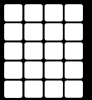


2020/21

# Impact Report



Book  
Publishing



Interactive +  
Digital Media



Magazine  
Publishing



Motion  
Picture



Music +  
Sound Recording



BRITISH  
COLUMBIA

# Greetings from Creative BC



**Prem Gill**  
CEO, Creative BC  
@premgill

## A Message from the CEO

Made-in-B.C. stories are satisfying our need for entertainment and connection more than ever - through screens, ear buds and across printed pages. Certainly, I continue to consume more creative content than ever before. I do so sometimes simply for a break from the pace of Zoom life. But daily, I monitor the impacts of four of the greatest disruptions of our time: the pandemic's effects on business and health, social change, the climate crisis, and ongoing digital transformation that affects the industries we're passionate about at Creative BC.

At this time I am listening and learning more. I honour the Indigenous children by reflecting on my role in reconciliation, with a deepening awareness of my critical responsibility, both as a sector leader and as a guest on the unceded ancestral homelands of the Musqueam, Squamish and Tsleil-Waututh Nations.

During the FY2020/21, I took risks. As CEO, I drove harder professionally and revealed more of myself personally. As a woman and a person of colour, I used my voice to stand ground and open opportunity. As part of networks of influence, I worked for change. In FY2020/21 I burned more energy than I thought I had to give and asked more than ever of my team—each of whom rose to the challenges and beyond.

I'm proud of our impacts in FY2020/21 and know that across all spheres of our influence, the work continues. Creative BC is committed and accountable. We are pleased to provide you this update on our efforts and new insights to the creative sector. I welcome your thoughts and input,

Prem



**Rob Bromley**  
Chair, Board of Directors, Creative BC

## A Message from the Chair

In this, the last year in my capacity as Chair of Creative BC, I want to thank the Province of British Columbia for its investment into B.C.'s storytellers, and for the trust and true collaboration of our many partners within the Ministry of Tourism, Arts, Culture and Sport. Your stewardship is the foundation upon which this sector is rebuilding to continue on even stronger.

I want to honour Prem and her vision, as well as the devotion of her entire team. And I want to thank the many contributors to Creative BC from industry - in associations and on panels, committees, juries, as clients and as grant recipients. Not only have we together focused on the sector's needs for recovery, but we have taken meaningful steps to establish a firm position of commitment to reconciliation, and to diversity and inclusion across the industries we serve. Creative BC will continue to unite and champion actions and accountability for what we create and what we leave behind for future generations - as an economic sector and as part of this planet.

From motion picture and music to books, magazines and interactive content, our board sees the unique challenges each one faces. Yet we also observe a brave entrepreneurial spirit that meets tough challenges, a creative intent to listen and spark change, and an increasing strength of will and innovation. I believe these come from an even greater sense of unity after all we've been through, and we'll continue to work and uplift these industries along with the people they serve.

Rob

### 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.

**Our 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

# Creative BC Board of Directors

## CHAIR

Rob Bromley

## VICE CHAIR + SECRETARY-TREASURER

Louise Clark

## MEMBERS

Jeevyn Dhaliwal

Sarah Fenton

Jesse Finkelstein

Michelle Grady

Shirley Lew

Pauline Moller

Matt O'Grady

Jamie Sterritt

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



**Honourable Melanie Mark**  
Minister, Tourism, Arts, Culture & Sport  
@melaniejmark



**Bob D'Eith**  
Parliamentary Secretary for Arts & Film  
@BobDEithMRM



## Evolving the Creative BC Annual Impact Report

*New year, new website*

We're moving to a print and digital hybrid, reducing our footprint and providing a summary to keep at your fingertips. This handy Impact Report Summary offers the year's top-line highlights with links to more information in our brand new website.

For more detail

[creativebc.com/annual-impact-reports](http://creativebc.com/annual-impact-reports)

For grant recipients

[knowledgehub.creativebc.com/s/funding-recipients](http://knowledgehub.creativebc.com/s/funding-recipients)

Thank you for your FY2020/21 investing partnerships

**Funding Programs:** Rogers Group of Funds, Canadian Media Producers Association, City of Vancouver

**Creative Pathways™ Initiative:** WarnerMedia, Ministry of Advanced Education and Skills Training, Martini Film Studios, Motion Picture Production Industry Association (MPPIA), Motion Picture Association—Canada (MPA—Canada), International Alliance of Theatrical Stage Employees, Moving Picture Technicians, Artists and Allied Crafts of the United States, Its Territories and Canada (IATSE 891), the Directors Guild of Canada, B.C. District Council (DGC BC), and the Canadian Media Producers Association, BC Producers Branch (CMPA BC)

**Reel Green™ Initiative:** MPPIA, CMPA BC Producers Branch), DGC BC, UBCP/ACTRA, IATSE 891, ACFC West, Teamsters Local 155, MBSE MBS Equipment Company, EP Canada – Entertainment Partners Canada, William F. White, Martini Film Studios, Bridge Studios, Vancouver Film Studios, Northshore Studios, Eaglecrest Studios, Sony Sony Pictures Entertainment, Sun Rentals – Sunbelt Rentals, CBC/Radio-Canada, Manitoba Film and Music, Newfoundland and Labrador Film Development Corporation (NLFDC), Alberta Film Commission, Quebec Film and TV Council (QFTC)

# FY2020/21

## At a glance

### Impacts + Highlights



EMPRESS OF VANCOUVER | Project Development Fund

### Funding Programs

The funding programs team delivered 15 programs, managed over 1,787 applications, and delivered 630 **Grants**, including 185 regional, totaling \$10,413,643 to March 22, 2021 YTD. Experienced 17% more media engagement and 14% more website traffic.



Arsenal Pulp Press' CBC Canada Reads 2021 winner

### Amplify BC Renewal

The Province of British Columbia made a commitment for renewal of the fund, providing \$22.5M over three years. This is the first multi-year commitment for this fund, providing stability and predictability to this hard hit industry. Specifically, innovation and operating supports for music companies and live music activities will aim to sustain businesses suffering consequences of health restrictions on gatherings and performance.



JNGL (iamtheliving + Teon Gibbs) | Amplify BC Career Development  
Photo by: Sterling Larose



Wings and Wizards Merges World-Building Art, Tech, Storytelling and Design

### Production Services

Provincial Film Commission's production services team serviced 175 productions YTD, delivered 142 script breakdowns to producers, and answered 217 **production-related inquiries** due to increased desire to do business in B.C. during the pandemic. Trained 341 motion picture professionals on **Reel Green™** through new online courses.



