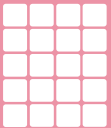


FY2021/22

Impact Report



Book
Publishing



Interactive +
Digital Media



Magazine
Publishing



Motion
Picture



Music +
Sound Recording



On behalf of the province's creative industries, Creative BC gratefully acknowledges the 200,000 Indigenous people living in British Columbia, including First Nations, Inuit and Métis.

The sector works across unceded homelands of 34 First Nations language and cultural groups with close to 60 dialects, representing over 200 distinct First Nations in B.C.

We embrace our crucial role as an economic development organization to prioritize, empower, and celebrate the creative sector's First Nations, Inuit, and Métis storytellers.



Meet the FY2021/22 funding recipients, discover sector contacts, and find current industry research.

knowledgehub.creativebc.com

Go behind the scenes and read stories of B.C. creators within book and magazine publishing, motion picture, interactive and digital media, and music and sound recording.

bccreates.com

Stay connected! Follow us online and subscribe to our newsletters for program openings, industry intel, and announcements.

creativebc.com/stay-connected

Creative BC Greetings



Prem Gill
CEO, Creative BC
✉ @premgill

A Message from the CEO

We are especially proud to reflect on British Columbia's creative sector accomplishments in FY2021/22. Creators and creative companies continued to demonstrate courage, stamina, and resilience as each industry navigates sustainable recovery from the impacts of a global pandemic. As the industries regain lost ground and reimagine storytelling within a changed context, our team at Creative BC continues to listen, support, and steward. During FY2021/22 we pivoted programs with new understanding of emerging trends and the aim to anticipate and address future needs of those working in the creative industries.

Creative BC introduced special partnership initiatives including Creative Pathways™, the Rogers Indigenous Film Fund, Domestic Motion Picture Fund, and we launched the inaugural REEL Earth Day Challenge to give back to the parks that have hosted hundreds of filming days. Within each of these collaborations, we are able to refocus on sustainable and inclusive opportunities for the future.

We measured the sector's Total GDP in 2021 at \$5.4B through our measurement tool, CIERA™, and celebrate its 17% recovery over 2020 pandemic levels. We note that this represents a 5.4% increase over the sector's 2019 pre-pandemic scale, and this is largely due to positive growth for the video games industry. We can see that B.C.'s creative industries contributed 18% of Canada's creative sector GDP and 24% of its jobs—an outsized proportion in each case. In this report we're pleased to unveil deeper insights at the regional level that reflect increasing activity, including 13.9% of the sector's Total GDP contributing to economic regions beyond the Lower Mainland.

FY2021/22 marked a significant year that closed our Service Innovation Plan, in place since FY2016/17. At the same time, we eagerly kicked off the board's new Strategic Plan and refreshed vision and mission to support the creative industries to grow sustainably and inclusively over the coming five years.

We thank the Province of British Columbia for their steadfast commitment to and trust in Creative BC. Their ongoing investments are pivotal for B.C. storytellers whose creative content continues to shape our conversation locally and share the B.C. point of view globally. In April 2023, the Province announced a historic investment of an additional \$42M to B.C. storytellers through FY2026/27. This monumental infusion is a testament to the value and potential of this dynamic sector within our culture and our economy.

Prem



Jesse Finkelstein
Chair, Board of
Directors, Creative BC

A Message from the Chair

In FY2021/22, Creative BC remained deeply engaged in understanding and fostering the recovery of the creative sector and its broader impact. As the lingering effects of the pandemic continued to challenge the creative sector, Creative BC undertook proactive measures to not only navigate the current landscape but also to chart a path for renewal across these global industries in British Columbia.

Creative BC's board of directors welcomed new members Kesi Smyth, Bill Tam, and Kate Wattie, and I stepped into the role of board chair as successor to Rob Bromley. The organization completed its previous Service Innovation Plan as the board wrote a new three-year Strategic Plan for FY2023/24 through FY2026/27. Building on solid achievements, we refreshed our vision, mission, and values and established goals and organizational objectives to uplift content creators and their products in a complex and evolving context, challenging all aspects of Creative BC's programs and services to level up for a sustainable and stronger creative sector in British Columbia.

The board of directors is proud of Creative BC's steadfast commitment to supporting and elevating the creative sector in its role as a trusted partner, sector leader, and bridge between industry and government. During these challenging times, Creative BC has an important role to play—growing each of the creative industry's capacities, showcasing the strength of collective work and investment, and developing innovative partnerships and research to bolster the sector.

I extend sincere gratitude to Rob Bromley for his exceptional dedication and invaluable contributions throughout his tenure as board chair for Creative BC. His unwavering commitment, strategic expertise, and dedicated efforts have enriched the sector and our work at Creative BC. We are profoundly thankful for Rob's leadership and we look forward to continuing his work into the future.

Jesse

creativebc.com/annual-impact-reports

Creative BC

Governance and Partnerships

Creative BC Board of Directors

CHAIR

Jesse Finkelstein

VICE CHAIR + SECRETARY-TREASURER

Louise Clark

MEMBERS

Rob Bromley

Jeevyn Dhaliwal

Michelle Grady

Shirley Lew

Matt O'Grady

Kesi Smyth

Jamie Sterritt

Bill Tam

Kate Wattie

creativebc.com/board

Thank you to our core funders

Ministry of Tourism, Arts, Culture and Sport



Ministry of
Tourism, Arts,
Culture and Sport



Honourable Lana Popham
Minister, Tourism, Arts, Culture and Sport
✉ @lanapopham



Bob D'Eith
Parliamentary Secretary for Arts and Film
✉ @BobDEithMRM

Thank you for your partnership and investment in FY2021/22.

Funding Programs: Rogers Group of Funds, BC Arts Council; Canadian Media Producers Association-BC Producers Branch (CMPA-BC); City of Vancouver; Province of British Columbia's Amplify BC Fund and Domestic Motion Picture Fund.

Creative Pathways™ Initiative: Warner Bros. Discovery Access Canada; Province of B.C. and Government of Canada through the Canada-B.C. Labour Market Development Agreement; 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 CMPA-BC.

Reel Green™ Initiative: Alberta Film Commission; Amazon Studios Canada; Association of Canadian Film Craftspeople Local 2020 Unifor (ACFC West); Bridge Studios; CBC/Radio-Canada; CMPA-BC; DGC BC; Eagle Creek Studios; Entertainment Partners Canada (EP Canada); International Cinematographers Guild Local 669 (ICG 669); IATSE 891; Manitoba Film and Music; Martini Film Studios; MBS Equipment Company (MBSE); MPA Canada; MPPIA; Netflix; Newfoundland and Labrador Film Development Corporation (NLFDC); North Shore Studios, Ontario Creates; Quebec Film and TV Council (QFTC); Screen Nova Scotia, Sim International; Sony Pictures Entertainment; Sunbelt Rentals; Teamsters Local 155; Union of British Columbia Performers (UBCP/ACTRA); Vancouver Film Studios; and William F. White International Inc.

FY2021/22
Organizational
Impacts + Highlights
at a Glance



Funding Programs

Managed 2,438 applicants and committed \$14.6M to 836 recipients across all funding programs. Attracted funding of close to \$6M into the sector, some for delivery in FY2021/22 and some for future years.

Music Focus

Offered operational support and business development funding to sustain live music presenters and companies through the pandemic, supplemented by the Province of British Columbia's additional \$2.5M pandemic resilience fund for hard-hit sectors, and collaborated with the City of Vancouver to deliver the Vancouver Music Fund.

**Industry +
Community Affairs**

Serviced 220 productions of close to 500 B.C.-based motion picture tax-credit qualifying projects in 2021.



**Film Commission
Production Services**

Answered 258 production inquiries, created 107 location packages and script breakdowns for incoming productions, and trained 204 crew through Reel Green™.



**Motion Picture
Tax Credit
Administration**

Received 649 applications in FY2021/22 with production volume of \$4.04B. Active: 499 productions in FY2021/22 (Principle Photography/Key Animation started in FY2021/22) based on the certification data as of April 2023. Certified: 430 productions with production volume of \$3.2B.



Sector Leadership

Represented the sector via 100 panels and presentations (up from 35 last year) and continue to deliver and expand on CIERA™ results, including new regional data published in this report.



**Promotion +
Engagement**

Supported 50+ media inquiries, wrote 36+ feature articles on B.C. creators for bccreates.com, received 302K+ website visitors, reached 12.8K newsletter subscribers (up 31%), and engaged 31.3K+ social media followers (up 14%).

**Industry Equity,
Diversity + Inclusion**

Delivered a labour market project for the motion picture industry sector. The project, Creative Pathways™, targets career seekers and includes equity streams. Also launched a parallel, collaborative industry tool called Creative Equity Roadmap.

**Regions +
Locations**

Added 695 assets to the digital locations library, supported 317 library users, answered 582 related inquiries (up from 437 last year), received 168 regional inquiries, and supported eight Regional Film Commissions.





Creative Industries Economic Results Assessment

CIERA™ | Bringing public datasets into our story

Estimating recovery and contributions by B.C.'s creative industries in 2021

At the time of publishing this report, CIERA™ 2021 numbers reflect the 2021 estimates. CIERA™ 2022 estimates, along with 2021 actuals were published online.

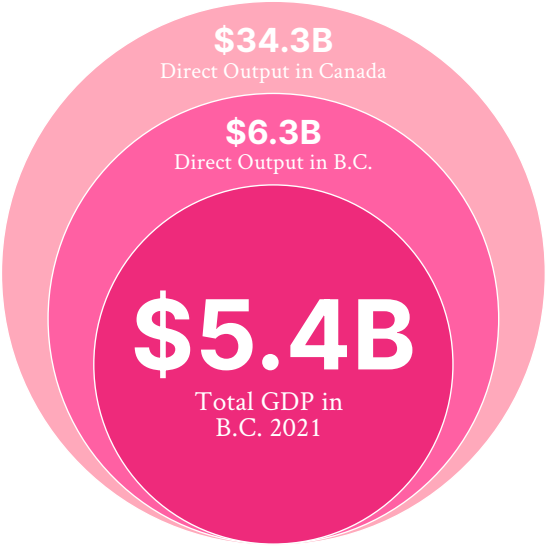
CIERA™ is Creative BC's proprietary tool that uses Statistics Canada data to produce annual economic impact estimates for the province's creative sector, comprising five storytelling industries. These industries produce original creative content for commercial sale, mass production, and global distribution.

The CIERA™ methodology is standard; however, producing quality estimates for 2020 and 2021 obviously presented challenges due to the anomalous year with the global pandemic's onset and the ensuing recovery. These challenges continue to be overcome through the use of parallel insights from proprietary Creative BC datasets and a variety of additional Statistics Canada datasets.

Access CIERA™ detailed methodology, comprehensive annual tables, and related information online: creativebc.com/ciera.

B.C. Creative Sector Total GDP in Relation to Direct Output

Gross Domestic Product (GDP) measures new value-add to the economy—labour income and corporate profit—but excludes industry expenditures, such as supply and service spending, both of which are counted as part of Output.



