

2019/20

# Impact Report



Book  
Publishing



Interactive +  
Digital Media



Magazine  
Publishing



Motion  
Picture



Music +  
Sound Recording

creativeBC



BRITISH  
COLUMBIA



RAVEN PEOPLE RISING (dir. Andrea Palframan) follows the 2016 BC Coast oil spill aftermath in the Heiltsuk region. Photo by April Benzce.

We gratefully acknowledge the people of the x̱w̱məθḵwəy̱əm (Musqueam), sḵw̱x̱w̱ú7mesh (Squamish), and sə́lḻw̱iṯuḻh (Tsleil-Waututh) First Nations. We are honoured to be living and working on their ancestral and unceded home territories, with commitment to learning how to be a respectful guest. Visit [native-land.ca](http://native-land.ca) to learn about your home on native land.

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**CREATIVE BC TEAM**

Report Author Karin Watson  
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"We must open the doors and we must see to it that they remain open, so that others can pass through."

– Rosemary Brown (1930 – 2003)

Born in Kingston, Jamaica, in 1930, Rosemary Brown came to Canada after WWII in 1951 to study social work. She earned a Masters degree in the field from UBC and went on to help found the British Columbia Association for the Advancement of Coloured People (BCAACCP), advocating for housing, employment and human rights legislation. She became the first black woman in Canada to be elected to public office as a member of the British Columbia Legislative Assembly in 1972. She served until 1986, advocating for services for the elderly, the disadvantaged, immigrants and people with disabilities, as well as prohibition of racist and sexist legislatures. She went on after politics, during the 1990's, to teach at SFU, and later was appointed Chief Commissioner of the Ontario Human Rights Commission, receiving many honours, awards and orders. She was sworn to the Queen's Privy Council for Canada as a member of the federal Security Intelligence Review Committee and served on the Order of Canada Advisory Committee until her death in 2003.



@premgill

The courage, vision and stamina of people like Rosemary Brown are inspiring to me, especially at this historic moment—a time in which many doors have closed and we continue to live and operate through the reality of a devastating, global pandemic. During this time, we have been distanced and yet we are also coming together to acknowledge that even with the hard work for change that many before us have undertaken, systemic racism and exclusion are real. And furthermore, that just like the pandemic, the effects of these will continue to be exponential and ongoing if we don't take extreme measures to mitigate their negative impacts.

Daily, our global collective watches news of both realities. Our interdependence with one another and with nature is being revealed again and again—and a historic lack of conscience has led to so much unfairness. Together we now face economic, social and environmental threats that cannot be ignored and that will undermine the well-being of society's most marginalized first.

Our leadership will be revealed and defined as a sector by the policies we choose to put in place, and the doors we open toward a better future for all. It's time to create space and opportunity, to amplify voices, and to reinvent ourselves—economically, socially, environmentally.

We thank the Province of British Columbia for their investment in the creative industries. With colleagues locally, nationally and globally, and especially with my team at Creative BC, the pages of this report reflect our work toward the priorities of positive change and sustainability in every aspect of our influence. Together, we can find steadiness amidst the uncertainty if we consistently choose optimism, bravely muster our combined strength, and go beyond kindness and compassion to act tirelessly from a place of 100% accountability.

**Prem Gill**  
CEO, Creative BC

# The Year Everything Changed: COVID-19

In FY19/20 the world and B.C.'s creative industries were rocked by the first global pandemic since 1918.

Had FY2019/20 closed the way its first 11 months began, the creative economy in B.C. would have celebrated steady contributions prior to the global crisis, with \$4.85B total GDP in 2019 according to Creative BC's new Creative Industries Economic Results Assessment tool, CIERA. But on Friday, March 13th, just 18 days before year-end, COVID-19 saw Creative BC's team dispatched together from the office for the last time since then.

The fact that all three service delivery lines – granting, film commission and tax credits administration – had gone 100% digital over the previous year meant operations were not disrupted. However, the industries we serve are widely acknowledged to be among the hardest hit by impacts of the global pandemic.

Our early creative industries-wide survey was completed by March 31<sup>st</sup>. It reflected

clearly the interdependence between health and economics. Small businesses form the majority of this sector, including sole proprietors and gig workers delivering skills on a project-to-project basis. Especially these creators and their companies, within the industries' more broadly destabilized workforce, faced immediate and ongoing uncertainty.

Hardest hit have been the live music and live action film segments of the sector. By investing in work from home infrastructure, animation/VFX, post-production and interactive companies were able to keep people working, but VFX and post-production later experienced a gap in demand. Book and magazine publishing experienced a variety of setbacks including consumer habits, supply chain and distribution issues.

## Immediate Sector Support

As Dr. Bonnie Henry reminds us, be kind, be calm and be safe. These behaviours remain arguably half the formula for economic recovery, with many financial interventions also contributing to the formula via provincial, federal and private investments that now are in place and/or on the way.

Creative BC quickly adjusted program criteria and funding models to serve the new context of COVID-19. The organization facilitated an industry coalition

to collaborate with government and quickly develop the B.C. Motion Picture Industry Health and Safety Guidelines.

A COVID-19 Index was launched to aggregate sector-relevant resources. The organization also established electronic financial practices and quickly distributed \$623,000 to 742 music artists via Showcase BC – the program, the concert, and the streaming events website hub, showcasebc.ca.

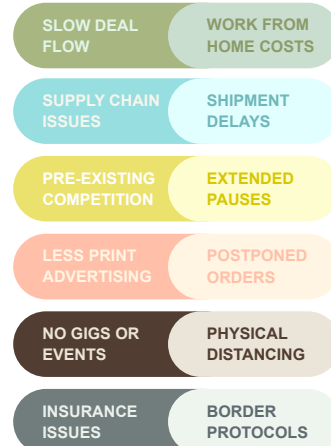
## supply disrupted, demand increased

After March 13th, the world went home and quickly turned to screens, earbuds, consoles and hardcovers to keep connected and entertained. Consumption of the creative sector's products spiked during self-isolation and remains higher than prior levels, however, changing consumer tastes and competition for their attention has been amplified.



Stats above reflect US consumption levels, as reported by Statista.com

## Obstacles to Overcome



## Creative BC COVID-19 Responses FY2020/21

- 1 Industry survey, qualitative and quantitative insights from 636 respondents submitted to government
- 2 Transitioned to electronic client payments
- 3 Delivered Showcase BC concert, program and online hub
- 4 CEO engaged as member of National Production Industry Task Force
- 5 CEO engaged as member of Premier's Economic Recovery Task Force
- 6 Province announced \$2M Domestic Motion Picture Fund for Creative BC delivery
- 7 Province renewed Amplify BC's \$7.5M funding for delivery by Creative BC

# Everything Must Now Change: Anti-Racism

In isolation, the world was quiet enough to listen and acknowledge the continued injustices of systemic racism, ableism and exclusion.

## JEDI: Justice, Equity, Diversity, Inclusion

Creative BC board and staff are engaged with specialists at Elevate Inclusion Strategies in equity, inclusion and anti-racism work: a formal, transformative, organization-wide, personal and professional JEDI training process. With a deliberate review and enhancement of behaviours at every touchpoint, opportunities and policies for change are being created.

The organization holds itself accountable to a thorough process, intended to build internal understanding and competence with JEDI principles. Creative BC will deliberately inform and expand changes that support and serve concentric

relationships. Positive impacts through all spheres of influence will reach the public.

Key strategies include: inclusive leadership and decision-making; continued project management of the Motion Picture Production Industry Association (MPPIA) workforce transformation project to serve motion picture and beyond; increased program participation by underrepresented groups; and increased discoverability for diverse voices and perspectives to shape culture and creative product for export.

We serve to unite and champion the success of B.C.'s diverse and distinctive creative sector.

Infused in our mission statement, Creative BC continues to evolve and learn—the work is never done.



## Strategy

Our vision is a British Columbia in which creators, creative entrepreneurs and creative industries are united in a globally competitive, growing and sustainable creative economy.

We serve to unite and champion the success of B.C.'s diverse and distinctive creative sector.

**Values**  
Inspire Creative Courage  
Focus on Client Needs  
Develop a United Vision  
Be Trusted to Act  
Show Service Leadership

**4 Strategic Pillars**  
Competitiveness  
Growth Mindset  
Discoverability  
Talent

## FY2019/20 BOARD OF DIRECTORS

### CHAIR

Rob Bromley

### VICE CHAIR + SECRETARY- TREASURER

Louise Clark

### MEMBERS

Gordon Esau  
Sarah Fenton  
Jesse Finkelstein  
Michelle Grady  
Pauline Moller  
Matt O'Grady  
Jamie Sterritt

## A Message from the Chair



The 2019/20 year was an extraordinary one for B.C.'s creative industries and for Creative BC. However, the successes achieved are difficult to report, as together now we must face the devastating ground lost due to the global pandemic. Beginning the last month of the fiscal year, negative impacts continue to impede stability and demand stamina for the long, steep climb to level ground and a gradual return.

Not just in B.C., but globally, the entertainment and media industries are additionally experiencing accelerated and amplified effects of digital disruption that were already major forces shaping their evolution. The creative industries will need to adapt to what PwC's Entertainment and Media Outlook 2020-2024\* says is a world that, due to the pandemic, almost instantly became "more remote, more virtual, more streamed, more personal...and more centred on the home".

While studies and lived experience confirm an immediate economic contraction, hitting some segments much harder than others, the underlying strengths of our sector along with consumer demand for the products we produce, remain high. Projections are for growth to resume in 2021 and, beyond jobs and GDP perhaps most significantly, the value of creative content in social terms is well-proven as it continues to connect, comfort and engage us individually and collectively through these challenging times.

B.C.'s creative industries are truly global leaders with a uniquely collaborative nature. Creative BC will capitalize on these differentiators while delivering responsive new strategies and tailored investments to enable the companies, communities and importantly, the people we serve.

Thank you to Prem and the team at Creative BC for the devotion and increased commitment this year. It has never been more important to support B.C. creators and creative companies. We thank our funding partners, the industry associations, and especially the Province for its annual commitment to the sector and for the new supports and ongoing policy work. Your resources and efforts are foundations upon which this sector will stand, rebuild and once again move forward—together, stronger.

### **Rob Bromley**

Chair, Board of Directors, Creative BC

# Ministry of Tourism, Arts, Culture and Sport

## A Message from the Minister



 @melaniejmark

I am the new Minister for Tourism, Arts, Culture and Sport and the MLA for Vancouver-Mount Pleasant. I am Nisga'a, Gitksan, Cree and Ojibway and the first and only First Nations woman to serve in the B.C. legislature and in B.C.'s Cabinet. I am excited to work with you as we build for the future.

We're fortunate to have a wealth of talent here in B.C. and I am proud of the incredible strength and resilience of our creative sector.

This report shows that we have developed an outstanding skilled workforce and infrastructure that help us capture more opportunities. The creative sector fuels our economy and provides more than 100,000 good paying jobs for people.

I am so proud that Creative BC has developed a new tool to measure the economic impact of the creative sector. The Creative Industries Economic Results Assessment (CIERA) sets a new standard for how data is collected and analysed across the four sectors. CIERA gives us annual, reliable, comparable data – and is the first of its kind for these sectors in Canada.

The COVID-19 pandemic has brought many challenges, but it has also showed us the value of working together. This new approach to measuring the value of the creative sector is a great starting place for working together as we chart a path to recovery. We will be here for you to open doors and grow the sector. Together, the future is bright.

T'ooyaksim' N'iisim'

**Honourable Melanie Mark**

Hli Haykwhl W'ii Xsgaak

Minister of Tourism, Arts, Culture and Sport

## A Message from the Parliamentary Secretary



 @BobDEithMRM

This report is a snapshot in time that showcases the strength, promise and talent in B.C.'s creative sector, despite these challenging times. Our work now, as the provincial government, is to help sustain the sector and to build it back even stronger.

I understand the challenges the creative sector is facing. I'm a musician and have been actively involved in the music industry for most of my career. I am honoured to be B.C.'s first Parliamentary Secretary for Arts and Film. I know we have a lot of work to do together.

Through collaboration and open dialogue, we're finding solutions. When the pandemic hit in March 2020, I had the opportunity to work directly with music leaders, and Creative BC, to adapt the Amplify BC program to meet the industry's needs. I was so impressed with people's strategic thinking, innovation and nimbleness; and together we got funding into the hands of artists and business owners when they needed it most.

The creative sector is resilient, in large part, due to the nearly 100,000 people who are working tirelessly to create and produce. I want to thank everyone for their efforts to follow the public health orders and pivoting so swiftly. You're a leading example of innovation in our province's economic recovery.

I'd also like to thank Creative BC for developing the new Creative Industries Economic Results Assessment. It will help us measure and report on the sector in a consistent and reliable manner - it's unique within Canada and a significant achievement. This new dataset will give the music, book publishing, digital and motion picture industries and policy makers the tools that they need to plan for recovery.

Your government is here for you. We are listening, and by working together we will emerge on the other side of this pandemic even stronger.

Thank you,  
**Bob D'Eith**

Parliamentary Secretary for Arts and Film

# A New Instrument of Measurement

Creative BC's CIERA: Creative Industries Economic Results Assessment



## Bringing Public Datasets into our Story

In FY2019/20, Creative BC undertook thorough research for the Amplify BC music program. Using public datasets obtained from Statistics Canada, a bespoke annual measurement tool was designed for the province's music and sound recording industry. While public datasets lag by two years (the most recent available is 2018), the tool was intended to complement and connect valuable, real-time industry research with a consistent, provincially and nationally accepted year-over-year benchmark.

Especially now, data is important and Creative BC expanded the project for standard data across the sector. The music pilot research was efficiently leveraged for a methodology using Statistics Canada-based sector insights for each of the creative industries served by Creative BC. The result is the design of a new proprietary tool of measurement called **CIERA**, the Creative Industries Economic Results Assessment tool.

In this Impact Report, Creative BC seeks to publish the first-ever CIERA benchmarks based on 2018-published data from Statistics Canada, with statisticians' estimates for 2019. This marks a break with previous figures and a new methodology. This improved

approach will be annual, gradually showing trends, facilitating expertly-informed modeling and estimates, and allowing for industry to relate their valuable, real-time insights, published by and within the sector, to this consistent, sector-wide CIERA measure that uses only Statistics Canada information. This way, Creative BC can present an expanded view each year—an increasingly rich yet consistent snapshot of each unique industry, as well as insights to a fluid and agile network of businesses and creators we call **Multi-Creative Industry Services** that directly feed and serve the entire sector—counted within it, yet defying categorization into just one industry. Learn more on page 42.

Results of the research confirm B.C.'s creative industries' strength and show us how **9 Enabling Factors**, introduced in the next pages, point to the work ahead for the sector so it can endure, recover and thrive once again.

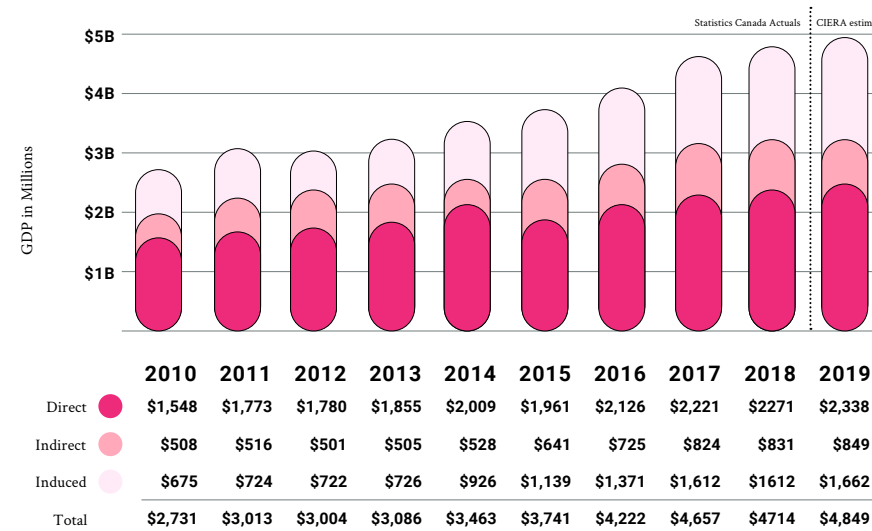
For CIERA'S research methodology, see page 96 and for comparability and detail see breakdowns of direct, indirect and induced GDP, Output and Jobs at [www.creativebc.com/ciera](http://www.creativebc.com/ciera).

## Benchmark Year, 2019\*

Statistics Canada data published to 2018, \*estimates for 2019

### Total GDP, B.C. Creative Industries 2019

### B.C. Impacts



	TOTAL GDP Exclusive of government investment	TOTAL JOBS Traditional FT + PT equivalents combined
	\$26M	390
	\$952M	8,746
	\$136M	1,954
	\$2.41B	35,332
	\$288M	6,144
	\$1.04B	13,958
<b>Total</b>	<b>\$4.85B</b>	<b>66,524</b>

## What CIERA Measures

All studies noted can be found on Creative BC's website at [ow.ly/aY7i50BvkkL](http://ow.ly/aY7i50BvkkL).

**Moving to Total GDP and Jobs** | Total GDP and Jobs will be the key indicators for all ongoing communications across all industries. By moving to GDP as the key measure of B.C.'s creative industries, they become more easily comparable with others and with each other. It is important to note that all CIERA GDP figures exclude government investments to the industries, such as tax credits or granting funds. For simplicity, GDP measures value-add to the economy (worker pay and profits resulting from industry activity) while Output includes broader industry expenditures (worker pay, profit, services and supplies spending). GDP is similar to a sub-set of Output, which in a general sense is how Creative BC had previously identified measures for the industries it serves. Particularly, the organization's direct insight to actuals for motion picture industry spending (similar to Output) in B.C., through provincial tax credit administration, remains a strong real-time industry insight for this segment of the sector. B.C. motion picture tax credit figures and Output are strong methods for contextualization, and Output is often used for general global estimates based on revenues.

**Workers VS. Hours Worked: Measuring Jobs In A Gig Economy** | Traditional statistical measurement of jobs relates to hours worked, including part- and full-time jobs. Again to improve comparability with other industries going forward, CIERA's figures take this approach. However, especially in the creative industries, it is acknowledged that traditional measures do not count how many people may have shared those jobs, working significantly fewer hours delivering highly specialized skills. In a sector dependent on skills over jobs, from stunts to copy editing, this gig work is the norm. Creative BC values real-time industry information regarding the number of people actively undertaking gig work, such as that through the recent industry collaboration and labour market study on below-the-line film workers that identified 48,300 people paid for services in 2017, based on actual payroll data. Compared with the 21,305 direct and 35,332 total jobs (CIERA 2019) this influence of workers over work will be

a continued area of study. The increasing influence of gig work is recognized around the world, and Creative BC will work in collaboration with public and industry partners to understand its influence.

**CIERA Indicator Definitions** | *Total GDP* - this figure is the sum of direct, indirect and induced contributions to the economy, it represents labour and profit contributions by the industry primarily, but excludes expenditures on supplies and services. Indirect and induced show economic contributions within the province only. GDP figures are net of any government subsidies received by the industry. *Direct Output* - this figure is the direct impact (no indirect or induced are added) and represents labour and profit contributions GDP plus expenditures on supplies and services. Direct Output figures are net of any government subsidies received by the industry. *Total Jobs* - this figure is the sum of direct, indirect and induced numbers, representing Statistics Canada-defined traditional Full-Time jobs (30+hrs/wk) and aggregated Part-Time jobs combining to count as a single Full-Time job based on the hours worked. It represents work, but not workers, and currently has limited ability to measure gig work. It must be noted that the creative industries include many people with gig work that is not easily tracked or assessed using traditional systems and models. Statistics Canada recognizes the importance of gig work and acknowledges that it is most prevalent in the arts, culture, recreation and sport industries. Furthermore B.C. has the highest share of gig workers in the country - in 2016, 8.7% of male workers and 10.7% of women workers in B.C. are engaged in the gig economy.

**Comparability** | When looking at measures from other reports and sources, such as those offered in the industry pages of this report, it is important to identify whether Total or Direct impacts are referenced, and whether GDP or Output are the economic measure. By offering detailed CIERA tables each year, Creative BC seeks to facilitate comparability in any circumstance.

## CIERA 2019\*

\*CIERA: Statistics Canada Outputs to 2018, estimates for 2019

The Creative Industries Economic Results Assessment is a new tool, designed through Creative BC research, to deliver consistent annual insights based on Statistics Canada public data sets.

### B.C. Creative Industries Impacts

#### TOTAL B.C. GDP

Direct, Indirect, Induced

**\$4.85B**



#### B.C. JOBS

Total FT + Equivalent (Direct, Indirect, Induced)

**66,524**



Total FT + Equivalent (Direct)

**42,358**



Up to 108,000 people when gig workers are counted by a variety of industry sources, complimenting CIERA data

#### GROWTH RATE

Outpacing B.C.'s 5% Rate Overall 2010-2018

**7.1%**



# 21%

## Multi-Creative Industry Services are a significant contributor to the creative industries Total GDP

See page 42

### Skills over Jobs

A note on the new normal: gig work

Conference Board of Canada research indicates that people in the creative industries have more than one occupation, reflecting the gig work nature of this sector. Examples are in sound recording, with an average 3.2 occupations each; in writing and publishing 2; in audio-visual and interactive media 1.5; and those in live performance 1.9. In addition, where business services could support multiple creative industries, CIERA separates them into a group called Multi-Creative Industry Services—

those businesses and gig workers that deliver skills to multiple industries in the cultural sector of which the creative industries are part. Improved measurement of the gig economy, that redefines the way many people trade skills for pay, will help governments understand the evolving nature of work beyond traditional FTEs. In Canada, arts, culture, recreation and sport have the highest percentage, and B.C. had the highest share, of gig workers in the country according to Statistics Canada.

### The World Depends on B.C.'s Collaborative "Creative Trust"

Our creative industries are preferred business partners, fueled by convergent assets, local capacity and *coopetition*

Access to international trade and partnerships is key to the success of our creative industries in this province—talent, markets, travel, investment—the industry itself, and the consumers of B.C. creative products, are united in a global system.

B.C. is trusted as a positive business climate that delivers quality and invests in the success of its creative industries—from conducive policy and expert talent, to dynamic creative product, and world-class industry services and infrastructure. However, the sector is not only recognized for what it offers to local and international businesses, it has a positive international reputation for how it behaves as it delivers.

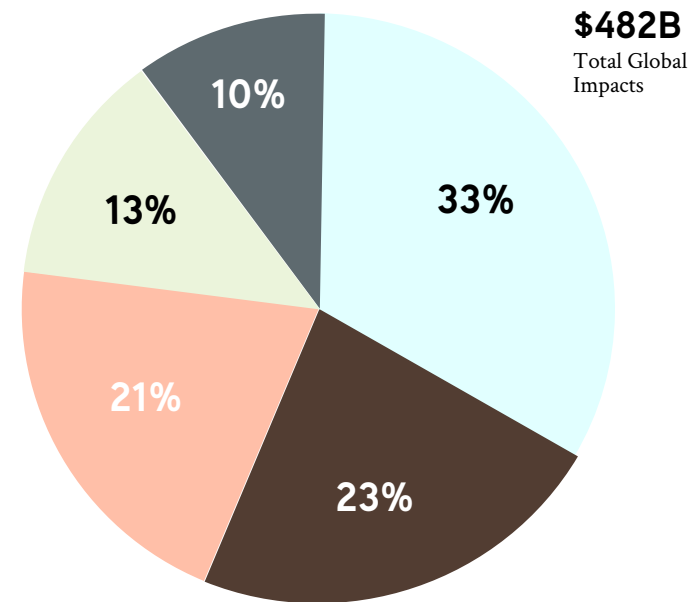
B.C.'s creative industries set themselves apart through a tight-knit and collaborative

culture that is structured for mutual success. The network of industry associations meets regularly with Creative BC, which was created by the Province to champion their dynamic and interconnected contributions to the economy and to B.C. creative culture. Raising all five industries' opportunity through cross-industry synergies is a central function of the organization and the intent is to serve their united vision for sustained success. Domestic and international businesses, festivals, programs, initiatives and industry summits all converge within this ecosystem of trust where connections and relationships are catalyzed.



### Global Economic Impacts 2019

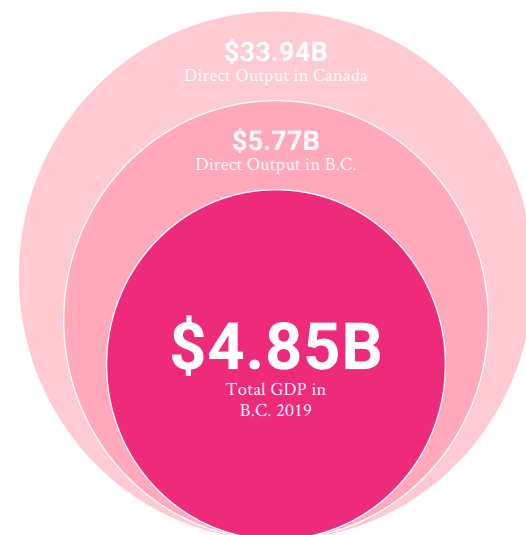
The World's Creative Industries: Media + Entertainment



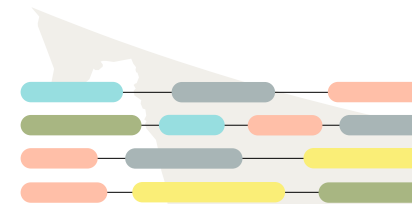
**\$482B**  
Total Global Impacts

### B.C. Total GDP in Relation to Direct Output

GDP measures value-add to the economy while Output includes broader industry expenditures



- \$160B**  
Interactive + Digital Media
- \$110B**  
Book Publishing
- \$100B**  
Motion Picture
- \$62B**  
Magazine Publishing
- \$50B**  
Music + Sound Recording



# 17%

of Canada's creative industries activity is generated in B.C.

A stronger B.C. requires us to return even better, by measuring not just economic benefits but by valuing the creative industries' social and environmental contributions too.

### Collective Strength Beyond COVID

B.C.'s Creative Industries' and their Global Opportunity

The media and entertainment industry are a part of the world's knowledge economy. On the supply side, manufacture of creative products is more heavily dependent than most other industries on intangibles such as collaboration, research, intellectual property, expertise, access, non-rivalry and powerful network effects to fuel its success. This capacity is akin to a collective **Creative Trust** from which the industries, and their clients may draw.

Demand for creative content remains higher than ever. Estimates from a variety of sources show \$482B in collective contribution to the global economy in 2019. However, along with tourism, the sector is one of the hardest hit by the pandemic, especially live action filming and live music activity.

COVID-19 impacts on each of the industries are reflected in the industry-specific pages of this report, as is the work ahead for recovery.

All studies noted on can be found on Creative BC's website at [ow.ly/aY7i50BVkkl](http://ow.ly/aY7i50BVkkl)

Book Publishing (Source: IBIS World: Global Book Publishing Industry - Market Research Report 2020); Interactive + Digital Media (Source: New Zoo); Magazine Publishing (Source: IBIS World: Global Magazine Publishing Industry - Market Research Report 2020); Motion Picture (Source: MPA THEME Report 2019); Music + Sound Recording (Source: PwC, World Economic Forum: This is how COVID-19 is affecting the music industry); \*\*Conference Board of Canada, Labour Market Information Study of the Cultural Labour Force 2019 (Source: [ow.ly/XmyY50BVkiV](http://ow.ly/XmyY50BVkiV))



# Enabling Factors

Creative BC's CIERA research studies the economic impacts of B.C.'s creative industries across their three-part value chain: create-produce-distribute. However as experienced globally during the pandemic's shutdown, their value to society delivers tremendous non-economic benefit beyond GDP and jobs.

Around the world, we stayed connected while staying apart with entertainment through screen, earbud, console and hardcover. Storytelling deepens our sense of self and influences how we relate to others, encouraging us to explore our individual and collective beliefs. Creative content translates experiences—transcending time and space to unite us, change our opinions, and instill values.

While out of scope for Creative BC's research, the value of B.C.'s creative industries to our provincial culture through the reflection, expression and documentation of our history is important to note.

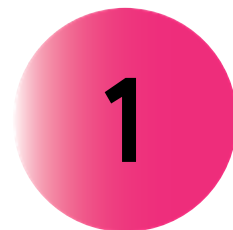
To extract increasing worth from the creative industries, Creative BC's research identified Nine Enabling Factors that positively impact value creation by the industries Creative BC serves and in turn, the ripple effect of their positive contributions to our lived experience.

Several frameworks were drawn upon to identify and define the enabling factors including those from the World Economic Forum, the Conference Board of Canada, the Boston Consulting Group, the World Intellectual Property Organization, and various industry reports.

Particularly at this pivotal time in securing the industries' capacity to endure, recover and thrive, Creative BC sees these factors as a framework to inform strategic planning efforts, including the definition of priorities, goals, strategies and metrics—by Creative BC, government, industry and other stakeholders going forward.

## Training + Development

Includes access to structured training, development programs and short-term workshops available to the creative workforce to advance skills, as well as programs that provide foundational education and training for new entrants to the workforce or for people transitioning into the sector from another.



## Networks + Institutions

Includes the exchange of ideas through industry networks, mentoring, and other modes of communication and collaboration. Includes the presence of regional clusters for which there is some evidence that their success is linked to creative output and quality. Also includes the presence of complementary sectors and potential for cross-pollination of ideas. Institutions refers to the collaborations between parts of the value chain, which propels advocacy and problem-solving.



## Access to Markets

Refers to the ability to sell projects, concepts, and finished commercial goods and services across borders, aided by support for international travel, showcasing opportunities, relationship-building and growth of business networks. This also includes effective navigation of trade barriers and frictions imposed by other jurisdictions as well as increasing the marketability of a company's goods and services through branding and marketing.



## Access to Funding

Includes various instruments available to businesses to finance their operations, achieve self-sufficiency, and enable long-term profitability and growth. Also includes advisory services provided by investors.



## Technology Adoption

Includes the adoption of technologies to achieve any number of benefits, such as decreasing the cost of production, improving the quality of finished goods and services, increasing sales and administration effectiveness and efficiency, and facilitating collaboration and communication.



## Facilitative Regulation

Includes policy and regulatory frameworks at all levels of government (federal, provincial, municipal) that are facilitative of content creation and commercialization, performance and distribution.



## Justice, Equity, Diversity + Inclusion

Includes the means to engage a broad range of populations throughout the communities and regions of B.C. so they may participate in the value chain as creators, collaborators and consumers.



## Infrastructure

Represents capital investments in the value chain including those that are specific to, and exclusively for the sector as well as those that are leverageable by the sector but available to multiple sectors. This includes investments into community resources and spaces in addition to individual companies.



## Other Favourable Business Conditions

Includes all other factors that impact the ability for the value chain to thrive and, generally, the "cost of doing business", such as availability of labour, interprovincial mobility, cost of living, quality of life, presence of other sectors competing for the same skills, etc.



Relevant COVID-19 Response FY2020/21

COVID-19 RESOURCE INDEX

GUIDING PRINCIPLES

4 AREAS OF FOCUS

Factor #5 | To enable the industries, Creative BC immediately designed program and service adjustment principals for in-play and new supports. Principles included: Flexible Funding, Innovative Pursuits, Distinctive Regional and Association Considerations, Strengthened Workforces, Rapid Delivery, Expert Service

for COVID-19, Partnership and Leverage of General Supports. Areas of Focus included: Value Chain stages (creation/performance, production, marketing/ distribution), and Creative Ecosystem. Additionally, a tagged and searchable index with federal/national/provincial financial resources is being maintained.

### References

- World Economic Forum: Global Competitive Index | [ow.ly/5SaA50BUO35](https://www.weforum.org/reports/global-competitive-index-2019)
- Conference Board of Canada: Valuing Culture - Measuring and Understanding Canada's Creative Economy, 2004 | [ow.ly/zOkO50BUO78](https://www.conferenceboard.ca/~/media/Files/2004/Valuing-Culture-2004.pdf)
- Boston Consulting Group: How Governments Are Sparking Growth in Creative Industries | [ow.ly/HXdC50BUOcB](https://www.bcg.com/publications/2014/how-governments-are-sparking-growth-in-creative-industries)
- World Intellectual Property Organization: Global Innovation Index | [ow.ly/zJKy50BUOgQ](https://www.wipo.int/ipindicators/indicators/gii)



"Despite the crisis—or perhaps because of it—I see our B.C. magazines' great content being sought after and appreciated by many more readers."