UNICORN CODE | Harold Greenberg Fund

### Industry + Community Affairs

Provincial Film Commission's industry and community affairs team worked on 37 major policy files, continue to sit on 21 film task forces, chaired 29 meetings to deliver industry's **Health & Safety Guidelines** for motion picture in B.C.; resolved 453 concerns to sustain film friendliness in B.C. and answered 164 COVID-19-related issues.



John Wittmayer announced as new film commissioner for the Kootenay Regional Film Commission

### Regions + Locations

Provincial Film Commission's production services team added 700+ assets to the digital **Locations Library**, answered 616 related inquiries, updated 100% of business/service web-listings; addressed 41 regional inquiries, supported 8 **Regional Film Commissions**, chaired 13 **Municipal Film Advisory Meetings** for 35 municipal film offices.

### Industry Leadership

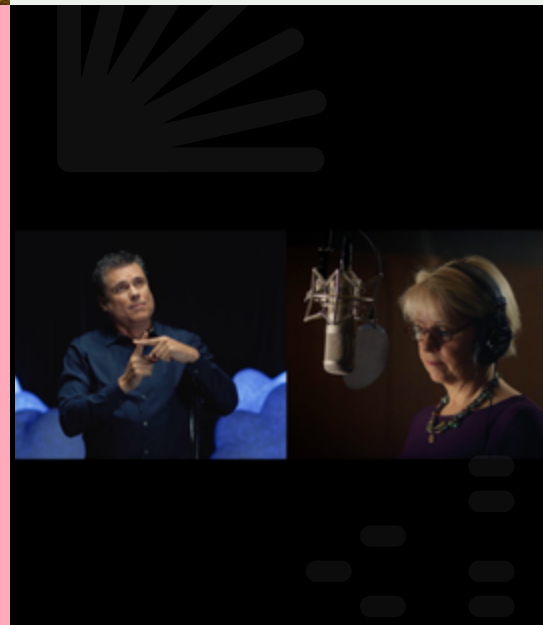
Leadership team represented the sector by presenting or moderating on 35 panels; collaborated on 8 joint program, initiative, or recipient announcements with government and industry; designed **CIERA™** to measure B.C.'s creative industries' GDP, output and jobs.



2020 Canadian Online Publishing Award finalist for Best Print & Digital Publication

### Collaboration

To support MPPIA/Creative BC **Creative Pathways™** strategy, CEO undertook 39 stakeholder consultations, 12 subject matter expert interviews, 10 workforce roundtables with 120 participants. This work combined to secure \$500k investment from government and industry for Sector Labour Market Partnership project.



WHO THE HELL IS NIGEL? | Project Development Fund

### Motion Picture Tax Credits

In FY2020/21 the motion picture tax credits administration team completed **348 tax credit certifications** to support **\$3.1B production spending** (117/\$370M FIBC and 231/\$2.7B PSTC), delivered **FIBC tax credits seminar** live to 59 registered viewers with 489 Facebook livestream views.

#BCCreates  
stories I ♥

bccreates.com

## Estimating COVID-19 impacts on B.C.'s creative sector in 2020

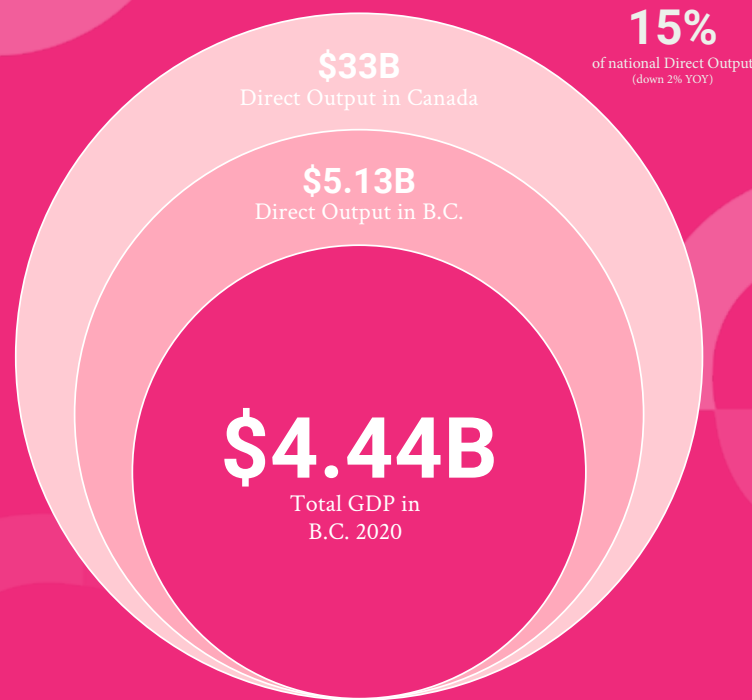
*B.C.'s Creative Sector Impacts 2020*

CIERA™ is Creative BC's proprietary tool that uses Statistics Canada data to produce annual economic impact estimates for the province's creative sector - the five storytelling industries in B.C. that produce creative content for mass production and global consumption.

The CIERA™ methodology is standard, however producing quality estimates for 2020 obviously presented challenges due to the anomalous year of the global pandemic's onset. These challenges were overcome through the use of parallel insights from proprietary Creative BC and a variety of Statistics Canada datasets. The CIERA™ methodology and annual tables are publicly available online.

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

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

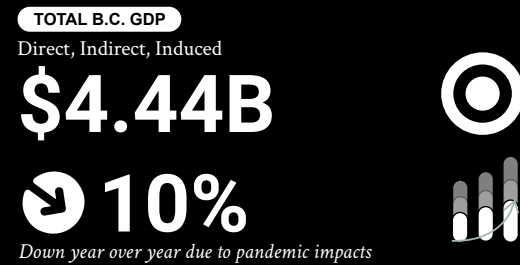


\*\*Measures hours worked, in terms of number of positions, not the number of people working or sharing these positions. Due to the freelance nature of the creative industries, this methodology is a proxy only and typically underestimates the number of workers in the sector.

\*\*\*Prior to the pandemic, Creative BC's count of estimated gig workers was up to 108,000 people, aggregated from a variety of industry sources and contextualizes CIERA™ insights to full-time and equivalent job figures. By using CIERA™ insights to estimate pandemic-related job losses across the sector, this count is reduced by -14% to approximately 92,880 people.

