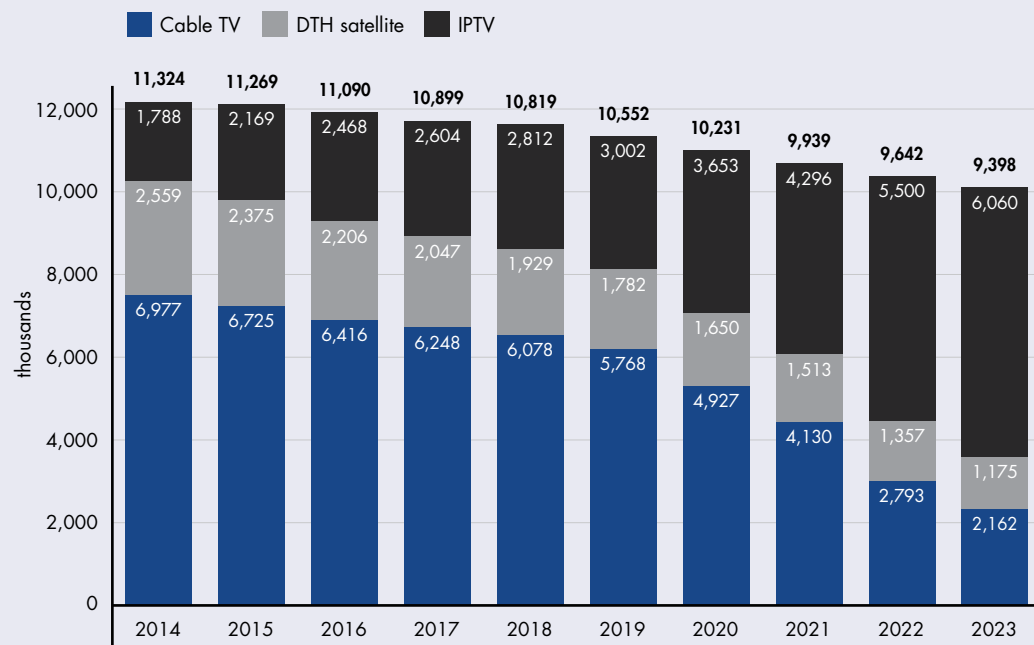
Canada’s BDU industry continued to experience further cord-cutting during the 2023 broadcasting year (September 1, 2022 to August 31, 2023). According to statistics from the Canadian Radio-television and Telecommunications Commission (CRTC), the number of subscriptions to Canadian BDU services peaked at 11,529,000 in 2012. Since that year, the industry has experienced annual declines, including a record net loss of 321,000 subscribers (3.0%) in 2020 (Exhibit 11-1). In 2023, the BDU industry shed 244,000 subscribers, or 2.5% of the subscriber base at the end of 2022. Since 2019, Canada’s BDU industry has been losing an average of 2.9% of subscribers annually.

The flip-side of cord-cutting has been the continued up-take 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 2023, Internet-based video services in Canada earned \$4.93 billion from audiovisual services - an increase of 19.5%.<sup>44</sup> Indeed, between 2019 and 2023 total audiovisual revenue for digital media broadcasting units (DMBUs) increased at an annual average rate of 9.8%.<sup>45</sup> SVOD services, such as Netflix, Amazon Prime Video, Disney+, Crave, Club illico, CBC Gem, ICI Tou.tv and Sportsnet Now, accounted for \$2.75 billion in revenue in 2023; AVOD services such as YouTube accounted for \$1.96 billion; and TVOD services such as iTunes accounted for \$220 million.<sup>46</sup>

Through their contributions to the Canada Media Fund (CMF), certified independent production funds (CIPFs) and the funding of local programming, BDUs support the creation of Canadian content. In 2023, BDUs’ contributions to the creation of Canadian programming decreased by 4.1% to \$374 million (Exhibit 11-3). This overall decline included a 6.2% decrease in contributions to the CMF. BDUs contributions to independent production funds were 4.9% lower and still one-third lower than the level in 2015 (\$65 million). Meanwhile, BDUs’ contributions to local expression (i.e. community programming and locally reflective news) remained unchanged in 2023.

## BDU SUBSCRIBERS AND REVENUE

Exhibit 11-1 Number of BDU subscribers\*



Source: CRTC.