Sylvia Skene, Executive Director, Magazine Association of BC

magsbc.com  
Facebook: @magazinesbc  
Twitter: @magsbc



motion picture production  
industry association of bc

"Built on decades of talent, tenacity and hard work, B.C.'s motion picture industry stands among North America's busiest centres for international production. Today, we're taking a longer view of our business growth plans by acting on strategies that make BC's industry not just bigger, but better: Better opportunities for BC creatives to reap the rewards of a thriving film + tv sector; better engagement with our host communities and partners in government; better environmental practices that make a bigger difference; better education and training models that build our workforce in the right ways; and a better path forward to equity, diversity and inclusion that ensures fair and balanced representation in our industry. A better industry is a stronger industry, the kind we want to deliver to future generations of British Columbians."

Peter Leitch, Chair, Motion Picture Industry Association of British Columbia (MPPIA)

mppia.com  
Facebook + Instagram: @mppiabc  
Twitter: @mppia

## Anim & Vfx Alliance

"The Animation and VFX sector in B.C. is a story of success. Over the past decade we've created thousands of high value jobs for British Columbians, our companies create world class content and our reputation as a creative digital hub is a key pillar of B.C.'s motion picture industry. I look forward to continuing this winning streak, working in partnership with government and industry stakeholders to ensure we remain an ideal location for our sector to thrive."

Michelle Grady, Chair, A&VFX Alliance of BC and EVP Sony Pictures Imageworks

animvfxbc.ca



"Democratizing VR/AR technology and scaling the industry."

Dan Burgar, President, Vancouver VR/AR Association and Co-Founder & Managing Partner at Shape Immersive

vanvrrar.com  
Twitter: @vrraravancouver  
Instagram: @vrraravancouver

## DigiBC

"B.C. is a leader in creative tech and as such has a major role to play in the provincial recovery plan. Supporting both small, nimble companies and global industry leaders creates the rich mix of innovation and expertise in which this economy will thrive. Interactive and digital media talent is in high demand and attracting more British Columbians from diverse backgrounds and perspectives is a priority. We want people to choose careers in this well-paid and dynamic part of the creative industries to grow with us in this sector."

Loc Dao, Interim Executive Director, DigiBC, the Interactive and Digital Media Association of British Columbia

digibc.org  
Facebook + Twitter: @digibc  
Instagram: @follow\_digibc



"I think the industry needs to be more self-aware of its lack of diversity in every sector and acknowledge that the playing field has never been equal. Our film and television industry still lacks proper representation and it's never been more apparent than now that diverse voices matter in the creative arts and in filmmaking. We need to stand together as a collective voice against systemic racism and work harder to create more opportunities for underrepresented members in our industry and broader community."

Kerry McDowall, Chair of the Board, Vancouver Post Alliance Society

vancouverpostalliance.com  
Facebook: @vancouverpostalliance  
Twitter: @vancouverpost  
Instagram: @vancouverpostalliance

## ABPBC

"To make sure we can continue to reach readers, B.C. publishers are reimagining their operations and strengthening relationships with their industry partners and with one another. In my experience, it's always been a collegial industry, but more than ever it's become clear that a rising tide lifts all boats."

Heidi Waechtler, Executive Director, Association of Book Publishers of BC

books.bc.ca  
Facebook: BookPublishersBC  
Twitter: @ABPBC  
LinkedIn: @bcbooks



FIRST PEOPLES' CULTURAL COUNCIL

"Now more than ever, support of the Indigenous music industry is vital to ensure that the incredible diversity of Indigenous music in B.C. thrives into the future. FPCC is committed to supporting the needs of Indigenous musicians and professionals through the Indigenous Music Initiative. We hold our hands up to all those who are working to strengthen and celebrate their cultures and are engaged in innovative approaches to artistic expression through music. It is through celebrating British Columbia's rich and unique music landscape that we will ensure a strong and vibrant music industry for all."

Sarah Pocklington, Arts Program Manager, First Peoples' Cultural Council

fpcc.ca  
Facebook + Instagram: @firstpeoplesculturalcouncil  
Twitter: \_FPCC



"For over 25 years I've been passionately attached to motion picture sector in British Columbia. It's always been a collaborative and dynamic community, but never so much as now. From my fairly new seat at CMPA-BC, I have exposure to multiple stakeholders and to companies of all sizes, producing all genres, with a wide range of partners. The level of commitment across the industry is at an all time high to reimagine our creative sector as even healthier, safer, more diverse and sustainable than ever before."

Tracey Friesen, Managing Vice President, Canadian Media Producers Association, BC Branch

cmpa.ca/cmpa-bc  
Twitter: @CMPABC  
Facebook: @CMPABCProducers



"Music is woven into the fabric of our DNA. It is the soundtrack to our lives. As Music BC celebrates its 30th anniversary this year, we reflect on how we have evolved within the ever-changing landscape of our industry. In looking forward we are mindful of how we can adapt as an organization to navigate this time of immense uncertainty together. We will continue to stand by our community, to listen, uplift, and unlock the passion and potential of BC's music creators and professionals, because our sector is resilient, and because the human need to create and express oneself remains at the core of this vital art form."

Lindsay MacPherson, Executive Director, Music BC Industry Association

musicbc.org  
Instagram: @music\_bc

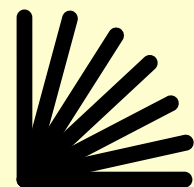
# United by a vision to sustain and return stronger

In August 2020, Granville Island gained an exciting new venture: Upstart & Crow, a bookshop that “exists to share stories and to support the literary arts in Vancouver and beyond.” Founded by the Vancouver Writers Fest’s Marketing Director and literary publicity professional, Zoë Grams, and writer and social entrepreneur, Ian Gill, Upstart & Crow features a wide collection of carefully curated books, gifts and artwork right in the heart of the cultural hub.



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Book  
Publishing



The nucleus of the province's publishing industry is comprised of **26 member publishers** of the Association of Book Publishers of B.C. (ABPBC). These publishers make corporate financial investments into the cultural output they produce and share profit from that creative content from commercial sales. More broadly in the province, there are an additional 20 businesses that include self-publishers, hybrid publishers and chapbook presses. These bring **B.C.'s total publishing business count to 48**.

B.C. represents 18% of the English-language Canadian owned publishing industry according to the ABPBC, and recipients of the Canada Book Fund in B.C. indicate 15% of their revenues come from export. The industry contributed **\$26M Total GDP** to the B.C. economy, **232 traditional direct FTE jobs and 390 when including indirect and induced employment** (CIERA 2019). **The industry's Total GDP Compound Annual Growth Rate (C.A.G.R.) contracted by -7.3% between 2010 and 2018** (CIERA data). The information in CIERA based on public datasets is complemented by industry association data that indicates up to 1,670 people working in the field. It's important to note that book publishing industry activity generates a portion of the additional \$1.04B incremental total GDP attributed to the Multi-Creative Industry Services segment of the creative industries overall. *See the industry's value chain for specific relevant activities on the following spread and full details of the Multi-Creative Industry Services on page 42.*

The recent 2018 Canadian Book Publishing Industry Profile, a study by Nordicity indicates the workforce is predominantly female at 70%. The same study indicates that in 2016 the average salary for those working in publishing was \$48,500 nationally.

The evolving nature of book formats continues to reflect the dominance of print, particularly for publishers producing specialized coffee table, illustrated, photography and children's books which do not translate well to e-book. While audio and digital book formats are contributing to diversify the industry's opportunities, print book purchases remain the key driver of this market. The Nordicity study cited in the previous paragraph is the most recent review of

the industry's breakdown of product formats in three categories: education, scholarly and trade. It indicates that in 2016 almost all new works were produced in print (96%) with 4% in digital only, and 59% published in both print and digital format with 37% published in print only. Within this, educational works were found to be more likely to be produced in print only (46% for the category), and 97% of scholarly titles produced in both formats with 3% for print only and none published in digital alone. Trade books, published for general audiences, saw 59% published in both digital and print format showing this market as best suited to digital formats.

Significantly, the book publishing industry is one of the first in the creative sector to make public a diversity baseline study, using data collected via a survey of 372 individuals working in the sector nationally. The 2018 study by the Association of Canadian Publishers (ACP)'s Diversity and Inclusion Working Group, while including only 13% of responses from B.C.-based employees, offers general insights and benchmarks from which the industry intends to measure improvement. The baseline data reflects a predominantly white (82% of respondents), female (74%), able-bodied (80%), heterosexual (72%) workforce. Respondents indicated that workplace initiatives supporting diversity and inclusion are recognized to be in place although their objectives are not yet achieved in practice.

However, the research indicates that respondents felt the commitment to principals of equality and inclusion had resulted in the establishment of diverse workplaces. Many specific actions are reflected in the study – from policies to recruitment, and targeted funding to supporting accessibility. Furthermore, ongoing programs like National Network for Equitable Library Services funding products for all readers are informing the business. With challenges to workforce diversification including the size of publishing companies themselves, respondents indicated commitments actualized through other means such as diverse authors and composition of editorial and other boards, as well as intended initiatives. The study is recommended to be repeated in three to five years from its publishing date.

During the pandemic, demand for books in North America and around the world remains high, with many anecdotal and industry statistics indicating increased book sales through COVID-19. However, there are three major supply issues facing publishers that have been revealed as a result of pandemic impacts: open and dependable channels for products to consumers, depth of the economic crisis, and pre-existing health of businesses and cash-flow.

The ABPBC echoes these general reflections on the industry, citing the challenges for B.C. publishers ahead include mounting debt and a need for financing guarantees. A revenue gap of approximately 50% is anticipated, due to extended payment terms and the returns model in book publishing by which bookstores may return a substantial percentage of the books they order but do not sell. Falling sales also jeopardize publishers' eligibility for Canada Book Fund support and the BC Book Publishing Tax Credit, both of which have an annual sales threshold to qualify for funding.

Returning from disruption will be challenging because of the long lead times and high start-up costs in this industry, which include those for acquisition, production, and marketing. As book deals are often signed two to three years prior to publication, and cashflow is an issue due to COVID-19 disruptions to supply and delivery chains, existing companies will be focused on ways to maintain continuity and find some stability until the value chain begins functioning again.

It is estimated that after an economic restart, three to six months will be required to return supply chains to precrisis levels. Bookstores, distributors and printers are all adjacent industries on which publishers in B.C. depend.

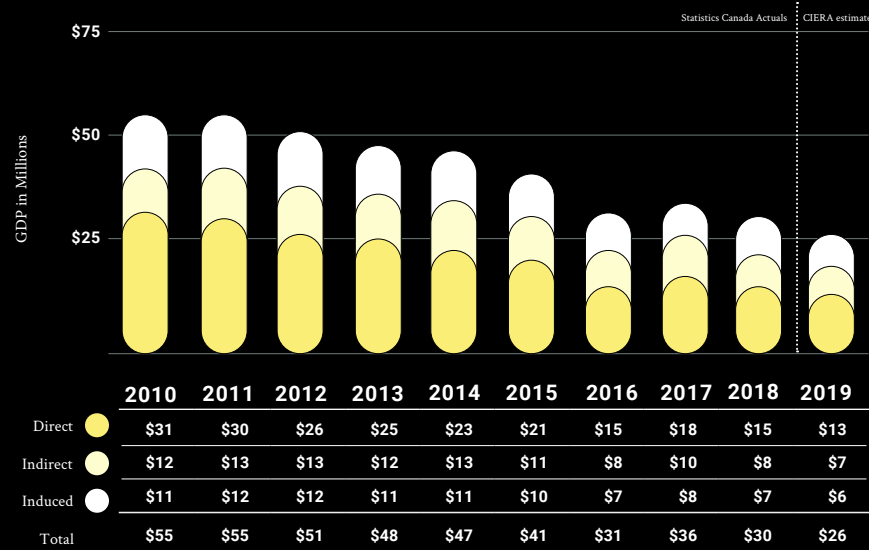
While gains in e-book and audiobook sales may be made, margins on the sale of these formats are slim and as well, they only account for less than 7% of Canadian publishers' total revenue. Furthermore, Canadian book publishers' economic success relies more heavily on bricks and mortar sales than their U.S. counterparts. Independent bookstores are a particularly important part of the industry's success in B.C. and as such, an early initiative by a B.C. publisher, Rocky Mountain Books, quickly established a Canadian Google Map of hundreds of local independent retailers embracing online sales during the pandemic. Positive reports were hopeful, such as that by Patricia Massy of Massy Books, who said that in June 2020 the store sold more books online than they did in all of 2019. Her story was featured in the Vancouver Sun, showing these businesses' resilience and encouraging the viability and value of curbside pickup services. Shipping costs are high and online delivery of books was deprioritized by major online retailers to facilitate shipping of healthcare products at the onset of the crisis, and deprioritization continues to be an issue. Consumers wish to support community bookstores, and publishers recognize them as a very real contributor to the local publishing industry's resilience.



# Book Publishing Industry Impacts in British Columbia

# 2019

## CIERA Total GDP



**390**  
TOTAL JOBS  
Traditional FT + Equivalent

**232**  
DIRECT JOBS  
Traditional FT + Equivalent

Comparability - it is important to identify whether Total or Direct impacts are referenced, and whether GDP or Output are the economic measure. By offering detailed CIERA tables each year, Creative BC will seek to facilitate comparability in any circumstance.

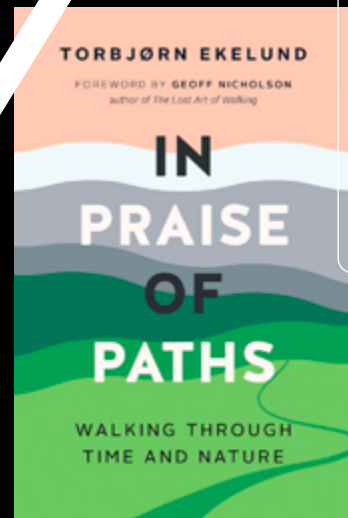
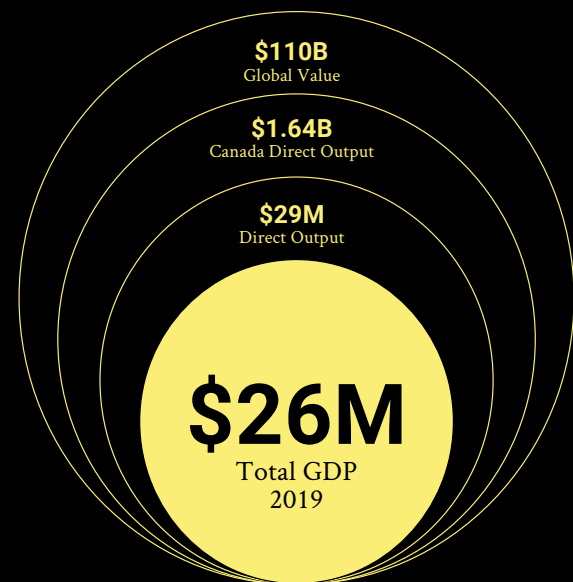
[creativebc.com/ciera](http://creativebc.com/ciera)

Traditional, hybrid and digital publishing

Annual data is shown in the graph as a time series. However, it is important to note that periodic refinements to measurement methods, by Statistics Canada, are not consistently applied to previous years' figures, therefore trends identified over long periods of time are estimates.

## Total GDP in Relation to Direct Output

Sources: CIERA 2019 (B.C. and Canada), IBIS World



An ode to paths and the journeys we take through nature, by Torbjørn Ekelund from Greystone Books

Total GDP C.A.G.R. 2010-2018

**-7.3%**

All results exclude any public investments made to these industries at federal or provincial levels.



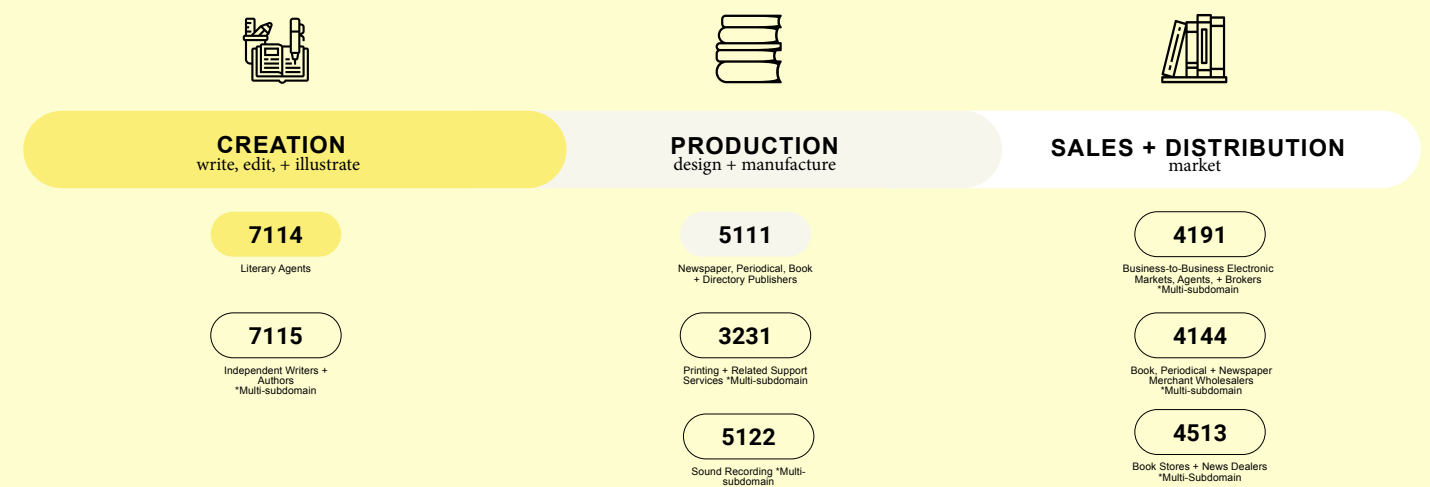
Books by B.C.-based publishers and authors taken at Upstart + Crow



Carpe Fin: A Haida Manga by Haida artist Michael Nicoll Yahgulanaas (Douglas & McIntyre) won the 2020 BC Book Prize: Roderick Haig-Brown Regional Prize, awarded to the author which contributes the most to the enjoyment and understanding of B.C. and Yukon.

## The Book Publishing Value Chain Mapped to North American Industry Classification System

Some of the "culture industries" as defined by Statistics Canada contribute to more than one creative industry, therefore these NAICS cannot easily be attributed to a single creative industry, nor can their business activities be proportionally allocated. In these cases, their economic contributions have been aggregated into CIERA's Multi-Creative Industry figures. Outlined bullets below are Multi-Creative Industry Services that do contribute to some extent to this value chain. See page 42 for Multi-Creative Industry impacts.



## Context: Recent Realtime Economic Research Conducted by Industry

The following resources add currency and context and can be considered as complementary insights to CIERA outputs each year.

Study	Economic	Employment	Link
Canadian Publishing Book Industry Profile: Public Report Nordicity for the Association of Canadian Publishers (ACP) Most recent study is 2018	\$27.9M Direct GDP \$76.3M Total GDP	520 Direct, Indirect, Induced 1040 Total	ow.ly/QPYM50CicKZ



# #READBC

Book Publishing Highlights

## 1 YOU HOLD ME UP | MONIQUE GRAY SMITH

Published by Orca Book Publishers, Monique Gray Smith's foundational book was commended on the TD Summer Reading List 2020, fostering empathy and encouraging respect between peers, starting with our littlest citizens.

## 2 REBENT SINNER | IVAN COYOTE

In *Rebent Sinner*, Ivan takes on the patriarchy, the political, the intimate and the personal in these beguiling and revealing stories of what it means to be trans and non-binary today. BC Yukon Book Prize winner for the Jim Deva Prize for Writing that Provokes.

## 3 CEDAR + SALT | DL ACKEN, EMILY LYCOPOLUS

This pacific-flavour cookbook from Salt Spring authors made the 2020 Taste Canada shortlist, a Globe and Mail Top 100 Book that Shaped 2019, winner of a 2020 Gourmand World Cookbook Award and shortlisted for a 2020 BC Yukon Book Prize. Image by DL Acken, from *Cedar and Salt* copyright © 2019 by DL Acken and Emily Lycopulus. Reprinted with permission of TouchWood Editions.

## 4 VANCOUVER AFTER DARK | AARON CHAPMAN

The Arsenal Pulp Press award-winning book features the vibrant historic nightlife of Vancouver prohibition-era nightclubs and Chinatown cabarets to gay bars, dive bars, goth hideaways, discos, and taverns.

## 5 JONNY APPLESEED | JOSHUA WHITEHEAD

The Indigiqueer author Joshua Whitehead's *Jonny Appleseed* won the CBC Books Canada Reads Contest. The debut novel from Arsenal Pulp Press by Whitehead, an Oji-nehiyaw scholar from Peguis First Nation, follows a two-spirit Indigiqueer young man as he returns home to his reserve to attend his stepfather's funeral.

## 6 A HISTORY OF MY BRIEF BODY | BILLY-RAY BELCOURT

The youngest winner of the Griffin Poetry Prize released his highly-anticipated memoir, featuring essays and vignettes on grief, colonial violence, joy, love, and queerness, printed by Penguin Canada.

## 7 HOW SHE READ | CHANTAL GIBSON

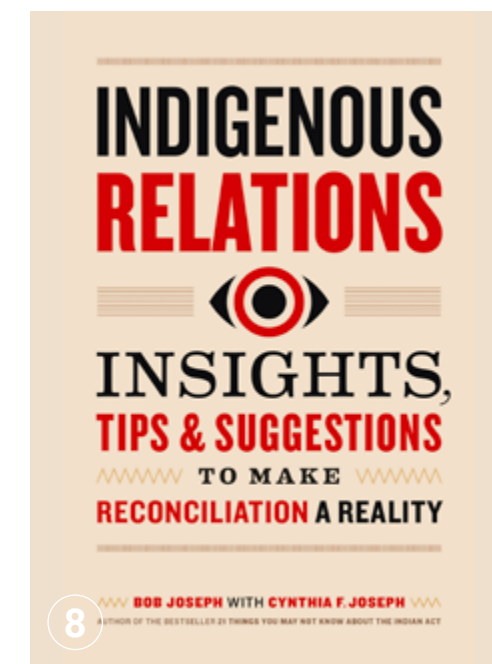
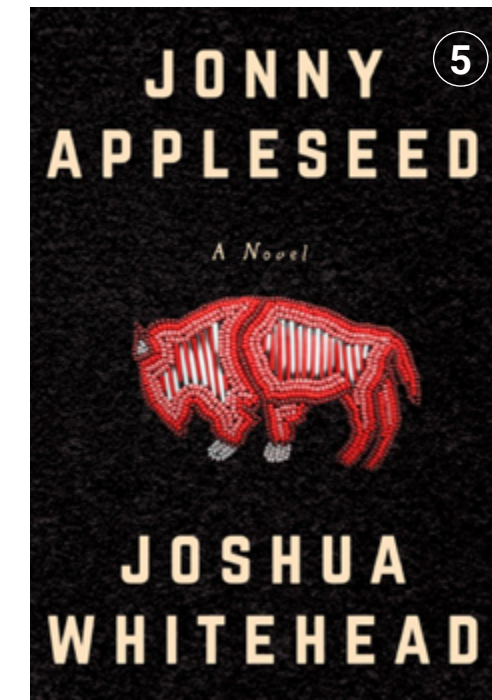
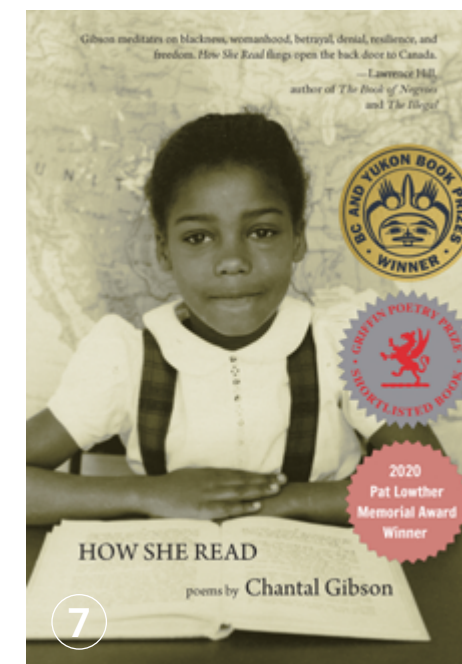
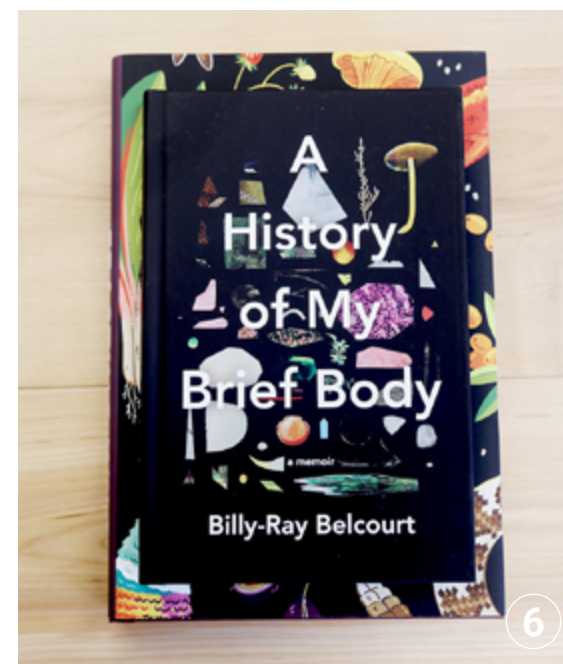
*How She Read*, published by Caitlin Press is a Griffin Poetry Prize and BC Yukon Book Prize shortlisted collection of genre-blurring poems about the representation of Black women, their hearts, minds and bodies, across the Canadian cultural imagination.

## 8 INDIGENOUS RELATIONS | BOB JOSEPH

By hereditary chief and leading Indigenous relations trainer, Bob Joseph, *Indigenous Relations* equips you with the necessary knowledge to respectfully avoid missteps in your work and daily life. Indigenous Relations is an invaluable tool for anyone who wants to improve their cultural competency and undo the legacy of the Indian Act. Published by Page Two Books.

## 9 POETRY IN TRANSIT

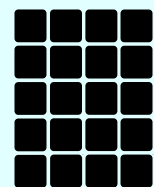
Each year a collection of poetry cards is produced featuring the work of B.C.-authored poets. Now in its 24th year, this project, in partnership with TransLink and BC Transit, showcases ten local poets onboard the transit fleet in Metro Vancouver and around the province.



Orpheus VR is a new virtual reality opera that immerses single audience members in a choose-your-own-adventure musical experience. Funded by Creative BC's Interactive Fund.



Interactive +  
Digital Media



The interactive and digital media industry is a broad category. However, for Creative BC's purposes, we include in our definition companies telling stories through entertainment and educational interactive games, experiences and applications. The field is changing rapidly, and even the definitions of the businesses and products within it are evolving more slowly than the companies and the marketplace itself. Creative BC's CIERA measure focuses solely on video games this year, as it is the only component of the industry within our scope, that has a clearly defined set of codes used by Statistics Canada (North American Industry Classification Systems (NAICS)). Creative BC's ongoing research will seek to isolate and measure new fields like VR/AR that are difficult to measure at this time.

**The video game industry alone is measured at \$952M Total GDP** (CIERA 2019) and represents the portion of interactive and digital media that can be measured at this time. This industry is part of the green and knowledge economies and shows a **Total GDP Compound Annual Growth Rate of 3.6% from 2010 to 2018** (CIERA data and BC Stats). It's important to note that interactive and digital media industry activity generates a portion of the additional \$1.04B incremental total GDP attributed to the Multi-Creative Industry Services segment of the creative industries overall. *See the industry's value chain for specific relevant activities on the following spread and full details of the Multi-Creative Industry Services on page 42.*

The video game industry provides **5,601 direct jobs and an estimated 8,746 when indirect and induced are included in the count** (CIERA 2019). Validating CIERA insights with realtime industry research is The Entertainment Software Association of Canada's (ESA) 2019 study on the health of the video game ecosystem in Canada. Furthermore, continued support for international market access in this industry is imperative, as the study shows that 76% of revenues for video game companies come from global sales.

Ensuring international market access in this industry is imperative, as the study shows that 76% of revenues for video game companies come from global sales. The study also reflects the historic strength of B.C.'s video game industry, and shows 139 companies in 2017

down to 116 in 2019 employing approximately 7,300 people, 83% of whom are full-time. The ESA shows 63% of expenditures are for labour, and in B.C. that same labour costs employers 25% more than it does on average in Canada.

Challenges and opportunities in B.C. are to increase the success rate for smaller companies that innovate and feed the ecosystem. It may be important to understand more about a higher cost-of-living in B.C. and its potential contribution to higher local wages, or whether competition for talent is leading to our province's above-average labour cost. The study shows that large companies employ 79% of labour in this industry (companies larger than 100 employees), and these organizations are multiplying in number in B.C., but the overall number of companies has decreased by 9% since 2015. Conversely, Quebec and Ontario are experiencing growth in the number of video game companies within their provinces—aggressive growth in fact, with 57% and 118% respectively in only four years. Ensuring B.C.'s fair share of federal support may contribute to balance the ecosystem and sustain it here.

From a demographic perspective, The ESA annual survey results show that B.C. employee average age is highest at 36 years vs. 31 in Canada overall, and employment participation by those identifying as women is lowest nationally at 14% (with only 21% of those working directly on games) vs. 26% and 56% respectively in Ontario and Quebec (with 18% and 56% working directly on games in those provinces).

Turning to B.C.'s virtual and augmented reality ecosystem, the Vancouver VR/AR Association and partners VIFF and the Vancouver Economic Commission, published a study in 2019 showing B.C. as the **second largest VR/AR centre in the world with 230 immersive tech companies**. The study surveyed 68 of those 230 companies finding that this subset employs 1,665 full-time employees in 2019. Due to issues mentioned, full visibility into the impacts of the sector is difficult. Again, access to capital, infrastructure and foreign markets (responsible for 65% of revenue for the companies surveyed) along with investment attraction are core to the industry's success.

From a consumer demand perspective, according to Deloitte Insights, the global pandemic quickly increased our screen time and inspired us to try new digital activities. Deloitte's 2020 Digital Media Trends Survey discovered that during COVID-19 one-third of consumers for the first time subscribed to a video or cloud gaming service, watched e-sports or a virtual sporting event. The survey found that COVID-19 accelerated both subscriptions and cancellations with consumers searching for value, and an average of 12 subscriptions per consumer.

The World Economic Forum's Three Ways AR Can Have a Positive Impact on Society identifies three things augmented reality does well: visualization, annotation and storytelling. In the reality of a global pandemic, these opportunities could be timely for cultural institutions, schools and workplaces. They could also help people overcome the social impacts of living in isolation. AR is not simply a technology, but a tool by which we can define how we will live with it, and the potential for delivery of meaningful experiences that will enrich humanity. With impacts beyond storytelling, immersive technology is facilitating medical training, making live performances accessible to people who are deaf and hard of hearing, and succeeding to reduce anxiety and build competence for differently abled people.

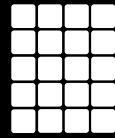
Unfortunately, in terms of impacts to B.C. companies, a national report by Nordicity measuring the impact of COVID-19 on the IDM industry showed immediate negative impacts, and significant revenue losses, layoffs

and unrecoverable costs. These include additional monthly costs and 40% of companies surveyed anticipating ongoing losses and/or less profitability.

Particularly in this part of the creative sector, major negative impacts were felt to productivity and delays from three weeks to more than 12 weeks were experienced in getting products and services to market as a result of COVID-19. Loss of business development opportunities were also experienced relevant to market cancellations where products are promoted and deals are made.

Combining current consumer trends with short-term insight to impacts on companies making the products they use, with the fact that COVID-19 realities will be longer-ranging, the marketplace remains viable although increasingly competitive for B.C.'s video game and immersive tech companies. Deal flow, access to talent, consumer choice, competitive jurisdictions and diverse investment needs and opportunities for both public and private sources of capital, will all have a role to play in the shape of the industry's recovery. As noted, working to ensure B.C.'s fair share of federal support to local interactive and digital media companies will build on the province's historic national leadership and roots of innovation in this field.