# CIERA™ 2020

CIERA™: Statistics Canada actuals for 2019, statisticians estimates for 2020



CIERA™ Impacts by Industry	TOTAL GDP <small>Exclusive of government investment</small>	TOTAL JOBS <small>**Traditional FT + Equivalent combined</small>
Book Publishing	\$25M	280
Interactive + Digital Media	\$1.25B	12,583
Magazine Publishing	\$107M	1,366
Motion Picture	\$1.83B	28,018
Music + Sound Recording	\$203M	4,067
Multi-Creative Industry Services	\$1.02B	11,899
<b>Total</b>	<b>\$4.44B</b>	<b>58,213</b>

## Sector Sustainability: Renewed Purpose

*Bringing social change and environmental responsibility into economic development*

B.C.'s creative industries continue to weather and adapt to the global pandemic that initially disrupted business activity in March of 2020 across the sector. While recognized as one of the hardest hit segments of the economy, CIERA™ 2020 discovered the industries' resilience with only a -10% overall drop in Total GDP contributions to the B.C. economy, but a -14% drop in Total Labour between 2019 actuals and 2020 estimates. A unique set of economic challenges and even some opportunities now face each of the industries, many of which were already grappling with (or in some cases seizing upon) disruptions due to the rapid expansion of tech and the ongoing digital revolution. But

from within this variable and uncertain economic context, there is a strong and unifying theme across the entire sector as the people within it ask: what kind of economy do we want to rebuild? Deepening priorities for social justice are combining with close to home experience of the global climate crisis linked to B.C.'s devastating fires and floods in 2021. Altogether, the sector is adopting a new imperative for developing a "sustainability mindset" - one that builds its economy with greater purpose and interconnection, reprioritizing equity and the environment as equal considerations.

### Calls to Action

- Respectful relationships
- Long term value
- Equitable access
- Learn Indigenous history
- Remember and recognize the legacy of residential schools

## Collaboration

*Opening doors, bridging industry and community*

Creative BC works closely with many to inform our work and the progress we support in the sector. The FY2020/21 year brought new meaning to the value of collaboration and partnership - from adapting programs to serve industry needs during the pandemic, to understanding where Creative BC processes and systems could be improved. Goals included to listen, understand, remove barriers, and to facilitate for the motion picture industry to bring a committee together and publish high-level Safety Guidelines that assisted productions in their safe return to work.

Paramount to Creative BC's ability to deliver, are the relationships and growing network of partners and collaborators focused on mutual success and opportunity B.C.'s creative industries - from clients, creative industry associations, regional film commissions, labour organizations, and equity and sovereignty-focused organizations, to the government's creative sector team, and many more public bodies and granting organizations from local to national with whom the organization is proud to continue adapting, co-creating and delivering.

Environment,  
Economy,  
Equity

## Indigenous Creative Sovereignty and Partnership

*Commitment and accountability*

In the role of catalyst for B.C.'s creative industries, Creative BC has an important role to play in uplifting the activities and work of Indigenous creators and companies. Creative BC also prioritizes the leadership of, and partnership with, Indigenous-led organizations pursuing economic, social and cultural development across the creative sector locally and nationally. The organization provides ongoing education for management and staff, and purposefully observes National Day for Truth and

Reconciliation in order to participate in relevant and supporting community events, to learn and listen, and as a quiet day of reflection. By doing so, Creative BC recognizes and commemorates the tragic and ongoing legacy of residential schools so it is never forgotten. The organization commits to embed Reconciliation and accountability for change as a foundational principle in all spheres of its influence.





# Book Publishing

#BCCreates books | ♥

## CIERA™ 2020 Results

**280**  
TOTAL JOBS  
Traditional FT + Equivalent

**163**  
DIRECT JOBS  
Traditional FT + Equivalent

## FY2020/21 Creative BC Supports

**1,486**  
EST. PEOPLE  
Including gig workers, -11%

**3+1**  
General + dedicated funding programs

**\$101,850**  
Through dedicated program

**15**  
Recipients

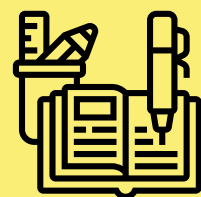
## Industry Insights

**270**  
Associated businesses. Source: Book Manager

**48**  
Publishers. Source: ABPBC

**26**  
Member publishers of the ABPBC also supported operationally through the BC Arts Council

**18%**  
Of Canadian-owned, English language publishing industry



Creation: write, edit + illustrate

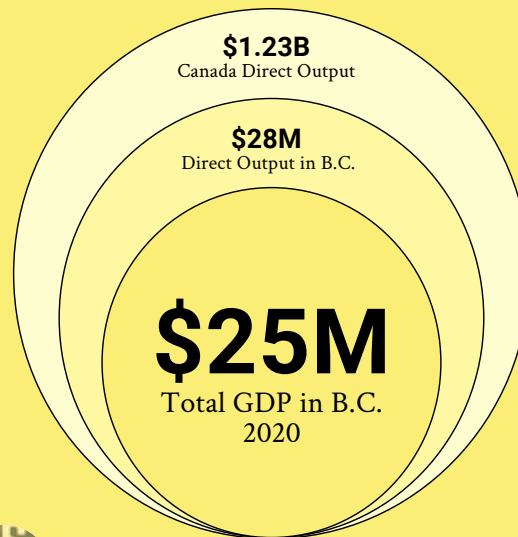


Production: design + manufacture



Sales + Distribution: market

BOOK PUBLISHING VALUE CHAIN



Total GDP in Relation to Direct Output  
Source: CIERA™ 2020

**11%**

YOY CHANGE IN TOTAL GDP

Source: CIERA™ 2020

There are 26 members of the Association of Book Publishers of B.C. (ABPBC) that form the nucleus of the province's dynamic publishing industry. These award-winning businesses make financial investments into the cultural output they produce and share profits from that creative content's sale. More broadly, there are an additional 20 self-publishers, hybrid publishers and chapbook presses. Together, **B.C.'s total count of publishers is 46, representing 20% of the English-language Canadian-owned publishing industry.** Book publishers ensure our province's unique perspective is delivered to the world via this beloved storytelling medium. They're central to the overall network of 273 businesses in B.C. that contribute to B.C.'s book culture.

The impacts of COVID-19 show **Total GDP in 2020 was remarkably down only 11% to \$25M from \$28M in 2019.** Full-time and equivalent **Total Jobs were also down 11% to 280** (source: CIERA™ 2020), with **up to 500 people working in the industry and another 1,200 freelancers** (source: ABPBC).

*Note that book publishing industry activities generate a portion of the additional 11,899 Total Jobs and \$1.02B Total GDP attributed to the Multi-Creative Industry Services segment of the creative industries overall.*

Regardless of pandemic turbulence on top of already challenging industry trends, a recent StatCan COVID-19 impacts assessment shows B.C. publishers' strength. The report shows that B.C. publishers fared better through pandemic impacts than those in other Provinces in terms of employment,

with **less than -1% impact to salaries, wages and benefits to staff** (vs. -7.1% CDN avg.), although more poorly in terms of **operating revenue at -10.6%** (vs. -5.5% CDN avg.).

Necessity saw the industry rise and adapt early by increasing online engagement. Closing the digital divide between publishers and consumers was highly effective, with one example, Arsenal Pulp, achieving a **400% increase to website sales** during the first four months of the pandemic.