*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 freelancers was at 108,000 people, aggregated from a variety of industry sources, including the B.C. motion picture industry's Below-the-Line Labour Market Study, 2018, and Staying in Tune: A Study of the Music Industry Labour Market in British Columbia, 2019. By using CIERA™ year-over-year job growth insights as multipliers, the count of freelance workers has been estimated for this report. As available, new information generated through industry's own real-time research will be used by Creative BC to improve this annual estimate.

***Presently, the video game segment is the only industry clearly measured by North American Industry Classification Codes (NAICs). Therefore interactive and digital media (IDM) figures represented by CIERA™ are limited to this segment of the industry, excluding other storytelling-based interactive and digital media such as virtual reality and augmented reality.

CIERA™ 2021

Based on Statistics Canada 2020 actuals bridged by statisticians' estimates for 2021.

Total B.C. GDP

Direct, Indirect, Induced

\$5.4B

8%

Up year-over-year due to pandemic recovery, up 1% over 2019 pre-pandemic levels

Total B.C. Jobs

Total Jobs (Direct, Indirect, Induced)*

74,532

Est. 120,000 people incl. freelance workers**

Direct Jobs**

47,854

17%

Up year-over-year

Impacts by Industry	TOTAL B.C. GDP <small>Exclusive of government investment</small>	TOTAL B.C. JOBS <small>**Traditional Jobs combined</small>
---------------------	---	---

Book Publishing	\$25M	262 <small>Up to 1,238 people incl. freelancers**</small>
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Interactive + Digital Media	\$1.5B	13,512
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Magazine Publishing	\$165M	1,499
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Motion Picture	\$2.4B	40,517 <small>Up to 88,214 people incl. freelancers**</small>
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Music + Sound Recording	\$286M	5,534 <small>Up to 11,122 people incl. freelancers**</small>
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Multi-Creative Industry Services	\$1B	13,208
----------------------------------	------	--------

Total	\$5.4B	74,691 <small>Up to 120,000 people incl. freelancers**</small>
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British Columbia Is an Innovator and a Keystone in Canada's Creative Economy

18% B.C. contributed 18% of Canada's creative sector GDP in 2021, an outsized proportion of national share when compared to B.C.'s overall economic contribution of 13% to the country's GDP in the same year.
Sources: CIERA™, Statistics Canada

24% B.C. generates 24% of Canada's creative sector jobs, an outsized proportion of national share when compared to B.C.'s working population, which is just 18% of the country's total.
Sources: Statistics Canada, WorkBC

creativebc.com/ciera-2021



Vancouver Mural Festival by Gabriel Martins

➤ B.C. GDP is steady vs. down 7% in Canada

B.C.'s creative sector 2021 GDP is on par with pre-pandemic levels, whereas nationally, the sector remains down by 7% from 2019 figures.

CIERA™ 2021 estimates show that creative sector GDP in B.C. is steady with pre-pandemic levels, balanced overall by growth in the video games segment. Canada's overall figures show the sector's national GDP is still down by 7% from pre-pandemic levels.

➤ Jobs up 5.4% in B.C. vs. down 8% in Canada

B.C.'s creative sector is outpacing national recovery, with 2021 Direct Jobs measured 5.4% higher than 2019's pre-pandemic levels.

CIERA™ 2021 estimates show that creative sector jobs in B.C. have increased over pre-pandemic levels, due in part to improved data and significant adjustments by Statistics Canada to 2020 actuals for the motion picture industry. Canada's overall 2021 figures show the sector's jobs are still down nationally by 8% from 2019 pre-pandemic levels.

Sector: 2021 over 2019 figures pre-pandemic. For recovery rate insights by industry, see estimates on the following page.

Recovery Insights

2021 vs. 2019

Each creative industry is different, as are its opportunities, challenges, and measures of success.

Demand for creative content has never been higher, nor has the competition been fiercer. Audiences are fickle, choice is unlimited, and the value chains behind each industry are subject to rapid change. Beyond recovery, B.C.'s creative industries must continuously and even radically experiment in order to adapt to shifting processes, consumer preferences, evolving markets, and ever-emerging delivery channels.

CIERA™ Industry Analysis Direct GDP and Direct Jobs

Book Publishing

GDP **19.2%** ↓

GDP is significantly lower than 2019 pre-pandemic levels in B.C., while Canada's overall figures show industry GDP is up 4% nationally.

JOBS **26.4%** ↓

Jobs are significantly lower than 2019 pre-pandemic levels in B.C., and Canada's overall figures show industry jobs are also down 18% nationally.

Interactive + Digital Media

GDP **11.3%** ↗

GDP is higher than 2019 pre-pandemic levels, slightly higher than Canada's overall industry figures, which are up 10%.

JOBS **0.9%** ↗

Jobs are slightly up over 2019 pre-pandemic levels in B.C., but Canada's overall figures show industry jobs are up by 9% nationally.

Magazine Publishing

GDP **5.2%** ↓

GDP is lower than pre-pandemic levels, while Canada's overall figures show industry GDP is down 3% from pre-pandemic levels.

JOBS **25.5%** ↓

Jobs are significantly down over 2019 pre-pandemic levels in B.C. and also down by 13% nationally over the same time period.

Motion Picture

GDP **4.8%** ↓

GDP in B.C. is still estimated in 2021 to be lower than 2019 pre-pandemic levels, slightly better than Canada's overall industry figures, which were down by 6%. Creative BC's tax credit administration data indicates, however, that production spending in B.C. was 10% higher in 2021 over 2019, when including supply and service spending that are not included in GDP (labour income and corporate profit only). This trend is also validated by Vancouver Economic Commission film spend data.

JOBS **23.5%** ↗

B.C. Jobs in 2021 are significantly up over pre-pandemic levels in 2019, far out pacing national recovery where industry jobs overall were down 1.5% over the same period.

(Additional sources: VEC Film Spend data, Creative BC motion picture tax credits GDP in B.C. is still estimated in 2021 to be lower than 2019 pre-pandemic levels, slightly better than Canada's overall industry figures, which were down by 6%. Creative BC's tax credit administration data indicates, however, that production spending in B.C. was 10% higher in 2021 over 2019, when including supply and service spending that is not included in GDP (labour income and corporate profit only). This trend is also validated by Vancouver Economic Commission film spend data.

Music + Sound Recording

GDP **15.2%** ↓

GDP is lower than pre-pandemic levels in B.C., slightly better than Canada's overall figures that show national industry GDP is down 18% between 2019 and 2021.

JOBS **16.7%** ↓

Jobs are significantly lower than 2019 pre-pandemic levels in B.C., and Canada's overall figures show industry jobs are also down 20% nationally.

Multi-Creative Industry Services

GDP **2.8%** ↓

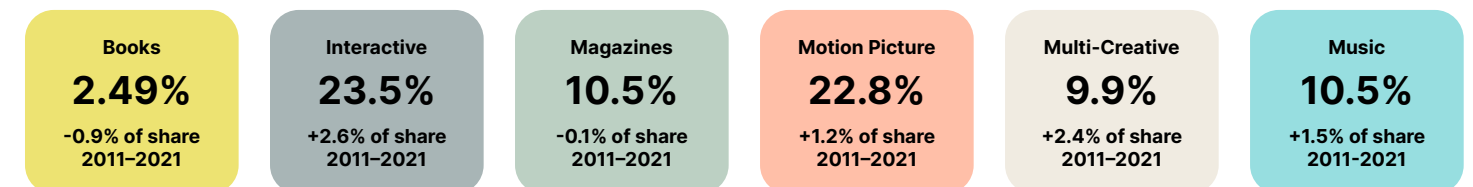
GDP is lower than pre-pandemic levels, significantly better than Canada's overall figures that show this segment of the sector's GDP is down by 15% nationally from pre-pandemic levels.

JOBS **12.7%** ↓

Jobs are significantly lower than 2019 pre-pandemic levels in B.C., and Canada's overall figures show jobs in this segment of the sector are also down 15% nationally.

B.C.'s share of national GDP contributions by creative industry

To unlock CIERA™ insights for your province, inquire with Creative BC: info@creativebc.com



Creative Sector Regional Impacts

Spotlight on B.C.'s Regional Creative Economy

CIERA™ 2020 insights (Note: no statisticians' estimate for 2021)

Creative BC further developed CIERA™ to explore B.C.'s creative industry impacts at a greater level of detail, providing regional insights to Total GDP and Direct Output (similar to total spend). Statistics Canada actuals for 2014 through 2020 are the basis for all regional results in this report. Sector-wide regional results are shown here with greater detail by industry on their respective pages.

With 2020 as the "COVID year," results for 2021 are anticipated to reflect a spike in quantitative economic impacts as reflected by regional qualitative reports.

CIERA™ 2020 Actuals

B.C.'s Creative Sector Regional Impacts
No statisticians' estimate for 2021

Regional GDP in 2020	Direct GDP	% of B.C. GDP	Assumed Total GDP	Assumed % of B.C.'s Total GDP	Direct Output	% of B.C. Direct Output
1. Cariboo	\$20.48	0.8%	\$45.19	0.9%	\$58.47	1.0%
2. Kootenays	\$15.37	0.6%	\$32.10	0.6%	\$39.15	0.7%
3. Nechako	\$2.28	0.1%	\$5.22	0.1%	\$6.96	0.1%
4. North Coast	\$13.84	0.6%	\$32.04	0.6%	\$43.30	0.7%
5. Northeast	\$8.29	0.3%	\$18.04	0.4%	\$23.50	0.4%
6 Thompson Okanagan	\$112.54	4.6%	\$232.24	4.6%	\$282.81	4.7%
7. Unallocated	\$5.16	0.2%	\$10.39	0.2%	\$12.20	0.2%
8. Vancouver Island	\$153.76	6.2%	\$306.31	6.1%	\$364.76	6.1%
Regional Sub-Total	\$331.72	13.4%	\$681.52	13.6%	\$831.15	14.0%
9. Mainland-Southwest	\$2,138.74	86.6%	\$4,314.48	86.4%	\$5,126.02	86.0%
Provincial Total	\$2,470.46	100%	\$4,996.00	100%	\$5,957.17	100%