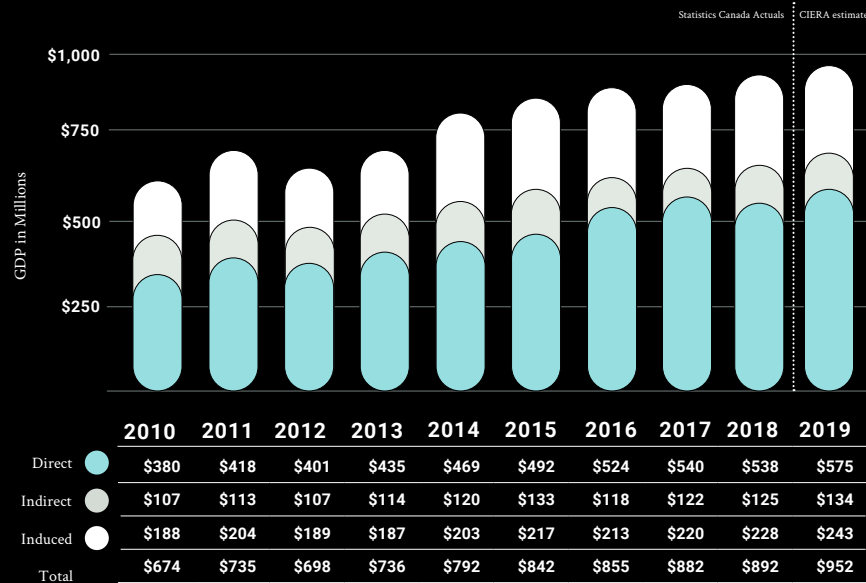
The capacity and resilience of B.C.'s creative industries ecosystem, its creative trust, and entrepreneurial DNA will all be advantages that bolster this industry as it seeks to sustain and steady itself and remain competitive.



# Interactive + Digital Media Industry Impacts in British Columbia

# 2019

## CIERA Total GDP



**8,746**  
TOTAL JOBS  
Traditional FT + Equivalent

**5,601**  
DIRECT JOBS  
Traditional FT + Equivalent

Comparability - it is important to identify whether Total or Direct impacts are referenced, and whether GDP or Output are the economic measure. By offering detailed CIERA tables each year, Creative BC will seek to facilitate comparability in any circumstance.

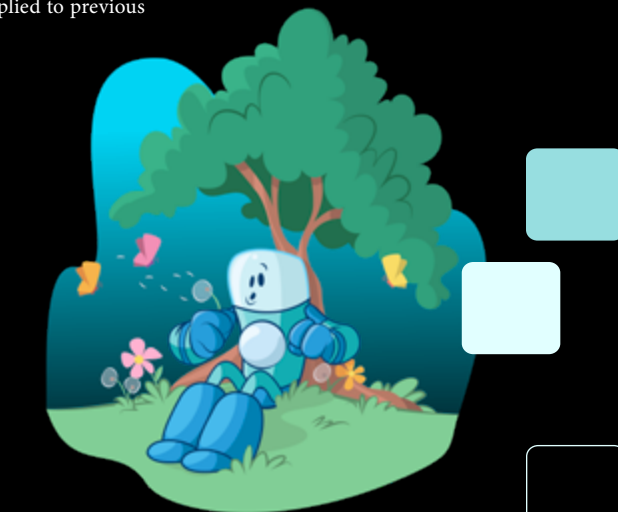
[creativebc.com/ciera](http://creativebc.com/ciera)

Limited to independently reflect B.C.'s video game cluster-coded entertainment

Annual data is shown in the graph as a time series. However, it is important to note that periodic refinements to measurement methods, by Statistics Canada, are not consistently applied to previous years' figures, therefore trends identified over long periods of time are estimates.

## Total GDP in Relation to Direct Output

Sources: CIERA 2019 (B.C. and Canada), New Zoo



Biba Playground Games was voted one of TIME Magazine's Best Inventions of 2019

Total GDP C.A.G.R.  
2010-2018  
**3.6%**

All results exclude any public investments made to these industries at federal or provincial levels.



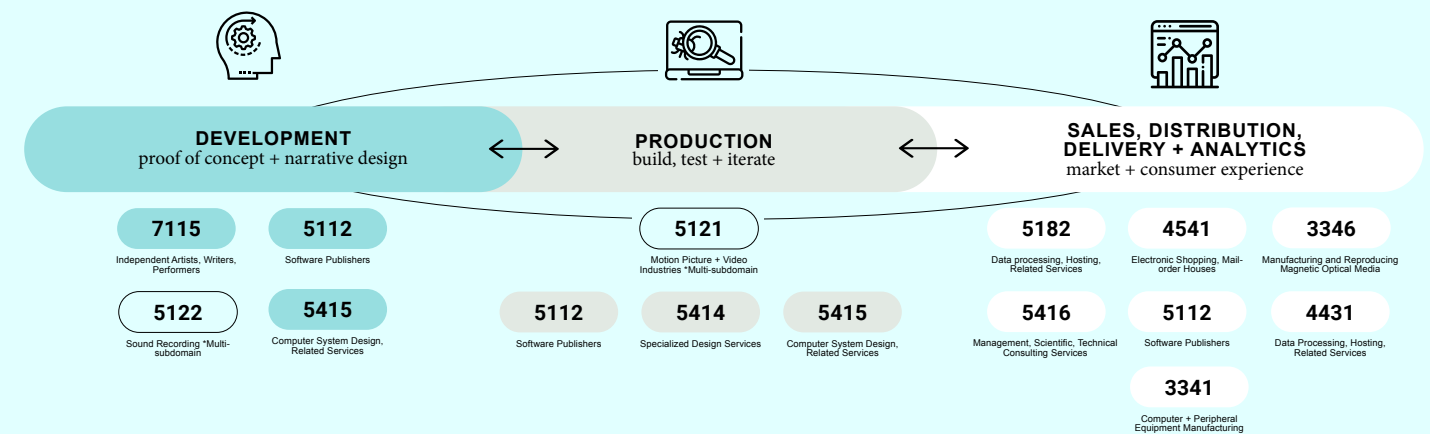
Piranha Games MechWarrior 5 won Best Narrative at the inaugural 2020 Canadian Game Awards



Big Bad Boo Studios partnered with Google Expeditions to create VR companion experiences for its 2D-animated series Galapagos X.

## The Interactive + Digital Media Value Chain Mapped to North American Industry Classification System

Some of the "culture industries" as defined by Statistics Canada contribute to more than one creative industry, therefore these NAICS cannot easily be attributed to a single creative industry, nor can their business activities be proportionally allocated. In these cases, their economic contributions have been aggregated into CIERA's Multi-Creative Industry figures. Outlined bullets below are Multi-Creative Industry Services that do contribute to some extent to this value chain. See page 42 for Multi-Creative Industry impacts.



The interactive and digital media industry is the only value chain with an iterative value chain process. Products are published then evolve based on consumer engagement, console and platform evolution and other factors to which the value chain responds. For the purposes of the CIERA tool, only the video game NAICS were mapped and Statistics Canada data related to these areas was integrated to the measurement results. This decision was made based on the fact that new codes for evolving technologies such as VR/AR have not been specifically defined and at this time it is not possible to isolate impacts relevant to these emerging industries. Creative BC will ensure to evolve the tool as new information and data specific to those industries evolves.

## Context: Recent Realtime Economic Research Conducted by Industry

The following resources add currency and context and can be considered as complementary insights to CIERA outputs each year.

Study	Economic	Employment	Link
The Entertainment Software Association: Canadian Video Game Sector 2019	\$826M Expenditures in B.C.	7,300 83% Full-time	<a href="http://ow.ly/DCnm50C0itl">ow.ly/DCnm50C0itl</a>
VRARA Vancouver: Reality Check   State of Vancouver and B.C.'s VR/AR Ecosystem	N/A	1,665 Full-time at 68 companies surveyed of the 230 in the immersive tech space	<a href="http://ow.ly/hoPB50C0iuY">ow.ly/hoPB50C0iuY</a>



# #PLAYBC

Interactive + Digital Media Highlights

## 1 360 RIOT WALK

360 Riot Walk is an interactive self-guided VR walking tour to address a significant moment in Vancouver's history: the Anti-Asian Riots of 1907. Funded by Creative BC's Interactive Fund.

## 2 SPLIQS | HALO

From Vancouver-based studio Spliqs, 'Halo' creates endless AI generated music and aoundscapes that shift your brain into a chosen state of rest, meditation, or focus. Funded by Creative BC's Interactive Fund.

## 3 MINDFULGARDEN

The MindfulGarden platform is designed to de-escalate anxiety and aggression associated with chronic disease in institutional care settings. Built on a videogame engine, and powered by the individual's own agitated voice and gestures, MindfulGarden engages computer-generated imagery that progressively calms disruptive behaviours, eliminating or reducing reliance on drugs and restraints.

## 4 PHOENIX LABS | DAUNTLESS

Dauntless won the award for 'Best Art Direction' at the inaugural Canadian Game Awards in 2020. Following their win, the Burnaby-based studio announced its expansion into Montreal and L.A.

## 5 LIFELIKE & BELIEVABLE | PRESS PLAY!

Press Play! combines the death-defying thrills of live circus that remotely connected audiences can enter and explore from their PCs, laptops, and VR headsets. Funded by Creative BC's Interactive Fund.

## 6 DREAMCRAFT | DREAMSET

The world's premiere hygienic head-mounted display adaptation for VR with durable, washable headsets, which quickly and easily attach to seats, ride vehicles or location-based entertainment arenas.

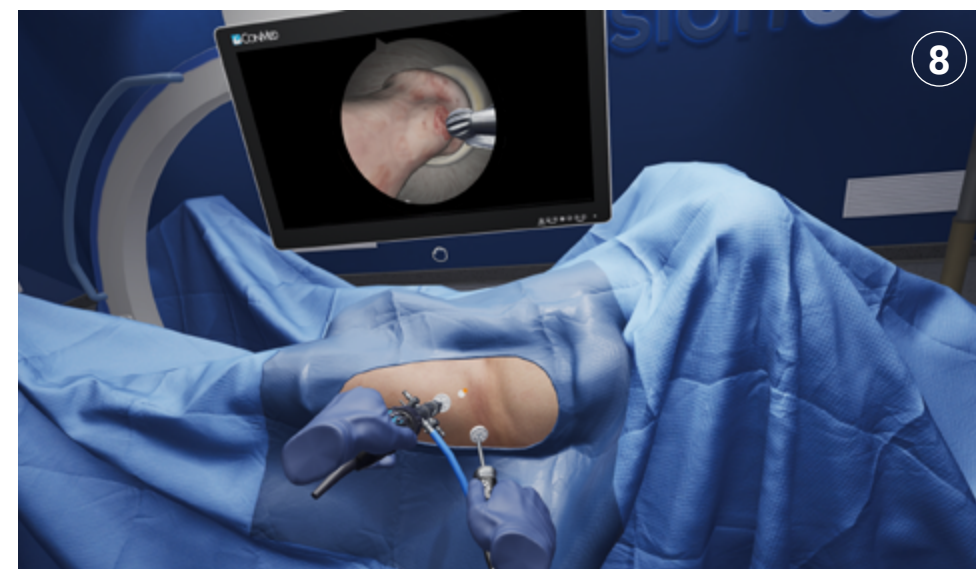
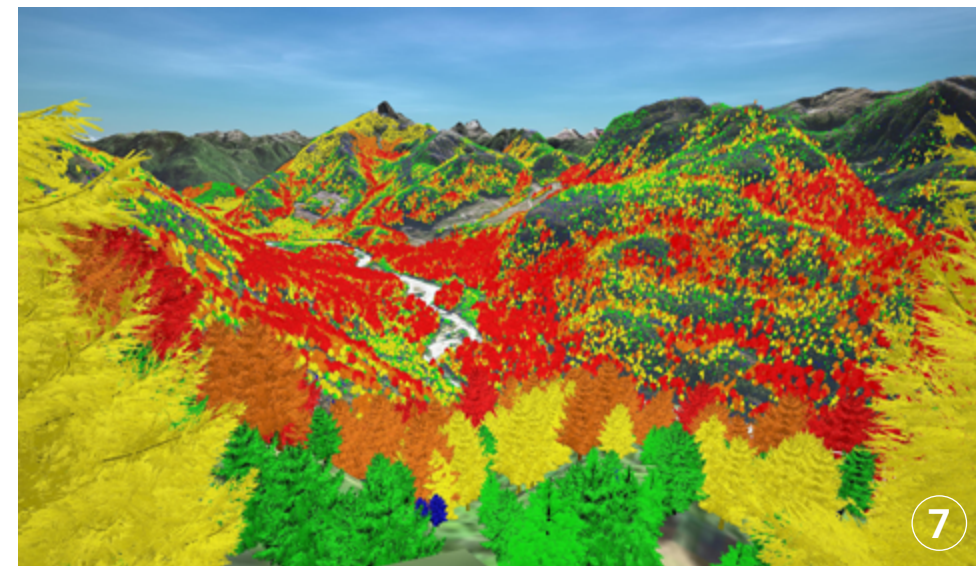
## 7 LLAMAZOO | TIMBER OPS

LlamaZOO's TimberOps is a first at creating a territory scale digital twin, using data of 350,000+ hectares of unceded Mowachaht/Muchalaht First Nations territory (land and water) near the west coast of Vancouver Island. The digital twin is used to improve mapping of the land, resource management, and referrals process.

## 8 PRECISION OS

Founded in 2017, Precision OS specializes in VR training for orthopaedic surgeons. Early 2020, the company announced a partnership with humanitarian organization SIGN Fracture Care to bring surgical training to orthopaedic surgeons in developing countries.

[read more on bccreates.com](https://www.bccreates.com)



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FOLKLIFE is a new biannual lifestyle print magazine inspired by the lives of wild intention, living on rocks in the ocean. Evoking fine craftsmanship with its minimalist design, matte aesthetic, poetic editorial, and vibrant photography, FOLKLIFE honours the art and agriculture, business and creativity, food and farming, and dwellings and nature of the intentional lives of British Columbia's Gulf Islanders. The new print magazine solely features content from the Gulf Islands, celebrating and connecting those living simply through engaging interviews, stories, photographs, recipes, and art.

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Magazine  
Publishing



British Columbia's magazine industry, despite ongoing global disruption due to digitization, demonstrated a significant contribution to the B.C. economy in 2019 with an estimated **\$136M Total GDP** (CIERA 2019). This insight is significant as Creative BC had not previously had insight to the significant scale and value of periodicals in B.C.—and in fact, this figure excludes newspapers. It's important to note that magazine publishing industry activity generates a portion of the additional \$1.04B incremental total GDP attributed to the Multi-Creative Industry Services segment of the creative industries overall. *See the industry's value chain for specific relevant activities on the following spread and full details of the Multi-Creative Industry Services on page 42.*

Within B.C., **325 titles are published**—14% of the 2,384 titles in Canada overall. They represent an important local voice and perspective that is uniquely west coast. **While the new CIERA figures are milestones, they also reflect a GDP Compound Annual Growth Rate (C.A.G.R.) contracting by -6.5% between 2010 and 2018.** Statista indicates that part of the reason magazine consumption is decreasing may be the fact that 44% of Canadians between 21 and 34 (millennials) read print magazines weekly vs. 67% of their counterparts aged 50 to 69—a trend that may continue for new digital generations. According to Statista, e-magazines are trending to be less competitive than e-books, generating 4% of the revenues seen by e-books.

This being said, long form content in reputable publications is increasingly seen as an important method to combat the age of “disinformation”. With **1,164 direct traditional FTE jobs** and **1,954 when including indirect and induced** (CIERA 2019), this industry employs many critical thinkers upon which consumers depend increasingly for quality content.

The Canadian magazine industry is promoting its “trusted-ness” to audiences and advertisers alike and providing practical strategies to combat disinformation. There is opportunity for magazines to respond creatively, and to emerge as expert brands—known for fact-checking and credibility, both in print and in their online presence. Publishers and outlets in Canada are learning how to strategically earn and enhance audience trust, build bridges with readers and empower audiences' news literacy. Skills being acquired include from those to identify false visuals, verify information and find sources in cyberspace, to understanding algorithms and the filter bubbles they create, which shape how services recommend content, and how users consume it.

Finally, it is worth noting that many magazine publishers are also exploring diversification into new mediums, such as podcasting to engage audiences. Many are also considering new income opportunities that may be generated by anything from courses, events and online events to merchandiser partnerships, affiliate sales and more.

The global pandemic has exacerbated challenging trends already faced by the industry. Forty-two percent of Canadians had decreased their consumption of print newspapers or magazines according to Statista's most recent 2018 summary. Ad sales too were waning already, which has been exacerbated by impacts of the global pandemic. Ad sales represent a significant source of revenue for magazine publishers and some had already become increasingly dependent on donations, contests or submission fees, in addition to advertising and subscription fees.

Special measures for the magazine industry were introduced by the federal government during the pandemic in 2020, however according to the Magazine Association of B.C., 55 of 89 B.C. publications participating in a national survey anticipated workforce reductions or ceasing publication within three to six months of the pandemic's onset. A recent pandemic-era Global Entertainment & Media Outlook 2020-2024 report by PwC indicates that marketing budgets are down worldwide with predictions for decline more than a quarter over the next five years, while global circulation and subscriber revenue is also expected to fall. The thin silver lining predicted by PwC will be when in 2023, revenue from digital advertising overtakes that of print.

Contrastingly, while COVID-19 impacts mean that already-vulnerable publications around the world may

face extinction, according to BuzzFeed.News, some specialist outlets are adapting, and their websites and magazines are thriving. Particularly encouragingly, the same research shows subscriptions to glossy magazines are up during the pandemic, and particularly childrens', DIY, food, and puzzle content subscriptions are growing as readers have more time. For example, the industry leader and benchmark, Condé Nast, reports title sales have grown through the crisis with some hitting record levels.

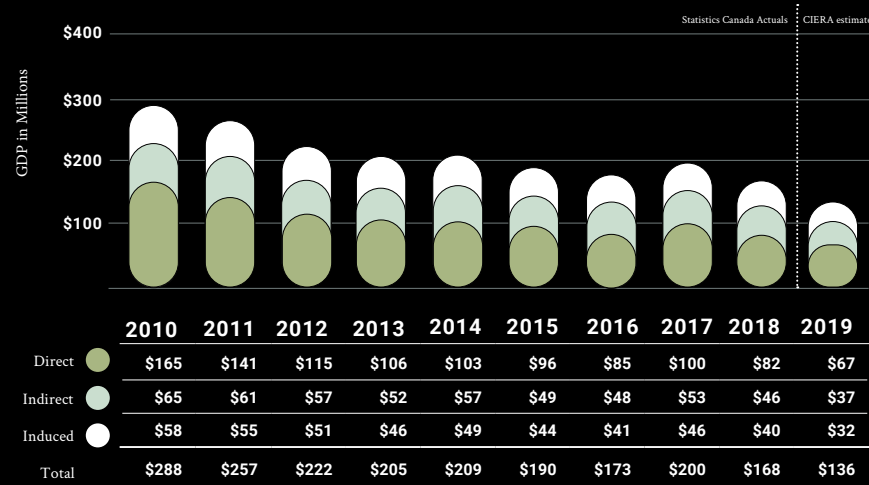
“Editorial relevance” is a critical driver of engagement emerging especially now, both in print and online. Many readers are turning to magazines for in-depth, trustworthy analysis of the impact of the virus locally, and others are looking for mental escape during lockdown.

This industry will look very different on the other side of this crisis. To some degree, opinions such as that of the New York Times hold that local news sites are among the biggest beneficiaries of the pandemic, but that increased website traffic does not always translate to increased subscribers. Looking for opportunities, questioning assumptions and finding ways to reinvent within the category will help magazines sustain, or maybe even enhance their competitive positioning in order to survive.



# Magazine Publishing Industry Impacts in British Columbia

## CIERA Total GDP

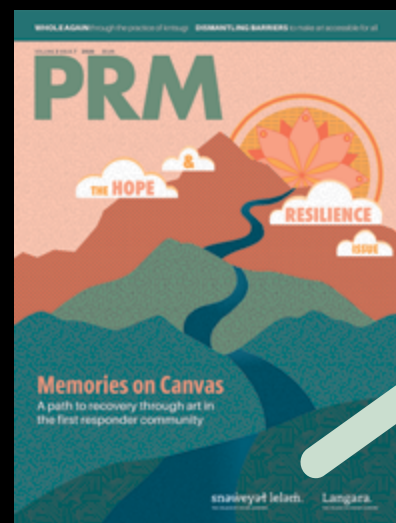


Includes Periodicals, Diversified Business Models Including Podcasts, Festivals, Conferences (excludes newspapers)

Annual data is shown in the graph as a time series. However, it is important to note that periodic refinements to measurement methods, by Statistics Canada, are not consistently applied to previous years' figures, therefore trends identified over long periods of time are estimates.

## Total GDP in Relation to Direct Output

Sources: CIERA 2019 (B.C. and Canada), IBIS World



Langara's Pacific Rim Magazine

Total GDP C.A.G.R.  
2010-2018

**-6.5%**

All results exclude any public investments made to these industries at federal or provincial levels.

**1,954**

**TOTAL JOBS**  
Traditional FT + Equivalent

**1,164**

**DIRECT JOBS**  
Traditional FT + Equivalent

Comparability - it is important to identify whether Total or Direct impacts are referenced, and whether GDP or Output are the economic measure. By offering detailed CIERA tables each year, Creative BC will seek to facilitate comparability in any circumstance.

[creativebc.com/ciera](http://creativebc.com/ciera)

# 2019



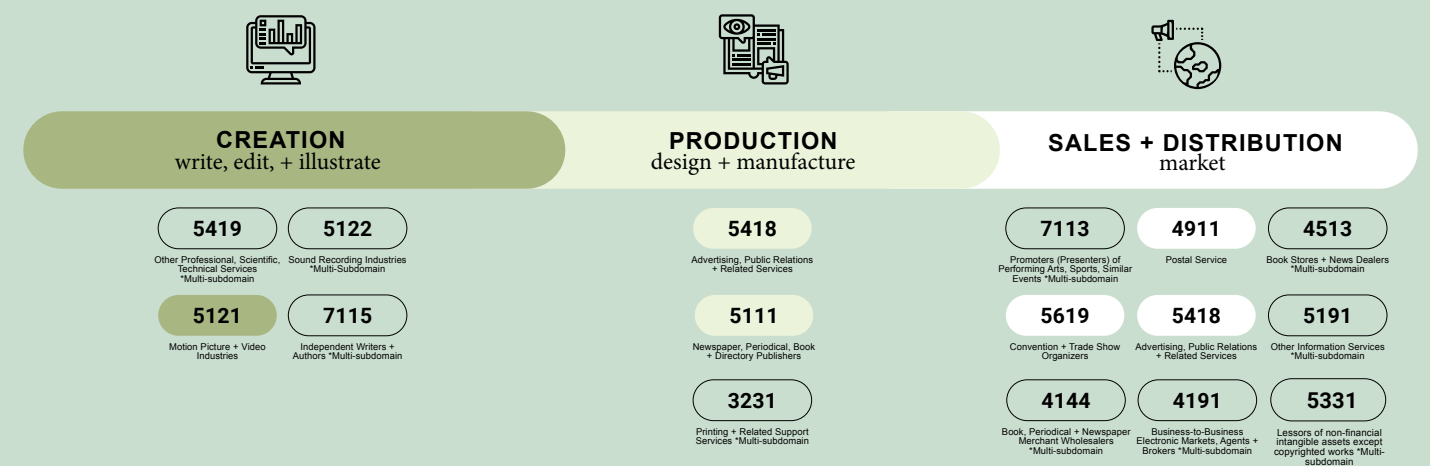
MONTECRISTO Magazine: Iconic Ron Thom House Could Be Saved From Demolition in West Vancouver  
Photo by Selwyn Pullan/Courtesy of the West Vancouver Art Museum.



Western Living Magazine features the best in west coast culture, lifestyle and design

## The Magazine Publishing Value Chain Mapped to North American Industry Classification System

Some of the "culture industries" as defined by Statistics Canada contribute to more than one creative industry, therefore these NAICS cannot easily be attributed to a single creative industry, nor can their business activities be proportionally allocated. In these cases, their economic contributions have been aggregated into CIERA's Multi-Creative Industry figures. Outlined bullets below are Multi-Creative Industry Services that do contribute to some extent to this value chain. See page 42 for Multi-Creative Industry impacts.





# #SUBSCRIBEBC

Magazine Publishing Highlights

## 1 VANCOUVER WINE BUYING GUIDE | VANCOUVER MAGAZINE

Best known for being a local tastemaker champion in the Vancouver community, the magazine was nominated for Service Journalism for its 2019 Vancouver wine buying guide.

## 2 EXPLORE MAGAZINE

Explore Magazine was nominated and given a special acknowledgment for Best Magazine: Service + Lifestyle at the 43rd annual National Magazine Awards.

## 3 THE TYEE

The Tyee is B.C.'s home-grown, pioneering online newsmagazine publishing original reporting, investigations, analysis, and essays about life in the province and beyond. The site won multiple awards for its 2019 coverage including three Digital Publishing Awards for general excellence, best newsletter, and best column.

## 4 BC ORGANIC GROWER

BC Organic Grower supports and promotes the organic sector of B.C. Image from "Adapting at Fraser Common Farm Cooperative" by Michael Marrapese.

## 5 DARPAN MAGAZINE

DARPAN Magazine has become an integral part of the South Asian community and greater Canadian society. The publication strives to reflect growth, accomplishments and connections to like-minded people in order to achieve a greater, effective and enlightened community and overall society.

## 6 GEIST MAGAZINE

The poetry piece "Marriage Poems" by Matsuki Masutani, which appeared in Geist magazine, was nominated for a National Magazine Award.

## 7 VANCOUVER MAGAZINE | THE POWER 50 2019

Prem Gill, CEO of Creative BC was featured in the 2019 Power 50 list, featuring Vancouver leaders who shape the city.

## 8 NUVO MAGAZINE

An elegant source for lifestyle and culture in British Columbia and beyond, NUVO Magazine shares the latest in B.C. culture. Image: Nectar Yoga B&B in "A Restorative Yoga Retreat on British Columbia's Bowen Island" by Amanda Ross.

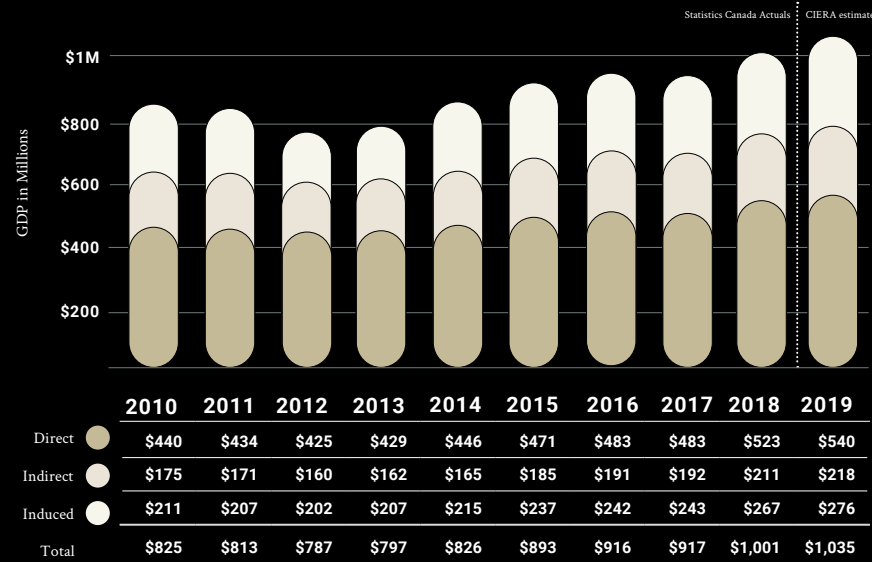
## 9 GROWING ROOM

Growing Room: A Feminist Literary Festival is Room Magazine's annual literary festival, a celebration of diverse Canadian writers and artists.



# Multi-Creative Industry Services Impacts in British Columbia

## CIERA Total GDP



**13,958**  
TOTAL JOBS  
Traditional FT + Equivalent

**9,443**  
DIRECT JOBS  
Traditional FT + Equivalent

Comparability - it is important to identify whether Total or Direct impacts are referenced, and whether GDP or Output are the economic measure. By offering detailed CIERA tables each year, Creative BC will seek to facilitate comparability in any circumstance.

[creativebc.com/ciera](http://creativebc.com/ciera)

Annual data is shown in the graph as a time series. However, it is important to note that periodic refinements to measurement methods, by Statistics Canada, are not consistently applied to previous years' figures, therefore trends identified over long periods of time are estimates.

**\$1.04B**

Total GDP  
2019

Total GDP C.A.G.R.  
2010-2018

**2.4%**

All results exclude any public investments made to these industries at federal or provincial levels.

# Multi-Creative Industry Services



The creative industries share many synergies. The result is that together, the five industries served by Creative BC catalyze the development and sustainment of a sixth component of the sector's ecosystem. This sixth component is comprised of many relevant industry categories that directly feed and serve the creative industries overall, but none of the businesses within it can be attributed to a single creative industry. Rather they serve multiple creative industries each. Therefore, this segment of the sector stands as its own component of the ecosystem, and CIERA measures and refers to it as Multi-Creative Industry Services.

At 7.1% Total GDP growth from 2010 to 2018, this segment of the sector's growth outpaced that of the B.C.

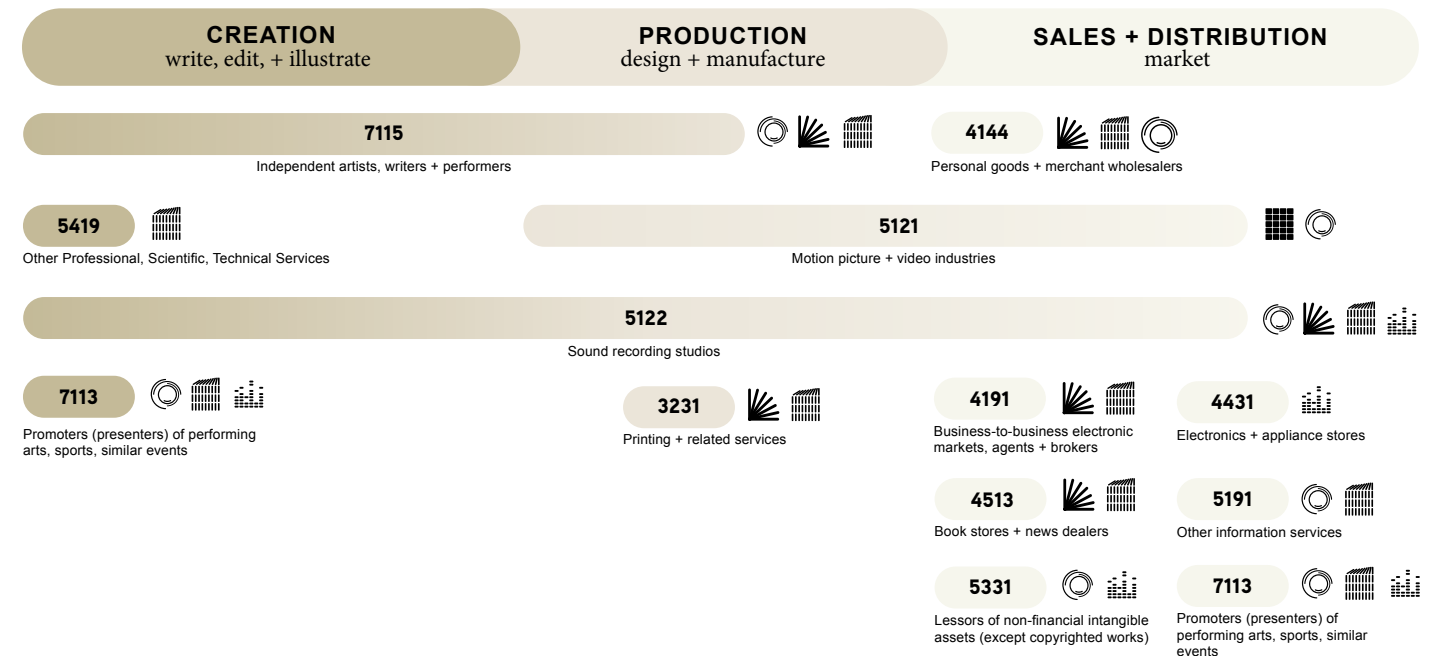
economy, which experienced 5% over the same period overall.