Industry supports to encourage stability included the B.C. government's renewal of the **BC Book Publishing Tax Credit for five years in Budget 2021.** In addition, Creative BC programs offered flexibility for grants "in play" when the pandemic struck, and the **Market Expansion Fund for Book Publishers** program delivered **\$101,850 to 18 recipients.**

It is important to note that while digital sales supplement revenues for publishers, they are no substitute for profits derived from print book sales. Furthermore, many B.C. publishers offer children's and coffee table books, which don't transfer well to the digital medium.

The future requires ongoing resilience and collaboration to tackle ongoing issues with disrupted supply chains, rising shipping costs (both national and international), access to printers, cash flow, access to markets, and the cost of paper and cardboard. These new pandemic-related issues compound those that are pre-existing from intellectual property rights and digital disruption to evolving business models in a changing environment.

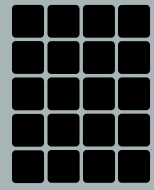
For in-depth information on this industry including links to referenced research visit: [creativebc.com/book-publishing](https://creativebc.com/book-publishing)

Thank you for your ongoing collaboration

ABPBC

#ReadBC | #ReadLocalBC | #BCBookDay

Image: Upstart + Crow



# Interactive + Digital Media

#BCCreates creative tech | ♥

## CIERA™ 2020 Results

**12,583**  
TOTAL JOBS  
Traditional FT + Equivalent

**8,208**  
DIRECT JOBS  
Traditional FT + Equivalent

## FY2020/21 Insights + Supports

**3+1**  
General + dedicated funding programs

**\$607,000**  
Through dedicated program

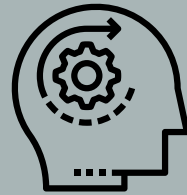
**12**  
Recipients

## Industry Insights

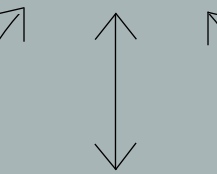
**170**  
Companies (source: DigiBC), CIERA™  
indicates industry is steady

**27%**  
Of B.C.'s creative industries' Total GDP when  
measuring video games alone

**163**  
Applications processed



Development: proof of  
concept + narrative design

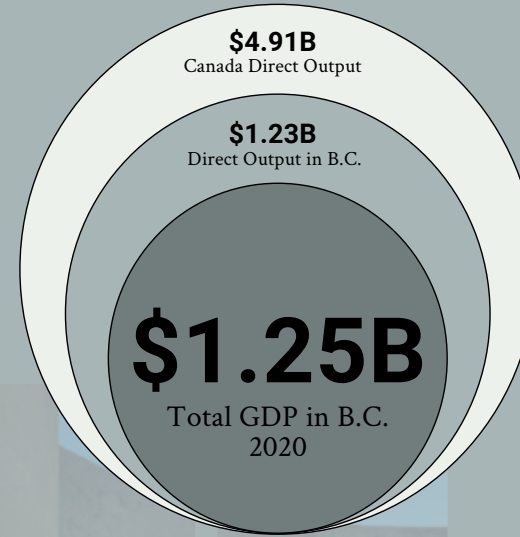


Production: build, test,  
iterate



Sales, distribution, delivery  
+ analytics: market  
+ consumer experience

INTERACTIVE + DIGITAL MEDIA  
VALUE CHAIN



Total GDP in  
Relation to Direct Output  
Source: CIERA™ 2020

The core of B.C.'s green, knowledge-economy-based interactive and digital media industry is represented by **161 video game companies** - 62 micro, 83 standard, 19 large - from world leaders in e-sports to emerging regional entrepreneurs and employers (Source: Entertainment Software Association of Canada, ESAC). Beyond this, B.C.'s virtual and augmented reality ecosystem was comprised of **230 immersive tech companies** prior to the pandemic in 2019 (Source: VR/AR Association - The VRARA) making it the second-largest centre in the world.

DigiBC, the creative tech industry's membership association, has 83 members and represents not only the types of interactive companies detailed above, but also includes animation and VFX companies in its membership.

Although COVID-19 immediately challenged B.C.'s video game industry in 2020, with deep, short-term disruptions to activity and deal flow, this is the only creative industry to show year over year growth with estimated **Total GDP up 3% from 2019 to \$1.25B in 2020** (source: CIERA™ 2020). However, full-time and equivalent **Total Jobs were down 1% to 12,583**.

*Note that video game industry activities generate a portion of the additional 11,899 Total Jobs and \$1.02B Total GDP attributed to the Multi-Creative Industry Services segment of the creative industries overall.*

It remains to be seen what the industry's actual and ongoing pandemic impacts will be, especially with Business in Vancouver's direct insights to Electronic Arts' employment trends. These insights showed that in contrast to public data

insights, this single yet significant player's employment numbers fell 37.6% in 2020 and a further 3.9% in 2021.

Supports for this segment of the creative sector centred around those through Small Business BC. In FY 2020/21, Creative BC and BC Arts Council's Interactive Fund again delivered \$607k to 12 interactive and digital media companies of the 169 that applied, with higher than ever demand for the program.

Continued resilience and rapidly changing business models, away from console and toward mobile gaming, will impact the future success of this segment of B.C.'s creative industries going forward. Access to both capital and foreign markets will be key, as well as infrastructure and investment attraction. Strategies must ensure companies of all sizes can thrive in B.C., that they can compete with other Canadian jurisdictions, and that the talent pipeline grows and diversifies through an attractive career pathway for the next generation. ESAC shows B.C. has the lowest proportion of women in the video games workforce at 20%, and of those 26% are working on games rather than as part of the administration.

Reliable, annual data sources complement and mirror CIERA's insights with the new Creative Tech Report showing revenue in Canada grew for this sub-sector by approximately 20% between 2017 and 2019 - four times that in Canada overall with wages for many roles up to 50% higher than WelcomeBC's weekly wage for working British Columbians. The latest ESAC report by Nordicity points to a 19% increase in direct employment from 7,300 to 8,700 between 2019 and 2021.

For in-depth information on this industry including links to referenced research visit: [creativebc.com/interactive-digital-media](https://creativebc.com/interactive-digital-media)

Thank you for your ongoing collaboration



#PlayBC | #ImmerseBC | #CreativeTech

Image: Museum of Other Realities | Interactive Fund

**3%**

YOY CHANGE IN TOTAL GDP

Source: CIERA™ 2020

# Magazine Publishing

#BCCreates magazines I ♥

## CIERA™ 2020 Results

**1,366**

TOTAL JOBS  
Traditional FT + Equivalent

**794**

DIRECT JOBS  
Traditional FT + Equivalent

## FY2020/21 Creative BC Support

**3+1**

General + dedicated funding programs

**\$5,000**

Grant writing support to access federal Special Measure for Journalism Fund

## Industry Insights

**51**

Members of Magazine Association of BC

**284**

B.C.-based magazines as of September 2020

**11%**

Of magazines in Canada published in B.C.