\$831M

Regional economic activity

14%

Of B.C.'s creative sector

33%

Growth between 2014–2020

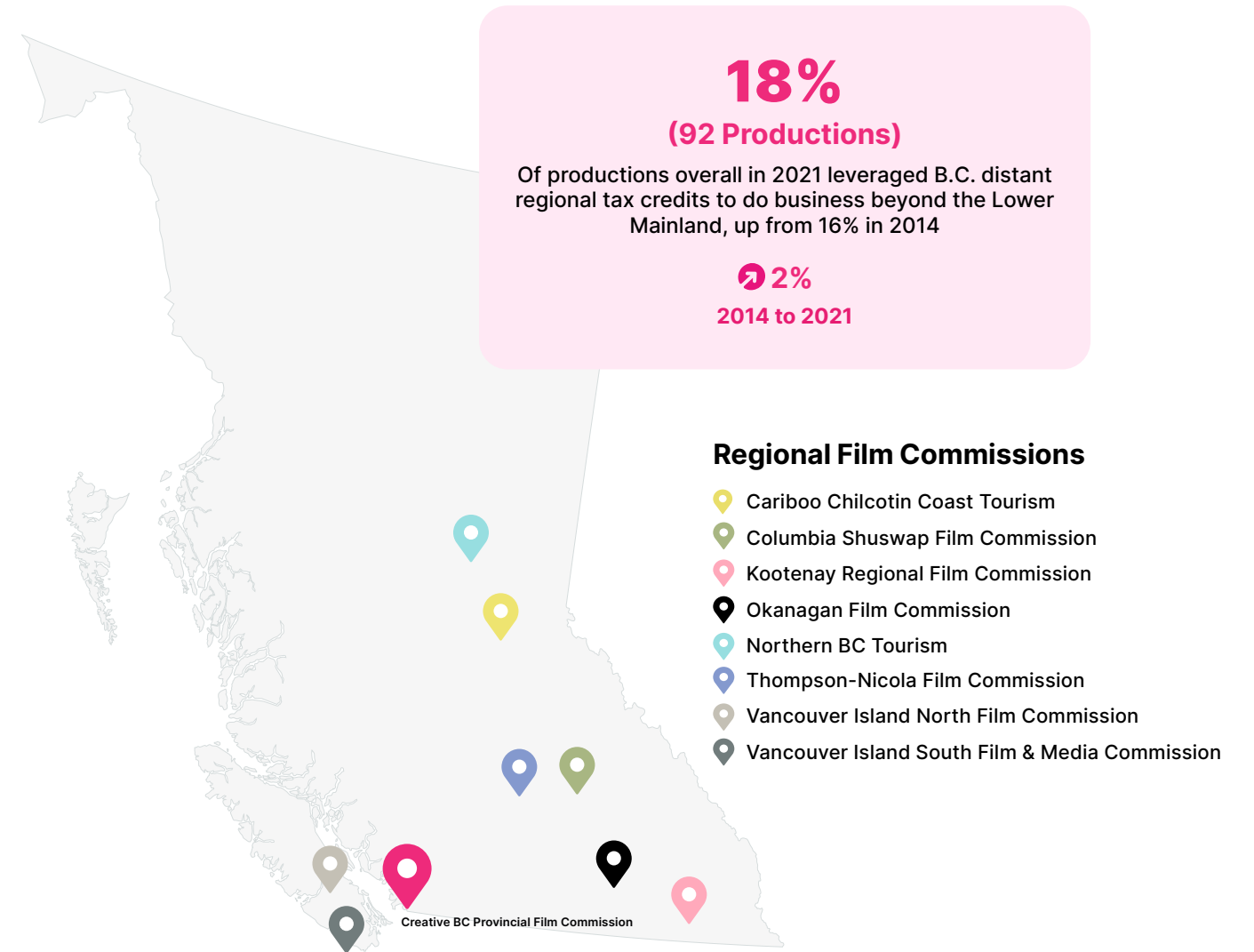
INDICATORS GUIDE

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.

Total Jobs – this figure is the sum of direct, indirect and induced numbers and it represents traditional FTE and PT equivalent jobs. 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 assessed using this traditional measurement approach model. 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.

Creative BC's insights through motion picture tax credit administration show the proportion of productions leveraging distant regional tax credits is growing.



18%
(92 Productions)
Of productions overall in 2021 leveraged B.C. distant regional tax credits to do business beyond the Lower Mainland, up from 16% in 2014
2%
2014 to 2021

Regional Film Commissions

- 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

38%
(63 Productions)
Domestic productions in 2021 that leveraged B.C. distant regional tax credits, up from 26% in 2014
12%
2014 to 2021

9%
(29 Productions)
Foreign productions in 2021 that leveraged B.C. distant regional tax credits, up from 8% in 2014
1%
2014 to 2021

B.C.'s Regional Film Commissions deliver regional marketing and production services for incoming film and television projects. CIERA™ offers insights based on census areas, which differ from the Regional Film Commissions' practical service areas. See the motion picture industry pages 32-33 for charts by census area and page 34 for Regional Film Commission territories.

Funding Programs

\$14.6M Distributed | **2,438** Applicants | **836** Recipients | **21** Programs

Creative BC funding programs supporting multiple creative industries
\$1,237,985

Domestic Industry Initiatives
Funding **\$1,144,500**
Applicants **120**
Recipients **45**

Passport to Markets Fund
Funding **\$30,003**
Applicants **43**
Recipients **34**

International Industry Initiatives
Funding **\$63,482**
Applicants **10**
Recipients **10**

Creative BC funding programs supporting specific creative industries
\$430,243

Regional Film Commissions
Funding **\$280,000**
Applicants **8**
Recipients **8**

Market Expansion Fund
Funding **\$150,243**
Applicants **17**
Recipients **17**

Reel Focus BC suite of programs supporting Domestic Motion Picture
\$2,505,566

Project Development Fund
Domestic Motion Picture Fund
Funding **\$578,841**
Applications **97**
Recipients **92**

Production Program
Domestic Motion Picture Fund
Funding **\$805,000**
Applications **158**
Recipients **12**

Equity + Emerging Development
Domestic Motion Picture Fund
Funding **\$210,000**
Applications **308**
Recipients **21**

Slate Development Program
Domestic Motion Picture Fund
Funding **\$270,000**
Applications **42**
Recipients **6**

Capacity Building Initiative
Domestic Motion Picture Fund
Funding **\$73,500**
Applications **21**
Recipients **21**

Documentary + Factual Development Fund
Rogers Group of Funds
Funding **\$297,725**
Applications **62**
Recipients **15**

Indigenous Screen Office Development Top-up
Indigenous Screen Office
Funding **\$220,500**
Applications **30**
Recipients **30**

TELUS STORYHIVE Documentary Edition Top-up
Storyhive
Funding **\$50,000**
Applications **15**
Recipients **15**

Amplify BC suite of programs supporting Music + Sound Recording
\$10,493,552

Career Development
Amplify BC
Funding **\$1,508,000**
Applications **611**
Recipients **121**

Live Music
Amplify BC
Funding **\$4,639,500**
Applications **358**
Recipients **216**

Music Company Development
Amplify BC
Funding **\$1,759,500**
Applications **226**
Recipients **94**

Music Industry Initiatives
Amplify BC
Funding **\$395,032**
Applications **52**
Recipients **22**

Demo Recording
City of Vancouver
Funding **\$60,000**
Applications **96**
Recipients **30**

Music Video
City of Vancouver
Funding **\$97,500**
Applications **102**
Recipients **10**

Industry Catalyst
City of Vancouver
Funding **\$134,020**
Applications **62**
Recipients **17**

Special Projects
MusicBC
Funding Envelopes **\$1,900,000**
First Peoples' Cultural Council

Thank you to our funders

Ministry of Tourism, Arts, Culture & Sport annual grant
Government of British Columbia Amplify BC fund, and Domestic Motion Picture Fund
Canadian Media Producers Association funding for domestic filmmakers
City of Vancouver music funding for creators from underrepresented communities
Rogers Group of Funds \$1M over 4 years in support of Indigenous filmmakers' projects

View all FY2021/22 funding recipients on Creative BC's Knowledge Hub
knowledgehub.creativebc.com

FY2021/22

Creative Sector + Funding Recipient Spotlights

Video Games from British Columbia

DigiBC launched a Games from British Columbia Steam page featuring titles from several of their independent and AAA developers, and are proud to showcase their talent and range of development capabilities. This launch celebrates the work of B.C.'s bold, innovative community.



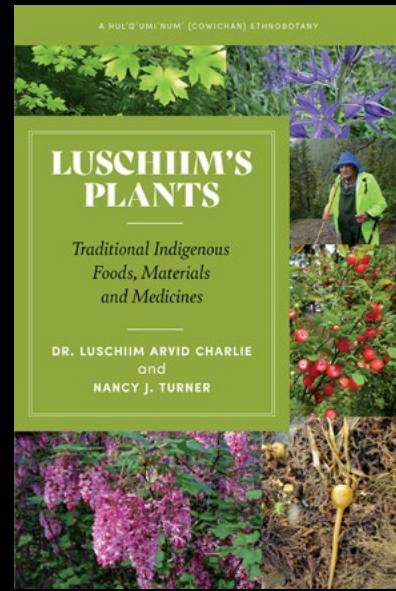
Canadian Screen Awards

B.C. films and filmmakers nominated for 2021 and 2022 Canadian Screen Awards include films THE NEW CORPORATION: THE UNFORTUNATELY NECESSARY SEQUEL, MONKEY BEACH, THE FRENCH EXIT, CBC's "Kim's Convenience," JESSE JAMS, KIMMAPIIYIPITSSINI: THE MEANING OF EMPATHY, NIGHT RAIDERS, and more.

BC and Yukon Book Prizes

Luschiim Arvid Charlie, who is based in the Cowichan Valley, and Nanaimo's Nancy J. Turner were awarded the Roderick Haig-Brown Regional Prize for Luschiim's Plants: Traditional Indigenous Foods, Materials and Medicines, a collection of botanical information that categorizes over 140 plants and their traditional uses by Coast Salish peoples, published by Harbour Publishing.

Harbour Publishing



Professional Development Workshops for Magazine Publishers

The Magazine Association of British Columbia hosted a variety of professional development workshops for B.C. magazine publishers covering topics including anti-oppressive writing, revenue diversification, and social media strategies.



Best B.C. Film

The TELUS STORYHIVE film HANDLE WITH CARE: THE LEGEND OF THE NOTIC STREETBALL CREW, directed by Jeremy Schaulin-Rioux and Kirk Thomas, wins Best British Columbia film and the Audience Award at Vancouver International Film Festival.

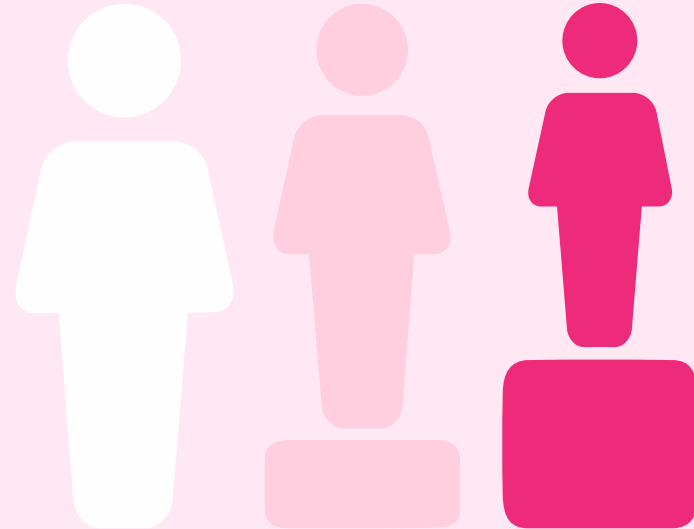


"Damage Control" by Nimkish

Nimkish's album "Damage Control" charted #1 on the Indigenous Music Countdown, received national radio play, and was on national television, with appearances on Etalk and Cityline. Nimkish was also a guest curator for Amazon Music playlist Indigenous Voices, featured on a billboard at Dundas Square in Toronto.

Justice, Equity, Decolonization, Diversity + Inclusion at Creative BC

A practice of both **commitment + accountability** at Creative BC



FY2021/22 Creative BC Impacts

16 + 12
Targeted industry initiatives supported via Domestic Industry Initiatives and Music Industry Initiatives programs.