The economic impacts of this sixth area are accurately counted within the creative industries' impacts, as its contributions have been identified as relevant only to this sector. The Multi-Creative Industry Services are scaled by CIERA to ensure only relevant activities specific to the five creative industries served by Creative BC are captured and reported.

From agents, artists' managers and independent writers to periodical and book wholesalers and trade agents, this fluid and agile network of companies and creators is depended on and fed by all of B.C.'s five creative industries.

## The Multi-Creative Industry Services Mapped Across the Sector Value Chain

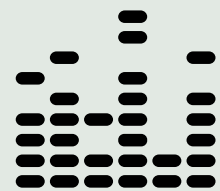
These industries, classified through the North American Industry Classification System, all contribute to the business activities of more than one creative industry.



With tens of millions of streams online, Joey Stylez is a Juno-nominated hip hop artist recognized by CBC as one of the top 25 rappers of all time. Opening Canada's Truth and Reconciliation process at a Winnipeg event along with Blue Rodeo, he performed his critically acclaimed song Living Proof about the horrors of Canada's residential school system, to which his Plains Cree Kookom (Grandmother) was subjected. Inspiring with chart-topping hits and opening for artists from Billy Ray Cyrus to Snoop Dogg, The Weeknd and 50 Cent, Joey granted us an interview on [bcreates.com](http://bcreates.com)

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## Music + Sound Recording



Creative BC supports have prioritized research across the sector, with studies conducted into the impacts of the music and sound recording industry in B.C. leading the way. B.C.'s artists, live music (from venues, festivals and presenters), music companies (from labels to recording studios) and industry ecosystem are proving their value delivery not only to culture, identity and community, but also to B.C.'s economy, with a **total GDP of \$301M annually** (CIERA data).

**The industry's total GDP Compound Annual Growth (C.A.G.R.) grew by 5.1% between 2010 and 2018 and total GDP grew by 8.8%** (CIERA data). It's important to note that music and sound recording industry activity generates a portion of the additional \$1.04B incremental total GDP attributed to the Multi-Creative Industry Services segment of the creative industries overall. *See the industry's value chain for specific relevant activities on the following spread and full details of the Multi-Creative Industry Services on page 42.*

The industry represents **4,613 traditional FTE equivalent direct jobs and 6,144 direct, indirect and induced combined jobs** (CIERA 2019). Due to the "gig" nature of this workforce, CIERA figures and public datasets are likely low as shown by a recent Amplify BC-supported research study by Adam Kane/Deetken Insights. The study aimed to account for greater capture of freelance workers, and found that approximately 13,400 people in B.C. receive a portion of their income through their music-related work. Eighty percent have multiple occupations within the industry and a full 79% are self-employed.

The province is home to **over 200+ music festivals**. A recent study in 2019 identified a \$25M contribution from just five of these festivals to the communities in which they were staged, contributing to tourism,

community pride, and local businesses. The B.C. music industry festival study was funded by Amplify BC in FY2018/19 and released in FY2019/20, was produced by Deb Beaton-Smith (B.Ed), Royal Roads University, and Beat Music Management together with Strategic Moves analytics and insights.

Discoverability of B.C.'s talent and creative product is at the top of an agenda for this industry's future success. Also funded in the previous year and published in FY2019/20, the Do604 research study collaboration shows that media consumption is increasingly digital. This includes the music industry, however ensuring visibility is equally important to fair compensation, legal use and rights-holding for creators in this digital reality of streaming, and all are key areas for strategic music industry action. Discovery of events is driven by social media, artists are discovered via streaming, word-of-mouth and on social media where use is higher than ever and increasing as the population ages.

The **200+ sound recording studios** and **80+ record labels** in B.C. ensure the production of new music. However, live music remains quintessential to artist income, economic output, community and culture, as well as city night life, livability and tourism, but geographic isolation can be a challenge for touring B.C. artists, according to Music Canada Live research.

Similar to the film industry, underrepresented groups (Indigenous, women, people with disabilities, Black creators and people of colour) are under-represented in the music industry workforce. Approximately one-third in the industry report experiencing discrimination, primarily based on sex, age and race, and Music BC, the industry's association is mounting events and training to improve conditions for inclusion.

Creative BC's industry survey in March 2020 achieved strong response rates, but the music industry's engagement was pronounced and revealed devastating impacts to its economy and to the many people working within it.

As COVID-19 health measures included limits to gatherings, the majority of live music performances ceased around March 13th, 2020 and plans for performances, shows at venues, festivals and related industry events were placed on hold. Many are still seeking to stay whole or to pivot as of the writing of this report.

Almost immediately, the Showcase BC funding program, livestream discoverability hub, and livestream concert were delivered by Creative BC. This provincial support drew attention to and supported this hard-hit and integral industry to our culture and community. Industry consultation led to Amplify BC's renewal and programs have been adjusted to focus on music businesses' ability to regroup, endure and sustain themselves through this crisis.

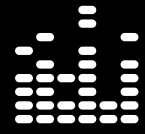
With a workforce comprising many gig workers and low median income levels, this industry is especially vulnerable. Music BC, the provincial industry association, published Guidelines for Reopening the Music Sector in British Columbia. While sound recording in studios has returned at a reduced level in compliance to guidelines, the path forward for live music continues to be complex, due to gathering limitations. This is especially challenging given its disproportionate contribution to artist creators' incomes.

The World Economic Forum (WEF) produced an interesting study confirming that the global pandemic may be accelerating underlying trends referenced previously, including that the streaming industry has

grown from 9% to 47% of total industry revenues in six years. However, maintaining adaptable monetization strategies will be key and a growing role for third-party platforms to shape distribution, discovery and consumer behaviour is emerging. Live concerts, such as the one featured by the WEF, that was hosted by the popular video game Fortnite, which attracted 30M viewers, may point to adoption of similar collaborative approaches by rights-owners and distributors.

Also according to the WEF, a "quirk" in the streaming business model has been identified through the study that indicates potential for streaming music share to decrease on platforms as a share of total audio consumption when compared with the increase of consumer's streaming of spoken word (podcasts, audiobooks, etc.) This ongoing trend first identified in 2014, if continues, it could lead to platforms renegotiating their relationships with record labels.

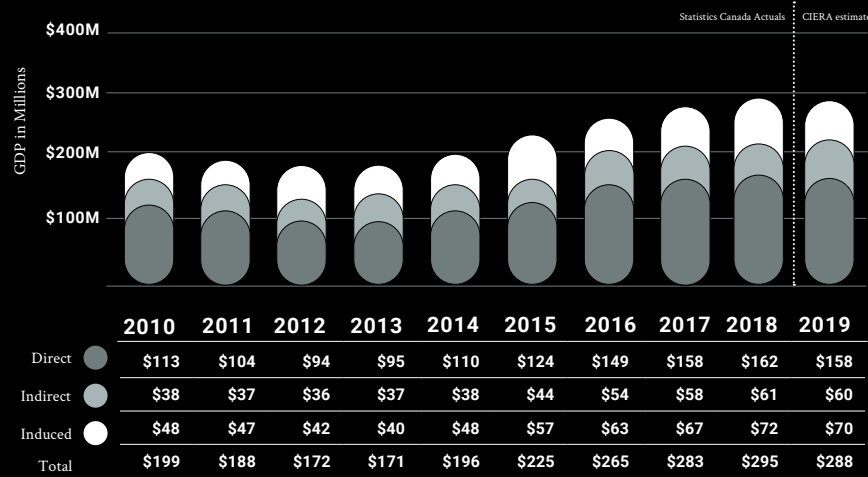
Such long-term considerations are no remedy for B.C.'s and the world's live music scene. Livestream concerts offer marginal economic returns compared with in-person events, where social and community value is also derived. Livestream fatigue and increased competitiveness due to open access online are also factors that make livestream a weak alternative. As B.C. is one of Canada's leading high-tech hubs, and home to North America's second-largest AR/VR business community, innovations such as Amplify BC-supported musician Jill Barber's live concert are emerging. The immersive online event will place viewers in a virtually reconstructed Palomar Theatre, as it stood in 1937 to 1955. This collaboration shows cross-industry opportunity leading to new dynamic experiences for audiences.



# Music + Sound Recording Industry Impacts in British Columbia

# 2019

## CIERA Total GDP



**6,144**  
TOTAL JOBS  
Traditional FT + Equivalent

**4,613**  
DIRECT JOBS  
Traditional FT + Equivalent

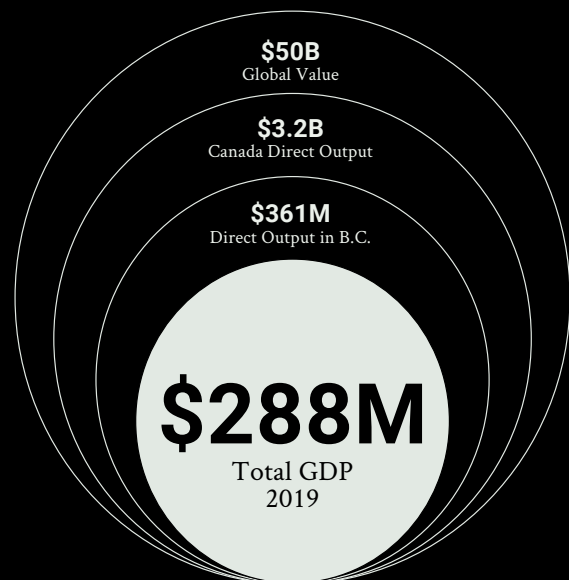
Comparability - it is important to identify whether Total or Direct impacts are referenced, and whether GDP or Output are the economic measure. By offering detailed CIERA tables each year, Creative BC will seek to facilitate comparability in any circumstance.

[creativebc.com/ciera](http://creativebc.com/ciera)

Annual data is shown in the graph as a time series. However, it is important to note that periodic refinements to measurement methods, by Statistics Canada, are not consistently applied to previous years' figures, therefore trends identified over long periods of time are estimates.

## Total GDP in Relation to Direct Output

Sources: CIERA 2019 (B.C. and Canada), PwC



18 year-old Bukola was named by CBC as one of the top 10 soulful female artists in the 2020 CBC Searchlight competition and was the grand prize winner of the Nimbus School of Recording Arts x Juno Host Committee provincial Battle of the Bands competition. Photo by Lindsay Elliot.

Total GDP C.A.G.R.  
2010-2018

**5.1%**

All results exclude any public investments made to these industries at federal or provincial levels.



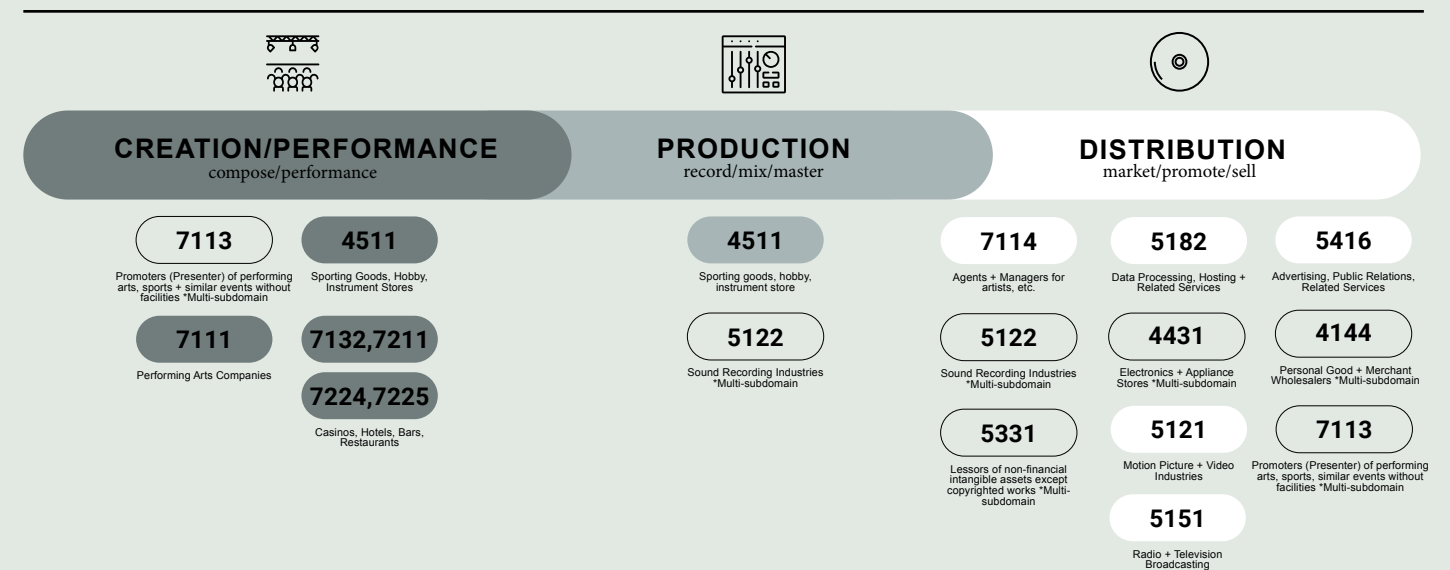
Alex Cuba, the award-winning singer performed at Showcase BC, a livestream music show to celebrate the new Showcase BC relief fund and online streaming event hub. Image by Eduardo Rawdriguez.



Jordan Klassen's cinematic music video directed by Farhad Ghaderi for "Virtuous Circle" was nominated for a 2020 Prism Prize award.

## The Music + Sound Recording Value Chain Mapped to North American Industry Classification System

Some of the "culture industries" as defined by Statistics Canada contribute to more than one creative industry, therefore these NAICS cannot easily be attributed to a single creative industry, nor can their business activities be proportionally allocated. In these cases, their economic contributions have been aggregated into CIERA's Multi-Creative Industry figures. Outlined bullets below are Multi-Creative Industry Services that do contribute to some extent to this value chain. See page 42 for Multi-Creative Industry impacts.



## Context: Recent Realtime Economic Research Conducted by Industry

The following resources add currency and context and can be considered as complementary insights to CIERA outputs each year.

Study	Economic	Employment	Link
DoBC Consumer Insights Final Executive Report (July 2019)	N/A	N/A	<a href="http://ow.ly/rQu150C0i68">ow.ly/rQu150C0i68</a>
Staying in Tune: A Study of the Music Industry Labour Market in British Columbia (October 2018) Adam Kane Productions + The Deetken Group	N/A	6,600	<a href="http://ow.ly/BFv050CB1xN">ow.ly/BFv050CB1xN</a>
BC Music Festival Survey Economic and Socio-Cultural Final Report (January 2020) Deb Beaton-Smith	\$25M estimated direct tourist spending for five sample festivals studied (British Columbia is home to over 200 festivals).	N/A	<a href="http://ow.ly/VIII50C0iKH">ow.ly/VIII50C0iKH</a>
The Vancouver Music Ecosystem Study (July 2018) Sound Diplomacy, Secret Study Projects, Music BC and the Vancouver Music Steering Committee [\$690M Total Economic Impact (employment, additional revenue, artists/musicians, festivals, venues), plus an estimated \$1.5B Indirect Gross Value Added (increased demand for products and services in sectors outside music that arise because of the increased music availability ie. transport services, extra tourist provisions, further activities and shopping).	\$690M Total economic impact	7,945 Direct FTE 6,595 Indirect FTE	<a href="http://ow.ly/RhKc50CB2m5">ow.ly/RhKc50CB2m5</a>
Hear, The Beat Economic Impact of Live Music (August 2018) Canada Music Live, Nordicity, 2017 data	\$403.5M B.C.-based labour spend	12,010 Direct FTE	<a href="http://ow.ly/Zwkh50CB50z">ow.ly/Zwkh50CB50z</a>



# #LISTENBC

Music + Sound Recording Highlights

## 1 MISSY D | "YES MAMA"

Rapping in French and English, this beloved Vancouver hip hop artist is supported by Amplify BC. "YES MAMA" was created with support from the Vancouver Music Fund, a partnership with the City of Vancouver.

## 2 BILLY BONES | CLAMPDOWN RECORD PRESSING

Owner Billy Bones' vinyl record press in Burnaby opened with support from Amplify BC.

## 3 ESPANGLISH

The Mexico-based group (FKA Mama Pulpa) supported through Record in BC recorded at Monarch Studios in Vancouver with B.C. producer Howard Reddekop.

## 4 TERELL SAFADI

Terell created and released his video for "Black History" in February 2020 in honour of Black History Month through the Vancouver Music Fund in partnership with the City of Vancouver. Read our in-depth interview with Terell and watch the music video on [bccreates.com](http://bccreates.com).

## 5 PUBLIC DISCO IN THE SKY | YU SU

In 2017, Public Disco emerged as a project to transform under-utilized urban spaces into much needed event space. Photo by Gabriel Martins.

## 6 HALEY BLAIS

Supported by Amplify BC and based in Vancouver, Haley Blais' debut full-length album, *Below the Salt*, was released by the new Vancouver-based, women-owned music label, Tiny Kingdom.

## 7 LUDIC | MUSIC BC LET'S HEAR IT! LIVE

Ludic performs at one of Music BC's Let's Hear It! Live micro grant performance series. Photo by Ester Tothova

## 8 DEBBY FRIDAY | "FATAL"

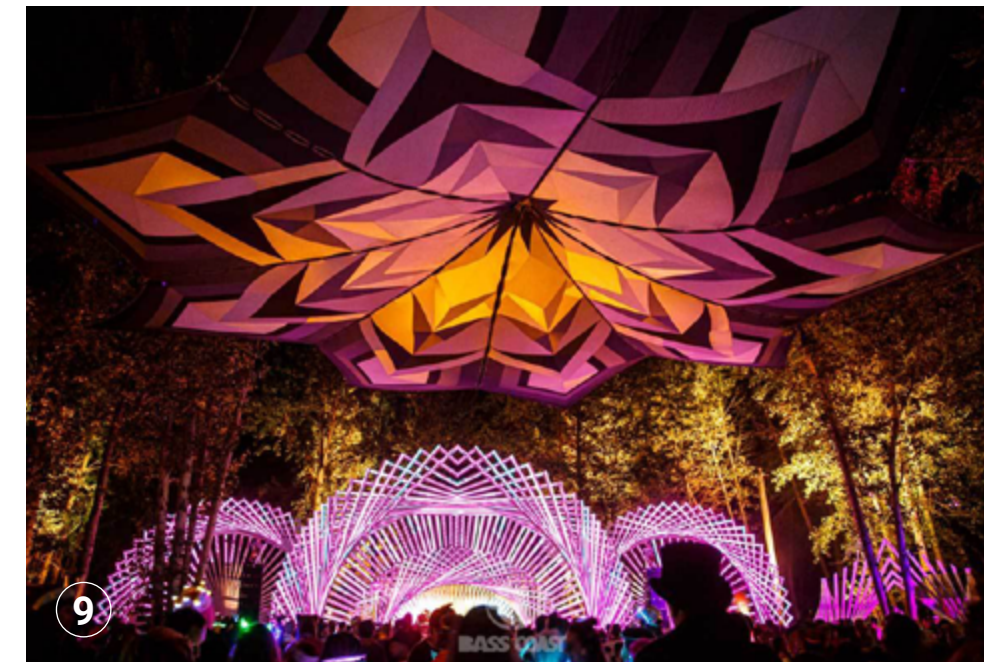
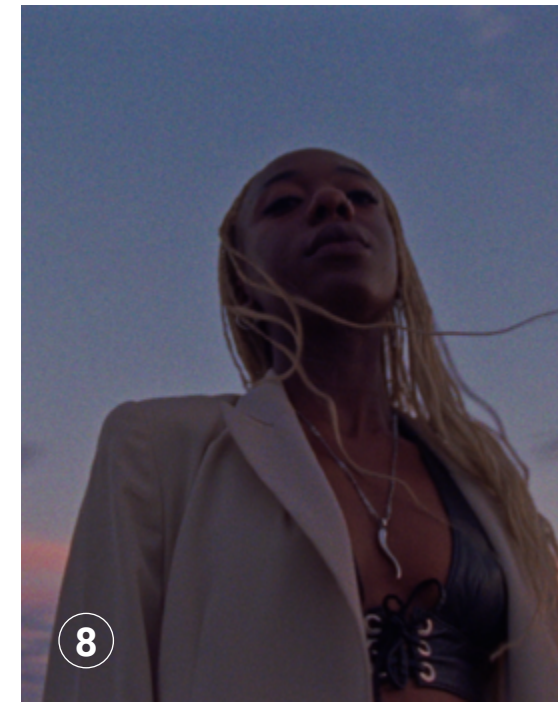
Debbi Friday's visual video "FATAL" from her debut EP *Death Drive* earned her a nomination for the 2020 Prism Prize awards.

## 9 BASS COAST

Independent, thoughtfully curated and highly agile, this Nicola Valley festival honoured its 12th year in 2020. Bass Coast has garnered a global reputation for showcasing innovative international talent and providing a springboard for Canadian artists. Image © Neil McElmon | ConcertSocks

## 10 MONARCH STUDIOS

World class studios in Vancouver are supported by Amplify BC to record the likes of Dear Rouge, Hey Ocean!, and the Zolas, and for labels from MGM Pictures to Universal Records.



THE BODY REMEMBERS WHEN THE WORLD BROKE OPEN, a domestic B.C. film that has gained global critical acclaim from the Canadian Screen Awards, VIFF and Berlinale Film Festival, earned B.C. directors Elle-Máijá Tailfeathers and Kathleen Hepburn invitations to the Academy of Motion Picture Arts and Sciences, the organization that holds the Oscars. The film was acquired by Ava Duvernay's (SELMA, 2014) distribution company, ARRAY Now, and won 2020 Canadian Screen Academy Awards for Best Director, Best Original Screenplay and Best Cinematography.



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Motion  
Picture



With an estimated **411 productions in FY2019/20** (Creative BC data), this industry is a steady employer. The industry contributes **\$2.41B total GDP**, with a **16.4% total GDP Compound Annual Growth Rate (C.A.G.R.) from 2010 to 2018** (CIERA data). Motion picture industry GDP growth outpaced that of the B.C. economy, which experienced 5% over the same period overall. It's important to note that motion picture industry activity generates a portion of the additional \$1.04B incremental total GDP attributed to the Multi-Creative Industry Services segment of the creative industries overall. *See the industry's value chain for specific relevant activities on the following spread and full details of the Multi-Creative Industry Services on page 42.*

B.C.'s motion picture industry represents a mature, **full-service global motion picture hub – the largest in Canada and third-largest in North America**—with world-leading expertise, supports and services from script to screen. The industry is experiencing proportional regional growth and spans from live action to animation, VFX and post-production. The province offers over **120 sound stages representing over 2.5 million square feet**, including purpose-built stages and conversions, **more than 131 animation, VFX and post-production companies**, as well as an estimated **250 expert industry supply companies**, defined as those where more than 80% of annual revenues are derived from motion picture industry-related services.

The industry in B.C. includes both foreign and domestic production, and CIERA's new baseline results are **21,305 traditional FTE equivalent jobs, and 35,332 total jobs (direct, indirect and induced)**. This includes above-the-line, producers and directors, below-the-line artists and technicians, and animation/VFX and post-production creators combined in 2019. Again, many more freelancers working in this industry also serve multiple parts of this sector and are therefore captured in the Multi-Creative Industry Services (see page 42). Due to the "gig" nature of this workforce, CIERA figures are likely low as shown by a recent below-the-line only labour market study, which identified 43,800 people through actual payroll data from 2017. The Canadian Media Producer's Association (CMPA) annual Profile report is another industry indicator and measures jobs at 30,840 direct and 65,270 direct + spin-off combined. Creative BC is intent on improved and aligned labour data but for the sake of comparability with other industries,

now depends on CIERA and will use industry research and new channels of collaboration with Statistics Canada to support its ongoing evolution of methodology.

B.C.'s domestic industry is an important part of motion picture overall in this province and consists of local production companies that develop owned-and-controlled intellectual property (IP). When produced (manufactured), these projects maintain revenues related to the ongoing sale and royalties from this creative product. The money remains in B.C.-based production businesses, and is reinvested into making more product. People in B.C.'s domestic industry include **domestic producers, 200 as estimated by the CMPA BC Producers' Branch**, with 120 of them active members of this industry association. B.C.'s above-the-line talent creates feature films, TV series, documentaries and factual content to critical acclaim.

Complementing CIERA research, are figures direct from the Animation + VFX Alliance of B.C., indicating an estimated 7,000 people employed in these industries, which CIERA cannot easily isolate at this time. Within the 250+ B.C. businesses in this sector, Creative BC has identified **99 companies of various sizes, specifically in the animation and VFX segments of the motion picture industry, and 32 post-production companies**. The Vancouver Post Alliance (VPA) itself has 331 individual members. These state-of-the-art companies create original domestic products, for broadcasters such as CBC and Corus, service foreign content production, for studios from Disney and Warner Bros. to AppleTV+ and Netflix. A strong talent pipeline is of primary focus for this high pay, high demand industry vertical, with a labour market study due out soon and the VPA's first mentorship program having launched in June 2019.

The Motion Picture Production Industry Association (MPPIA), where the Animation + VFX Alliance, VPA and CMPA BC Producers' Branch are members, represents the broader industry and foreign service production, which generates the majority of production spending in B.C. Ninety-seven percent are B.C. residents and 77% depend on the industry as their main source of income. Access to deep industry insights through the 2019 Labour Market Study has led industry to embark on the MPPIA workforce initiative, focused on increasing capacity through more fair and balanced participation.

A national Nordicity report for the CMPA estimated devastating economic impacts in motion picture due to COVID-19 disruption. Creative BC's own direct industry surveys, completed by the end of the fiscal year and submitted to government, indicated the same with direct insights and concerns submitted for responsive action.

Live action production companies came to a standstill, as did the additional 250 supply companies servicing the industry. Forty-four productions on Creative BC's go-to In Production list all indicated temporary suspension from late March until official reopening June 24th when production activity was permitted and gradually picked back up.

Regional physical production activity was first to resume with COVID-19 Safety Plans in place by each production. A Kelowna-based production was first to trial and implement WorkSafeBC Protocols for health and safety with a WorkSafeBC team member attending. The B.C. Motion Picture COVID-19 Best Practices Coalition published Safety Guidelines June 24th, 2020, the day Phase 3 of B.C.'s Restart Plan opened, with productions respectfully implementing them as quarantines remain in effect for those with valid work permits for B.C. Industry also produced a Pandemic Production Guide for use at the department level by any

production.

A two-million dollar Domestic Motion Picture Fund was announced by the B.C. government on September 14th, 2020, with domestic production companies' ongoing lack of insurance for COVID-19 assisted by federal government insurance backstops announced September 25th with a \$50M investment.

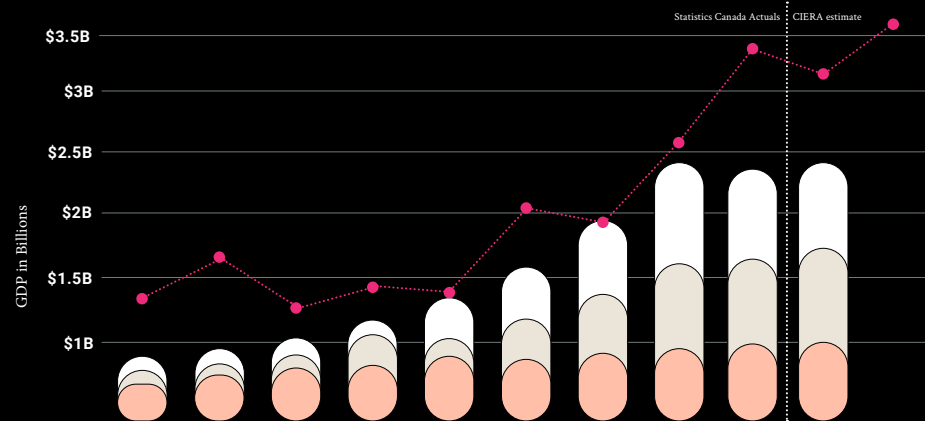
For animation companies, work slowed but was able to proceed once work-from-home arrangements were established, which required immense technical investments (est. \$250k per company), legal agreements with clients to permit employees having files at home, and the navigation of low residential broadband speeds that aren't built to handle the speed and file sizes necessary for industry. The Animation and VFX Alliance of BC published a Return to Studio Guide for Health and Safety.

In VFX and post-production, the same arrangements were required although technical equipment in some cases could only be accessed in-studio. The ripple effects of a pause in physical production will have downstream effects for both VFX and post-production. The VPA published the Post-Production COVID-19 Guidelines, completing a suite of tools that now serve B.C.'s entire spectrum of motion picture industry businesses.

# Motion Picture Industry Impacts in British Columbia

# 2019

## CIERA Total GDP



	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
Direct	\$420	\$645	\$719	\$766	\$857	\$757	\$870	\$923	\$951	\$984
Indirect	\$111	\$121	\$128	\$128	\$136	\$218	\$307	\$390	\$380	\$393
Induced	\$159	\$200	\$227	\$235	\$399	\$574	\$805	\$1,028	\$999	\$1,034
Total	\$690	\$966	\$1,074	\$1,129	\$1,393	\$1,550	\$1,981	\$2,341	\$2,329	\$2,411

**35,332**  
TOTAL JOBS  
Traditional FT + Equivalent

**21,305**  
DIRECT JOBS  
Traditional FT + Equivalent

Comparability - it is important to identify whether Total or Direct impacts are referenced, and whether GDP or Output are the economic measure. By offering detailed CIERA tables each year, Creative BC will seek to facilitate comparability in any circumstance.

[creativebc.com/ciera](http://creativebc.com/ciera)

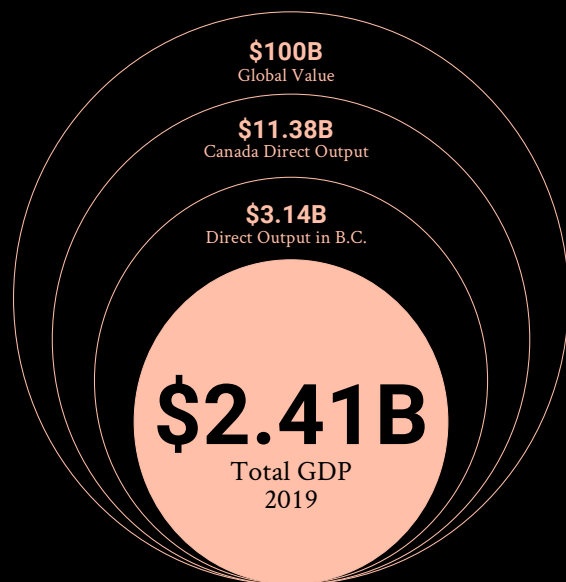
Annual data is shown in the graph as a time series. However, it is important to note that periodic refinements to measurement methods, by Statistics Canada, are not consistently applied to previous years' figures, therefore trends identified over long periods of time are estimates.

## Creative BC | Provincial Tax Credit Data by FY Ending (Apr 1-Mar 31)

	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
in Millions	\$1,414	\$1,663	\$1,336	\$1,476	\$1,448	\$2,023	\$1,922	\$2,624	\$3,443	\$3,207	\$3,601*

## Total GDP in Relation to Direct Output

Sources: CIERA 2019 (B.C. and Canada), MPA global study



The thriller film CHAINED directed by Titus Heckel was supported by Creative BC's Project Development Fund

Total GDP C.A.G.R.  
2010-2018

**16.4%**

All results exclude any public investments made to these industries at federal or provincial levels.