**100**

Mags published outside the Lower Mainland



Creation: write, edit + illustrate

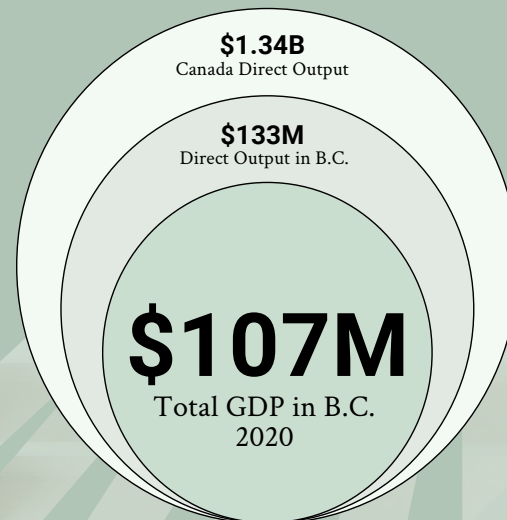


Production: design + manufacture



Sales + Distribution: market

MAGAZINE PUBLISHING VALUE CHAIN



Total GDP in Relation to Direct Output  
Source: CIERA™ 2020



**34%**

YOY CHANGE IN TOTAL GDP

Source: CIERA™ 2020

There are **51 members of the Magazine Association of BC** and **284 B.C.-based magazines** as of September 2021. B.C. represents 11% of the periodicals published in Canada overall.

From general news, business, trade and research to lifestyle, literary, cooking, culture, health, travel and more, British Columbia's long-form print media storytellers are critical thinkers. They anchor ideas and shape our narrative in print and digital magazine formats that we depend on for a distinctly west coast B.C. perspective.

The pandemic did exacerbate ongoing declining trends for the industry, with **Total GDP hard-hit, down 34% from 2019 to \$107M** (source: CIERA™ 2020). Full-time and equivalent **jobs were also down 23% to 1,366 from 1,772 the previous year.**

*Note that magazine publishing industry activities generate a portion of the additional 11,899 Total Jobs and \$1.02B Total GDP attributed to the Multi-Creative Industry Services segment of the creative industries overall.*

In B.C., insights to title counts through the Magazine Association of BC and Creative BC collaboration saw 13% fewer titles in 2020 from 2019, with a host of key challenges from reduced advertising investments and retail sales to supply chain and shipment issues. Additionally, some periodical business models are based on free distribution and walkthrough traffic in public spaces, all of which was reduced during the pandemic. Publishers' operating revenues were

slightly more negatively affected by COVID-19 than newspapers, down 24% in Canada on average according to a recent Statistics Canada COVID-19 Impacts publication, although salary, wage, commission and benefit expenses were only down by 14%.

The industry transitioned more easily than others to work from home, with those periodicals in digital formats better able to adapt. Response to the pandemic by industry was swift, with a Canada-wide publisher survey of impacts submitted and resulting in federal support through the Special Measures for Journalism Fund.

Creative BC support delivered grant-writing assistance and coaching for all publications seeking to apply and The Magazine Association of BC prepared a guide for B.C. periodicals to understand the funding, which came through Canadian Heritage. To increase successful federal leverage, Creative BC offered paid 45-minute Zoom or phone consultations with an experienced grant writer. This collaboration contributed to secure the highest amount of federal leverage ever to be designated to this province's industry. B.C. magazine publishers received \$14.8M (over 32%) of the total federal funding envelope for magazines, community newspapers, and periodicals. The Association estimates that 2/3 of the money coming to this province's publications went to the 186 B.C.-based magazines who applied.

The industry is operating within a highly competitive new media landscape and the ability to maneuver within it will enhance success rates.

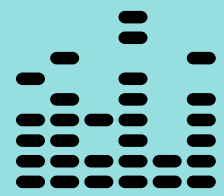
For in-depth information on this industry including links to referenced research visit: [creativebc.com/magazine-publishing](https://creativebc.com/magazine-publishing)

Thank you for your ongoing collaboration



#SubscribeBC | #BCReadsMagazines

Image: Western Living Magazine



# Music + Sound Recording

#BCCreates music | ♥

## CIERA™ 2020 Results

**4,067**  
TOTAL JOBS  
Traditional FT + Equivalent

**3,117**  
DIRECT JOBS  
Traditional FT + Equivalent

## FY2020/21 Creative BC Supports

**8,190**  
EST. PEOPLE  
Including gig workers, -37%

**5**  
Programs serviced + 2 partnerships

**7,577,821**  
Funding committed including \$623K for Showcase BC emergency relief

**386**  
Recipients

**1110**  
Applications processed

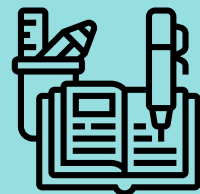
**53%**  
Of Creative BC funds

## Industry Insights

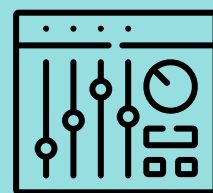
**200+**  
Recording studios

**80+**  
Record labels

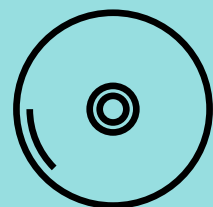
♥  
Music festivals 200+ prior to COVID-19



Creation: compose/  
performance

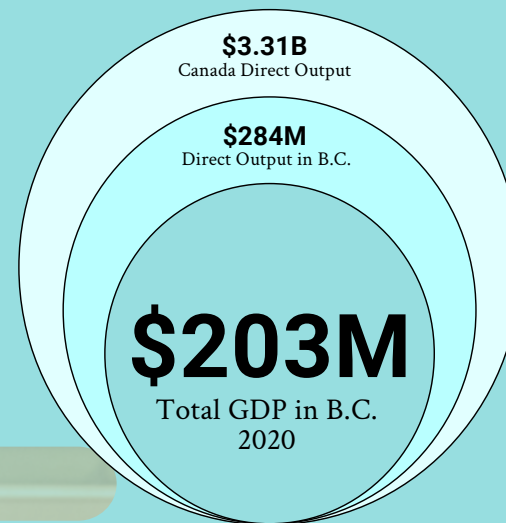


Production:  
record/mix/master



Distribution: market/  
promote/sell

MUSIC + SOUND RECORDING  
VALUE CHAIN



Total GDP in  
Relation to Direct Output  
Source: CIERA™ 2020



Source: CIERA™ 2020

There are **1,100 members of Music BC, the industry's provincial membership association**. These include many artists and businesses at the core of B.C.'s music and sound recording industry, which boasts **200+ sound recording studios** and **80+ record labels across the province**. Recording in these studios are thousands of B.C.'s emerging and established artists, and supporting these activities are hundreds of industry professionals, service providers, promoters, venues, festivals, producers, agents and managers, all of whom drive B.C.'s music economy.