Note: Some totals may not sum due to rounding.

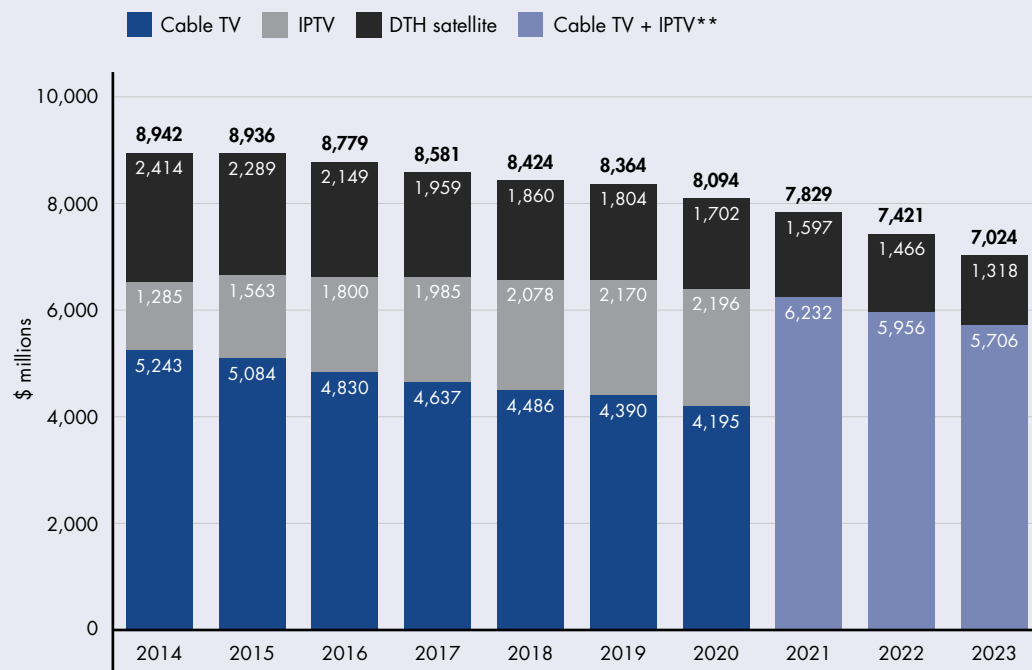
\* Excludes BDUs not required by regulations to report financial and operating data to the CRTC.

<sup>44</sup> CRTC (2024). *Communications Market Reports – Open Data*. Table TVT9.

<sup>45</sup> CRTC (2024). *Annual highlights of the broadcasting sector 2022-2023*.

<sup>46</sup> Ibid.

**Exhibit 11-2 Total revenue in the Canadian broadcasting distribution 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**

	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023
CMF	219	219	215	206	193	191	189	185	177	166
Independent production funds	64	65	63	58	46	45	44	43	41	39
Local Programming Improvement Fund	40	0	0	0	0	0	0	0	0	0
Local expression										
Licensee's own community channel	—*	—*	—*	—*	112	106	107	105	110	108
Community programming in other markets operated by the licensee	—*	—*	—*	—*	3	2	1	1	3	3
Locally reflective news programming	—*	—*	—*	—*	48	49	47	43	39	42
Subtotal	152	153	154	154	162	156	156	149	152	152
Independent Local News Fund (ILNF)	0	0	0	0	22	21	21	20	19	18
<b>Total</b>	<b>475</b>	<b>437</b>	<b>431</b>	<b>417</b>	<b>422</b>	<b>414</b>	<b>409</b>	<b>397</b>	<b>390</b>	<b>374</b>

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,<sup>47</sup> Nordicity applied the following gross-up factors to the raw production data supplied by CAVCO.

- 2021/22: 2.9%
- 2022/23: 5.4%
- 2023/24: 22.4% (television) 16.4% (theatrical)

Note that the gross-up factor for 2023/24 is higher than the rate previously used (11%). This is due to the fact that this version of the Profile was prepared using a dataset from CAVCO from Spring 2024 rather than Fall 2024 and therefore would be subject to a larger lag adjustment, since it was missing six months of data in comparison to the historical Fall datasets supplied by CAVCO.