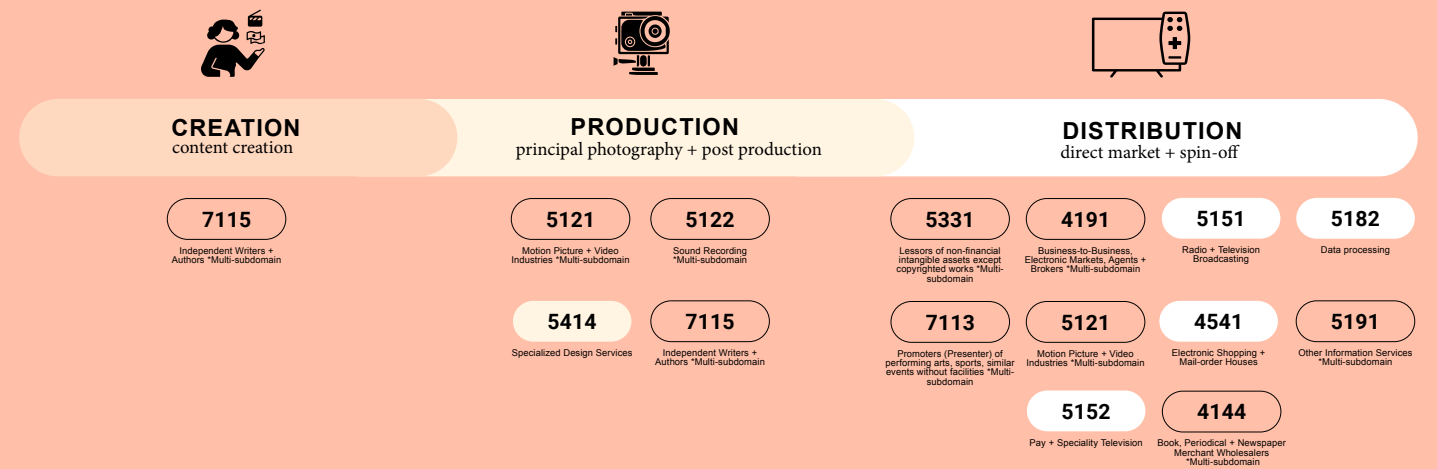
DNEG Vancouver worked on the blockbuster feature MEN IN BLACK: INTERNATIONAL. Image courtesy of DNEG © 2019 CTMG. All Rights Reserved.



Amazon Prime's "Pete the Cat" is a loveable children's animated series by Yeti Farm Creative from Kelowna, B.C.

## The Motion Picture Value Chain Mapped to North American Industry Classification System

Some of the "culture industries" as defined by Statistics Canada contribute to more than one creative industry, therefore these NAICS cannot easily be attributed to a single creative industry, nor can their business activities be proportionally allocated. In these cases, their economic contributions have been aggregated into CIERA's Multi-Creative Industry figures. Outlined bullets below are Multi-Creative Industry Services that do contribute to some extent to this value chain. See page 42 for Multi-Creative Industry impacts.



## Context: Recent Realtime Economic Research Conducted by Industry

The following resources add currency and context and can be considered as complementary insights to CIERA outputs each year.

Study	Economic Impact	Employment Estimates	Link
Profile 2019 Industry-wide annual publication on the screen industries' economic impact and estimated jobs.	\$3.4B	30,840 Direct FTEs 65,270 Direct + Spin-Off FTEs	ow.ly/nDuT50BVkqp
B.C. Motion Picture Labour Market Study 2019, based on actual payroll data	N/A	43,800 Unique BC workers paid for below-the-line work in 2017	ow.ly/gwce50BVkkl
Vancouver Economic Commission (VEC) annual film industry research 2019	\$4.1B	40,000+ jobs in Metro Vancouver (includes positions that are not captured in CIERA or tax credit-certified projects such as commercial production or video game creation).	ow.ly/Jqzm250CbsH
Profile of the British Columbia Technology Sector: 2019 Edition, BC Stats *Cautions specifically in all figures relevant to Motion Picture industry: "Note that Statistics Canada data for British Columbia's film industry are understated. Efforts are under way by Statistics Canada to better capture the true nature of the industry"	\$1.4B* Direct GDP	11,201* Direct FTEs	ow.ly/uHhW50De4sC



# #WATCHBC

FY2019/20 Motion Picture Highlights

## 1 SONY PICTURES ANIMATION | HAIR LOVE

Vancouver artist Pearl Low worked as a story artist on the 2020 Academy Award-winning Best Animated Short Film.



## 2 ADHEL AROP | WHO AM I

Adhel Arop's award-winning short film supported by TELUS STORYHIVE and Creative BC follows the quest for her own identity against the background of her life as a South Sudanese refugee.



## 3 WENDY ORD | TO THE WORLDS

Kelowna-based director Wendy Ord won Best Documentary Program at the 2020 Canadian Screen Awards and five Leo Awards for the CBC Gem documentary that follows Okanagan adult figure skating team.



## 4 ABC | "THE GOOD DOCTOR"

ABC's "The Good Doctor", a fan-favourite from the creators of FOX's "House", produced by and filmed at Burnaby's Brightlight Pictures Inc.



## 5 ATOMIC CARTOONS | "MOLLY OF DENALI"

The Thunderbird Entertainment series "Molly of Denali" has been recognized as the first nationally distributed children's series in the US to feature an Indigenous lead character, won a 2020 Television Critics Association award for Outstanding Achievement in Youth Programming and a Peabody Award in the children's and youth category.



## 6 MARTYNA CZAPLAK | A-YI

The CBC Short Docs directed by Martyna Czaplak, supported by Creative BC/CBC partnership program follows the heartwarming story of an unlikely friendship in East Vancouver.



## 7 CINESITE | EXTINCT

From the director of MONSTERS INC., co-venture between multi-territory distributor China Lion Film, and China's Wink Animation, part of Huayi Brothers Media, in production at the animation and post-production studio, Cinesite. Extinct © 2020 China Lion Films. All Rights Reserved.



## 8 THE CW | RIVERDALE

The hit CW series, "Riverdale", returned to film its fifth season in B.C.



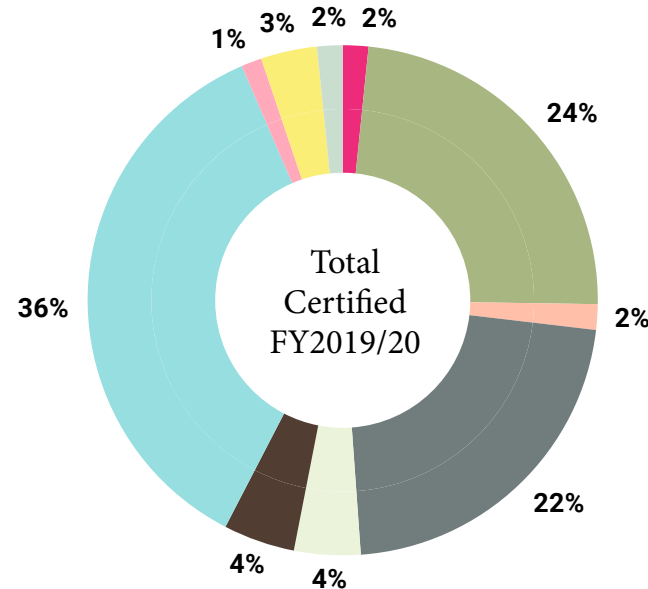
## 9 MARIE CLEMENTS | RED SNOW\*

RED SNOW, written and directed by Galiano Island filmmaker Marie Clements has gained acclaim since its debut at Vancouver International Film Festival in 2019 with a digital premiere on Apple TV.

# Motion Picture Tax Credit Administration

B.C.'s motion picture industry in FY2019/20 is estimated by Creative BC at **\$3.6B** and **411** productions, based on direct tax credit application knowledge.

Actual certifications processed were 309 and \$2.78B due to technical system upgrade and COVID-19 disruption.



Project Format	Approved Certifications
DIRECT TO DVD	5
FEATURE FILM	73
MINI SERIES	5
MOVIE OF THE WEEK	68
TV PILOT	13
TV PROGRAM	14
TV SERIES	111
WEB BASED/OTHER	4
SVOD SERIES	11
SVOD PRODUCTION	5

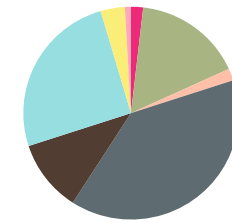
**NEW!**  
 → 18-month deadline to file claim with CRA  
 → Pre-certification introduction for corporations intending to claim the Production Services Tax Credit Program (PSTC)  
 → Increase to PSTC fee

## Comparing CIERA Annual Insights to Tax Credits Knowledge by Fiscal Year

Creative BC administers motion picture tax credits for the Province of British Columbia, and reports on processed applications by fiscal year (ending March 31st). In 2019 a new software system was implemented, impacting file processing times and volume. The new system delivers higher quality client experience and permits greater agility for reporting. Creative BC estimates that had processing times not been affected, tax credit certifications for FY2019/20 would have been \$3.6B, whereas CIERA direct output estimates the industry at \$3.43B using Statistics Canada data. While tax credit certifications are based on production spending insights to each certified production application, CIERA measures are slightly different in that they include not just the production phase of the motion picture value chain, but the preceding creation and final distribution phase as well. Due to the size of the motion picture industry in B.C., the tax credit certified activity may represent a combination of CIERA's direct and indirect figures. In order to deliver a nationally relevant, provincially validated approach to the creative industries in B.C., going forward, CIERA measures will be the public figures reported for the motion picture industry (and all Creative BC-served industries), with contextual and direct insights from Creative BC's tax credit administration activity as a validator.

TOTAL FY2019/20 TAX CREDITS IMPACTS	
ACTUALS CERTIFIED	EST. TRUE VOLUME
B.C. LABOUR SUPPORTED	
<b>\$1.49B</b>	<b>\$2.10B</b>
PRODUCTIONS CERTIFIED	
<b>309</b>	<b>411</b>
TAX CREDITS ADMINISTERED	
<b>\$563M</b>	<b>\$720M</b>
TOTAL B.C. PRODUCTION SPENDING STIMULATED	
<b>\$2.78B</b>	<b>\$3.6B</b>

## Film Incentive BC Program



Project Format	Approved Certifications	%	Project Format	Approved Certifications	%
DIRECT TO DVD	2	2%	TV PROGRAM	12	11%
FEATURE FILM	18	16%	TV SERIES	28	25%
MINI-SERIES	2	2%	SVOD SERIES	4	4%
MOVIE OF THE WEEK	43	39%	OTHER	1	1%

Canadian-owned and controlled companies producing Canadian content may apply for the Film Incentive BC (FIBC) tax credit, which will refund an eligible portion of a project's B.C. labour costs. The percentage of costs refundable increases the farther outside the metro Vancouver area the project is shot, with additional refunds available for training, scriptwriting, and digital animation, visual effects and post-production.

**There are six tax credits available under the FIBC:** **BASIC** tax credit (35%) applies to the qualified B.C. labour costs of the production.

**REGIONAL** tax credit (12.5%) applies to B.C. labour costs associated with principal photography that is conducted outside of the designated Vancouver area; e.g. in nearby communities such as Maple Ridge or Langley. View the Regional and Distant Location Tax Credit Map: [ow.ly/4gxX50CARVa](http://ow.ly/4gxX50CARVa).

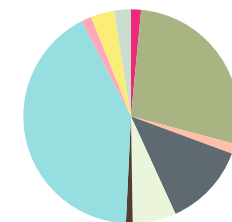
**DISTANT LOCATION REGIONAL** tax credit (6%) applies to B.C. labour costs associated with principal photography that is conducted in distant locations, e.g. north of Whistler, east of Hope or on Vancouver Island. View the Regional and Distant Location Tax Credit Map: [ow.ly/4gxX50CARVa](http://ow.ly/4gxX50CARVa).

**TRAINING** tax credit (30%) applies to a B.C.-based individual registered in an approved training program.

**DIGITAL ANIMATION, VISUAL EFFECTS AND POST-PRODUCTION (DAVE)** tax credit (16%) applies to the B.C. labour costs related to digital animation, visual effects and eligible post-production activity.

**SCRIPTWRITING** tax credit (35%) is calculated on the labour expenditures paid to a B.C.-based scriptwriter that are directly attributable to the development of script material of a production that are incurred after February 20, 2018 and before the end of the final script stage of the production.

## Production Services Tax Credit Program



Project Format	Approved Certifications	%	Project Format	Approved Certifications	%
DIRECT TO DVD	3	2%	TV PROGRAM	2	1%
FEATURE FILM	55	28%	TV SERIES	83	42%
MINI-SERIES	3	1%	WEB BASED/OTHER	3	1%
MOVIE OF THE WEEK	25	13%	SVOD SERIES	7	4%
TV PILOT	13	7%	SVOD PRODUCTION	5	2%

Attracting inward investment, the Production Services Tax Credit (PSTC) is available to producers globally, and reflects similar parameters for refunds on B.C. labour costs.

**There are four tax credits available under the PSTC:** **BASIC** tax credit (28%) applies to the qualified B.C. labour costs of the production.

**REGIONAL** tax credit (6%) applies to B.C. labour costs associated with principal photography that is conducted outside of the designated Vancouver area; e.g. in nearby communities such as Maple Ridge or Langley. View the Regional and Distant

Location Tax Credit Map: [ow.ly/4gxX50CARVa](http://ow.ly/4gxX50CARVa).

**DISTANT LOCATION REGIONAL** tax credit (6%) applies to B.C. labour costs associated with principal photography that is conducted in distant locations; e.g. north of Whistler, east of Hope or on Vancouver Island. View the Regional and Distant Location Tax Credit Map: [ow.ly/4gxX50CARVa](http://ow.ly/4gxX50CARVa).

**DIGITAL ANIMATION, VISUAL EFFECTS AND POST-PRODUCTION (DAVE)** tax credit of (16%) applies to the B.C. labour costs related to digital animation, visual effects and eligible post-production activity.

\*Creative BC implemented a new technical system that now facilitates tracking of actual economic activity, rather than using tax credit file processing as a proxy for activity. This report marks the implementation of a new reporting methodology that will share both figures each year: economic activity based on principal photography date during the fiscal year, and tax credits processed during the same period.

### FY2019/20 FIBC IMPACTS

ACTUALS CERTIFIED	EST. TRUE VOLUME
B.C. LABOUR SUPPORTED	
<b>\$207M</b>	<b>\$270M</b>
PRODUCTIONS CERTIFIED	
<b>110</b>	<b>145</b>
TAX CREDITS ADMINISTERED	
<b>\$96M</b>	<b>\$126M</b>
TOTAL B.C. PRODUCTION SPENDING STIMULATED	
<b>\$433M</b>	<b>\$570M</b>

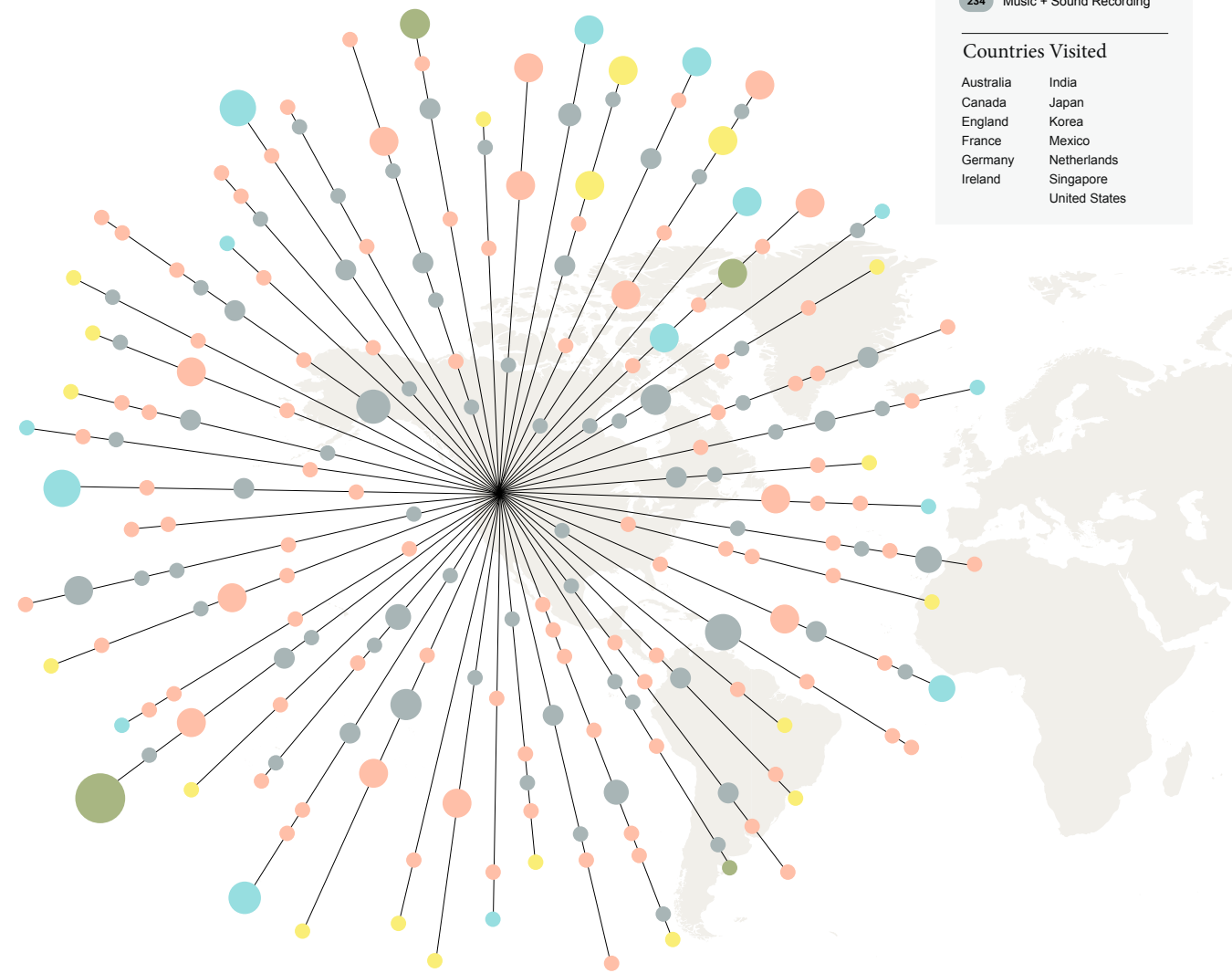
Estimated **145** productions and **\$570M** actual foreign motion picture industry economic activity in FY2019/20 based on principal photography dates and Creative BC tax credit data\*

### FY2019/20 PSTC IMPACTS

ACTUALS CERTIFIED	EST. TRUE VOLUME
B.C. LABOUR SUPPORTED	
<b>\$1.28B</b>	<b>\$1.83B</b>
PRODUCTIONS CERTIFIED	
<b>199</b>	<b>266</b>
TAX CREDITS ADMINISTERED	
<b>\$468M</b>	<b>\$594M</b>
TOTAL B.C. PRODUCTION SPENDING STIMULATED	
<b>\$2.35B</b>	<b>\$3.03B</b>

Estimated **266** productions and **\$3.03B** actual foreign motion picture industry economic activity in FY2019/20 based on principal photography dates and Creative BC tax credit data\*

# Positioning Globally



**CREATIVE BC  
FY2019/20 IMPACTS**

**499**  
CREATORS + COMPANIES  
SHOWCASED GLOBALLY

**58**  
GLOBAL MARKETS ATTENDED

**35**  
DELEGATIONS, PAVILIONS,  
FUNCTIONS

**13**  
COUNTRIES VISITED

## Market Expansion

Presenting B.C. creators and their products to the world

Creative BC funding programs drive not only the creation but the export of domestic content. The organization champions exposure of creators and their products at global markets with the intent to position domestic businesses for incremental success, as these industries are highly dependent on export sales and foreign investment. Creative BC facilitates strategic networks and positions B.C. at events and fairs where global content is exchanged. This economy is one in which competition is

growing as quickly as consumer demand for the sector's product.

For inbound and outbound trade missions in the sector, Creative BC investments support travel, hosting, networking opportunities, delegation funding, promotion, presence and participation. The intent is to build B.C.'s creative industries brand internationally, stimulate investment in the production of B.C.-based intellectual property, and support global players to establish and do business in B.C.

- VIRTUAL MARKET ATTENDANCE
- INDUSTRY INITIATIVES PIVOT SUPPORT
- LIVE MUSIC PIVOT SUPPORT

Relevant COVID-19 Response FY2020/21 Creative BC adjusted new programs providing access to global markets and adapted guidelines to be more flexible for those contracts in play when the pandemic struck.

# Re: Building Locally

## Ecosystem Strength

Building and Sustaining our Local Creative Trust

Creative talent and services that work across our sector | B.C. has a fluid and agile network of businesses and creators called Multi-Creative Industry Services that CIERA measures. This economic and job activity is specific to the creative industries, however reflects skill sets and work performed across multiple industries. The chart offers NAICS codes, descriptions of services and the multiple industries served by each. This network of services, expertise and creativity is essential and represents another component of B.C.'s Creative Trust, upon which the creative industries depend.

Increasing impacts through funding partnerships and geographic networks | To maximize funding opportunities for B.C. creators and creative entrepreneurs, Creative BC seeks to leverage other funders' support to B.C. or to offer fund administration services to organizations seeking specialized expertise in grant delivery. A strategic approach to programming and cycles ensures that B.C. creators can access resources from a variety of sources to multiply their opportunity.

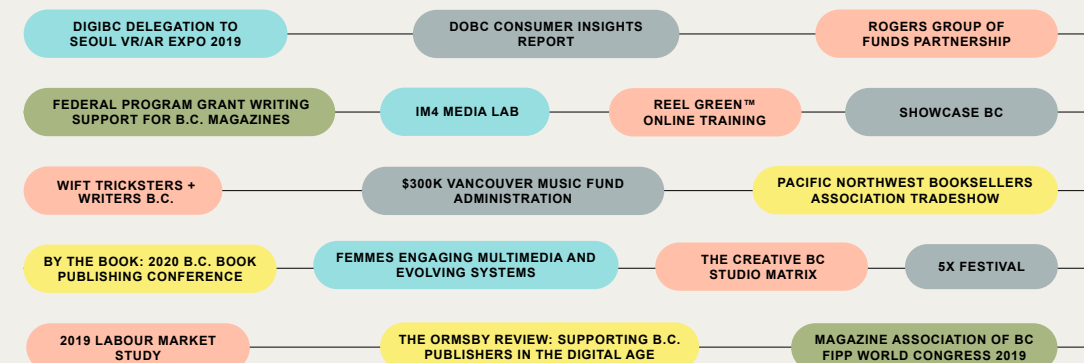
To maximize localized client services, through Creative BC, eight regional film commissions are funded and service productions with expertise, locations support and production services beyond the Lower Mainland/Southwest region. Strong ties and common digital platforms facilitate regular connections

to the Provincial Film Commission that delivers hands-on support from Hope through Metro Vancouver to Pemberton. Within this area, 36 municipal film offices serving the most film-intensive jurisdictions are engaged, serviced and coordinated by the provincial film commission team. Provincial film commission resources also deliver the studio matrix, a confidential tool facilitating insights for producers regarding space availability across B.C.'s sound stage infrastructure.

Hands-on services: research, promotion, workforce | In November 2019 Creative BC and the motion picture industry delivered the industry's first Sector Labour Market Partnerships Program-supported study with major support from the Ministry of Advanced Education and Skills Training. The first ever to leverage actual payroll data, this B.C. study is a global benchmark. Insights reveal low participation in the below-the-line workforce for women and visible minorities, including barriers for Indigenous, Black and people of colour, sparking the evolution of the MPPIA-led, Creative BC-supported workforce initiative with the vision for greater capacity through a more equitable, diverse and inclusive industry. Creative BC also staged, delivered and serviced the Showcase BC COVID-relief concert, program and promotional platform for the province's music industry. Read the Study: [ow.ly/zCLy50Ce29k](https://ow.ly/zCLy50Ce29k)

## Select Initiatives, Delegations + Functions

Supported by Creative BC



Labour Market Study funding provided by the Government of Canada through the Canada-British Columbia Workforce Development Agreement. Thank you for your partnership:



**CREATIVE BC  
FY2019/20 IMPACTS**

**82**  
FESTIVALS, WORKSHOPS +  
SECTOR INITIATIVES FUNDED

**3**  
RESEARCH + STRATEGY  
PROJECTS SUPPORTED

**1**  
MAJOR LABOUR MARKET  
STUDY PUBLISHED

**\$252,000**  
8 REGIONAL FILM  
COMMISSIONS SUPPORTED

**36**  
MUNICIPAL FILM OFFICES  
COORDINATED

# Funding Programs



Heather Perluzzo, MPPIA Short Film Award Recipient

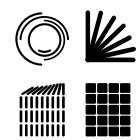
In FY2019/20, Creative BC funding programs provided B.C. creators, entrepreneurs and companies with strategic investment to development their projects, gain access to new markets, build stronger global partnerships and make a creative impact, domestically and internationally.

## FY2019/20 Impacts



Good Pitch Vancouver, March 2020

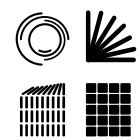
### MULTI-INDUSTRY



#### Domestic Industry Initiatives

Funding Committed **\$1,022,090**  
Recipients **55**  
Spending Stimulated **\$15,131,667**

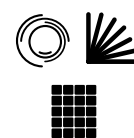
Domestic Industry Initiatives provides funding to a wide range of domestic events and initiatives that aim to engage and develop the ecosystem, inspiring and connecting British Columbia's creative industries sector. The Development Department directly administers funds to key initiatives to ensure that B.C.'s creative industries can access audiences and unite within a context that supports and fosters sustainable growth.



#### International Industry Initiatives

Funding Committed **\$234,072**  
Recipients **19**  
Spending Stimulated **\$817,280**

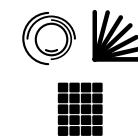
The International Industry Initiatives program ensures that British Columbia's creative industries have a presence at major international festivals and markets. The fund invests in missions, marketing and brand promotion including Canadian festival pavilions around the globe.



#### Passport to Markets Fund

Funding Committed **\$238,625**  
Recipients **143**  
Spending Stimulated **\$699,821**  
Interest Generated **\$23,699,837**

The Passport to Markets Fund provides travel support to B.C.-based film, TV, digital media, media producers, sales agents and book publishers. These creative media professionals are able to access key international markets, conferences, co-production and co-financing events. Creative BC's support offsets a portion of travel, accommodation and registration expenses.

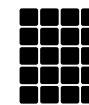


#### Passport to Markets Envelope Fund

Funding Committed **\$109,500**  
Recipients **15**

The Passport to Markets Envelope Fund program provides an envelope of financial support for B.C.-owned and controlled film, television and digital media production and distribution companies for the purpose of promoting projects in development, securing third party investments and stimulating co-production opportunities within international and domestic markets.

### INDUSTRY-SPECIFIC



#### Interactive Fund

Funding Committed **\$675,000**  
Recipients **11**  
Spending Stimulated **\$3,037,840**

The Interactive Fund is a collaboration between Creative BC and the BC Arts Council, intended to support the production of high quality, original, interactive digital media content and software applications owned and controlled by B.C. companies or individuals. By investing in interactive digital media projects, we aim to position B.C. companies and individuals for promoting new initiatives.



#### Market Expansion Fund

Funding Committed **\$67,700**  
Recipients **12**  
Markets Attended **39**  
Spending Stimulated **\$210,887**

The Market Expansion Fund provides financial support for B.C. book publishers to attend select book fairs, conferences and events for the purpose of promoting their publishing list in both foreign and domestic markets, expanding business opportunities through foreign and subsidiary rights sales and the development of digital marketing materials or campaigns.



#### Magazine Travel Support

Funding Committed **\$5,000**  
Recipients **4**

The Magazine Publishers Travel Support Program provides financial support for B.C. magazine publishers to send delegates to attend select magazine conferences and trade events for the purpose of promoting their publications, securing new business opportunities and professional development.



#### MPPIA Short Film Award

Funding Committed **\$5,000**  
Recipients **1**  
Leverage Secured: Private | In-kind **\$110,000**

An industry initiative of the Motion Picture Production Industry Association (MPPIA), in partnership with Creative BC and the Whistler Film Festival Society, this award supports an emerging filmmaker to develop their directing career by realizing a unique creative vision in a short film project. The award consists of up to \$15K in cash (Creative BC \$5K, MPPIA \$10K) plus in-kind services valued up to \$100K from across the industry.



#### Regional Film Commissions

Funding Committed **\$252,000**  
Recipients **8**

Creative BC continues to provide annual support to eight provincially-designated regional film commissions in B.C.

# Funding Programs



UNICORN CODE, Wallop Films, BC Shorts Program (Harold Greenberg Fund partnership) Photo by Matthew Lawrence Dix, Wallop Films



COLOUR STUDY, Anthem Jackson Digital Production Fund (CBC partnership)



MONKEY BEACH, dir. by Loretta Todd funded by the Project Development Fund

## FY2019/20 Impacts

**74**  
creators + companies supported

**5**  
programs serviced

**\$701,731**  
funding committed

**\$3.22M**  
future funding announced



## Reel Focus BC

In FY2019/20, Reel Focus BC programs supported B.C. producers and B.C.-based production companies with financial support for project development.

### DOMESTIC MOTION PICTURE

**THE HAROLD GREENBERG FUND** | BC Shorts Program | Harold Greenberg Fund  
Funding Committed **\$40,000**  
Recipients **4**  
Leverage Secured: Federal | Private **\$40,000**

The Harold Greenberg Fund and Creative BC BC Shorts Program is a financing initiative designed to bolster the emerging talent in B.C. In partnership, Creative BC and Harold Greenberg each provided \$10,000 to four emerging filmmaking teams to make dramatic short films aimed at showcasing new creative visions and further their careers toward feature filmmaking.

**STORYHIVE** | TELUS STORYHIVE Documentary Edition | Creative BC Top-up  
Funding Committed **\$75,000**  
Recipients **15**

The TELUS STORYHIVE Documentary Edition provides 30 projects with production funding, training and mentorship, and distribution support. Each awarded project receives a \$50,000 production grant to make a documentary, with additional top-up funding from Creative BC.

**Canada Media Fund** | **Access 2020 | Creative BC + Canada Media Fund + CMPA-BC Producers Branch**  
**NEW FUNDING ANNOUNCED \$420,000**

In FY2019/20, the Canada Media Fund (CMF), the Canadian Media Producers Association - BC Producer's Branch (CMPA-BC) and Creative BC announced this new partnership program delivering B.C.-based producers up to \$30,000 for the early stage development of children's, youth and scripted drama projects for television.

**+\$2M**

DOMESTIC MOTION PICTURE FUND

Relevant COVID-19 Response  
FY2020/21

Domestic motion picture industry investments secure partnerships and deliver funds to B.C. producers and B.C.-based production companies for the development of locally-owned intellectual property.



**Project Development Fund**  
Funding Committed **\$424,331**  
Recipients **48**  
Spending Stimulated **\$4,007,240**

The Project Development Fund enables B.C.-owned and controlled production companies to build on development commitments secured from broadcasters, distributors and funding agencies. The fund encourages support for existing and emerging domestic companies and provides financing in the form of non-recoupable advances for feature film script development, dramatic or animated TV projects, or documentaries.



**Digital Production Fund | CBC + Creative BC**  
Funding Committed **\$150,000**  
Recipients **6**  
Leverage Secured: Federal **\$150,000**

The CBC Digital Production Fund is a micro-budget production fund to support the creation of video content from B.C. producers and creators to be showcased in connection with CBC's digital platforms. The fund supports productions that reflect, represent and reframe diverse perspectives from B.C. creative teams, showcasing new creative visions and furthering the careers of emerging writers, producers, and directors.



**Story Department Internship | Creative BC + CMPA-BC Producers Branch**  
Funding Committed **\$12,400**  
Recipients **1**

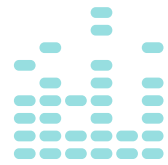
The Canadian Media Producers Association (CMPA)-BC Producers Branch provides funding for the skills development of professionals committed to careers in writing for dramatic television. The program supports the costs of hiring B.C. residents to work in story departments on productions confirmed for broadcast as a series on network television or video on demand (VOD) platform.



**Documentary + Factual Development Fund | Creative BC + Rogers Group of Funds**  
**NEW FUNDING ANNOUNCED \$800,000**

In FY2019/20, Rogers Group of Funds and Creative BC announced the new fund that will deliver B.C.-based producers \$800,000 over two years to support individual documentary and factual projects, before being greenlit by the market during early stage development.

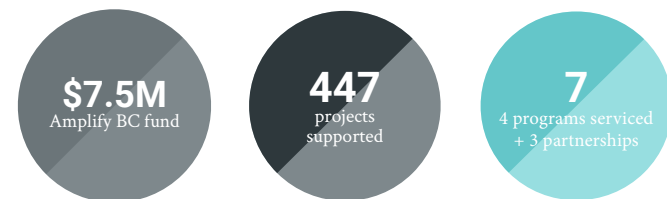
# Funding Programs



## Music + Sound Recording

In FY2019/20, Amplify BC programs delivered four streams to B.C. artists, live music presenters, music companies and the development of the music industry.