Within the creative sector, this industry was COVID-19's hardest hit, with **Total GDP in 2020 down 36% from 2019 to \$203M in 2020** (source: CIERA™ 2020). Full-time and equivalent labour paralleled the downward trend, at **-37% to 4,067 Total Jobs** (from 6,414 in 2019) **with an estimated 8,190 people working in the industry** (Creative BC estimate adjusting Staying in Tune study's 13,400 by -37%).

*Note that music + sound recording industry activities generate a portion of the additional 11,899 Total Jobs and \$1.02B Total GDP attributed to the Multi-Creative Industry Services segment of the creative industries overall.*

In 2020 live performance, which typically represents approximately 50% of industry economic activity, and most artists' incomes, was decimated at the onset of the pandemic and continues to be heavily impacted. This was due to the shut down of venues, live music events, and artists' inability to tour given health restrictions. Livestreaming acted as a lifeline connection to fans, but not a replacement to in-person revenue generation. As restrictions gradually lift, a passionate industry where business models and margins were already slender continues adapting to safety and financial demands.

On the positive side, research by Statistics Canada shows music and sound recording activity in Canada was

resilient, even emerging with success. The study estimates that both **music publishers and sound recording studios in Canada may have in fact experienced modest growth in operating revenue in 2020**, and moderate declines in labour-related expenses.

Responses to the pandemic for this industry included a variety of supports. Creative BC **delivered \$623,000 to 742 recipients through Showcase BC** – the concert, the program, and the online hub for streaming events. Via Creative BC's program changes the province became the only English-speaking jurisdiction to support operational funding to live music presenters and music companies. **Music BC delivered an inspired SoundON initiative, bringing Amplify BC funds together with other sources' helping presenters and artists get back to creating unforgettable live music experiences.** The **First Peoples' Cultural Council's Virtual Feast** project pivoted and offered both mentorship and festival initiatives online, significantly leaving equipment in Indigenous communities as a lasting legacy.

The **Province of B.C. renewed Amplify BC for another three years**, providing a total of \$22.5M across FY2021/22, FY2022/23 and FY2023/24. This is the first multi-year funding for Amplify BC and provides stability and predictability to this hard hit industry.

Global sources predict that from a fan perspective, in-person concerts will come back in a big way, with a hybrid future for this industry.

**For in-depth information on this industry including links to referenced research visit:** [creativebc.com/music-sound-recording](https://creativebc.com/music-sound-recording)

Thank you for your ongoing collaboration



#ListenBC | #BCMUSIC

Image: Amplify BC recipient Genevieve Jaide from Prince George B.C. Photo by Indigo Portrait Co.

# Motion Picture

#BCCreates film + tv | ♥

## CIERA™ 2020 Results

**28,018**  
TOTAL JOBS  
Traditional FT + Equivalent

**17,679**  
DIRECT JOBS  
Traditional FT + Equivalent



Creation: content creation

## FY2020/21 Creative BC Supports

**3+4**  
General + dedicated funding programs

**\$2,022,032**  
Funding committed incl. \$260K to regional film commissions, \$10K to Reel Green™

**134**  
Funding program recipients

**466**  
Funding program applications processed

**8 + 35**  
Regional Film Commissions + Municipal Film Offices

**121 + 2.8M<sup>FT</sup>²**  
Stages + Studios



Production: principal photography + post-production

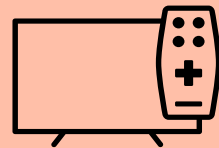
## Industry Insights

**61,892**  
EST. PEOPLE  
Including gig workers, -13%

**200+**  
Producers

**150+**  
Expert industry supply companies

**130+**  
Animation, VFX + post-production companies



Distribution: direct-market + spin-off

MOTION PICTURE VALUE CHAIN

CALENDAR YEAR 2020

**350+**  
Estimated Productions in B.C.

Source: Creative BC tax credit administration information

- Cariboo Chilcotin Coast Tourism
- Columbia Shuswap Film Commission
- Kootenay Regional Film Commission
- Okanagan Film Commission
- Northern BC Tourism
- Thompson-Nicola Film Commission
- Vancouver Island North Film Commission
- Vancouver Island South Film & Media Commission
- Creative BC Provincial Film Commission

Regional Growth is Trending Up Supported by B.C.'s Regional Film Commissions

Estimates and insights based on Creative BC tax credit applications data

Motion picture applications claiming distant regional tax credits

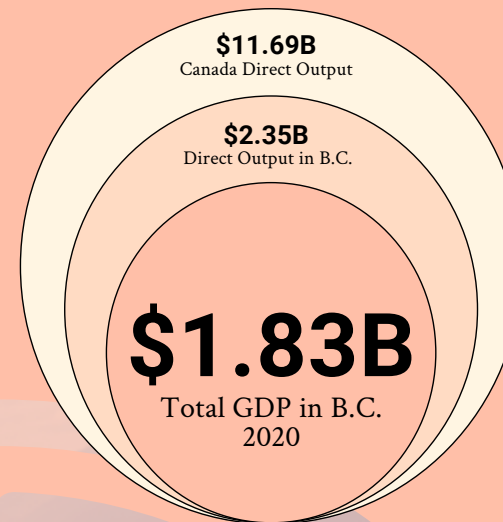
2019	2020
14%	21%

Foreign motion picture applications claiming distant regional tax credits

2019	2020
6%	9%

Domestic motion picture applications claiming distant regional tax credits

2019	2020
30%	36%



Total GDP in Relation to Direct Output  
Source: CIERA™ 2020

## FY2020/21 Film Commission Service

**300**  
Active users in the digital locations library

**557,485**  
Images in the digital locations library

**168**  
Location packages + scripts

**212+**  
Incoming production consultations

**21**  
Taskforces, committees + initiatives

**671**  
Items, inquiries + concerns resolved

**47**  
Ongoing major policy files

**18**  
Regional film commission meetings

**16%**

YOY CHANGE IN TOTAL GDP

Source: CIERA™ 2020

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. Spanning from domestic production to foreign activity, and from live action to animation, VFX and Post Production, B.C. delivers world-leading storytelling expertise, including supports and services from script to screen.

The province offers over **120 sound stages** representing over **2.8 million square feet**, including **purpose-built stages and conversions**, more than **130 animation, VFX and post-production companies**, as well as an estimated **160+ expert industry supply companies**, defined as those where more than 80% of annual revenues are derived from motion picture industry-related services.