The above rates were based on historical rates of under-coverage observed in the CAVCO statistics between 2012/13 and 2018/19 (i.e. before the COVID-19 pandemic), with particular weight given to the rates of under-coverage observed in the latter years of this 7-year period.<sup>48</sup> The rates for 2023/24 include further adjustment to reflect the historical changes in volume observed between the Spring and Fall datasets prepared by CAVCO.

## 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 2024* for the previous three years (2020/21, 2021/22 and 2022/23) 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 2024* to estimate the total volume of CRTC-certified production.

<sup>47</sup> 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.

<sup>48</sup> 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 in earlier years within that seven year period.

### 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 was included in the statistics for Canadian television production. In *Profile 2023*, data for theatrical short films has been included in Canadian television production for all years – 2013/14 through 2022/23. 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.

### Canada Media Fund

The statistics reported for the CMF include data for Convergent Stream production supported by the CMF. Statistics for CMF funding and supported production are reported on a fiscal-year basis, April 1 to March 31. Data is collected by the CMF during pre-production. In this report, if the source of the data is CMF alone, the data represents a pre-production year. If the source refers to CMF data with other sources, such as CAVCO, a project's fiscal year is adjusted accordingly.

### 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 2024* 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's 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 full-time equivalent (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 2023/24 was \$82,425. 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).<sup>49</sup>

**Average FTE salary in the film and television production sector**

	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24
Average FTE cost	\$58,016	\$58,607	\$59,445	\$60,396	\$62,389	\$64,074	\$67,213	\$77,094	\$79,638	\$82,425

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.

<sup>49</sup> 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%).

### **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 \$60,883.

#### 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.

**Canadian Audio-Visual Certification Office (CAVCO)**

The section within the Department of Canadian Heritage that co-administers (with the Canada Revenue Agency) the Canadian Film or Video Production Tax Credit (CPTC) and the Film or Video Production Services Tax Credit (PSTC). As part of this role, it is responsible for assessing television programs and films against a number of eligibility criteria, including a key creative point system, to determine if a film or television program is eligible to access the CPTC and thereby can also access other funding mechanisms.

<b>Canadian Film or Video Production Tax Credit (CPTC)</b>	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 expenditure" (QLE) in a given year. The QLE refers to the eligible labour expenses for the production, capped at 60% of the production's total costs, net of any assistance received.
<b>Canadian programming expenditure (CPE)</b>	The monetary value of licensed Canadian broadcasters' spending on original or acquired television programs that qualify as Canadian content.
<b>Canadian Radio-television and Telecommunication Commission (CRTC)</b>	Canada's regulator of the broadcasting and telecommunications sectors.
<b>Conventional television / Conventional TV</b>	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.
<b>Convergent Stream</b>	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.
<b>Coproduction</b>	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.
<b>Direct-to-home (DTH) satellite television</b>	A BDU service under which households and businesses utilize a small aperture satellite antenna to receive television signals.
<b>Discretionary services</b>	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.
<b>Educational broadcasters</b>	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.

<b>Experimental Stream</b>	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.
<b>Film or Video Production Services Tax Credit (PSTC)</b>	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" (QCLE). The QCLE is equal to the eligible Canadian labour expenses for the production, net of any assistance received in respect of those expenses.
<b>Foreign investment in production (FIIP)</b>	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.
<b>Foreign location and service (FLS)</b>	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.
<b>Free Ad-Supported Streaming Television (FAST)</b>	A type of internet-based television service that gives consumers access without having to pay a subscription because the service sells advertising to fund its operations.
<b>Full-time equivalents (FTEs)</b>	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.
<b>Gross domestic product (GDP)</b>	The sum of the economic value-added generated within 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.
<b>Internet-based television services or Internet-based video services</b>	Includes SVOD, AVOD and TVOD services.
<b>Internet protocol TV (IPTV)</b>	A BDU service that is supplied to households and businesses through a broadband connection.
<b>On-demand services</b>	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 (VOD) or over the Internet (SVOD, AVOD, TVOD and FAST).

**Programs of national interest (PNI)**

Television programming that falls within the categories of drama and comedy; long-form documentary; English-language awards shows; and French-language music, dance and variety programming.

**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 set-top boxes, smart TVs, laptops or mobile devices.

**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).