### FY2019/20 Amplify BC Impacts



**CREATIVE BC  
FY2019/20 IMPACTS**

**1,339**  
IP ASSETS CREATED,  
986 RECORDINGS, 211 VIDEOS

**162**  
ARTISTS FUNDED,  
47 ESTABLISHED, 95 EMERGING  
AND 20 ATTRACTED FROM OUT-  
OF-PROVINCE ATTRACTION

**836**  
APPLICATIONS PROCESSED,  
34% SUCCESS RATE

**668**  
ATTENDEES OF 36 ONLINE,  
IN-PERSON + REGIONAL  
INFO SESSIONS

**26**  
INDUSTRY  
INITIATIVES FUNDED

#### AMPLIFY BC PROGRAMS



#### Career Development

Funding Committed **\$1.75M**  
Funded Projects **162**

The Career Development program supported the economic growth and career development of emerging and established artists in the areas of sound recording, marketing, and music videos.



#### Music Company Development

Funding Committed **\$800,000**  
Funded Projects **33**

The Music Company Development program supported the sustainability, growth and capacity of BC's music companies.



#### Live Music

Funding Committed **\$1.7M**  
Funded Projects **64**

The Live Music program supported BC-based live music events, creating engagement opportunities for audiences, artists and youth funding live music presentation and business development activities.

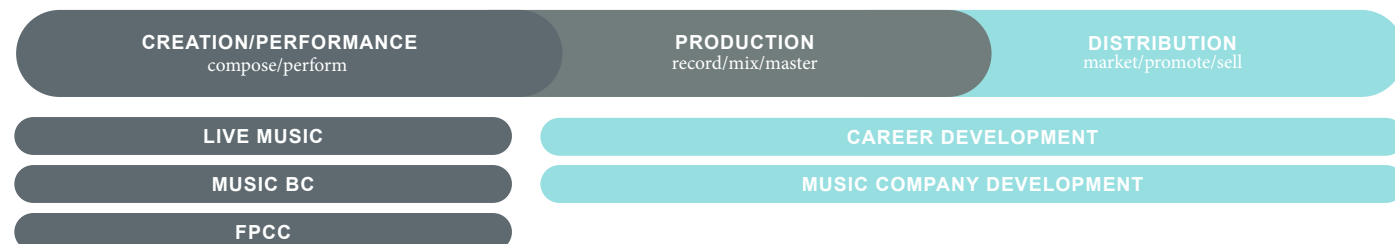


#### Music Industry Initiatives

Funding Committed **\$500,000**  
Funded Projects **26**

The Music Industry Initiatives program supported initiatives that grow and develop British Columbia's music ecosystem.

#### PROGRAM INVESTMENTS ACROSS THE MUSIC INDUSTRY VALUE CHAIN



**\$7.5M**

#### ANNUAL FUNDING RENEWAL

In 2020, the Province announced the renewal of the \$7.5M Amplify BC fund to stabilize, support and sustain B.C.'s music and sound recording industry.

#### AMPLIFY BC PARTNERS



Funding Envelope **\$1.2M**

As B.C.'s music industry association, Music BC is the leader in professional development, showcasing and export development, promoting B.C. artists and industry professionals locally and at export markets around the globe, through the following initiatives: training and professional development through the How-to-Series and other initiatives • travel grants to support touring artists and business travel for industry professionals • domestic and international showcasing opportunities • Let's Hear It! live micro grants funding local music showcases across the province.



Funding Envelope **\$500,000**

First Peoples' Cultural Council: The Indigenous Music Initiative increased opportunities for Indigenous music industry professionals to participate in, and further influence, BC's music industry through knowledge transfer, skill development and the creation of new business opportunities. This included: mentorship grants for Indigenous music industry professionals and artist-entrepreneurs • capacity building grants for Indigenous recording engineers, producers and studios • support for Indigenous artists touring, marketing and performing in Canada • the Indigenous Music Retreat, strengthening the artistic and business skills of emerging and established artists.



Funding Envelope **\$100,000**

DigiBC's education project engaged youth in sound design and music composition for digital media and animation, using a free, ongoing resource of videos and instructional tools created for music educators and students in B.C.

#### CREATIVE BC PARTNER



**NEW!** Vancouver Music Fund  
**\$300,000**

The City of Vancouver allocated \$300K via the Vancouver Music Strategy for underrepresented populations within the city on the unceded traditional homelands of the Musqueam, Squamish or Tsleil-Waututh Nations. The City leveraged Creative BC's expertise to deliver three new programs: Demo program, Music Video Program, Industry Catalyst program.



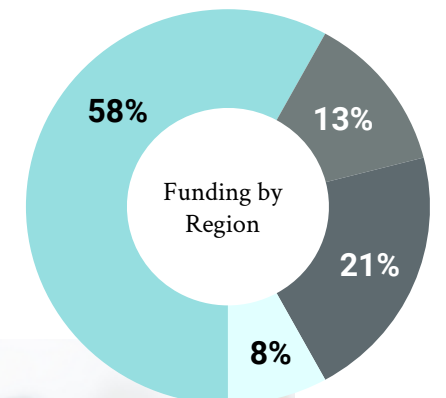
Pharis and Jason Romero are a duo based in Horsefly, B.C., where they also run a custom built banjo shop in their home, J. Romero Banjos. In May 2020, the couple released their new album *Bet on Love*. Their previous album received the 2019 Juno for Traditional Roots Album of the Year. Image by Rick Magnell.

#### Thank you to the Music Industry Advisory Committee

- |                          |                   |                     |
|--------------------------|-------------------|---------------------|
| Prem Gill                | Jocelyn Greenwood | Robert Darch        |
| Amanda Schweers          | Kathryn Calder    | Rupinder Sidhu      |
| Amy Schneider            | Mark Jowett       | Tewanee Joseph      |
| Christine Diamantopoulos | Nate Sabine       | Warren Dean Flandez |
| Howard Redekopp          | Paul Hinrichs     |                     |
| Jackie Dean              | Rob Calder        |                     |



While results for Amplify 19/20 are still coming in, FY18/19 showed the \$7.5 million Amplify BC investment stimulated \$29.9 million in expenditures, 3,256 jobs, and generated a 1:3 economic return.  
See more results: [ow.ly/nVz50BEJLj](https://ow.ly/nVz50BEJLj)



Vancouver Island-based duo Half/Asian creates music for D/deaf and hearing communities. With a cool 80's synthesizer sound, soft vocals and lyrics sung in sign language and English, this music is for everyone — because music is for everyone. Mary Matheson Photography

# Provincial Film Commission

Established in 1978, the Provincial Film Commission at Creative BC delivers and supports the resources that serve B.C.'s thriving motion picture industry.

From high-calibre projects, fantastic indies and moving documentaries to beloved series, the entertainment content made in B.C. transports audiences, influences culture and employs thousands of skilled industry professionals from tech, trade, business and the arts.

Creative BC's provincial film commission is crucial to sustaining motion picture activity in B.C. It promotes and facilitates the province's production capabilities that make B.C. both a global centre of creative excellence and a full-service hub.

Policy facilitation, stakeholder relations, production and location services, and

community affairs support are all offered by Creative BC. These film commission resources for the industry are provided free of charge to contribute to a responsible economy as well as one in which productions can enjoy smooth and efficient operations, whether shooting on urban streets or in wilderness locations.

Serving province-wide, in collaboration with eight regional film commissions beyond the lower mainland, Creative BC collaborates with and between industry and government. The provincial film commission is committed to unite and champion a strong and sustainable industry that brings value at all levels, including to the communities in which it works.

**205** Productions leveraged film commission support in FY2019/20—half of the 411 productions in B.C. during the year

## Relevant COVID-19 Response FY2020/21

B.C.'s motion picture industry has adapted to COVID-19, with animation, visual effects and post-production able to rapidly transition to work-from-home, with additional infrastructure investments. While physical production paused around the world, B.C.'s industry came together and, facilitated by Creative BC, collaborated to deliver resources supporting physical production to begin a safe and responsible return beginning June, 2020.

- COALITION SAFETY GUIDELINES
- PANDEMIC PRODUCTION GUIDE
- ANIM+VFX ALLIANCE RETURN TO STUDIO
- BC POST-PRODUCTION COVID-19 GUIDELINES
- WORKSAFE BC SAFETY PROTOCOLS
- REEL GREEN™ | A GREENER RETURN

ow.ly/VsfO50CBbLr

## Production Services from Script to Screen

Creative BC markets the province's diverse settings and technical expertise. Through tailored location packages generated from Creative BC's proprietary locations library, the location services team provides domestic and international producers with a World of Looks™ that reflect their cinematic stories' creative requirements—from the rugged landscapes of the Kootenays to the Okanagan's sunny vineyards or the Lower Mainland's urban settings.

The digital locations library contains over half-a-million images. As the team reads through

incoming scripts, they draw on an encyclopedic knowledge of suitable locations to identify and tailor images for the client's needs, turning packages around in 48 hours or less.

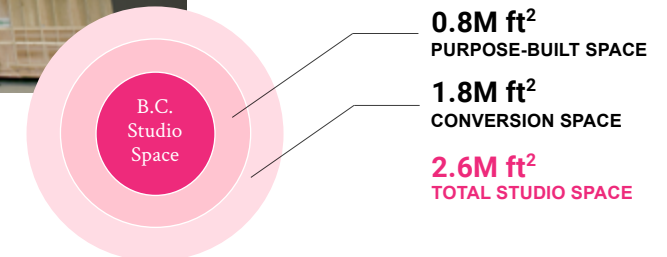
Creative BC and the regional film commissions also deliver familiarization (FAM) tours and location surveys for visiting producers. As additional support, Locations Caucus members of the Directors Guild of Canada BC Chapter may apply for direct digital library access, along with support and training through Creative BC.



In 2019 Martini Film Studios announced a 33 acre, 680,000ft<sup>2</sup> expansion of their studios in Langley, B.C.



**EQUITY, DIVERSITY + INCLUSION - PARTNERSHIP WITH CREATIVE BC**  
Toward a dynamic workforce that is equitable, diverse and inclusive, increasing workforce capacity above- and below-the-line, in animation, VFX and post-production.



**CREATIVE BC  
FY2019/20 IMPACTS**

**260**  
ACTIVE USERS SUPPORTED IN THE DIGITAL LOCATIONS LIBRARY

**507,297**  
IMAGES IN THE DIGITAL LOCATIONS LIBRARY

**6,852**  
FILES IN THE DIGITAL LOCATIONS LIBRARY (+964 IN FY2019/20)

**222+**  
LOCATION PACKAGES, SCRIPT BREAKDOWNS, REGIONAL COLLABORATIONS

**151**  
INCOMING PRODUCTION CONSULTATIONS



- Motion Picture Community Initiative Partners**
- ACFC West, Local 2020 Unifor**  
(Association of Canadian Film Craftspersons)
  - CMPA-BC**  
(Canadian Media Producers Association - BC Producers Branch)
  - CPAWC**  
(Commercial Production Association of Western Canada)
  - DGC BC**  
(Directors Guild of Canada, B.C. District Council)
  - IATSE Local 891**  
(International Alliance of Theatrical Stage Employees)
  - ICG 669**  
(International Cinematographers Guild of the International Alliance of Theatrical Stage Employees)
  - MPA Canada** (Motion Picture Association Canada)
  - MPPIA** (Motion Picture Production Industry Association of BC)
  - UBCP/ACTRA**  
(Union of BC Performers/Alliance of Canadian Cinema, Television and Radio Artists)
  - Teamsters Union Local 155**

ASH, Amazing Factory Productions funded by the Project Development Fund

## Industry + Community Affairs Support and Collaboration

Creative BC provides leadership, consultation, service and support to sustain and strengthen the way motion picture works in B.C. As the first point of contact, the industry and community affairs team assists members of the public, industry, and

government to respond to stakeholder inquiries, address issues related to policy, and support physical production and B.C.'s film-friendliness. The focus is always on swift, successful resolution and longterm collaborative success.

*Thank you to our network of partners, businesses and communities of B.C. who contribute to the success of B.C.'s motion picture industry. We couldn't succeed without you!*



Netflix's ALWAYS BE MY MAYBE showcased some of Vancouver's most iconic cityscapes and neighbourhoods. Image: Ed Araquel / Netflix.

**CREATIVE BC  
FY2019/20 IMPACTS**

**780**  
INQUIRIES + CONCERNS RESOLVED

**35**  
MUNICIPAL FILM OFFICES SUPPORTED

**19**  
TASKFORCES + INITIATIVES

**23**  
13 GOVERNMENT + 11 INDUSTRY STAKEHOLDER PARTNERS

**20**  
ONGOING MAJOR FILES

# Regional Film Commissions

Beyond Creative BC in the Lower Mainland/Southwest, there are also eight provincially-funded regional film commissions that collaborate to promote, serve and assist their economic regions.

With stunning locations, unique local expertise and a broad network of relationships, the regional film commissions are integral to motion picture in our province. Their local knowledge informs both clients and Creative BC.



Season 1 of Apple TV+ "See" earns a Location Manager Guild International Award nomination for Outstanding Locations in a Period Television Series. The series filmed in various locations in the Vancouver Island North and South regions.



The filming of SONIC THE HEDGEHOG invested over \$37.5M across the province, and filmed in Campbell River, Nanaimo and near Parksville-Qualicum. ©2019 Paramount Pictures. All rights reserved.

REGIONAL FILM COMMISSIONS	8
REGIONAL FILES IN DIGITAL LOCATIONS LIBRARY	12,575
CERTIFICATIONS IN FY2019/20 CLAIMING DISTANT REGIONAL TAX CREDIT	14%
DISTANT REGIONAL FOREIGN PRODUCTION ACTIVITY BASED ON TAX CREDIT CERTIFICATIONS IN FY2019/20	40%
DISTANT REGIONAL DOMESTIC PRODUCTION ACTIVITY BASED ON TAX CREDIT CERTIFICATIONS IN FY2019/20	60%

Thank you for your leadership and partnership

Images: Destination BC

**CARIBOO CHILCOTIN COAST TOURISM**  
Williams Lake  
209 FILES IN THE LIBRARY

**OKANAGAN FILM COMMISSION**  
Kelowna  
3046 FILES IN THE LIBRARY

**COLUMBIA SHUSWAP FILM COMMISSION**  
Salmon Arm  
350 FILES IN THE LIBRARY

**NORTHERN BC TOURISM**  
Prince George  
754 FILES IN THE LIBRARY

**THOMPSON-NICOLA FILM COMMISSION**  
Kamloops  
3096 FILES IN THE LIBRARY

**VANCOUVER ISLAND NORTH FILM COMMISSION**  
Campbell River  
1966 FILES IN THE LIBRARY

**VANCOUVER ISLAND SOUTH FILM COMMISSION**  
Victoria  
1903 FILES IN THE LIBRARY

# REEL GREEN™

Environmental sustainability is the future of filmmaking



244

PEOPLE TRAINED

NOW ONLINE!

GET TRAINED AT REELGREEN.CA

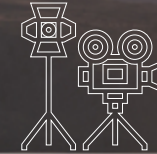
**REEL GREEN™ CLIMATE + SUSTAINABILITY COURSE**  
Virtual, frequent and free so industry members can improve their professional capabilities and green our industry

TRAIN YOUR COMPANY, CREW + CAST TO GO REEL GREEN™



**REEL GREEN™**  
Industry-led, Creative BC-facilitated, guided by Green Spark Group

Working toward a thriving industry and positive, healthy relationships to the environment and society.



INDUSTRY PARTNERS

18

The first production company to have all staff trained in Reel Green™  
Screen Siren PICTURES INC.

Spearheaded by Creative BC, and funded by 18 industry partners, the initiative empowers the local film and TV industry to implement sustainable production practices and measure carbon impact.

25

REEL GREEN™ INDUSTRY AMBASSADORS



10



**WAYS TO IMPLEMENT REEL GREEN™ PRACTICES ON SET**  
OW.LY/5A8X50DE47U

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- 1 REDUCE PAPER USE
- 2 USE RENEWABLE POWER
- 3 RECYCLE YOUR MATERIALS
- 4 REDUCE POWER CONSUMPTION
- 5 REUSE YOUR MATERIALS
- 6 REDUCE PLASTICS
- 7 REDUCE BEEF CONSUMPTION
- 8 REDUCE FUEL CONSUMPTION
- 9 REDUCE FOOD WASTE
- 10 SHOP SUSTAINABLY

## REEL GREEN™ GOES NATIONAL

New provincial and corporate partners enter memoranda of understanding to use tools and resources

QUEBEC

ONTARIO

MANITOBA



CBC



## REEL GREEN™ CARBON CALCULATOR

adapted for Canada from BAFTA's albert, measures your production's carbon footprint.

GET TRAINED AT REELGREEN.CA

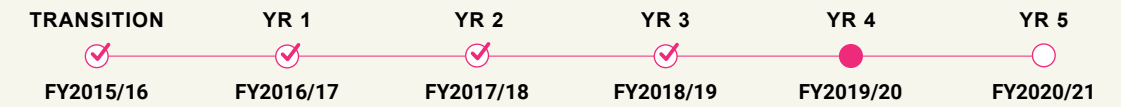
# Scorecard + Impacts

Creative BC concludes year four of its strategic plan, a framework developed in consultation with industry, government and internal stakeholders. The overarching goal was to transform Creative BC's relevance, engagement, transparency and contribution in advancing the success of B.C.'s creative industries. Creative BC is pleased to report on accomplishments and initiatives that are establishing benchmarks, measures and innovating our organization. These foundations form a supporting baseline for evolved reporting, with a balanced scorecard-informed evaluation each year. Creative BC aims to apply and adapt business strategies to improve and inform our non-profit impacts (see [balancedscorecard.org](http://balancedscorecard.org)).

## Creative BC | Four Strategic Pillars and Framework

	COMPETITIVENESS	GROWTH MINDSET	DISCOVERABILITY	TALENT
Strategies	Strategically position B.C.'s creative industries to compete to win	Design a growth culture for B.C.'s creative industries	Show, tell and share stories of B.C.'s creative industries, workforce and economy	Attract, build and retain the best creative talent
Goals	Build B.C.'s creative industries brand and investment opportunity globally	Invest in developing B.C.-generated ideas into Intellectual Property (IP) and jobs	Collect, generate, curate and distribute creative industries stories and market intelligence	Build the creative industries' people and capacity through partnership with associations, initiatives and institutions
Objectives	<ol style="list-style-type: none"> <li>Sustain and increase B.C.'s competitiveness and investment attractiveness</li> <li>Research, improve and curate creative economy knowledge and data for informed decision-making</li> <li>Facilitate collaborative action and initiatives between converging stakeholders</li> </ol>	<ol style="list-style-type: none"> <li>Invest in thinking and funding and export models that support creative entrepreneurship</li> <li>Champion mechanisms for IP development and licensing of B.C.'s creative products and services</li> <li>Foster a collaborative innovation economy that navigates risk and stimulates reward</li> </ol>	<ol style="list-style-type: none"> <li>Distribute and promote B.C. creative industry data, products, services, programs and platforms</li> <li>Develop and distribute a comprehensive and integrated B.C. creative industries communications plan</li> <li>Provide creative industries activation toolkits to industry and partners</li> </ol>	<ol style="list-style-type: none"> <li>Support industry, partners and associations to develop B.C.'s creative workforce and incubate the next generation of talent</li> <li>Collaborate on training, apprenticeship and education initiatives and close the digital divide</li> <li>Support and incentivize people development and diversity in the creative industries convergent workforce through events, conferences and venues</li> </ol>
Financial	Business to Business (B2B)	Business to Consumer (B2C)	Innovation + Learning	

## CREATIVE BC SCORECARD FY2019/20



## Measuring Investment and ROI

Five key Creative BC Input Indicators have been identified, and a select number of financial and non-financial data points have been measured within them. We anticipate ongoing enhancements as our tech transformation enables identification and tracking of new key performance indicators (KPIs) further aligning our day-to-day work to our strategy and our clients' evolving needs. We are proud that the FY2019/20 report delivers CIERA's bespoke measurement using public datasets to measure the sector's economic output.

## Creative BC Input Mechanisms

Investment Inputs

**GRANTS**  
We reviewed our data to see how many client companies, creators, projects, initiatives, productions and commissions were supported by Creative BC, and what the estimated economic investment was comparing this to last year's numbers.

**SERVICES**  
We surveyed our staffing resources, service departments and funding partnerships to review how many services were delivered by Creative BC to industry and partners leveraging our capacity to run programs that invest in B.C.'s creative industries.

**PROGRAMS**  
We compared the number and diversity of development programs and initiatives run year-over-year in total, and also the number of programs available to each of the specific industries we serve and those with unique targets such as regional and diversity objectives.

**REACH**  
We compared our traditional and non-traditional media, newsletter, website and social media reach, as well as our presence at markets and participation in trade missions. We benchmarked our traditional media reach this year so we can use it to measure our performance next year.

**ENGAGEMENT**  
We reviewed the number of applications, requests, inquiries and collaborations across the departments, online and via invitations from governing bodies, ministries, associations and industry organization partners who leveraged our expertise during FY2019/20.

## B.C. Economy Output Results

ROI Outputs

**NEW! CIERA**  
Creative Industries Economic Results Assessment  
Creative BC has designed a new measurement tool using public datasets from Statistics Canada, and a bespoke NAICS mapping, that delivers specific economic information for each of the five industries it serves, and one Multi-Creative Industry Services component. The achievement of this measurement mechanism has been built with input from both Statistics Canada and BC Stats. Its delivery marks the accomplishment of a key objective in the current service innovation plan. This proprietary tool sets new benchmark figures for 2019 based upon which consistent annual year-over-year measurement will proceed. See methodology page 96.

Comparability - it is important to identify whether Total or Direct impacts are referenced, and whether GDP or Output are the economic measure. By offering detailed CIERA tables each year, Creative BC will seek to facilitate comparability in any circumstance.

B.C. TOTAL GDP	B.C. JOBS	GROWTH RATE
<b>\$4.85B</b> Direct, Indirect, Induced	<b>66,524</b> Traditional FT/PT Jobs (Direct, Indirect, Induced)	<b>7.1%</b> Combined Total GDP C.A.G.R. 2010-2018
	<b>42,358</b> Traditional FT/PT Direct Jobs	

# Competitiveness

Beyond key performance indicators throughout the Impact Report, the following are additional highlights of Creative BC's activities within their strategic pillar.

# 21



## Key JEDI Events

Presenting, moderating, coaching or facilitating initiatives to drive change, anti-racism and equity with a focus on increased participation by under-represented groups in the creative industries.



Design of **CIERA**  
Creative Industries  
Economic Results  
Assessment

## Pilot Program

Provincial Film Commission facilitated industry-government collaboration in successful implementation of Hours of Service Policy for the transportation industry.

# 2 YR



## Policy

Agreement in principal for adoption of a new Provincial Film Policy, representing collaboration input and agreement between 13 ministries, facilitated by Creative BC in partnership with the Ministry of Tourism, Arts, Culture & Sport.

## Research

Industry collaboration on world's first Labour Market Study based on actual payroll data [ow.ly/BsF550Cu5wn](https://ow.ly/BsF550Cu5wn).



## Revenue

Industry and government consultation, facilitation, implementation of pre-certification process and tax credit fee changes to help sustain increased service to B.C.'s motion picture industry.

## Key Marketing, Export + Trade Meetings + Initiatives

Growing ties that build business activity in B.C., promoting B.C. creators and their products to leaders and in new markets: governments, funders, industry panels, B2B meetings at film festivals, with trade commissions, embassies, ambassadors, commissions, innovation offices and more.



# 80

  
Local


# 23

  
National


# 35

  
Global

# 16

  
Countries

CEO and Vice President outreach on behalf of all B.C.'s creative industries in Canada, USA, Korea, Hungary, Mexico, Estonia, France, England, Ireland, Japan, India, Australia, China, Uruguay, Iceland, Germany.

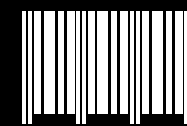
# Growth Mindset

**\$10,244,843** via **862** grants to **635** B.C. creators + companies across **19** programs for the **5** industries served



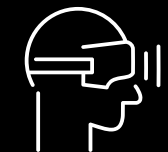
## Federal Support

New funding partnership and collaboration for B.C. book publishers to leverage federal supports through partnership with Livres Canada Books.



## Market Access

Magazine travel grant designed and introduced as new and ongoing support to B.C.'s periodicals.



## Innovation Delegation

DigiBC was supported in bringing its first BC's XR Company Delegation to build networks and explore opportunity at the Seoul VR/AR Expo 2019.



Federal First

Negotiated Canada Media Fund's first provincial collaboration with Creative BC and the Canadian Media Producers Association - BC Producers Branch, bringing early-stage funding to the province through Access 2020.



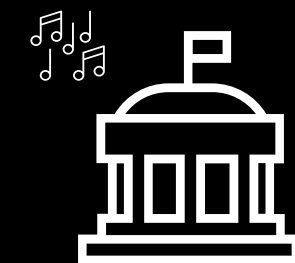
Corporate Collab

Secured first partnership with Rogers Group of Funds for documentary and factual content creators.



Provincial Milestone

Presented plan, research and rationale to support provincial \$2M decision for first domestic production stage investments since 2003.



## Municipal Partnership

Successfully delivered Creative BC's first-ever municipal collaboration, supporting the City of Vancouver to invest in musicians from under-represented groups to strengthen the vibrancy of the city's music scene.



## Environmental Commitment, Leadership and Collaboration

Delivered by Creative BC's Provincial Film Commission, Reel Green™ expanded nationally and partnered with CBC and three provinces (Manitoba, Ontario, Quebec), all of them coming on board to carry best practices across Canada. Accelerating this success, Creative BC has engaged in an international collaboration with the British Academy of Film and Television Arts (BAFTA) and is adapting the successful "Albert suite of tools" for Canada, including a carbon literacy course, a carbon calculator, and certification.

# Discoverability

In FY2019/20, Creative BC's audience has grown, strengthening a community that celebrates the best in B.C. talent and storytelling.



**5.6%**

Website Sessions: 421K vs 401K



**10.7%**

Website Users: 248.5K vs 224K



**13%**

Traditional Media Hits: 1.42K vs 1.25K



**23%**

Social Media Audiences: 20.6K vs 16.8K



**3.97%**

Social Media Impressions: 13.1K vs 12.6K



**6.83%**

Newsletter Subscribers: 8.2K vs 7.7K



**18.5%**

BC Creates Visitors: 46.7K vs 39.4K

Creative BC hosted **Apple Music** for an information session, coaching B.C. artists and music companies and passing on expert insights and skills with which to gain market access and improve their content's discoverability on streaming platforms.



Bell Media Fund, the Independent Production Fund and VICE Media Canada were engaged by Creative BC to provide coaching to B.C. producers, transferring essential knowledge on how to secure financing from their funds and programs.

# Talent

All Creative BC staff received unconscious bias training and far-reaching JEDI (justice, equity, diversity and inclusion) work is informing all touchpoints, processes and policies at Creative BC. Toolkits and resources for industry are the next step in Creative BC's JEDI strategy.



Creative BC implemented voluntary self-identification questions for program applicants. The organization also uses weighted criteria to ensure diverse pools of recipients and increased support for underrepresented groups, correcting a history of systemic inequity.



Three new advisory committees were established by Creative BC – for motion picture, magazine publishing and book publishing – another method by which the organization seeks to ensure close consultation and relevance through connections to “on the ground” talent working within the industries we serve, developing connections and fostering networks of insight.



Creative BC's ongoing collaboration with MPPIA is now building on recommendations of the 2019 B.C. Motion Picture Industry Below-the-Line Labour Market Study, with strategy and implementation of Equity, Diversity & Inclusion pilots and projects.



# Tax Credit Tables + Program Recipients

April 1, 2019 → March 31, 2020

## MOTION PICTURE TAX CREDITS | FILM INCENTIVE BC (FIBC)

FORMAT	# OF TAX CREDIT APPLICATIONS	BC BUDGET	PROJECTED TAX CREDITS
Direct to DVD	2	\$5,538,230	\$1,151,528
Feature Film	18	\$24,568,335	\$6,405,656
Mini-Series	2	\$4,575,000	\$925,150
Movie of the Week	43	\$107,676,810	\$24,625,269
TV Pilot	0	\$0	\$0
TV Program	12	\$6,143,774	\$1,337,627
TV Series	28	\$256,167,397	\$55,054,737
SVOD Series	4	\$28,278,308	\$6,762,445
Other	1	\$33,510	\$11,685
<b>TOTAL FIBC</b>	<b>110</b>	<b>\$432,981,364</b>	<b>\$96,274,097</b>

## MOTION PICTURE TAX CREDITS | PRODUCTION SERVICES TAX CREDIT (PSTC)

FORMAT	# OF TAX CREDIT APPLICATIONS	BC BUDGET	PROJECTED TAX CREDITS
Direct to DVD	3	\$6,815,105	\$2,151,772
Feature Film	55	\$619,948,578	\$142,219,839
Mini-Series	3	\$9,153,357	\$2,681,358
Movie of the Week	25	\$88,578,608	\$16,252,049
TV Pilot	13	\$61,274,291	\$10,147,540
TV Program	2	\$691,260	\$246,267
TV Series	83	\$1,296,074,391	\$255,964,671
Web Based/Other	3	\$4,474,283	\$1,070,783
SVOD Series	7	\$221,917,106	\$31,123,394
SVOD Production	5	\$37,569,809	\$5,676,777
<b>TOTAL PSTC</b>	<b>199</b>	<b>\$2,346,496,788</b>	<b>\$467,534,450</b>

## MOTION PICTURE TAX CREDITS | DIGITAL ANIMATION, VISUAL EFFECTS AND LIVE ACTION (DAVE)

	# OF TAX CREDIT APPLICATIONS	BC BUDGET
<b>FILM INCENTIVE BC (FIBC)</b>		
Digital Animation	3	\$8,012,792
Live Action	107	\$424,968,572
<b>TOTAL FIBC</b>	<b>110</b>	<b>\$432,981,364</b>
<b>PRODUCTION SERVICES TAX CREDIT (PSTC)</b>		
Digital Animation	51	\$401,692,548
VFX only	51	\$256,327,956
Live Action	97	\$1,688,476,284
<b>TOTAL PSTC</b>	<b>199</b>	<b>\$2,346,496,788</b>

Source: Creative BC, B.C. Tax Credit Program applications (FIBC and PSTC) that were approved by Creative BC for certification by the Province of British Columbia. For more information, please refer to the Creative BC Fact Sheet "Tax Credit Certification for Film and Television / Explanation of Reporting Methodology".

<sup>a</sup> The number of tax credit certifications for each fiscal year may include productions that were completed in a different fiscal year than what is reported.  
<sup>b</sup> The B.C. budget is based on budgets that are submitted to Creative BC at the time of application for tax credit certification and may not correspond to the final production budget. The budget for FIBC applications may also include the total budget for international treaty co-productions and inter-provincial co-productions.