6
Targeted granting programs

2
Creative BC-serviced projects launched Creative Pathways™ + Creative Equity Roadmap

9
Creative Pathways™ funders: Ministry of Post-Secondary Education and Future Skills plus eight industry funders.

16
Creative Pathways™ supporters + partners

3
Coaching workshops for all staff + board

1
Internal Occupational Health and Safety Committee formed.



Creative Pathways™ launched, providing British Columbians with resources, opportunities, and equity streams to get into #BCFilm. Creativepathwayscanada.com is the first of its kind in Canada, outlining a path forward to join the motion picture industry with practical tools to evolve and support new entrants, providing a safe and welcoming environment. Creative Pathways™ was built with jobseekers in mind. See Creative Pathways™ for partners, associates, and advisory committee members and supporters: creativepathwayscanada.com/about/creative-pathways.



The Creative Equity Roadmap is a partnership between Creative BC and Elevate Inclusion Strategies. This resource was developed as an industry-focused support to increase cultural competence and inclusive practices within the motion picture industry's businesses and systems. It complements the Creative Pathways™ project, which is focused on serving British Columbians seeking access to careers in the motion picture industry. The Creative Equity Roadmap is intended to serve equity, diversity, and inclusion work across the motion picture industry in British Columbia.

Must Reads: Creative Sector Reports Advancing JEDDI

Indigenous Screen Office

Building Trust and Accountability: Report on Eligibility in the Indigenous Screen Sector

This report analyzes and explores considerations for eligibility, including definitions, and criteria needed to identify Indigenous applicants for the purposes of Indigenous-specific funding and support, and to develop policy recommendations and a framework for Indigenous-specific funding.

Writers' Union of Canada

Diversity in Canadian Writing

The Writers' Union of Canada (TWUC) has released Diversity in Canadian Writing: A 2020–2021 Snapshot, a report with key findings from a community survey of nearly 600 literary authors in English Canada. Intended as a snapshot of the industry and the continuation of an important discussion, the report analyzes both demographic patterns and written responses on the state of diversity and equity in Canadian publishing from 2020 to 2021. TWUC thanks all publishers, industry organizations, and authors who contributed to the survey.

Black Screen Office

Being Seen

The Black Screen Office's vision is to provide directives to everyone in the film, television, and interactive digital media industries to help them commission, create, and assess authentic content. The Directives, which come from the community of underrepresented members of the industry and general public who were consulted as part of the research, are a tool meant for the industry to use to educate themselves, develop strategies for change, and enact real, systemic, and long-lasting transformation.

Canadian Live Music Association

Closing the Gap

This report examines the challenges confronted by BIPOC workers, while also exploring the opportunities and industry strengths that can be harnessed to promote their full participation, helping to close the gap in representation and inequitable experiences in the live music community. The study consists of 40 in-depth interviews with BIPOC live music workers across Canada, spanning various roles, genres, levels of experience, and identities, and includes country-wide demographic survey data on the economic, as well as mental and physical health effects, of working in the live music sector.

Vancouver Asian Film Festival

Diversity on Screen Audit Report of Canadian Broadcasters 2022

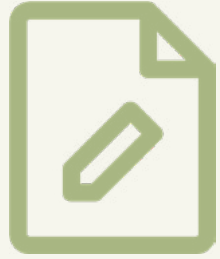
This report is a cross-sectional study that examines the top four major national broadcasters in Canada—CBC, Citytv, CTV, and Global Television Network—and one provincial broadcaster, Knowledge Network. The research is driven by two central questions: Who are Canadians watching on their television screens?, and How does this reflection impact diversity, equity, and inclusivity in Canada?

Association of Canadian Publishers in partnership with Canadian Publishers' Council 2022 Canadian Book Publishing Industry Diversity Baseline Survey

The Association of Canadian Publishers, in partnership with the Canadian Publishers' Council, has released the results of its 2022 Canadian Book Publishing Industry Diversity Baseline Survey to increase the representation of Indigenous and racialized people in the Canadian publishing industry. The survey is an update to the 2018 version, with additional questions about compensation packages and work arrangements. The survey aims to understand the demographic makeup of the industry and identify challenges and opportunities to increase diversity.

Industry Experts

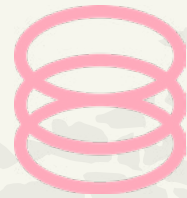
B.C.'s Creative Ecosystem



39+
Post Production Studios

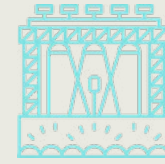
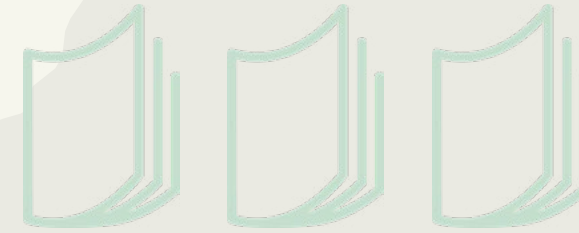
11

Virtual Production Services



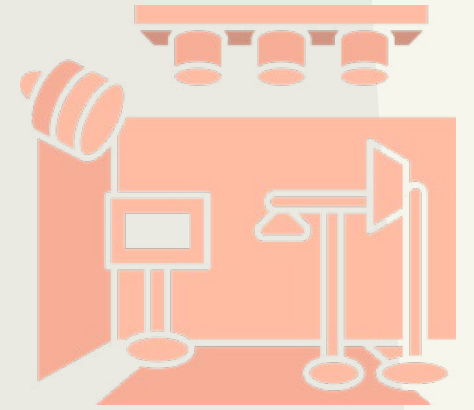
50+
Visual Effects Studios

Nearly
300
Magazines



50+
Animation Studios

2.8M ft²
Stage Space



130+
Music Venues + Rehearsal Spaces



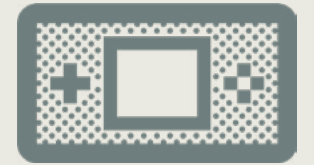
116+
Record Labels



150+
Music Festivals

8

Regional Film Commissions



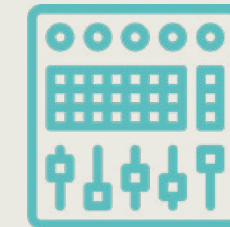
130+
Video Game Studios

27

Stages + Studio Facilities

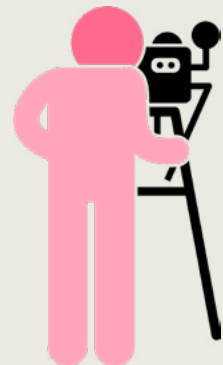


100+
Recording Studios



7

Creative Industry Associations



150+
Domestic Producers



100+
Bookstores



32
Virtual Reality/Augmented Reality Studios



48
Independent Book Publishers

Discover B.C.'s creative sector industry contacts on Creative BC's Knowledge Hub
knowledgehub.creativebc.com

Book Publishing

#BCCreates books | ♥

CIERA™ 2021 Results

262
TOTAL JOBS
Direct, Indirect, Induced Traditional Jobs

148
DIRECT JOBS
Traditional Jobs

1,236
EST. PEOPLE
Including freelance workers (Source: Creative BC estimates based on best available information at time of this report)

0.5%
*Of B.C. creative sector's Total GDP

FY2021/22 Industry Insights

285
Associated B.C. businesses
(Source: bookmanager.com)

26
Publishing Members (Source: Books BC)

48
Publishers in B.C.

FY2021/22 Creative BC Supports

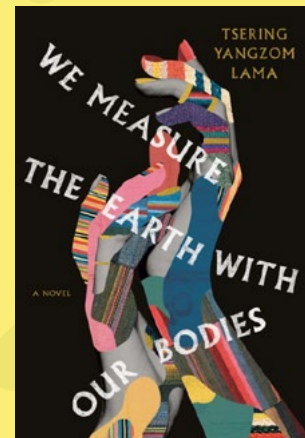
3 + 1
General + dedicated funding programs

\$147,743
Through dedicated program

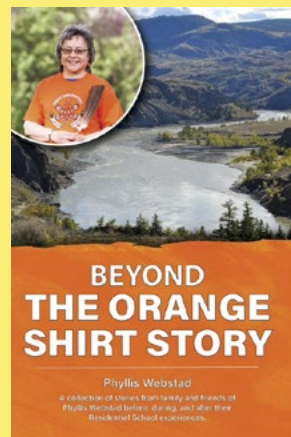
17
Recipients



Have You Eaten Yet?
by Cheuk Kwan
Douglas & McIntyre



We Measure the Earth with Our Bodies
by Tsering Yangzom Lama
Penguin Random House



Beyond the Orange Shirt Story
by Phyllis Webstad
Medicine Wheel Publishing



Vancouver Vice
by Aaron Chapman
Image by CROWE Archives c/o Gordon Price
Arsenal Pulp Press



Thank you for your ongoing collaboration

* Note that book publishing industry activities generate a portion of the additional 13,208 Total Jobs and \$1.04B Total GDP attributed to the Multi-Creative Industry Services segment of the creative industries overall.

Industry Impacts

Source: CIERA™
Provincial-level insights are based on 2020 Statistics Canada actuals plus one year of statisticians' estimates for 2021.
Regional-level insights are based on 2020 Statistics Canada actuals.

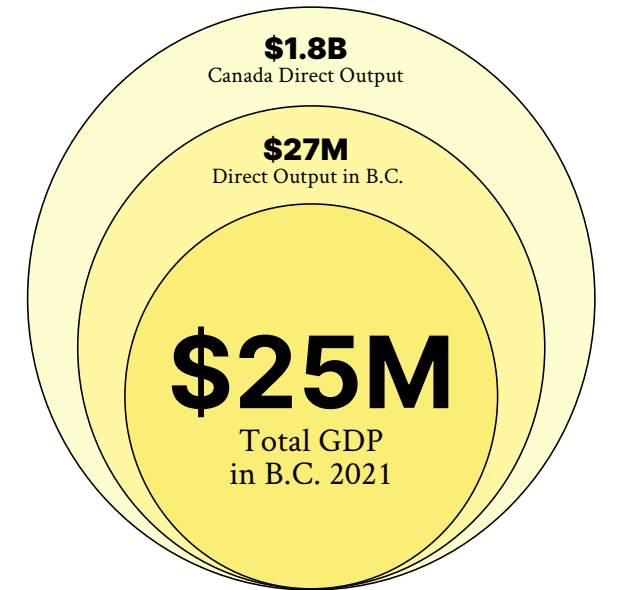
B.C. Growth

7.4%
Provincial GDP CAGR 2012–2021
vs. down 1.2% in Canada overall

Regional Insights

35%
of book publishing industry
Direct GDP is contributed regionally

- \$5.4M Direct GDP
- Assumed \$10.6M Total GDP



National and Provincial Insights

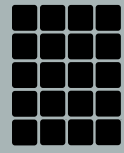
Regional GDP in 2020 (Millions)	Direct GDP	% of B.C. GDP	Assumed Total GDP	Assumed % of B.C.'s Total GDP	Direct Output	% of B.C. Direct Output
1. Cariboo	\$0.23	1.5%	\$0.44	1.5%	\$0.46	1.5%
2. Kootenays	\$0.11	0.7%	\$0.22	0.7%	\$0.23	0.7%
3. Nechako	-	0.0%	-	0.0%	-	0.0%
4. North Coast	-	0.0%	-	0.0%	-	0.0%
5. Northeast	-	0.0%	-	0.0%	-	0.0%
6 Thompson Okanagan	\$1.55	10.2%	\$3.05	10.2%	\$3.19	10.2%
7. Unallocated	-	0.0%	-	0.0%	-	0.0%
8. Vancouver Island	\$3.50	23.0%	\$6.89	23.0%	\$7.20	23.0%
2020 Regional Sub-Total	\$5.39	35.3%	\$10.60	35.3%	\$11.08	35.3%
9. Mainland-Southwest	\$9.86	64.7%	\$19.40	64.7%	\$20.26	64.7%
2020 Provincial Total	\$15.24		\$30.00		\$31.34	