There are 160 members of the Canadian Media Producers Association, BC Producers' Branch, 24 members of the Animation & VFX Alliance, 32 members of the Vancouver Post Alliance and 171 contributing members of the Motion Picture Production Industry Association. In calendar year **2020 there were an estimated 350+ productions—40% domestic and 60% foreign** (Source: Creative BC tax credit administration data), this drop mirrors CIERA™ estimates that reflect a 16% drop in activity. Creative BC estimates that 2021 production counts are back up to 2019 levels.

However, even with a five month pause (March through July 2020), together these 350+ productions' activities delivered **\$1.83B Total GDP** (Source: CIERA™) to the B.C. economy, down only 16% year-over-year from 2019. A trend toward higher value productions choosing B.C. during the pandemic is attributed to committed crews, and engaged citizens, doing their part to become one of Canada's and North America's safest jurisdictions. The increased Lower Mainland/Southwest activity pushed expansion into B.C.'s regions, particularly the Okanagan and Vancouver Island.

*Note that motion picture industry activities generate a portion of the additional 11,899 Total Jobs and \$1.02B Total GDP attributed to the Multi-Creative Industry Services segment of the creative industries overall.*

The Province of B.C. demonstrated commitment through the **new \$2M Domestic Motion Picture Fund** as part of the Reel Focus BC suite of provincial investments for domestic creators. Creative BC collaborated on health and safety with the industry, which demonstrated determination and resilience by delivering a strong rebound to the economy. Activity went from 0 productions in June to a peak of between 60 and 70 simultaneous

productions during the fall of 2020 - **both the lowest and the highest recorded number of simultaneous productions in the province in a single year**. This is attributed to the fact that early in the pandemic, B.C. was recognized for its excellent response to COVID-19, including the public's commitment to Provincial Health Officer orders, which supported a faster return to work than in other jurisdictions.

Measuring employment, **FTE Total Jobs were 28,018, down 13% from 2019** (Source: CIERA™) with an **estimated 61,892 people working in the industry** when freelance/gig workers are counted (Source: adjusted 2019 industry labour market study figures of 71,140 people down by 13%). This includes above-the-line (producers and directors), below-the-line (artists and technicians) and animation/VFX and postproduction creators combined in 2020.

**Contextualizing CIERA™** Reliable, industry data sources are valuable tools to contextualize CIERA™ insights, which are based entirely on public datasets:

Creative BC tax credit insights can be drawn from a fluid applications process which, although not static or fixed, does serve as a better proxy for B.C. production activity than tax credit certification information that was used in the past. At the time of this report's writing this fluid applications data shows an estimated \$2.84B total production spending for productions with Principal Photography/Key Animation dates falling within the 2020 calendar year. Production spending can loosely be compared with CIERA™'s Output indicator of \$2.35B, which reflects a somewhat lower figure.

CMPA's Profile 2020 does not provide provincial breakdowns this year, however it does reflect Canadian content production nationally was down by 12%, jobs were down 16%. These national impacts fall between CIERA™ indicator insights with drops as follows: Total GDP down 16%; Output down 25%; and Jobs down 13%.

Vancouver Economic Commission's annual figures reflect a drop between 2019 and 2020 of 16.6% in economic contributions by the industry to B.C.'s economy.

Film L.A.'s Television 2020 report notes projects in Canada increased by 85% in 2020 and B.C. accounted for two-thirds of that activity.

**For in-depth information on this industry including links to referenced research visit:** [creativebc.com/motion-picture](http://creativebc.com/motion-picture)

Thank you to the Regional Film Commissions and our partners for your ongoing collaboration



#WatchBC | #BCFilm

Image: IN THE LAND OF DREAMERS, funded by Project Development Fund



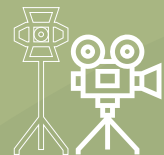
Environmental sustainability is the future of filmmaking

341 PEOPLE TRAINED

TRAIN YOUR COMPANY, CREW + CAST ONLINE AT REELGREEN.CA

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

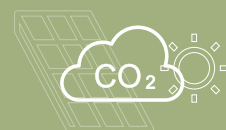
25 INDUSTRY AMBASSADORS



INDUSTRY PARTNERS

18

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



REEL GREEN™ CARBON CALCULATOR adapted for Canada from BAFTA's albert, measures your production's carbon footprint.

GET TRAINED AT REELGREEN.CA

Clean Energy Committee formed to support implementation of clean energy sources to reduce the motion picture industry's consumption of fossil fuels.

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

CLEAN ENERGY MAPS Grid Power Access Generator Data Collection

FY2020/21 Recent Highlights

- National Reel Green™ Committee formed
Clean Energy Committee formed
Innaugural REEL Earth Day Challenge announced
First nation-wide Reel Green™ Sustainability lead at a film commission
New strategic plan

Reel Green™ Evolution



GRASSROOTS 2006-2015



STRATEGIC PLAN 2016-Present



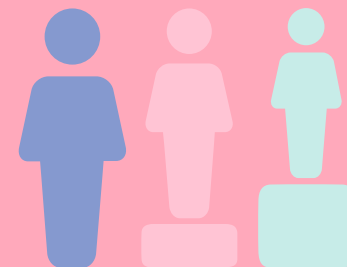
SERVICE FOCUS Evolving for the future

- Focus on collaboration, delivery and services toward measurable uptake
Reporting and increased participation, use of tools
Industry integration; governance integration; service integration through tools, events, committees, and partnerships



JEDDI Justice, Equity, Decolonization, Diversity + Inclusion

A practice of both commitment + accountability at Creative BC



Policy + Commitment

Added new strategic pillar "People + Culture"

+1



Undertook organizational assessment, and engaged third-party in policy review and enhancements

Committed to undertake 2 year JEDDI strategy implementation

2 yrs

7

7 coaching and jam board conversations to engage staff in applying a JEDDI lens to improve service and program delivery

Program Commitments

Published JEDDI program commitments online, including 10 ways Creative BC programs, training and staff focus on increasing inclusion across activities. These commitments include: removing barriers, targeted programs, weighted criteria and prioritization, targeted outreach, data collection, industry consultation, representation, partnerships, communications and staff training.

Resources + Measurement

Published 10 point JEDDI actions relevant to program access, refined self-identification practices to include organizational mandate and/or ownership and control insights.