## INTERACTIVE FUND | GRANTING PROGRAMS

COMPANY NAME	PROJECT TITLE	FUNDING COMMITTED
Inscape Studios	Proximity: Chapter One	\$100,000.00
Imposter Media	Discriminator	\$50,000.00
Mobil Art School Inc.	EQ	\$50,000.00
Silverstring Media Inc.	Glitchhikers 2	\$50,000.00
re:Naissance Opera	Orpheus VR	\$50,000.00
Lifelike & Believable Animation Design, Inc.	Press Play! Live Virtual Circus	\$100,000.00
Ludare Games Group Inc.	Project Viper	\$75,000.00
Spliqs Intelligent Media inc	Spliqs Music Creation App	\$50,000.00
Mindful Garden Digital Health Inc.	Change of State	\$50,000.00
Strawberry Fields Interactive Inc	Aeksia	\$50,000.00
Henry Tsang	360 Riot Walk	\$50,000.00
<b>TOTAL</b>		<b>\$675,000</b>

## MARKET EXPANSION FUND | GRANTING PROGRAMS

COMPANY	RECIPIENT	FUNDING COMMITTED
Anvil Press	Brian Kaufman	\$6,000
Arsenal Pulp Press Ltd.	Brian Lam	\$3,300
Caitlin Press Inc.	Vici Johnstone	\$7,300
Engage Books	Alexis Roumanis	\$4,000
Greystone Books Ltd.	Rob Sanders	\$8,000
Medicine Wheel Education	Teddy Anderson	\$5,200
Orca Book Publishers	Ruth Linka	\$8,000
Rocky Mountain Books	Don Gorman	\$4,000
Ronsdale Press	Ronald Hatch	\$1,300
Talon Books Ltd.	Kevin Williams	\$8,000
TouchWood Editions	Taryn Boyd	\$6,000
UBC Press	Laraine Coates	\$6,600
<b>TOTAL</b>		<b>\$67,700</b>

## MAGAZINE TRAVEL SUPPORT | GRANTING PROGRAMS

CONFERENCE	COMPANY	RECIPIENT	FUNDING COMMITTED
Magazine Publishers Travel Support Envelope	The Geist Foundation (Geist Magazine)	AnnMarie MacKinnon	\$2,000
Magazines - Toronto International Festival of Authors (TIFA)	Ricepaper Magazine	Allan Cho	\$1,000
MagNet 2020	Loose Lips Media Inc.	Brittany Tiplady	\$1,000
	Canada Wide Media	Anicka Quin	\$1,000
<b>TOTAL</b>			<b>\$5,000</b>

## REGIONAL FILM COMMISSIONS | GRANTING PROGRAMS

REGION	LOCATION	RECIPIENT	COMMITTED FUNDING
Cariboo Chilcotin	Williams Lake	Cariboo Chilcotin Coast Tourism Association	\$15,000
Columbia Shuswap	Salmon Arm	Columbia Shuswap Regional District	\$15,000
Kootenay Columbia	Nelson	Kootenay Columbia Film	\$12,000
Northern B.C.	Kelowna	Northern BC Tourism Association	\$30,000
Okanagan	Kamloops	Okanagan Boundary Similkameen Film Commission Society	\$40,000
Thompson-Nicola	Prince George	Thompson-Nicola Film Commission	\$40,000
Vancouver Island North	Campbell River	Vancouver Island North Film Commission	\$40,000
Vancouver Island South	Victoria	Vancouver Island South Film & Media Commission	\$60,000
<b>TOTAL</b>			<b>\$252,000</b>

## MPPIA SHORT FILM AWARD | GRANTING PROGRAMS

RECIPIENT	PROJECT TITLE	FUNDING COMMITTED
Heather Perluzzo	Wild Flower	\$5,000
<b>TOTAL</b>		<b>\$5,000</b>

## DOMESTIC INDUSTRY INITIATIVES | GRANTING PROGRAMS

RECIPIENT NAME	PROJECT TITLE	FUNDING COMMITTED
Academy of Canadian Cinema and Television	Academy Talks: Success	\$5,000
Across Borders Media	Media That Matters: The Nature of Media	\$4,000
Alliance Francaise de Vancouver	Rectoverso @Vancouver	\$7,500
Association of Book Publishers of BC	By the Book: 2020 BC Book Publishing Conference	\$5,000
Association of Book Publishers of BC	Operating support 2019/20	\$55,000
Canadian Film in the Schools (REEL CANADA)	National Canadian Film Day 2019	\$10,000
Canadian Media Producers Association - BC Producers Branch (CMPA-BC)	Business Affairs/Media Business Skills Training	\$10,000
Crazy8s Film Society	Crazy8s 2020	\$10,000
Creative Coworkers	Inter/Mediate	\$5,000
Creative Women Workshops Association (CWWA)	Women In the Director's Chair (WIDC) 2020	\$15,000
Directors Guild of Canada - BC District Council	BC Directors Initiative	\$62,500
Documentary Media Society - Vancouver Podcast Festival	Vancouver Podcast Festival	\$6,000
Documentary Organization of Canada - BC Chapter DOCBC	The Documentary Ecosystem: An Impact Masterclass with filmmakers of Metamorphosis	\$2,500
Documentary Organization of Canada - BC Chapter DOCBC	IRIS NG Masterclass: Question Everything	\$2,500
Documentary Organization of Canada - BC Chapter DOCBC	Hot Doc's Doc Ignite Lab	\$1,750
DOXA Documentary Film Festival	DOXA Industry Program	\$15,000
Field and Post Vancouver	Factual West 2019	\$17,000
Field and Post Vancouver	CBC Info Session & Networking Reception	\$3,000
First Weekend Club	First Weekend Club	\$10,000
IM4 LAB / Emily Carr University of Art + Design	IM4	\$10,000
Indian Summer Arts Society	Indian Summer Festival	\$15,000
JFLNW Comedy Ltd	Comedy Creators Series	\$35,000
KDocsFF (Kwantlen Polytechnic University)	KDocs 2020	\$10,000
Leo Awards	2019 Leo Awards	\$12,500
Magazine Association of BC	2019 Operating Funding	\$35,000
MPPIA	The Sustainable Production Forum	\$50,000
Music BC Industry Association	Operational Funding 2019/20	\$50,000
Ormsby Literary Society	The Ormsby Review: Supporting BC Publishers in the Digital Age	\$15,000
Pacific Book World News Society	BC Book World, ABC Book World, BC Book Look	\$50,000
Pacific Cinematheque Pacifique Society (The Cinematheque)	The Indie Filmmakers Lab	\$5,000
Pacific Screenwriting Program	Pacific Screenwriting Program (Year 2)	\$50,000
Pulledin Productions	VR/AR Global Summit	\$20,000
Saanich Peninsula Memorial Park Society	Vancouver Island Comic Con	\$5,000
ShowCanada	ShowCanada	\$5,000
SMI Film Society	Good Pitch Vancouver Second Edition	\$35,000
Spark Computer Graphics Society	Spark Animation 2019	\$50,000
The Future Arts Projects	Femmes Engaging Multimedia and Evolving Systems (FEMMES)	\$3,000
The Vancouver Out On Screen Film and Video Society	Vancouver Queer Film Festival	\$10,000
UNLTD Media & Events	Northern FanCon	\$15,000
Vancouver Asian Film Festival	VAFF Industry Panel Series hosted by Vancouver Asian Film Festival	\$7,500
Vancouver Book and Magazine Fair Society	Word Vancouver Festival	\$6,000
Vancouver Comic Arts Association	Vancouver Comic Arts Festival	\$3,000
Vancouver International Film Festival Society (VIFF)	Vancouver International Film Festival	\$90,000
Vancouver Island South Film & Media Commission	2019 Film Industry Career Fair	\$5,000

## DOMESTIC INDUSTRY INITIATIVES CONT'D | GRANTING PROGRAMS

Victoria Film Festival	Victoria Film Festival	\$20,000
VIsaff South Asian Film Festival Society	VISAFF and VISAFF BIZ and TECH Day	\$7,500
West Coast Book Prize Society	BC Book Prizes Tour 2019/2020	\$15,000
West Coast Feminist Literary Magazine Society (Room Magazine)	Growing Room: A Feminist Literary & Arts Festival	\$10,000
Western Canadian Music Alliance	BreakOut West 2019	\$25,000
Wet Ink Collective Society	Wet Ink Collective Screenplay Writing Intensive	\$2,000
Whistler Film Festival Society (WFF)	Whistler Film Festival, Content Summit & Talent Programs	\$75,000
Women in Film and Television Vancouver (WIFTV)	Spotlight Awards	\$840
Women in Film and Television Vancouver (WIFTV)	Tricksters and Writers BC	\$20,000
Youth Media Alliance	Master Class: A Day in the Life of an Animation Art Director II	\$5,000
<b>TOTAL</b>		<b>\$1,022,090</b>

## INTERNATIONAL INDUSTRY INITIATIVES | GRANTING PROGRAMS

RECIPIENT	PROJECT	FUNDING COMMITTED
Association of Book Publishers of BC	Pacific Northwest Booksellers Association 2019 Tradeshow	\$18,300
Association of Book Publishers of BC	Frankfurt Book Fair 2019	\$19,000
Canadian Media Producers Association (CMPA)	Content London - Canada UK Business Development Day + Sponsored panel	\$5,000
Canadian Media Producers Association - BC Producers Branch (CMPA-BC)	Export Plan 2019-20	\$35,000
DigiBC	BC XR Company Delegation to Seoul VR/AR Expo 2019	\$15,000
Embassy of Canada - Berlin	Creative BC Breakfast at Embassy of Canada	\$4,000
European Film Market	DocSalon Toolbox Programme	\$2,368
Hot Docs	Doc Accelerator Emerging Filmmaker Lab	\$16,000
Launch Academy	AWE EU and VR Days	\$20,000
Launch Academy	SXSW Vancouver Consortium	\$10,000
Lowenbe Holdings Limited	Trans Atlantic Partners - Halifax Module	\$5,000
Magazine Association of BC	FIPP World Congress 2019	\$16,500
Manitoba Film & Music	American Film Market Event	\$3,230
Telefilm Canada	Telefilm Canada Pavilions	\$30,000
Vancouver Economic Commission	Pocket Gamer Connects 2020	\$5,000
Vancouver Economic Commission	London Animation Business Exchange	\$6,000
Youth Media Alliance	Kidscreen Summit 2020	\$4,500
Youth Media Alliance	Canada at Kidscreen Summit	\$4,000
<b>TOTAL</b>		<b>\$218,899</b>

## PASSPORT TO MARKETS | GRANTING PROGRAMS

MARKET	COMPANY	RECIPIENT	FUNDING COMMITTED
<b>Australian International Documentary Conference</b>	Visceral Village Productions Inc.	Asia Youngman	\$2,000
<b>American Film Market</b>	Kiss Off Entertainment Inc.	Sara Edwards	\$1,500
	Citizen 11 Entertainment Inc.	Timo Puolitaipale	\$1,500
	Tilt 9 Entertainment	David Milchard	\$1,500
	Resonance Films Inc.	Jason James	\$1,500
<b>Asian Television Forum (ATF)</b>	And Now Global	Eric Lapointe	\$2,000

**PASSPORT TO MARKETS CONT'D | GRANTING PROGRAMS**

<b>Banff World Media Festival</b>	Soapbox Productions Inc.	Nick Orchard	\$1,000	
	Reign Films	Magali Gillon-Krizaj	\$1,000	
	Flying Cloud Productions Inc.	Leon Lee	\$1,000	
	Ferns Productions Inc.	Pat Ferns	\$1,000	
	M1 Films Inc.	Mike Wavrecan	\$1,000	
	Great Pacific Media	Jeff Kinnon	\$1,000	
	Kat Jayme	Kat Jayme	\$1,000	
	Judith MacInnes	Judith MacInnes	\$1,000	
	Explorart Films	Juan Carlos Lopez Duran	\$1,000	
	North of Now Films Inc.	Tyler Funk	\$1,000	
	Snow Crow Productions Inc	Dasha Novak	\$1,000	
	John Ritchie Productions	John Ritchie	\$1,000	
	Aimer Films Inc.	Maxime Beauchamp	\$1,000	
	L'Etranger Film Productions	Kimberly Wakefield	\$1,000	
	Screen Siren Pictures Inc.	Trish Dolman	\$1,000	
	Wavelength Entertainment	Jeff Stecyk	\$1,000	
	Kate Green Productions Inc.	Kate Green	\$1,000	
<b>CineMart</b>	Remembrance Pictures Inc.	Hedyeh Bozorgzadeh	\$2,000	
<b>Clermont-Ferrand Short Film Market</b>	Visceral Village Productions Inc.	Asia Youngman	\$2,000	
<b>Content LA</b>	Grade Five Films	Jenni Baynham	\$1,000	
	Magnify Digital	Moyra Rodger	\$1,000	
	Citizen 11 Entertainment Inc.	Timo Puolitaipale	\$1,000	
	Sawchuk Productions Inc.	Stephen Sawchuk	\$1,000	
	Media Button	Kyle McCachen	\$1,000	
	Million Faces Productions	Joely Collins	\$1,000	
	Drive Films Inc.	Kyle Mann	\$1,000	
	Unity Pictures Group	Ron French	\$1,000	
	NGN Productions Inc	Jack Nasser	\$1,000	
	Really Real Films	Cynde Harmon	\$1,000	
	<b>Content London</b>	Omnifilm Entertainment	Elizabeth Schofield	\$2,000
	<b>European Film Market</b>	Visceral Village Productions Inc.	Asia Youngman	\$2,000
		Lily Pictures	Michelle Morris	\$2,000
Marie Clements Media Inc.		Marie Clements	\$2,000	
Emily Alden		Emily Alden	\$2,000	
Stories First Productions Inc.		Leena Minifie	\$2,000	
Cedar Island Films Inc.		Henrik Meyer	\$2,000	
Chasing Pictures Inc.		Jason Friesen	\$2,000	
Goodbye Productions		Amber Ripley	\$2,000	
Amazing Productions		Josh Huculiak	\$2,000	
My Precious Pictures		Rachelle Chartrand	\$2,000	
<b>FIN Partners</b>		Goodbye Productions	Amber Ripley	\$1,500
	Kiss Off Entertainment Inc.	Sara Edwards	\$1,500	
	Earth Orbit Productions	William Came	\$1,500	
	Sun Door Media Inc.	Anthony Roberts	\$1,500	
	Hope of Glory Pictures Ltd.	Dylan Jenkinson	\$1,500	
<b>FRMAP Top-Up</b>	Livres Canada Books	Christy Doucet	\$20,000	
<b>Frontières International Co-Production Market</b>	Digital Interference Productions Inc.	Kyle McCachen	\$1,500	
	Rock and Roll Waltzer Productions	Caitlin Vanstone	\$500	
	Luchagore Productions	Raynor Shimabukuro	\$1,500	
	Kiss Off Entertainment Inc.	Sara Edwards	\$1,500	
	Melanie Butler	Melanie Butler	\$500	

<b>GameDaily Connect USA 2019</b>	Busan Sanai Games	Seungwhan Shin	\$750
<b>Game Developers Conference (GDC)</b>	Sonderlust Studios	Nels Anderson	\$1,000
	Sun Machine Entertainment Inc.	Derek Yip	\$1,000
	Silverstring Media Inc.	Lucas Johnson	\$1,000
	Carina Kom	Carina Kom	\$1,000
	Fairview Games Inc.	Craig Martin	\$1,000
	Sun Machine Entertainment Inc.	Ellie Moon	\$1,000
	Shrimpboot Games	Michael Neely	\$1,000
	LlamaZOO Interactive Inc.	Li Ji	\$1,000
	Ted Mui	Ted Mui	\$1,000
	<b>IDFA Forum &amp; Festival</b>	Make Believe Media	Lynn Booth
<b>IFF (International Financing Forum)</b>	Anne Wheeler Inc.	Anne Wheeler	\$1,000
	Ontario Creates	Jan Nathanson	\$1,875
<b>imagineNATIVE</b>	Take Flight Entertainment Inc	Troy Watts	\$1,000
	Hammer & Tong Picture Industries Ltd.	Jordan Waunch	\$1,000
	Blue Fire Production Inc.	Jennifer Ille	\$1,000
<b>India Joy</b>	Kabam Games	Tim Fields	\$2,000
<b>Kidscreen Summit</b>	Hyper Hippo Productions Ltd.	Sam Fisher	\$2,000
	Flying Kraken Creative Studios Inc.	Rose-Ann Tisserand	\$1,500
	Global Mechanic	Tina Ouellette	\$1,500
<b>Marché du Film</b>	Wind Sun Sky Entertainment	Krista Kelloway	\$1,500
	Mostafa Keshvari	Mostafa Keshvari	\$2,500
	Darkside Releasing	Vince D'Amato	\$2,500
	White Hart Film Group Inc.	Matt Drake	\$2,500
	Broad Content	Amanda Verhagen	\$2,500
	Horizon Motion Pictures	Rob Straight	\$2,500
	Kiss Off Entertainment Inc.	Sara Edwards	\$2,500
	Goodbye Productions	Amber Ripley	\$2,500
	Savage Arts Pictures	Anthony Risling	\$2,500
	CURIOSITY PICTURES	Galen Fletcher	\$2,500
	Black Moon Media Inc.	Kate Kroll	\$2,500
	Road Trip Films Inc.	Allan Hopkins	\$2,500
	Piramide Productions	Kerri Borsuk	\$2,500
	Relevision Productions Inc.	Paul Armstrong	\$2,500
	IndustryWorks Studios Inc	Caterina Scrivano	\$2,500
	Pacific Northwest Pictures	Emily Alden	\$2,500
	<b>MIFA</b>	Big Bad Boo Studios Vancouver	Shabnam Rezaei
Paper Oni Productions		Jonathan Valdez-Pavez	\$2,000
Pansensory Interactive Incorporated		Ollie Rankin	\$2,000
Arcana Studios		Sean O'Reilly	\$2,000
Volumetric Camera Systems		Tobias Chen	\$2,000
<b>MIPCOM</b>	Global Mechanic Media Inc.	Bruce Alcock	\$2,000
	Wavelength Entertainment	Jeff Stecyk	\$2,000
	Soapbox Productions Inc.	Nick Orchard	\$2,000
	Chasing Pictures Inc.	Jason Friesen	\$2,000
	Omnifilm Releasing	Gabriela Schonbach	\$2,000
	Big Bad Boo Studios Vancouver	Shabnam Rezaei	\$2,000
<b>MIPTV</b>	Upstream Flix Inc.	Jhod Cardinal	\$2,000
<b>Mobile Games Growth Summit</b>	Sun Machine Entertainment Inc.	Ellie Moon	\$1,000
<b>Pax South</b>	Mod Studio Inc.	Jaeyun Noh	\$1,500
<b>PG Connects London</b>	Smoking Gun Interactive Inc.	John Johnson	\$1,500
	Monstercat	Gavin Johnson	\$1,500
	Ludare Games Group Inc.	Samarth Chandola	\$1,500
	Sun Machine Games	Ellie Moon	\$1,500

**PASSPORT TO MARKETS CONT'D | GRANTING PROGRAMS**

<b>Realscreen Summit</b>	La Sirena Pictures Inc.	Mary M. Frymire	\$1,500	
	Big Time Decent Productions Inc.	Matthew Shewchuk	\$1,500	
	Infinity Filmed Entertainment Group LTD.	Shel Piercy	\$1,500	
	Omnifilm Entertainment	Gabriela Schonbach	\$1,500	
<b>Realscreen West</b>	De Vries Productions Inc.	Sean De Vries	\$1,000	
	Sawchuk Productions Inc.	Stephen Sawchuk	\$1,000	
	Andon Productions	Megan Cameron	\$1,000	
	Cedar Island Films Inc.	Andrew Williamson	\$1,000	
	Great Pacific Media	Kristen Boychuk	\$1,000	
	Wild Media Entertainment	James Milligan	\$1,000	
	<b>Sunny Side of the Doc</b>	Arctic Bear Productions, Inc.	Sarah Robertson	\$2,000
Cedar Island Films Inc.		Henrik Meyer	\$2,000	
<b>SXSW</b>	Stambol	Dogu Taskiran	\$1,500	
	Tobias Chen	Tobias Chen	\$1,500	
	Pulledin Productions	Anne-Marie Enns	\$1,500	
	Dreamcraft Attractions Ltd.	Dave Elton	\$1,500	
	S.A.L.M.O.N Project	Upkar Tatlay	\$1,500	
	Metanaut Labs Inc.	Peter Kao	\$1,500	
	BGC Engineering	Keith Lay	\$1,500	
	ICTUS Audio Inc.	Yao Wang	\$1,500	
	<b>Television Animation Conference</b>	Ceroma Films	Sara Blake	\$1,500
		Jesters Animation	Brad Gibson	\$1,250
Emily Mullock		Emily Mullock	\$1,250	
Big Bad Boo Studios Vancouver		Shabnam Rezaei	\$1,000	
<b>The Electronic Literature Organization Conference &amp; Media Arts Festival</b>	BradField Narrative Designs Inc.	Ian Harper	\$1,500	
<b>Trans Atlantic Partners</b>	Lily Pictures Inc.	Michelle Morris	\$2,000	
	Vladolena Pictures Inc.	Olena Fetisova	\$2,000	
<b>VR On The Lot</b>	Jo Dunlop	Jo Dunlop	\$1,000	
	Volumetric Camera Systems	Tobias Chen	\$1,000	
<b>World Congress of Science &amp; Factual Producers</b>	Blue Plate Productions	Alan Goldman	\$2,000	
	Curious Features	Judith Pyke	\$2,000	
	Omnifilm Entertainment	David Gullason	\$2,000	
<b>TOTAL</b>			<b>\$238,625</b>	

**PASSPORT TO MARKETS ENVELOPE | GRANTING PROGRAMS**

COMPANY	RECIPIENT	FUNDING COMMITTED
All in Pictures Inc	Leah Mallen	\$9,500
Anaid Entertainment Inc.	Margaret Mardirossian	\$7,000
Curiosity Pictures	Kaleena Kiff	\$6,500
Independent Edge Films Inc.	Kyle Mann	\$4,000
Less Bland Productions	Leslie Bland	\$9,000
Massey Productions Ltd.	Raymond Massey	\$6,500
MMM Film Finance International Ltd.	Raj Dhillon	\$5,500
Mythical City Games	Jedrzez Jonasz	\$7,000
NGN Productions Inc	Jack Nasser	\$8,500
Reality Distortion Field Inc.	Stephen Hegyes	\$9,000
Saturn Animation Studios Inc.	Nazim Ragimov	\$6,000
Screen Siren Pictures Inc.	Trish Dolman	\$7,000
Sepia Films	Tina Pehme	\$10,000
SIL0 Entertainment Inc.	Mel D'Souza	\$8,000
Sun Door Media Inc.	Anthony Roberts	\$6,000
<b>TOTAL</b>		<b>\$109,500</b>

**REEL FOCUS BC | PROJECT DEVELOPMENT FUND**

COMPANY NAME	PROJECT TITLE	FUNDING COMMITTED
0846515 B.C. Ltd	The Cannabis Cure: Year One	\$10,000
0987800 BC Ltd.	Dead Man's Switch: A Crypto Mystery	\$10,000
Amazing Productions	I Am Not A Bad Person/ASH	\$1,250
Anaid Entertainment Inc.	Pirates of the Pacific: Drake's Lost Voyage	\$20,000
BCWA3 TV INC.	BC Was Awesome Season 3	\$10,000
Blue Fire Production Inc.	As The Smoke Rises	\$8,000
Bountiful Films Inc.	Did Drinking Alcohol Give Me Breast Cancer?	\$10,000
Clownblog Studios Inc.	The Cameraman	\$8,500
Curiosity Pictures Inc	Middle 8	\$15,000
Doorlight Films	Triche	\$2,500
Download Joy Productions Inc.	Happiness	\$2,500
Earth Orbit Productions Inc.	Relapse	\$2,500
Experimental Forest Films Inc.	Invasions	\$7,500
Experimental Forest Films Inc.	Inedia	\$7,500
Frostbite Digital Media Inc.	DemonX	\$10,000
Grizz Films Inc	Worst Team Ever	\$7,500
Honalee Productions Inc.	Pyramiden	\$7,500
Honalee Productions Inc.	Sugar	\$10,000
Hunkpapa Films	Tipping Andy Warhol	\$10,000
Independent Edge Films Inc.	Charlie for Your Thoughts	\$8,000
Independent Edge Films Inc.	The Pioneer	\$7,500
Independent Edge Films Inc.	North of Normal	\$10,000
Kate Green Productions Inc.	Murphy's Law	\$5,000
Mad Samurai Productions	Trust/Fall	\$10,000
Notable Content Inc	Sure as Hell	\$5,000
Oddfellows Entertainment Inc.	Tender Kisses	\$6,000
Opus 59 Films Inc.	Real Enough: The Doug And The Slugs Story	\$10,000
Opus 59 Films Inc.	Iconic	\$3,500
Opus 59 Films Inc.	Stanley Park	\$15,000
Orbital Mechanics Inc	Levels	\$5,000
Perpetuum Films Ltd.	Moonless Oasis	\$10,000
Portraits from a Fire Productions	Portraits from a Fire	\$7,500
Reality Distortion Field Inc.	Kryo	\$15,000
Reality Distortion Field Inc.	FAKES	\$20,000
Render Digital Media Inc.	Silicon Valley North	\$10,000
Render Digital Media Ltd.	Code Wild	\$2,858
Savath Pictures Inc.	Bloom	\$10,000
Screen Door Entertainment Inc.	Little Black Stretchy Pants	\$10,000
Screen Door Entertainment Inc.	Something to Live For: The Bentall Story	\$6,500
Screen Door Entertainment Inc.	My Life In Murder	\$18,348
Self Hired Lifestyle Co	One Million Trees	\$10,000
Sir Perphoulous Films Inc.	Tales of the ThunderBird	\$9,000
Sir Perphoulous Films Inc.	White Blood	\$6,875
Sir Perphoulous Films Inc.	REHAB	\$7,500
Sugar 2 Productions	Imperfect High	\$10,000
Taking Flight Entertainment Inc.	May The Bannock Force Be With You	\$8,000
Thoughts From The Asylum Productions	Winners and Losers (2)	\$7,500
Wolf Spirit Films Inc.	Beyond Human Power	\$10,000
<b>TOTAL</b>		<b>\$424,331</b>

### HAROLD GREENBERG FUND | REEL FOCUS BC

COMPANY NAME	PROJECT TITLE	FUNDING COMMITTED
AGA Films Inc.	A Pregnant Woman	\$10,000
Freya Film Inc.	Freya	\$10,000
Visceral Village Productions Inc.	Hatha	\$10,000
Wallop Film	Unicorn Code	\$10,000
<b>TOTAL</b>		<b>\$40,000</b>

### CBC + CREATIVE BC DIGITAL PRODUCTION FUND | REEL FOCUS BC

PROJECT TITLE	FUNDING COMMITTED
Men on Pause	\$25,000
A-Yi	\$25,000
Take Me to the River	\$20,000
The Pilgrimage	\$30,000
Colour Study	\$25,000
No Fun City	\$25,000
<b>TOTAL</b>	<b>\$150,000</b>

### TELUS STORYHIVE DOCUMENTARY EDITION CREATIVE BC TOP-UP | REEL FOCUS BC

PROJECT NAME	LOCATION	PROJECT LEAD	COMMITTED FUNDING
Muriel Sasakamoose: Kind Heart and Secwepemc Matriarch	Kamloops	Nolan McAllister	\$5,000
Sit. Stay. Search.	Kamloops	Jennifer Stahn	\$5,000
Accessible Okanagan	Kelowna	Chelsea McEvoy	\$5,000
Salmon Capital - Campbell River	Campbell River	Eiko Jones	\$5,000
The Story of Special Woodstock	Duncan	Erin Rooke	\$5,000
Higher Perspective	Penticton	Dave Mai	\$5,000
Skeena Salmon past present and future with Captain Quinn	Terrace	Quinn Barabash	\$5,000
By Your Side	Vancouver	Amy Hemmerling	\$5,000
Kalinga (Care)	Vancouver	Kent Donguines	\$5,000
Raising Ava Rose	Vancouver	Jordan Macken	\$5,000
Take Me to the River	Vancouver	Julie Kim	\$5,000
What About Our Future?	Vancouver	Jaime Leigh Gianopoulos	\$5,000
sk̓wxwú7mesh spén'em (Squamish Plants)	Brackendale	Leigh Joseph	\$5,000
Dance Like Everybody is Watching	Victoria	Simone Blais	\$5,000
The Oaklands Totem	Victoria	Carey Newman	\$5,000
<b>TOTAL</b>			<b>\$75,000</b>

### STORY DEPARTMENT INTERNSHIP CREATIVE BC + CMPA-BC PRODUCERS BRANCH | REEL FOCUS BC

RECIPIENT	MENTOR	PROJECT TITLE	FUNDING COMMITTED
Corey Liu	Tex Antonucci	Family Law	\$12,400
<b>TOTAL</b>			<b>\$12,400</b>

### VANCOUVER MUSIC FUND | MUNICIPAL PARTNERSHIP WITH THE CITY OF VANCOUVER, SOLE FUNDER

COMPANY NAME	PROJECT TITLE	FUNDING COMMITTED
Adam Fulton	Alejandro Zarazua	\$2,000
Adham Shaikh	ALI	\$2,000
Afro Van Connect Society	Black Spaces	\$10,000
Alex Tsisserev	MEGZ	\$2,000
Aluma Sound	Aluma Sound	\$7,250
A Moving Experience Inc.	Caitlin Goulet	\$8,000
Artemis Musicians' Society	Artemis Showcase Concert	\$6,750
ArtStarts in Schools	Hear our Voices	\$8,000
Ashley Weis	Biawanna	\$7,000

A-SLAM Productions LTD	A-SLAM	\$6,700
A-SLAM Productions LTD	Lady Sinccere	\$2,000
A-SLAM Productions LTD	Shana Chow	\$2,000
Baptone Studios	Damasco Soul System	\$2,000
Braeden Pockets Rangno	Lowkita	\$2,000
Braeden Pockets Rangno	Tissa Rahim	\$2,000
Braeden Pockets Rangno	Kin Balam	\$2,000
Braeden Pockets Rangno	LeFay	\$2,000
Capsule Studios	DJ O Show	\$2,000
Capsule Studios	Producers Lounge Season 2	\$8,000
Capsule Studios	Mary Ancheta	\$2,000
Carnegie Community Centre Association	Carnegie Community Centre Theatre Upgrade - Recording Equipment	\$4,000
Cushy Entertainment	Glitter Ball	\$5,000
Cyanura	Angel Wen	\$2,000
David Tallarico	Nite Sun	\$2,000
David Tallarico	Hatim	\$2,000
Debby Friday	Debby Friday	\$3,050
Desirée Dawson	Desirée Dawson	\$8,000
Eastside Studios	Audio Infrastructure Upgrade and Venue Booking Subsidy for Live Music Events at Eastside Studios	\$15,000
Edzi'u Music	Edzi'u	\$4,780
E Major Entertainment	Womxn Rising: Empowering Womxn in Music	\$8,000
Emily Millard	Amanda Sum	\$2,000
Farnaz Ohadi Esfahani	Farnaz Ohadi	\$10,000
Field Recordings	Gabby M	\$2,000
Gordon Grdina	Vashaan Ensemble	\$2,000
ishQ Bector Studio	A-SLAM	\$2,000
Jamie Kuse	Heyoka	\$2,000
Jamie Thomson	Dennis Joseph	\$2,000
Josh Eastman	Kaya	\$2,000
Kimmortal Productions	Kimmortal	\$10,000
Lache Cercel	We Are All One Nation: Roma Addition to the World Music	\$3,700
Laura Michelle Smith	Kristina Shelden	\$2,000
Matt Dauncey	Crystal Precious	\$2,000
Mike Ferraro	Margaret Gorrell	\$2,000
Missy D	Missy D	\$8,000
New Orchestra Workshop Society	8EAST Skwachàys Gatherings	\$12,000
Opera Mariposa	'This Is Me': A Benefit & Awareness Initiative	\$15,000
Phyzxx	Jina Anika	\$2,000
Raise Em Up Productions	Enoch Choi	\$2,000
Remi Thibault	eQualia	\$2,000
Ron Joseph	Whyte Feather	\$2,000
Rupinder Sidhu	KeAloha	\$2,000
Rupinder Sidhu	CCS	\$2,000
Russell Wallace	Kathara Pilipino Indigenous Arts Collective	\$2,000
Sam Raven	Sam Raven	\$10,000
Scratch Spin Music	Nat Jay	\$8,000
Sound of Kalima	Hoodie Browns	\$2,000
Stansilas Sajjabi	ebonEmpress	\$2,000
Terell Etienne	Terell Safadi	\$8,950
The Black Lab Artists Society	Downtown Eastside I Can't Believe It's Not Jazz	\$4,820
The Future Arts Projects	The Future is You and Me - Music Workshop + Showcase	\$8,000
Thiago Keller Music	VSUVIUS	\$2,000
TIV Production	Kresnt	\$8,000

**VANCOUVER MUSIC FUND | MUNICIPAL PARTNERSHIP WITH THE CITY OF VANCOUVER, SOLE FUNDER CONT'D**

Ujival Suri	Amal	\$2,000
Vancouver Indigenous Fashion Week	Vancouver Indigenous Fashion Week	\$10,000
Vancouver Moving Theatre	Spotlight on the East End	\$5,000
Veron Xio	Venetta	\$2,000
Rupinder Sidhu	CCS	\$2,000
Russell Wallace	Kathara Pilipino Indigenous Arts Collective	\$2,000
Sam Raven	Sam Raven	\$10,000
Scratch Spin Music	Nat Jay	\$8,000
Sound of Kalima	Hoodie Browns	\$2,000
Stansilas Sajjabi	ebonEmpress	\$2,000
Terell Etienne	Terell Safadi	\$8,950
The Black Lab Artists Society	Downtown Eastside I Can't Believe It's Not Jazz	\$4,820
The Future Arts Projects	The Future is You and Me - Music Workshop + Showcase	\$8,000
Thiago Keller Music	VSUVIUS	\$2,000
TIV Production	Kresnt	\$8,000
Ujival Suri	Amal	\$2,000
Vancouver Indigenous Fashion Week	Vancouver Indigenous Fashion Week	\$10,000
Vancouver Moving Theatre	Spotlight on the East End	\$5,000
Veron Xio	Venetta	\$2,000
<b>TOTAL</b>		<b>\$305,000</b>