Book Publishing Value Chain



#ReadBC | #ReadLocalBC

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



Interactive + Digital Media

#BCCreates creative tech I ♥



This Is Not A Ceremony
National Film Board of Canada



Transgender Expressions Haven

DigiBC

The Interactive & Digital Media Industry
Association of British Columbia



Thank you for your ongoing collaboration

CIERA™ 2021 Results

13,512

TOTAL JOBS
Direct, Indirect, Induced
Traditional Jobs

8,638

DIRECT JOBS
Traditional Jobs

27%

Of B.C. creative sector's Total GDP when
measuring video games alone

FY2021/22

Industry Insights

230

Immersive tech companies
(Source: Vancouver Economic Commission)

160

Video game companies (Source: Entertainment
Software Association of Canada)

FY2021/22

Creative BC Supports

3

General funding programs

Industry Impacts

Source: CIERA™

Provincial-level insights are based on 2020 Statistics Canada
actuals plus one year of statisticians' estimates for 2021.
Regional-level insights are based on 2020 Statistics Canada actuals.

B.C. Growth

9.1%

Provincial GDP CAGR 2012–2021

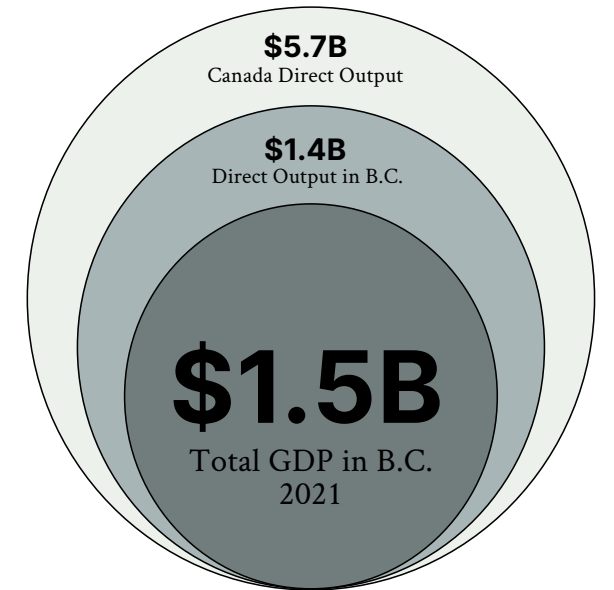
vs. up 5.7% in Canada overall

Regional Insights

6.5%

of interactive + digital media industry
Direct GDP is contributed regionally

- \$53.3M Direct GDP
- Assumed \$90M Total GDP



National and Provincial Insights

Regional GDP in 2020 (Millions)	Direct GDP	% of B.C. GDP	Assumed Total GDP	Assumed % of B.C.'s Total GDP	Direct Output	% of B.C. Direct Output
1. Cariboo	-	0.0%	-	0.0%	-	0.0%
2. Kootenays	\$0.27	0.0%	\$0.46	0.0%	\$0.45	0.0%
3. Nechako	-	0.0%	-	0.0%	-	0.0%
4. North Coast	-	0.0%	-	0.0%	-	0.0%
5. Northeast	-	0.0%	-	0.0%	-	0.0%
6 Thompson Okanagan	\$25.03	3.0%	\$42.29	3.0%	\$41.32	3.0%
7. Unallocated	\$1.58	0.2%	\$2.66	0.2%	\$2.60	0.2%
8. Vancouver Island	\$26.39	3.2%	\$44.58	3.2%	\$43.56	3.2%
2020 Regional Sub-Total	\$53.27	6.5%	\$89.99	6.5%	\$87.93	6.5%
9. Mainland-Southwest	\$771.39	93.5%	\$1,303.01	93.5%	\$1,273.21	93.5%
2020 Provincial Total	\$824.66		\$1,393.00		\$1,361.14	

Interactive + Digital Media Value Chain



Development: Proof of
Concept + Narrative Design

.....



Production: Build, Test, Iterate

.....



Sales, Distribution, Delivery
+ Analytics: Market
+ Consumer Experience

#PlayBC | #ImmerseBC | #CreativeTech

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



The Malahat Review Issue 216



BAZOOF! Magazine



Thank you for your ongoing collaboration

CIERA™ 2021 Results

1,499

TOTAL JOBS
Direct, Indirect, Induced
Traditional Jobs

848

DIRECT JOBS
Traditional Jobs

3%

Of B.C. creative sector's Total GDP

FY2021/22

Industry Insights

51

Members of Magazine Association of BC

280

B.C.-based magazines

FY2021/22

Creative BC Supports

3

General funding programs

Industry Impacts

Source: CIERA™

Provincial-level insights are based on 2020 Statistics Canada actuals plus one year of statisticians' estimates for 2021. Regional-level insights are based on 2020 Statistics Canada actuals.

B.C. Growth

↘ **3.3%**

Provincial GDP CAGR 2012–2021
vs. down 3.8% in Canada overall

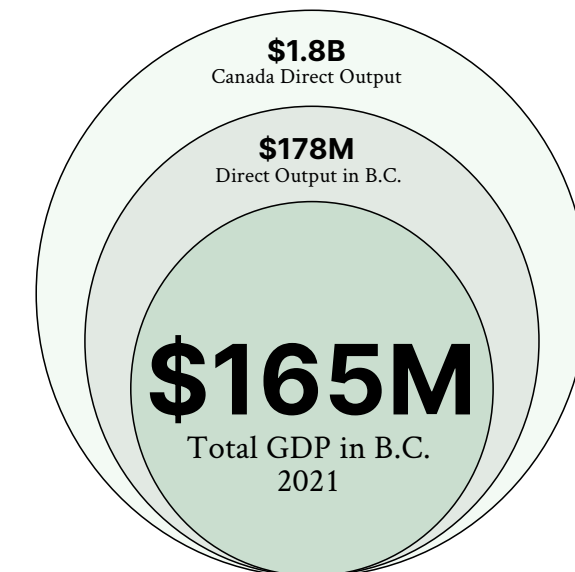
Regional Insights

28%

of magazine publishing industry
Direct GDP is contributed regionally

- \$23.9M Direct GDP
- Assumed \$46.32M Total GDP

Regional GDP in 2020 (Millions)	Direct GDP	% of B.C. GDP	Assumed Total GDP	Assumed % of B.C.'s Total GDP	Direct Output	% of B.C. Direct Output
1. Cariboo	\$2.45	2.9%	\$4.75	2.9%	\$5.06	2.9%
2. Kootenays	\$3.71	4.3%	\$7.19	4.3%	\$7.65	4.3%
3. Nechako	\$-	0.0%	\$-	0.0%	\$-	0.0%
4. North Coast	\$-	0.0%	\$-	0.0%	\$-	0.0%
5. Northeast	\$-	0.0%	\$-	0.0%	\$-	0.0%
6. Thompson Okanagan	\$3.40	4.0%	\$6.58	4.0%	\$7.00	4.0%
7. Unallocated	\$-	0.0%	\$-	0.0%	\$-	0.0%
8. Vancouver Island	\$14.35	16.7%	\$27.79	16.7%	\$29.55	16.7%
2020 Regional Sub-Total	\$23.91	27.9%	\$46.32	27.9%	\$49.25	27.9%
9. Mainland-Southwest	\$61.79	72.1%	\$119.68	72.1%	\$127.27	72.1%
2020 Provincial Total	\$85.70		\$166.00		\$176.53	



National and Provincial Insights

Magazine Publishing Value Chain



Creation: Write, Edit + Illustrate



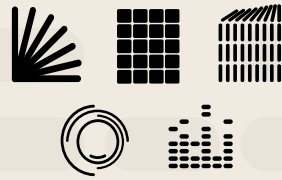
Production: Design + Manufacture



Sales + Distribution: Market

#SubscribeBC | #BCReadsMagazines

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



Multi-Creative Industry Services

#BCCreates



Sammy Rich
Photo by Michael Benz



Netflix/CBC Gem "FAKES"
Photo by David Astorga

CIERA™ 2021 Results

13,208
TOTAL JOBS

Traditional Jobs

8,695
DIRECT JOBS

Traditional Jobs

19.3%

Of B.C. creative sector Total GDP

FY2021/22

Insights + Supports

3

Programs supporting activities fueling context and ecosystem:

- Domestic Industry Initiatives
- International Industry Initiatives
- Passport to Markets

\$1,234,980

Delivered

89

Recipients

Industry Impacts

Source: CIERA™

Provincial-level insights are based on 2020 Statistics Canada actuals plus one year of statisticians' estimates for 2021. Regional-level insights are based on 2020 Statistics Canada actuals.

B.C. Growth

2.5%

Provincial GDP CAGR 2012–2021
vs. down 1.4% in Canada overall

Regional Insights

13%

of multi-creative industry Direct GDP is contributed regionally

- \$63.6M Direct GDP
- Assumed \$124.49M Total GDP

Regional GDP in 2020 (Millions)	Direct GDP	% of B.C. GDP	Assumed Total GDP	Assumed % of B.C.'s Total GDP	Direct Output	% of B.C. Direct Output
1. Cariboo	\$2.62	0.5%	\$5.13	0.5%	\$5.57	0.5%
2. Kootenays	\$3.35	0.7%	\$6.55	0.7%	\$7.12	0.7%
3. Nechako	\$0.39	0.1%	\$0.76	0.1%	\$0.82	0.1%
4. North Coast	\$1.26	0.3%	\$2.46	0.3%	\$2.67	0.3%
5. Northeast	\$1.25	0.3%	\$2.44	0.3%	\$2.65	0.3%
6 Thompson Okanagan	\$24.93	5.2%	\$48.78	5.2%	\$52.98	5.2%
7. Unallocated	\$1.81	0.4%	\$3.54	0.4%	\$3.85	0.4%
8. Vancouver Island	\$28.04	5.8%	\$54.85	5.8%	\$59.57	5.8%
2020 Regional Sub-Total	\$63.64	13.2%	\$124.49	13.2%	\$135.22	13.2%
9. Mainland-Southwest	\$417.37	86.8%	\$816.51	86.8%	\$886.83	86.8%
2020 Provincial Total	\$481.00		\$941.00		\$1,022.05	

Multi-Creative Industry Services Value Chain



Service the Creative Process

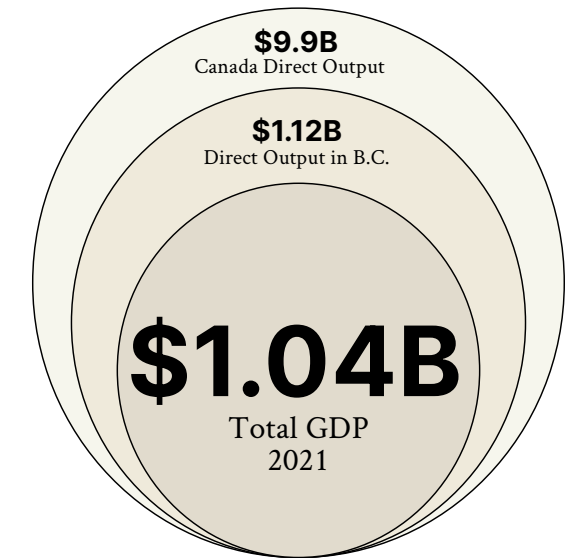


Service the Production Process



Service to Sales + Distribution of Creative Content

Multi-Creative Industry Services is the segment of the creative sector that serves multiple industries. For in-depth information on this industry including links to referenced research visit: creativebc.com/multi-creative-industry-services



National and Provincial Insights

\$1.04B
Total GDP
2021

\$1.12B
Direct Output in B.C.