Motion Picture ED+I Resource Directory Creative BC + MPPIA

VIEW THE DIRECTORY ON CREATIVEBC.COM

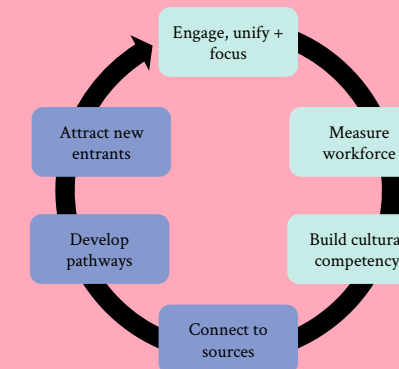


STRATEGY

Through industry funding support, MPPIA developed a six-part strategy by which B.C.'s motion picture industry will deliberately increase its workforce and achieve more fair and balanced representation - above-the-line, below-the-line, and across animation, VFX and post production.

PROJECT

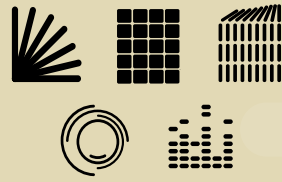
The strategy then secured \$500k in public/private funding from the B.C. government's \$400,000 investment through Sector Labour Market Partnerships and a \$100,000 seed contribution from WarnerMedia Access Canada.



Championing a dynamic motion picture workforce in B.C. that is equitable, diverse, and inclusive.

Governance Committee

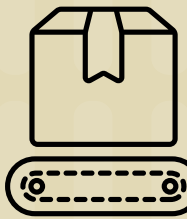
Chair | Prem Gill, CEO, Creative BC; Kendrie Upton, Executive Director, Directors Guild of Canada BC District Council; Phil Klapwyk, Business Representative, IATSE Local 891; Tracey Friesen, Managing VP, CMPA BC Producers Branch; Barbara Lee, Founder, Vancouver Asian Film Festival; Tara Kemes, General Manager, Cinesite; Natasha Tony, Founder, Elevate Inclusion Strategies; Erika Kumar, Program Manager, Warner Media Access to Action Canada; Kerry Swanson, Managing Director, Indigenous Screen Office; Sheryl Wilson, Hairstylist, IATSE 891 Member; Joan Jenkinson, Executive Director, Black Screen Office; Ryan McCormick, Ex-Officio, Senior Program Manager, Sector Labour Market Partnership Office; Adrienne Beck, Ex-Officio, Policy, Ministry of Tourism, Arts, Culture and Sport



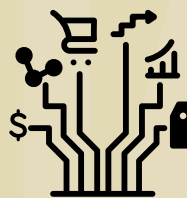
# Multi-Creative Industry Services



Service the creative process

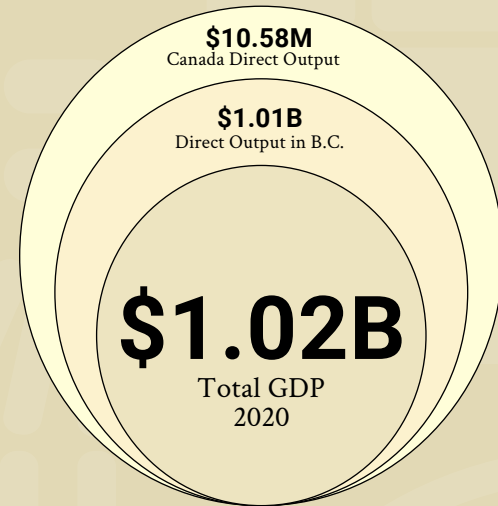


Service the production process



Service to sale + distribution of creative content

MULTI-CREATIVE INDUSTRY SERVICES VALUE CHAIN



Total GDP in Relation to Direct Output  
Source: CIERA™ 2020

The multi-creative industry services segment of B.C.'s creative sector is comprised of many relevant industry categories that directly feed and serve the creative industries overall. However, none of the businesses within this component of the creative sector can be attributed to a single creative industry. Rather they each serve multiple creative industries, 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.

This segment is 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 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.

For in-depth information on this supportive network of businesses visit: [creativebc.com/multi-creative-industry-services](http://creativebc.com/multi-creative-industry-services)

## CIERA™ 2020 Results

**11,899**  
TOTAL JOBS  
Traditional FT + Equivalent

**8,161**  
DIRECT JOBS  
Traditional FT + Equivalent

## FY2020/21 Insights + Supports

**3**  
Programs supporting activities fueling context and ecosystem:  
Domestic Industry Initiatives  
International Industry Initiatives  
Passport to Markets

**\$1,054,813**  
Delivered

**111**  
Recipients

## FY2020/21 Highlights

Competitiveness



Provincial and national strategic leadership | CEO Prem Gill, member, National Production Industry Task Force, Premier's Economic Recovery Task Force.

Pandemic health + safety coordination + hub between government + industry  
**10,600**

Diversified board of directors  
**40%** Indigenous + racialized  
**70%** Women

**100%**  
Of programs: self-identification, key personnel identification, or mandate identification to encourage + support equity-deserving groups

**33%**  
Increase of In Production list views to 154,252



**60+**  
Record number of simultaneous film productions

**100%**  
All programs redesigned for rapid delivery, flexibility, adaptation and innovation

Growth Mindset

Discoverability

**34%**  
27,535 social followers

**17%**  
Increase in media inquiries YOY

**19%**  
9,785 newsletter subscribers

**57%**  
2228 traditional media hits

**13%**  
281,282 website users up YOY

Talent

Expanded B.C. artists' audiences by **15,000** new users of Showcase BC, a hub for streaming events at pandemic's outset

**CREATIVE PATHWAYS**  
Initiation of the Creative Pathways website and services welcoming all British Columbians to B.C.'s film industry with targeted equity streams

## 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 compared to last year's numbers.
- Service**  
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.
- 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.

## B.C. Economy Output Results

ROI Outputs

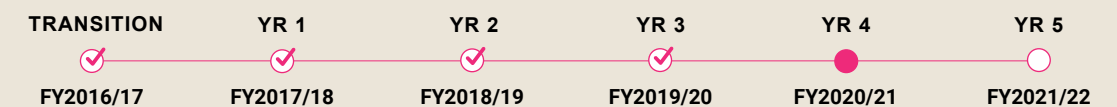
**CIERA™**  
Creative Industries Economic Results Assessment  
CIERA™ is Creative BC's proprietary tool producing annual economic impact estimates for the province's creative sector - these storytelling industries produce creative content for mass production and global consumption.

ESTIMATED COVID-19 IMPACTS ON B.C.'S CREATIVE INDUSTRIES

B.C. TOTAL GDP	YOY CHANGE	B.C. JOBS	
<b>\$4.44B</b>	<b>10%</b>	<b>58,213</b>	<b>38,122</b>
Direct, Indirect, Induced	Est. change between 2019 actual and 2020 estimate	FT + Equivalent Jobs (Direct, Indirect, Induced) est. -14%	FT + Equivalent Direct Jobs est. -14%

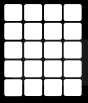
## Creative BC Scorecard

FY2020/21





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 generating original creative content for commercial production 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.

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