**AMPLIFY BC | CAREER DEVELOPMENT**

COMPANY	ARTIST	FUNDING COMMITTED
1z Co. Recordings Inc.	Manila Grey	\$13,925
604 Records	Fionn	\$6,250
604 Records	Marianas Trench	\$20,000
Alea Clark	Douse	\$8,625
Alexander Boynton	Alexander Boynton Jr.	\$3,375
Alexandria Maillot	Alexandria Maillot	\$10,000
Alex Maher Music	Alex Maher	\$7,050
Amelia Recordings Inc.	Fintan	\$10,000
Amelia Recordings Inc.	Luca Fogale	\$9,650
Amistad Music Corp.	daysormay	\$10,000
A Moving Experience Inc.	Caitlin Goulet	\$2,500
Andrea Superstein	Andrea Superstein	\$3,050
Anthem Entertainment	Eric Ethridge	\$30,000
Art d'Ecco	Art d'Ecco	\$24,365
Arts & Crafts	Dan Mangan	\$20,000
Ashley Weis	Biawanna	\$3,294
Aza Nabuko	Aza Nabuko	\$5,753
Bbno Music Inc.	bbno\$	\$30,000
Big Mother Entertainment	Toni Childs	\$11,650
Black Hen Music	Kat Danser	\$24,550
Black Hen Music	Allison Russell	\$24,550
Booty EP	Booty EP	\$2,727
BOSLEN	BOSLEN	\$10,000
Braun and Brains Music	Norine Braun	\$1,000
Bukola Balogun	Bukola Balogun	\$10,000
Carmanah Music	Carmanah	\$20,000
Carmen Bruno	Trailerhawk	\$7,900
Chapter 5 Productions Inc.	Via Barcelona	\$10,000
Coalition Music	Nice Horse	\$12,377

Coax Records	G.R. Gritt	\$10,976
Coax Records	Wax Mannequin	\$15,438
Collin Ankerson	Collin Ankerson	\$5,118
Connor Guyn	OKGB	\$1,000
Corb Lund	Corb Lund	\$30,000
Current Swell Music Inc.	Current Swell	\$15,000
Daddy & Sons Music	Peach Pit	\$9,973
Daniel Bell	Danny Bell	\$4,553
Dave Hartney	Dave Hartney	\$10,000
Destroyer Music	Destroyer	\$35,000
Donny McCaslin	Donny McCaslin	\$20,310
Elbowroom Recordings Ltd.	Ryan McMahan	\$8,290
Elbowroom Recordings Ltd.	Lance Lapointe	\$2,500
Elisa Thorn	Gentle Party	\$7,765
Elyse Saunders	Elyse Saunders	\$10,200
Erica Dee Landsberg	Della (FKA Erica Dee)	\$10,000
Evan Cheadle	Evan Cheadle	\$7,810
Farnaz Ohadi Esfahani	Farnaz Ohadi	\$10,000
Fierce Panda Canada	Tourist Company	\$10,000
Fox Glove Music	Fox Glove	\$5,232
Francis Gregory Henson	Francis Gregory Henson	\$4,850
Gerald Sung	Scope G	\$1,500
Ginalina Music	Ginalina	\$20,000
Goldmouth Music Inc	Goldmouth	\$10,000
Graham Richard	Jason Camp and the Posers	\$10,000
Harvey Paris	Salsahall Collective	\$4,500
Havy Swavy Music Co.	HAVYN	\$2,000
Hollow Twin Music	Hollow Twin	\$2,080
Hot Feat Canada Ltd.	Brooke Maxwell	\$10,000
Iamtheliving Music	The Living	\$7,425
Ian Griffiths	HALF/ASIAN	\$4,000
III-Legitimate Productions	III-Legitimate	\$10,000
Imagine Create Media Inc.	Jessie Farrell	\$19,914
ishQ Bector Studio	ishQ Bector	\$10,000
J. Romero Banjos	Pharis & Jason Romero	\$23,353
James Porter	Meltt	\$8,575
Jody Glenham	Jody Glenham	\$7,483
John Welsh Music	John Welsh & Los Valientes	\$10,000
JP Lancaster	At Mission Dolores aka JP Lancaster	\$3,610
JSY Music	Jasper Sloan Yip	\$9,525
Justice McLellan	Blue J	\$7,345
Kaeli McArter	Kaeli McArter	\$2,937
Kandle Music	Kandle	\$12,500
Kenneth Wayne Spruell	Kenny "Blues Boss" Wayne	\$10,010
Kirsten Ludwig	Kirsten Ludwig	\$10,000
Kitty & The Rooster	Kitty & The Rooster	\$6,718
KLB Entertainment Inc.	Karen Lee Batten	\$20,000
Klick Entertainment	Ben Klick	\$10,000
Kristin van Bommel van Vloten	Kristin Witko	\$3,526
Kym Gouchie	Kym Gouchie	\$2,583
Last Gang Records Inc.	Noble Oak	\$10,000
Last Gang Records Inc.	Loving	\$20,000
Laughing Heart Music Ltd.	Hillsburn	\$26,865
Laura Crema	Laura Crema	\$5,275

## AMPLIFY BC | CAREER DEVELOPMENT CONT'D

Laura Reznick Music	Laura Reznick	\$6,600
Lauren Mann	Lauren Mann	\$10,000
Leather Apron Revival	Leather Apron Revival	\$4,750
Light Organ Records	We Are The City	\$29,283
Lindsay Sjoberg	Babe Corner	\$5,367
Lisa Nicole Music	Lisa Nicole	\$4,290
Liv Wade Co	Liv Wade	\$10,000
Liz Stringer	Liz Stringer	\$10,000
loig morin	Loig Morin	\$10,000
Lozen Music	Lozen	\$4,115
Ludic Music	Ludic	\$10,000
Lydia Hol Music	Lydia Hol	\$9,000
Lyle Bismark	Checkmate	\$10,000
Maddisun	Maddisun	\$7,210
Madison Olds	Madison Olds	\$10,000
Mamá Pulpa	Espanglish (FKA Mamá Pulpa)	\$19,865
Mark Takeshi McGregor	Mark Takeshi McGregor	\$4,000
Matinee Music Inc.	The Matinee	\$16,445
Merkules Music Inc.	Merkules	\$10,000
Meta Arts Management Inc.	Snotty Nose Rez Kids	\$35,000
Mike Gouchie	Mike Gouchie	\$10,000
Miss Quincy Music	Jody Peck	\$4,650
Monowhales	Monowhales	\$11,760
Monstercat	Conro	\$20,250
Moontricks Music	Moontricks	\$10,000
Neck of the Woods Music	Neck of the Woods	\$5,517
Nimkish Younging	Nimkish	\$10,000
Ocie Elliott Music	Ocie Elliott	\$32,045
Ollie Mckee-Reid	Downtown Mischief	\$9,863
Outside Music	Jill Barber	\$30,000
Outside Music	Aidan Knight	\$20,000
Oxlip Music	Oxlip	\$6,875
Partner Music	Partner	\$10,000
Pat Chessell	Pat Chessell	\$4,387
Physical Presents	Hoffey	\$10,000
Quinn Pickering	Quinn Pickering	\$10,000
Rachelle van Zanten	Rachelle van Zanten	\$9,657
Rae Spoon Productions Inc.	Rae Spoon	\$15,350
Raincity	Raincity	\$7,531
Rare Americans	Rare Americans	\$25,000
Regan Luth	The Crescent Sky	\$3,675
Reid Jamieson	Reid Jamieson	\$10,000
RMS Music	Morning Show	\$4,928
Rocket From Russia	Russian Tim and Pavel Bures	\$1,799
RSE Music Services Inc.	The Veer Union	\$20,000
Ryan Oliver Music	Ryan Oliver	\$6,000
Sade Awele	Sade Awele	\$4,430
Said The Whale	Said The Whale	\$15,600
Sam Tudor	Sam Tudor	\$2,000
Sandy Powlik	Lola Parks	\$10,000
Sarah Kwok	Elysian Trio	\$1,125
Sarah MacDougall	Sarah MacDougall	\$26,148
Shantaleela Arts	The Offering of Curtis Andrews	\$10,000

Shenanigans Inc. Ltd	Alice Phoebe Lou	\$30,000
Shred Kelly	Shred Kelly	\$10,025
Skulastic	Skulastic	\$1,300
Snakes x Ladders	DJ Hark	\$10,000
Snakes x Ladders	Khanvict	\$16,300
Souls Rest Publishing	Souls Rest	\$10,000
Sound Language Music	Somna	\$7,125
Steelhead Music Inc	Shawn Austin	\$30,000
Steve Marc	Steve Marc	\$1,000
Sunday Comes Productions	Sunday Morning	\$2,100
Technical Damage	Technical Damage	\$4,512
The Fugitives Music Group	The Fugitives	\$20,200
The Funk Hunters	The Funk Hunters	\$25,000
The Northern Pikes	The Northern Pikes	\$25,500
The Statistics	The Statistics	\$10,000
This Way North	This Way North	\$10,055
Tiny Kingdom Music	Haley Blais	\$10,000
Tissa Rahim	Tissa Rahim	\$5,425
Tyson Venegas	Tyson Venegas	\$10,000
Victoria Anthony Music Inc.	Victoria Anthony	\$10,000
Volunteer Media	Tank Gawd	\$10,000
Warner Music Canada	Matthew Good	\$10,000
Warner Music Canada	The Washboard Union	\$15,000
West My Friend	West My Friend	\$4,753
XL The Band Inc.	XL The Band	\$10,000
Yung Heazy Co.	Yung Heazy	\$21,397
<b>TOTAL</b>		<b>\$1,832,533</b>

## AMPLIFY BC | LIVE MUSIC

COMPANY	PROJECT	FUNDING COMMITTED
2 Rivers Remix Society	Q'emcin 2 Rivers Remix	\$35,000
Aquila Constellation Productions Inc.	Squamish Constellation Festival Expansion 2020	\$50,600
Aquila Constellation Productions Inc.	Squamish Constellation Festival - New Programming	\$49,400
Bass Coast Project Ltd.	Staff Development and Expansion	\$11,093
Bez Arts Hub	Bez 2019-2020 Concert Series and Festival Partnerships	\$48,000
Capitol Theatre Restoration Society	Indigenous Music Series	\$20,200
Car Free Vancouver Society	National Indigenous Peoples Day at Car Free Day	\$10,000
Jazz Cellar Cafe Ltd.	Jazzwalk at the Shadbolt	\$12,300
Conway Enterprises Inc.	Twilight Music Festival	\$17,729
Crystal Creek	Crystal Creek 2020	\$7,170
Dog or Die Entertainment	Expanding RUTS Wednesdays Guest Performer Series	\$5,000
Downtown Vancouver Business Improvement Association	Busker Blast	\$5,375
Vancouver Society for Early Music	The Pacific Baroque Series	\$20,000
Myden Enterprises Inc.	Block Rockin' Beats 2020	\$14,750
Elektra Women's Choir	Acquisition of Customer Relationship Management System	\$7,250
AdMedia	Fireside Festival 2020	\$9,500
Fort Langley Jazz & Arts Festival Society	Fort Langley Jazz & Arts Festival Capacity Building	\$12,250
Fort Langley Jazz & Arts Festival Society	Fort Langley Jazz & Arts Festival	\$75,000
Full Circle: First Nations Performance	The Múyuntsut ta Slúlum Live Series	\$8,930
Gate House Community Association	Gate House Sound and Lighting Upgrade	\$19,750
Hipposonic Music Ltd.	Live at Hipposonic	\$16,121
Locals Lounge Vancouver	Locals Lounge Services Expansion	\$10,000
Indian Summer Arts Society	Myriad Music BC	\$33,213

## AMPLIFY BC | LIVE MUSIC CONT'D

Island Mountain Arts Society	ArtsWells Festival Operations & Accessibility Development	\$6,355
Kiwanis Performing Arts Centre Society	Theatre Coordinator	\$18,200
Kiwanis Performing Arts Centre Society	Live Music Series at the KPAC	\$8,905
Lakeshore Village Ltd.	Salmon Arm Concert Hall	\$89,619
Langham Cultural Society	Langham Theatre Ventilation System	\$19,780
LIP Events Inc.	LIP	\$9,828
Mad Loon Entertainment	Feast on the Farm Concert Series	\$9,850
Man Up Productions	Man Up presents Kindly Queer: Music & Drag Festival	\$21,000
MRG Events Ltd.	Khatsahlano Street Party 2020	\$10,518
MRG Events Ltd.	Filberg Festival 2020	\$45,000
MRG Events Ltd.	Music in Transit Festival 2020	\$15,000
Nelson & District Arts Council	Nelson International Mural Festival 2020	\$38,150
North Peace Cultural Society	Full Time Marketing Position	\$32,204
Ok Corral Cabaret	Live Music Friday's	\$60,000
Pedersen-Gruppen Group Enterprises, Inc. (PGE)	ValhallaFest 2020 Stage and Artist Expansion	\$22,661
Pacific Region International Summer Music Academy Association	Discover a Feast of Classical Music on Canada's West Coast	\$21,698
Ptarmigan Arts Society	2020 Mosaic Arts and Culture Festival	\$6,350
Collinet Events (Public Disco)	Increasing Organizational Capacity	\$10,000
Rail District Collective Inc.	Rail District Collective + Music Hall	\$87,000
re:Naissance Opera	Indie Opera Week	\$9,760
Rebellious Unicorns Production Company Inc.	QUSIC Live Music Series	\$53,330
Red Door Events Inc.	Summerset Music & Arts Festival	\$60,000
Renasceance Arts and Sustainability Society (Tiny Lights Festival)	Marketing Renewal and Staffing	\$23,944
Revelstoke Arts Council	Luna Sound	\$30,000
Salt Spring Arts Council	Summer Outdoor Concert Series 2020 on Salt Spring Island	\$8,922
Savage Production Society	Savage Summer Series	\$16,275
Shape Shifter Studio Productions	Deep From The Underground	\$9,950
Smithers Community Radio Society	Winter Alternative Music Extravaganza	\$5,550
Live in Vancouver Entertainment Inc.	Rickshaw Theatre Sound Sight and Security Program	\$7,639
The Skeena Bar	Live at The Skeena	\$11,200
Thick as Thieves Entertainment Inc	AltiTunes Music Fest at Big White Ski Resort	\$100,000
Tune It Down Turn It Up	Tune It Down Turn It Up Festival 2020	\$10,000
Uptown Business Association of New Westminster	TD Uptown Live Street Party	\$28,740
Vancouver Independent Music Centre Society (VIM)	Grow VIM's Organizational Capacity and Long-Term Viability	\$35,000
Verboden Arts Society	Verboden 2020	\$9,946
Vancouver International Bhangra Celebration Society	5X Festival 2020	\$41,441
Vinyl Envy	Live Music Presentation - Expanded Year Round Programming	\$21,667
Wander West Ventures Ltd.	"The Barn" Venue Expansion	\$71,165
Wander West Ventures Ltd.	Concert Series and Music Festival at Hidden Acres	\$14,725
Wideglide Entertainment Ltd.	Stage Infrastructure Project	\$40,300
Wideglide Entertainment Ltd.	Summer at the Ranch Festival Series Expansion Project	\$59,700
<b>TOTAL</b>		<b>\$1,700,000</b>

## AMPLIFY BC | MUSIC COMPANY DEVELOPMENT

COMPANY	PROJECT	FUNDING COMMITTED
Becoming Sound	Becoming Sound-Mastering Equipment and Software Purchase and Integration, Online Marketing Campaign	\$10,000
Caline Artists International	Training the Next Gen - Arts Management & Publicity	\$18,000
Capsule Studios	Capsule Studios - Phase 2	\$32,250
Clampdown Record Pressing Inc.	Marketing Is Go!	\$35,000
CQ Voice	CQ Voice	\$10,000
Decibel Entertainment	Snakes x Ladders Record Label Expansion	\$34,630

Diamond Dick Studios Inc.	New West Rehearsal Space & Venue	\$75,000
Doug Cox Productions	Studio Upgrades and Staff Assistance	\$6,553
EarWorm Sound	EarWorm Sound Studio Upgrade & Business Expansion Project	\$25,000
Echoplant Recording Studios	Echoplant Creating Jobs, Revenue and Culture Capital in BC	\$23,983
Fly Fantastic Productions Inc.	Fly Fantastic-Kaplankrunch Studio Expansion	\$14,264
Fritz Media	Fritz Media Expansion	\$10,000
High Tide Artists	High Tide Company Expansion	\$9,999
Inscapes Spatial Sound Ltd.	LOBE Spatial Sound Studio	\$50,381
Menzies Music Productions	Employment	\$10,000
Mercury Artists	Mercury Artists Business and Services Growth Project	\$9,000
Monarch Studios	Staff Expansion and Additional Upgrades	\$9,950
Monstercat	Label Manager	\$35,000
Oscar Street Records	Label Assistant	\$6,500
Reel To Real Recordings Ltd.	Phase 2 of Reel to Real Recordings Archival Releases	\$37,206
Rhythm Club	Workshop Tour Business Foundations	\$7,395
RPM Music Services	RPM New RA Development Project	\$27,500
Secret Study Projects Inc.	Extended Expression (EE) Software Application	\$25,000
Seeking Blue Records	Seeking Blue "RFLKT. retreat." Writing/Recording Camps	\$25,800
Serena Eades Academy of Music	Expansion of Teaching Practice into an Academy of Music	\$10,000
Studio Downe Under	Studio Downe Under Upgrade Project	\$39,845
The District	Record Label Royalty Reporting Platform	\$50,000
The Hive	Studio Growth and Upgrade	\$8,824
The Phonix Band	"Back On Stage" Application Development and Launch	\$17,465
Tiny Kingdom Music	Tiny Kingdom - Record Label Expansion	\$27,970
Warp Academy	New Website and Expanded Marketing Activities for Warp Academy	\$34,650
Westwood Recordings	Westwood Recordings - Staff Expansion	\$44,000
Yogi Tunes	Sonos Application	\$20,000
<b>TOTAL</b>		<b>\$801,165</b>

## AMPLIFY BC | PARTNERSHIPS

RECIPIENT	PROJECT	FUNDING COMMITTED
DigiBC	Music education initiative engaging youth in music composition for digital media and video games.	\$100,000
First Peoples' Heritage, Language and Cultural Council	Funding opportunities for mentorship for recording professionals and industry professionals, and the launch of Indigifest.	\$500,000
Music BC Industry Association	Training and professional development, export and showcasing initiatives, business travel and tour support.	\$1,200,000
<b>TOTAL</b>		<b>\$1,800,000</b>

## AMPLIFY BC | MUSIC INDUSTRY INITIATIVES

RECIPIENT	PROJECT	FUNDING COMMITTED
2 Rivers Remix Society	Remix2Rez	\$12,750
ArtStarts in Schools	Hear our Voices	\$11,550
Capsule Studios	Producers Lounge Season 2	\$42,000
Chapel Sound	Feminist Electronic Art Symposium - Mentorship Program	\$21,000
Chapel Sound	Creative + Get-It-Together Workshops	\$12,090
Creative Okanagan	Central Okanagan Music Strategy	\$20,000
E Major Entertainment	Womxn Rising: Empowering Womxn in Music	\$11,555
Fort Langley Jazz & Arts Festival	Jazz Education Workshop	\$2,800
Full Circle: First Nations Performance	Múyuntsut ta Slúlum Industry Series	\$20,000
KHP Productions Inc.	Road to Rockin' River 2020	\$30,811
Manitoba Music	Indigenous Music West Export Gathering 2020	\$24,000
Mint Records	Mint Records' Inclusive and Respectful Industry Initiative	\$7,150
Music BC Industry Association	Victoria Music Ecosystem Study	\$60,000
Nelson & District Arts Council	Cottonwood Farmers Market Stage	\$40,000

## AMPLIFY BC | MUSIC INDUSTRY INITIATIVES CONT'D

PRISMA Pacific Region International Summer Music Academy	Making a Life as a Musician	\$9,549
Red Chamber Cultural Society	Emergence Mentorship	\$14,925
Rhythm Club	Rhythm Club 2019 Summer Series	\$16,000
Studio 9 Independent School of the Arts	Performance Space	\$40,000
The Future Arts Projects	The Future is you and me - Music Workshop + Showcase	\$12,000
The Sound Garden Retreat	Songwriters and Teens Workshops	\$11,220
Tiny Kingdom Music	Women In Music BC Events	\$10,000
Vancouver Adapted Music Society	VAMS Accessible Music Studio	\$25,000
Vancouver Asian Film Festival	Asians in Music	\$5,600
Vancouver International Film Festival Society (VIFF)	VIFF AMP	\$30,000
Vancouver Moving Theatre	Spotlight on the East End	\$10,000
Vernon Community Music School	Empowerment Through Creative Education	\$4,000
<b>TOTAL</b>		<b>\$504,000</b>

# CIERA Methodology

Creative BC's Creative Industries Economic Results Assessment  
BRINGING PUBLIC DATASETS INTO OUR STORY

Creative industries have an economic objective and are defined as those producing original creative content for commercial exploitation and global distribution.

Creative BC engaged Notio Media and Deetken Insight in a collaboration to design a bespoke mechanism of measurement for Creative BC to use annually, leveraging government datasets to track the economic impacts of each of the industries we serve and the creative industries in B.C. overall. The methodology was designed to meet the following criteria: repeatability – the estimates can be updated and regularly and no less than annually; reliability – the data used to generate the estimates are from trusted sources and are well-documented; comparability – the estimates can be compared to those generated for other purposes (different sectors, regions, etc.); comprehensiveness – the data supports estimates that cover the full scope of economic impact (e.g. output, gross domestic product, employment); and alignment – the data supports estimates that align to the particular scope at hand, in this case, the B.C. creative sector.

The approach to build CIERA involved 1) establishing industry scope by mapping North American Industry Classification System (NAICS) codes against a standard three-part value chain for each of the industries (creation>production>distribution); 2) assembling publicly available government data required to generate economic impact results for each industry, and 3) designing a tool to calculate Output, Gross Domestic Product (GDP), and Employment each year that is easily updated as government datasets are refreshed and released.

A core component of the methodology is the Provincial and Territorial Culture Indicators (PTCI) and the Culture Satellite Account (CSA) on which the indicators are based. The CSA is a product of both the Canadian Framework for Culture Statistics (CFCS) and the Canadian System of Macroeconomic Accounts (CSMA): the CFCS provides the guiding principles to define and identify cultural economic activity by culture domain and subdomain, while the CSMA provides the mechanism and data to derive the PTCI.

The PTCI include results by culture domain and subdomain\* for Output, GDP, and Jobs. Output\*\* is the value of those goods or services that are produced within an establishment that become available for use outside that establishment, or in some special cases within the producing establishment, and is net of subsidies received. GDP

represents the output of an industry minus the value of intermediate inputs that were used up in the production of goods and services. Jobs refers to the total number of jobs existing in the industry. If a job exists for only part of the year, it counts as a job for the portion of the year it existed (e.g. 3 months = ¼ of a job). Conversely, a part-time job is valued the same as a full-time job (both are considered one job). CIERA uses the industry perspective version of the PTCI which represents all economic activity associated with those industries included within the CFCS. Output and GDP are valued in basic prices and nominal terms. The basic price of a good or service is its selling price before wholesale, retail and transportation margins and net of taxes on products, such as PST and GST. Nominal value reflects prices in a given period, whereas real value is adjusted for inflation.

Statistics Canada provides a mapping of CSA domains and subdomains to industries based on the 2007 version of the North American Industry Classification (NAICS) system, producing industry codes. This mapping is done at the most detailed 6-digit level. NAICS Canada 2017 Version 2.0 was reviewed by Notio and Deetken with industry stakeholders to select those codes to include in the CIERA model which uses estimates and assigns results to creative industries that Creative BC serves. Concordances between NAICS versions were used to backwards-map 2017 NAICS to 2007 NAICS codes.

Additional data from Statistics Canada's Business Register (BR) is used to allocate the PTCI to in-scope 6-digit NAICS and thus to the Creative BC industries. Business Register (BR) reports the number of businesses that have employees within a certain range (e.g. 1-4, 5-9, 10-19, etc.) by 6-digit NAICS industry. The midpoint of each range is multiplied by the number of businesses with that range of employees. These are then summed across all ranges to estimate total employment by NAICS code. (Note that the PTCI results reflect the jurisdiction where business activity occurs whereas BR data reflect the jurisdiction in which a business is registered. The BR data, therefore, is used in CIERA as a proxy for where business activity occurred.)

This BR data, combined with output by industry from the Supply and Use Tables (SUT), is used to estimate output per 6-digit NAICS codes,

as follows. The SUT include a wide range of variables by Input-Output Industry Classification (IOIC) code, including Output. IOIC is a special aggregation of NAICS code. Based on this mapping, it can be estimated what the Output was for a given year for the group of 6-digit NAICS code that corresponds to a given IOIC code. Estimated employment results at the 6-digit level from the Business Register are mapped to the corresponding IOIC code from the Supply and Use Tables. These two datasets are used in combination to estimate an output per employee benchmark per in-scope IOIC code. These benchmarks are, in turn, used to estimate output per 6-digit NAICS code, and these results are used to apportion PTCI results to a given Creative BC industry.

The PTCI represents the direct economic impact of the culture industries. Direct impact reflects the immediate economic activity of those businesses within the culture industries. Input-output multipliers are used to estimate the indirect and induced impacts. The indirect impact reflects the demand from culture industries for inputs from other industries. The indirect impact is cumulative, meaning it includes transactions going all the way back to the beginning of the supply chain. The induced impact reflects the economic activity that arises as a result of industry workers, involved in either direct or indirect activity, spending part of their wages and salaries on other goods and services. CIERA utilizes multipliers published by Statistics Canada to estimate indirect and induced impacts. Adjustments are made to these multipliers as follows.

**Indirect multipliers** | These multipliers are adjusted downward to account for "own indirect" activity, that is, supplier activity from the same industry. Not adjusting for "own indirect" activity leads to a form of double-counting between direct, indirect and induced effects. The multipliers are adjusted downward to reflect only that proportion of "own direct" activity that is satisfied by domestic suppliers. To determine this proportion, CIERA uses results from the Domestic Use Tables (DUT) that are derived from the Supply and Use Tables.

**Induced multipliers** | Induced multipliers are similarly adjusted downward to account for "own indirect" activity. While the indirect multipliers are adjusted on total supplier purchases from the same industry, the induced multipliers are adjusted based on that portion of own-industry purchases that goes to wages and salaries. The DUT are used to determine the proportion of output that is made up of wages and salaries for each supplier industry. The induced multipliers are adjusted downward to account for that proportion of total wages and salaries (including both direct wages and salaries and wages and salaries paid by suppliers) resulting from "own indirect" activity, excluding wages and salaries on imports from that industry.

CIERA generates two sets of indirect and induced results: one for within B.C. and the other for all of Canada. The adjustments to the within-B.C. multipliers account for both international and interprovincial imports, while the adjustments to the all-of-Canada multipliers account for international imports only. CIERA results published in the 2019/20 Impact Report are based on the within-B.C. multipliers.

The CFCS is mapped to the 2007 version of NAICS, while more recent versions of NAICS are 2012 and 2017. Given the various timeframes, the versions used in CIERA to apportion the PTCI and adjust the multipliers are: BR (2016), SUT (2016), and DUT (2016). The same output-to-employment benchmarks are used for all years in CIERA, and, likewise, the proportions used to adjust the multipliers are the same for all years.

The most recent version of the PTCI, released on October 22, 2020, includes results for 2010 through 2018, which are used in CIERA. Historical datasets for GDP and Employment, by industry, were utilized in combination with PTCI historical trends to generate estimates for 2019. As a validation exercise, the relationship between relevant

NAICS industries and their respective cultural sectors were checked for statistical significance. For quality assurance purposes, different statistical model approaches were back-tested and scored on their ability to forecast actual PTCI results for 2017 and then 2018, with the best model being selected to generate the 2019 estimates.

### Limitations and Key Considerations

The following are limitations and/or key considerations with respect to the methodology:

1. Information from Statistics Canada's Business Register (BR) was used to derive estimates of employment for in-scope 6-digit NAICS codes. Per above, Business Register data is used to adjust PTCI and multipliers to produce results that align to the required industry scope by estimating employment based on business counts, which presumes that the midpoint of each employment range represents the average number of employees for all businesses within that group.
2. Direct, indirect and induced effects should not be summed across Creative BC industries to attempt to represent total effects, because of likely double-counting across industries. For instance, some direct activity in Music and Sound Recording could be indirect (supplier) activity to Motion Picture.
3. It is questionable to consider spending decisions as induced effects attributable to direct activity.
4. A variety of Statistics Canada datasets are used in the methodology, the release schedules of which vary. Every attempt has been made to match the datasets by reported year.
5. Results should not be viewed as time series. Statistics Canada periodically refines its measurement methods and does not consistently revise published data about prior years.
6. A limitation in applying the multipliers is with respect to how well the IOIC codes align to the in-scope NAICS codes and culture subdomains. The better the alignment, the more dependable are the results generated by the multipliers. This alignment varies across the Creative BC industries.
7. Jobs as a measure is not ideal for gig work as it provides limited insight into the number of individuals working in an industry. "Jobs" reflects the average number of full- and part-time jobs in an industry over the course of the measurement period.

\*Statistics Canada definitions: The domains and sub-domains are intended to be measureable, distinct and recognizable to data users. At their highest level, domains consist of an aggregation of activities, artistic disciplines, industries, products and occupations that are related and provide a useful level of analysis. In most cases, these higher-level domains may be comparable at the international level, while a sub-domain may support analysis at a more discrete or detailed level. Core culture sub-domains produce goods and services that are the result of creative artistic activity and whose main purpose is the transmission of an intellectual or cultural concept. Read more online: <https://www150.statcan.gc.ca/n1/pub/87-542-x/2011002/s02-eng.htm>

\*\*The value of output is reported at basic prices, which means it includes all costs of production incurred by the producer: goods and services purchased as intermediate inputs; wages, salaries and benefits paid to workers; mixed income (payments to unincorporated business owners for their services) any operating surplus (profit or loss); and net payments to government (taxes net of subsidies on factors of production such as labour). Subsidies are netted out because they reduce the cost of certain inputs such as labour, while taxes on factors of production (e.g., property taxes) are added in because they are costs paid by the producer and are included in the final value of the product.

For dataset links and more visit

[creativebc.com/ciera](https://creativebc.com/ciera)



## We love what we do

The team at Creative BC is dedicated to empowering B.C.'s storytellers. Each one of us has a focused role to play, yet we are integrated, adaptive and continually expanding. Our shared goal is profoundly clear: to use our reach, resources and vision to wholly serve our clients' needs. The narrative of our daily work and the character of our commitment is inspired by four key archetypes:



The **Sage** holds knowledge and wisdom, offering clarity in decision making.



The **Creator** sees the big picture, while supporting process, to create expressions of lasting value.



The **Magician** opens doors to transformation, forging influential associations, while turning dreams into reality.



The **Lover** builds relationships through community and connection, fostering memorable experiences and lasting impressions.



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CEO

**KARIN WATSON**  
Director of Business Operations

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Manager, Music Programs

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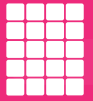
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Book  
Publishing



Interactive +  
Digital Media



Magazine  
Publishing



Motion  
Picture



Music +  
Sound Recording

Creative BC is an independent society created and supported by the Province to sustain and help grow British Columbia's creative industries: motion picture, interactive and digital media, music and sound recording, and magazine and book publishing.

The society delivers a wide range of programs and services with a mandate to expand B.C.'s creative economy. These activities include: administration of the provincial government's motion picture tax credit programs; delivery of program funding and export marketing support for the sector; and provincial film commission services. Combined, these activities serve to attract inward investment and market B.C. as a partner and destination of choice for domestic and international content creation.

The society acts as an industry catalyst and ambassador to help B.C.'s creative sector reach its economic, social, environmental and creative potential both at home and globally

Creative industries have an economic objective and are defined as those producing original creative content for commercial exploitation and global distribution.

The views, opinions, conclusions and/or recommendations expressed in these materials are those of the author(s). These materials do not necessarily reflect the official policy or position of the Government of British Columbia. The Government of British Columbia does not endorse, nor has it confirmed the validity of the information contained in these materials.