\$9.9B
Canada Direct Output

Music + Sound Recording

#BCCreates music I ♥



Meet You At The Light
Desirée Dawson



5X Fest Block Party



Thank you for your ongoing collaboration

CIERA™ 2021 Results

5,534

TOTAL JOBS
Direct, Indirect, Induced
Traditional Jobs

4,195

DIRECT JOBS
Traditional Jobs

11,122

EST. PEOPLE
Including freelance workers

5.3%

Of B.C. creative sector Total GDP

FY2021/22

Industry Insights

100+

Recording studios

116

Record labels



Music festivals 200+ prior to COVID-19

FY2021/22

Creative BC Supports

2 + 7

General + dedicated funding programs

\$10,493,552

Through dedicated programs

513

Recipients

Industry Impacts

Source: CIERA™

Provincial-level insights are based on 2020 Statistics Canada actuals plus one year of statisticians' estimates for 2021. Regional-level insights are based on 2020 Statistics Canada actuals.

B.C. Growth

5.9%

Provincial GDP CAGR 2012–2021
vs. up 2% in Canada overall

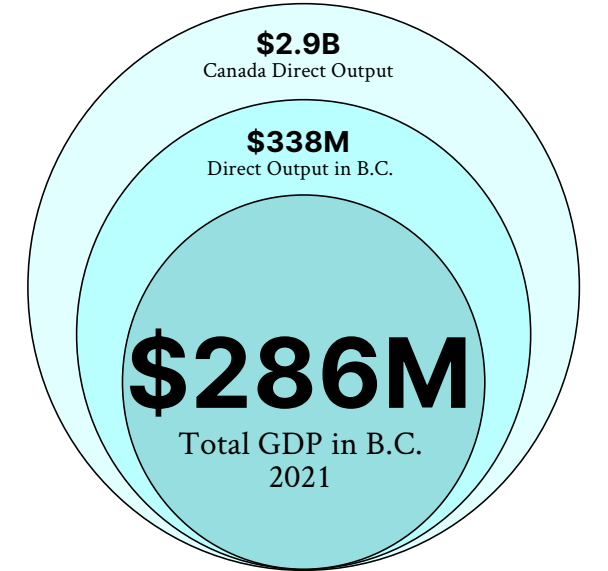
Regional Insights

42%

of music + sound recording industry
Direct GDP is contributed regionally

- \$59M Direct GDP
- Assumed \$107M Total GDP

Regional GDP in 2020 (Millions)	Direct GDP	% of B.C. GDP	Assumed Total GDP	Assumed % of B.C.'s Total GDP	Direct Output	% of B.C. Direct Output
1. Cariboo	\$2.56	1.8%	\$4.65	1.8%	\$5.57	1.8%
2. Kootenays	\$2.22	1.6%	\$4.04	1.6%	\$4.84	1.6%
3. Nechako	\$0.12	0.1%	\$0.22	0.1%	\$0.26	0.1%
4. North Coast	\$0.93	0.7%	\$1.70	0.7%	\$2.03	0.7%
5. Northeast	\$2.18	1.6%	\$3.96	1.6%	\$4.74	1.6%
6 Thompson Okanagan	\$11.04	8.0%	\$20.08	8.0%	\$24.04	8.0%
7. Unallocated	\$0.12	0.1%	\$0.22	0.1%	\$0.26	0.1%
8. Vancouver Island	\$39.65	28.6%	\$72.11	28.6%	\$86.34	28.6%
2020 Regional Sub-Total	\$58.81	42.4%	\$106.96	42.4%	\$128.07	42.4%
9. Mainland-Southwest	\$79.75	57.6%	\$145.04	57.6%	\$173.66	57.6%
2020 Provincial Total	\$138.56		\$252.00		\$301.74	

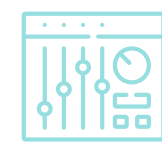


National and Provincial Insights

Music + Sound Recording Value Chain



Creation: Compose + Performance



Production: Record, Mix + Master



Distribution: Market, Promote + Sell

#ListenBC | #BCMUSIC

For in-depth information on this industry including links to referenced research visit:
creativebc.com/music-and-sound-recording



CBC Gem "BONES OF CROWS", dir. Marie Clements



Netflix THE ADAM PROJECT
Photo by Doane Gregory/Netflix

CIERA™ 2021 Results

40,517
TOTAL JOBS
Traditional Jobs

25,329
DIRECT JOBS
Traditional Jobs

88,000
EST. PEOPLE
Including freelance workers

44.5%
Of B.C. creative sector Total GDP

FY2021/22 Industry Insights

150+
Producers

150+
Expert industry supply companies

130+
Animation, VFX + post-production companies

FY2021/22 Creative BC Supports

3 + 9
General + dedicated funding programs

\$2,888,500
Funding committed incl. \$280K to regional film commissions + \$10K to Reel Green™

218
Recipients

8 + 35
Regional Film Commissions + Municipal Film Offices

119 + 2.8M ft²
Stages + Studios

CALENDAR YEAR 2022

494

Estimated Productions in B.C. vs. 500 in 2021
499 for FY2021/22

Source: Creative BC tax credit administration information.



Thank you for your ongoing collaboration

Industry Impacts

Source: CIERA™
Provincial-level insights are based on 2020 Statistics Canada actuals plus one year of statisticians' estimates for 2021.
Regional-level insights are based on 2020 Statistics Canada actuals.

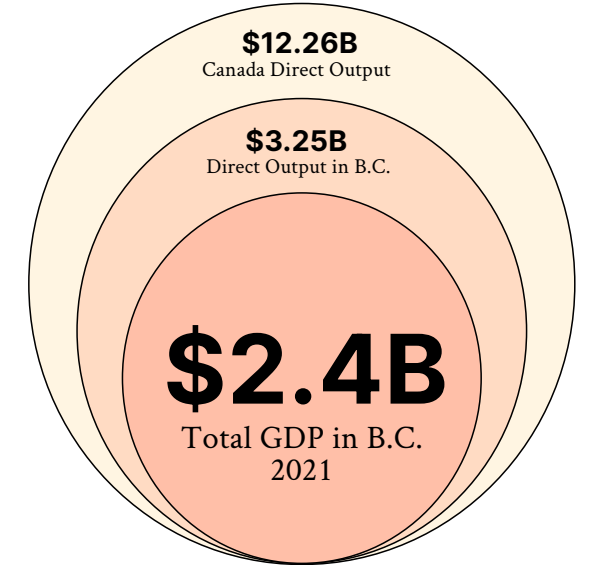
B.C. Growth

3.8%
Provincial GDP CAGR 2012-2021
vs. up 2.8% in Canada overall

Regional Insights

14%
of motion picture industry Direct GDP is contributed regionally

- \$126.7M Direct GDP
- Assumed \$303.16M Total GDP

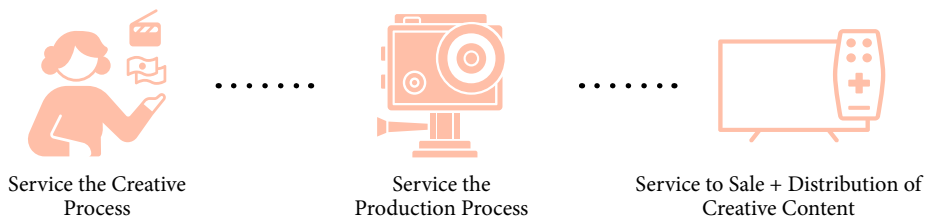


National and Provincial Insights

Regional GDP in 2020 (Millions)	Direct GDP	% of B.C. GDP	Assumed Total GDP	Assumed % of B.C.'s Total GDP	Direct Output	% of B.C. Direct Output
1. Cariboo	\$12.63	1.4%	\$30.21	1.4%	\$41.82	1.4%
2. Kootenays	\$5.70	0.6%	\$13.63	0.6%	\$18.87	0.6%
3. Nechako	\$1.78	0.2%	\$4.25	0.2%	\$5.88	0.2%
4. North Coast	\$11.65	1.3%	\$27.88	1.3%	\$38.59	1.3%
5. Northeast	\$4.87	0.5%	\$11.65	0.5%	\$16.12	0.5%
6 Thompson Okanagan	\$46.59	5.0%	\$111.47	5.0%	\$154.28	5.0%
7. Unallocated	\$1.66	0.2%	\$3.97	0.2%	\$5.50	0.2%
8. Vancouver Island	\$41.83	4.5%	\$100.09	4.5%	\$138.54	4.5%
2020 Regional Sub-Total	\$126.70	13.7%	\$303.16	13.7%	\$419.60	13.7%
9. Mainland-Southwest	\$798.59	86.3%	\$1,910.84	86.3%	\$2,644.78	86.3%
2020 Provincial Total	\$925.29		\$2,214.00		\$3,064.39	

Note on Output (similar to spending) as it relates to the Regional Film Commissions for their respective jurisdictions. Calculations for Regional Film Commissions do not match those of the CIERA™ economic regions, which are based on census regions used by Statistics Canada. Creative BC has made best attempts at breaking out census regions and reallocating by Regional Film Commission jurisdiction. Refer to page 36 for insights broken down by jurisdiction.

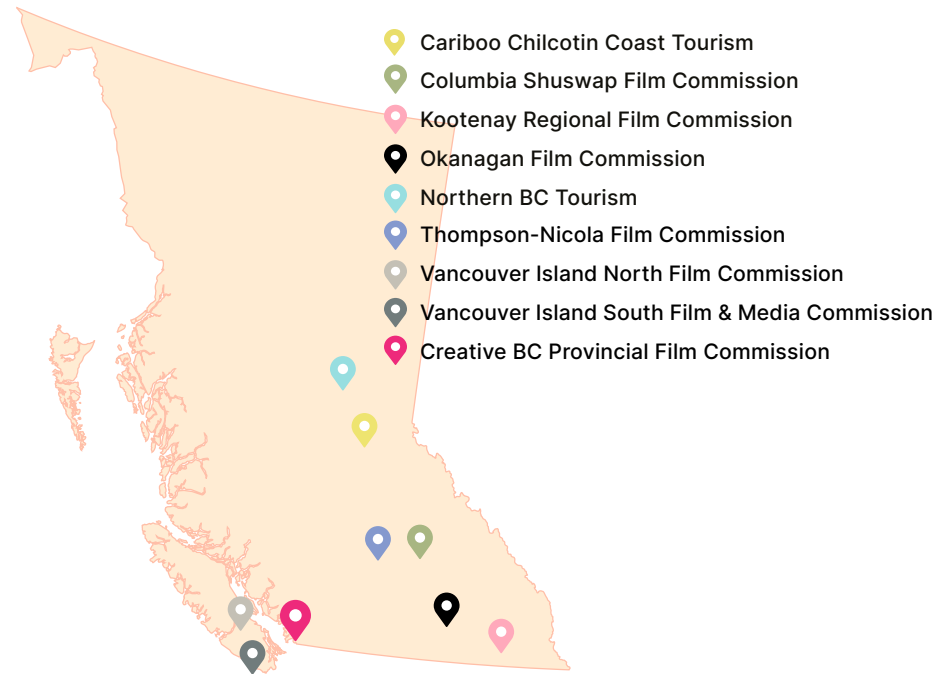
Motion Picture Value Chain



#WatchBC | #BCFilm

For in-depth information on this industry including links to referenced research visit:
creativebc.com/motion-picture

Provincial + Regional Film Commission Service



- Regional Direct Output is 14% of Provincial Direct Output
- \$419.6M Direct Output
- Motion picture contributes 51% of the creative sector's \$831.1M regional Direct Output

Regional Film Commission (Millions)	Direct GDP	% of B.C. GDP	Assumed Total GDP	Assumed % of B.C.'s Total GDP	Direct Output	% of B.C. Direct Output
Cariboo Chilcotin Coast Tourism	\$0.40	0.0%	\$0.96	0.0%	\$1.33	0.0%
Northern BC Tourism*	\$30.52	3.3%	\$73.03	3.3%	\$101.08	3.3%
Kootenay Regional Film Commission	\$5.35	0.6%	\$12.81	0.6%	\$17.73	0.6%
Okanagan Film Commission	\$38.42	4.2%	\$91.94	4.2%	\$127.26	4.2%
Columbia Shuswap Film Commission	\$3.06	0.3%	\$7.33	0.3%	\$10.15	0.3%
Thompson-Nicola Film Commission	\$5.44	0.6%	\$13.02	0.6%	\$18.02	0.6%
Vancouver Island North Film Commission	\$10.05	1.1%	\$24.05	1.1%	\$33.28	1.1%
Vancouver Island South Film & Media Commission	\$31.78	3.4%	\$76.05	3.4%	\$105.26	3.4%
2020 Regional Subtotal	\$125.02	13.5%	\$299.19	13.5%	\$414.11	13.5%
Creative BC [Lower Mainland Southwest]	\$800.25	86.5%	\$1,914.81	86.5%	\$2,650.28	86.5%
2020 Total	\$925.29	100%	\$2,214.00	100%	\$3,064.39	100%

*CIERA's methodology includes creation > production > distribution. Northern BC Tourism covers a large geographic territory and includes many cinemas where motion picture content is distributed to audiences, contributing to higher figures.

FY2021/22 Film Commission Service

318
Active users in the digital locations library

8,418 + 12,649
Digital location library files in the Lower Mainland + Distant Regional respectively

142
Location packages + scripts

381
Incoming production consultations

15
Task forces

582
Items, inquiries + concerns resolved

46
Ongoing major policy files

12 + 6
Regional film commission, and municipal film advisory meetings chaired



Spearheaded by Creative BC, and funded by 20 industry partners, the initiative empowers the local motion picture industry to implement sustainable production practices and measure carbon impact.

#ReelGreen™

FY2020/21 - FY2023/24

Three Pillars of the Reel Green™ Strategic Plan



Industry Transformation

- Normalize green
- Shift systems, behaviours, operations
- Promote sustainable growth
- Collect data to measure trends and indicate progress



Zero GHG Emissions

- Expand use of clean tech
- Increase clean tech infrastructure
- Reduce fuel consumption
- Engage supply chain



Circular Economy

- Prioritize reuse over consumption
- Seek new partnerships and solutions

FY2021/22 Initiative Impacts

\$120K
Annual industry funding raised

20
Industry investors

30
National partners

1,300+
Crew trained to date, 226 in FY2021/22

124
Productions calculating carbon footprint

20
Panel presentations

57
Working committee members on 11 committees

1
New website: reelgreen.ca

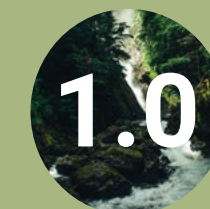
\$164K
Funds raised for REEL Earth Day Challenge in support of 7 Metro Vancouver Regional Parks

Become a Reel Green™ Vendor!

These vendors are rated based on green performance and reliability. To apply to be a Reel Green™ Vendor, fill out and submit the application form on our website.

Reel Green™ Transformation

- Focus on collaboration, delivery, and services toward measurable uptake
- Use of tools for reporting and increased participation
- Integrate with industry, governance, and services through tools, events, committees, and partnerships



GRASSROOTS 2006-2015



STRATEGIC PLAN 2016-2021



SERVICE FOCUS 2021-Present

Motion Picture Tax Credits FY2021/22

Certifications and British Columbia Activity Level Insights from Tax Credit Administration Data

Creative BC administers the Province of British Columbia's motion picture tax credit programs that support creators and attract film and television productions from around the world to do business in B.C. The statistics here are reported by fiscal year (ending March 31) for both the domestic production program (Film Incentive BC/FIBC) and the foreign production program (Production Services Tax Credit/PSTC). Creative BC reports on both the administrative processing activities of the Creative BC Tax Credits Team (Actuals Certified) and gains B.C. production volume insight through analysis of all applications with a Principal Photography or Key Animation (PP/KA) start date that falls within the fiscal year.

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

While tax credit certifications deliver information on production spending to Creative BC, 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 phases 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 measure the creative industries in B.C., CIERA™ replaces tax credit administration data as the public figure reported for the motion picture industry (and for all Creative BC-serviced industries).

View CIERA™ 2021 provincial indicators on page 33 of this report. For most current indicators visit creativebc.com/ciera.

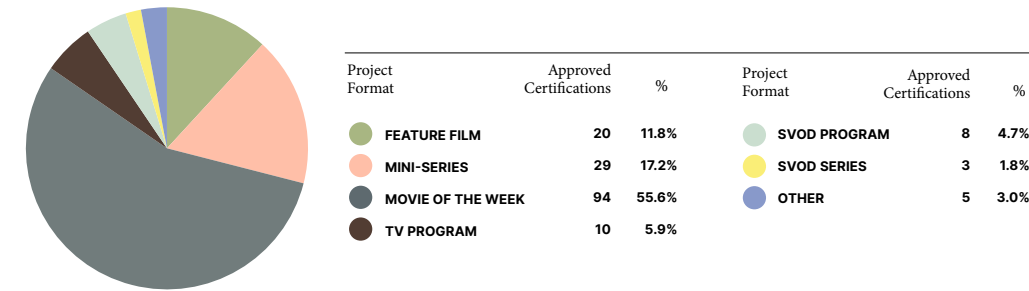


*PP/KA-Principle Photography/Key Animation

Film Incentive BC Tax Credit Program

FIBC

Canadian-owned and-controlled companies producing Canadian content may apply for the Film Incentive BC (FIBC) tax credit, which refunds 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, digital animation, visual effects, and post production.



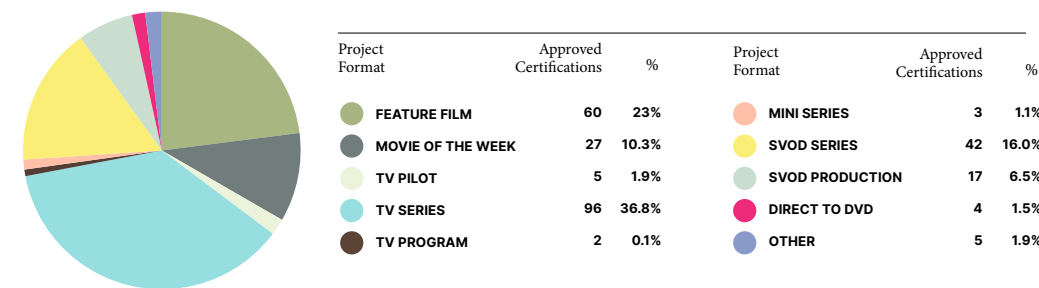
Estimated **161** productions and **\$557M** actual domestic motion picture industry economic activity in FY2021/22 based on principal photography dates and Creative BC tax credit data.



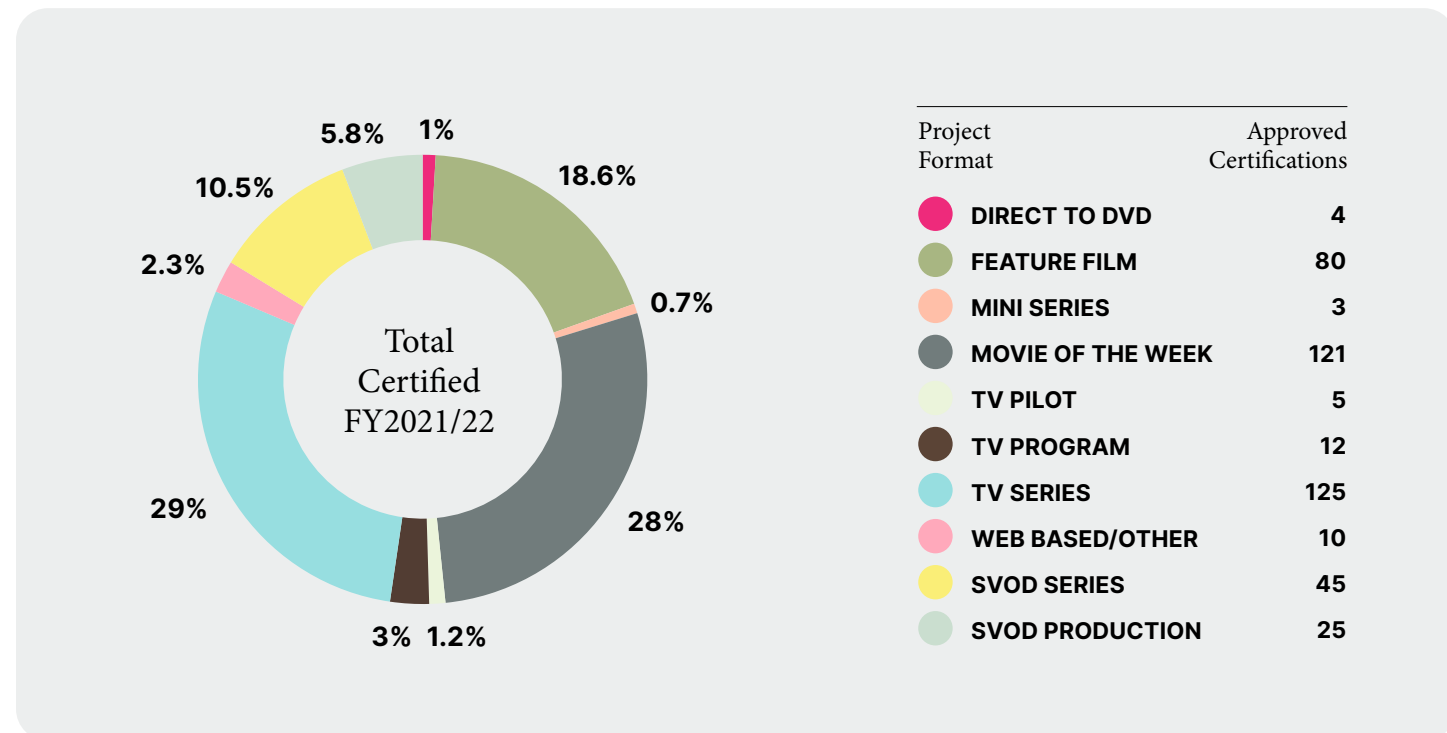
Production Services Tax Credit Program

PSTC

Attracting inward investment, the Production Services Tax Credit (PSTC) is an economic initiative designed to encourage film, television, digital animation and visual effects production in B.C. Eligible applicants are film, television and animation production corporations that have incurred qualifying labour expenses in B.C.



Estimated **338** productions and **\$2.97B** actual foreign motion picture industry economic activity in FY2021/22 based on principal photography dates and Creative BC tax credit data.



Strategy

Completing Six-Year Service Innovation Plan

Reflecting on Completion of the Previous Plan: FY2016/17 – FY2021/22

With this FY2021/22 Impact Report, Creative BC successfully closes its previous “transformational” strategic plan. From April 2016 through March 2022, the organization repositioned itself through accountability to a bold Service Innovation Plan. Strategically created by applying innovation and design-thinking principles, the process consulted more than 80 stakeholders representing industry and government, engaged staff and the board, and worked with industry and academic experts to imagine a service framework to reinvent the organization. The strategic planning process was facilitated by Dr. Angèle Beausoleil, Rotman School of Management, and Berkeley Haas. Read the 2022 white paper published about the innovative process and results achieved by the organization: Creative BC Service Innovation Plan.

+4.7% GDP CAGR in B.C. | +1% in Canada

Compound Annual Growth Rate (CAGR) of Direct GDP between 2016 and 2021 (Source: CIERA™)

+4.6% GDP CAGR in B.C. | -0.8% in Canada

Compound Annual Growth Rate (CAGR) of Direct Jobs between 2016 and 2021 (Source: CIERA™)

+25.6% GDP Change in B.C. | +5% in Canada

Industries' unique increase/decrease in annual Direct GDP for 2021 vs. 2016 (Source: CIERA™)

-14% Books
+10% in Canada

+67% Interactive + Digital Media
+39% in Canada

0% Magazines
-1% in Canada

+10% Multi-Creative Services
-14% in Canada

+5% Music
-8% in Canada

+16% Motion Picture
+14% in Canada

5x Engagement

Between 2015 and 2021, Creative BC newsletter subscriptions grew by 31%, social media engagement up 225%, traditional media hits up 135%, and online Impact Report views up 2,000 from eight views per year.

6x Funding

From FY2015/16 with \$2.6M via six programs and investment from two funders to FY2021/22 with \$14.6M via 22 programs with five funders plus two key motion picture initiatives with 25 industry investors.

Strategy

Updated Strategic Platform and Pillars for an Evolving Creative Sector

Building on Strong Foundations, an Evolutionary Plan for FY2022/23 to FY2026/27

Creative BC's board of directors led a strategic planning process in 2022, drawing on their own industry and functional expertise; creative sector stakeholder surveys and interviews; Ministry of Tourism, Arts, Culture and Sport inputs; and Creative BC insights. Areas of inquiry included economic themes and commitment to reconciliation, environmental measures, and the Justice, Equity, Decolonization, Diversity, and Inclusion (JEDDI) work that Creative BC and many stakeholders are prioritizing.

Creative BC's economic development mandate, and its previously narrow focus on rate of growth, must expand to consider the direction of that growth. The organization will focus on sustainability by emphasizing solutions that address social inequity and the climate crisis. Creative BC's hallmark collaborative approach and new strategic plan both focus on sustainable and inclusive outcomes.

11

Board Members

219

Stakeholder Inputs

6

Working Sessions

How will...

companies **balance** business with environmental considerations?

creators **retain** value for their intellectual property in a digitized world?

B.C. **sustain** its leading position as other jurisdictions compete to win creative sector business?

creative industries **become** more inclusive and culturally competent?

creativebc.com/about

Strategic Platform

Vision

British Columbia's creators, companies, and stories are sought out and celebrated—at home and around the world.

Mission

Creative BC elevates a diverse and dynamic creative sector through leadership, collaboration, and investment.

Values

Integrity:

We commit, uphold, and deliver.

Inclusion:

We listen, respond, and expand.

Innovation:

We challenge, imagine, and forge.

Wisdom:

We seek, trust, and share.

Our Strategic Priorities

Local Capacity

Foster an ecosystem in which creative ambition can thrive.

Global Strength

Attract business and investment to B.C. while sustaining and promoting exports.

Creative Storytelling

Introduce B.C.'s creative industries to new audiences and future advocates.

Talented People

Empower the creative sector to expand, diversify, and develop its workforce.

Service Innovation Plan Outcomes

Goals

Results

1 Undertake research, provide development assistance, and establish the expertise and organizational capacity necessary to serve the additional industries for which Creative BC is responsible.

Creative BC's programs fund industry-led research each year. The organization itself has increased capacity from 16 to 41 people and has embedded research as a core service to the sector. It delivered a major 2019 labour market study for the Ministry of Post-Secondary Education and Future Skills about the motion picture industry's below-the-line workforce. Creative BC designed CIERA™, the Creative Industries Economic Results Assessment tool, based on Statistics Canada datasets and validated by BC Stats. It now provides annual, comparable economic insights to the sector and its composite industries, acting as a bridge between industry-originated studies and public data.

2 Increase investment in B.C.'s creative industries and capitalize on emerging opportunities in digital technology.

Disbursed investments through program funding have increased five times from \$2.6M to \$14.6M. Program access by industry has increased for interactive and digital media, book and magazine publishing from one to four-plus annual programs each; from one to eight programs for music and sound recording, with additional funding envelopes to Music BC and the First Peoples Cultural Council annually; and from four to twelve programs for domestic motion picture. Creator and festival funding, travel support, and trade missions encourage digital innovation across the sector, from audio books and interactive content to virtual reality/augmented reality/metaverse initiatives.

3 Strengthen B.C.-based corporate capacity in the creative industries.

In 2022, British Columbia continues to be a global destination, especially for animation and visual effects, with major players such as Disney, Industrial Light and Magic, and Animal Logic establishing or increasing corporate presence here. Using employment as a proxy for corporate capacity, CIERA™ results reflect overall sector job growth with direct employment in 2016 at 38,194, in 2019 at 45,399, and in 2021 at 47,854 (or 74,532 Total Jobs when including direct, indirect, and induced). Within the sector, however, pre-existing downward trends in book and magazine publishing persist. Jobs in music were increasing pre-pandemic but have not recovered fully in B.C., although the province is outpacing Canada overall in this industry. Jobs in motion picture and interactive and digital media are a growth story, including during the pandemic.

4 Promote British Columbia and B.C.'s creative industries in the global marketplace.

In CIERA™, GDP results are up 26% from 2016 to 2021, acting as a proxy for the sector's success in the global marketplace. Export programs have been expanded beyond motion picture to include interactive and digital media, book and magazine publishing, and music and sound recording. During the pandemic, virtual markets were identified and promoted to B.C. creators.

5 Provide the leadership necessary to ensure B.C.'s creative sector prospers.

Creative BC embedded foundational Justice, Equity, Decolonization, Diversity, and Inclusion (JEDDI) training within its workplace, principles across its programs, and ongoing accountability through department action plans. It established a Sector Impact Report and each year profiles and promotes the creative industries' achievements, and challenges, and reports activities. Web engagement rose from eight Annual Report views in FY2015/16 to 2K+ Impact Report views in FY2020/21. The BC Creates coalition of seven industry associations depends on Creative BC to champion, support, and lead activities and collaborations relevant to the sector. Nationally, the organization provides facilitation to the Association of Provincial and Territorial Funding Agencies' committee, its motion picture sub-committee, and its research + data sub-committee. The Provincial Film Commission at Creative BC is a leader in environmental and social sustainability initiatives with responsibility for delivery of Reel Green™ and Creative Pathways™.

6 Establish Creative BC as an integrated, efficient, effective, and knowledge-based organization.

An internal IT transformation integrated all of Creative BC's data and services into one platform for management, delivery, and insight. The result was no service downtime during the pandemic. The public website was updated for greater flexibility, security, and usability. Its calendar and news are the most comprehensive sources of information on the sector with close to 10K newsletter subscribers, up from 1,617 in 2016. Web visitors are up from 164K to 303K with an additional 20K visitors on bccreates.com, also managed by Creative BC.

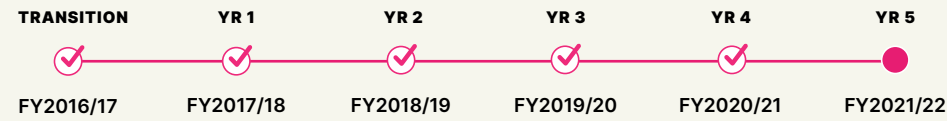
7 Provide exceptional client service in the delivery of Creative BC programs.

The organization's program delivery team expanded from two to 11 staff. Beyond inbound calls, staff now travel to promote and showcase programs across the province, ensuring outreach that increases new applicants, regional engagement, and greater representation of people from systemically excluded groups in both applicant and recipient pools. The motion picture tax credits team also increased from three to nine staff with application turn-around times now recognized as the fastest in the industry.

The Provincial Film Commission team expanded from four to 11 staff to service over 200 productions/year hands-on in FY2021/22, run Reel Green™ and Creative Pathways™ initiatives, support regional film commissions, develop film-friendly policy, and bridge government and industry, such as via ownership of the industry's Health and Safety Guidelines during the pandemic.

Creative BC Scorecard

FY2021/22



Creative BC Input Mechanisms

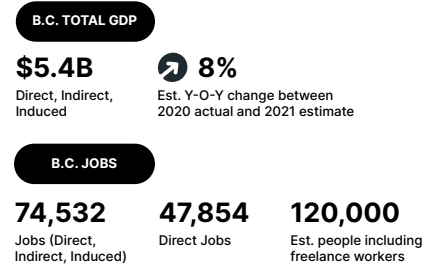
Investment Inputs

- 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**
Our reach remained steady as we compared our traditional and non-traditional media, newsletter, website, and social media channels.
- 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.



Amanda Sum "Different Than Before"

Competitiveness

Growth Mindset

Discoverability

Talent

100%
Of programs: self-identification, key personnel identification, or mandate identification to encourage + support systemically excluded groups

210K
In Production List Views

31%
Newsletter Subscribers to 12.8K

53
Media Inquiries

302K
Website Visitors

2.1K
Traditional Media Hits

FY2021/22 Highlights

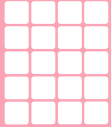
+5
New Websites

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

14%
Social Followers to 31.1K



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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