

# Enabling British Columbia's Creative Sector

Prem Gill, CEO, Creative BC

# Territorial Recognition

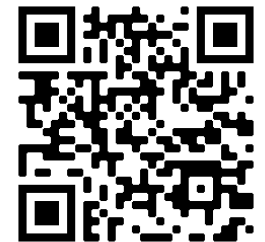


We gratefully acknowledge the lands, languages and cultures of the **34 First Nations** that are Indigenous to what is now called British Columbia. The motion picture industry is fortunate to live and work on their unceded ancestral territories.



Please explore Indigenous languages, arts and heritage on **The First Peoples' Map**, created by First Peoples' Cultural Council in collaboration with First Nations communities and Indigenous artists, language champions, Elders, Knowledge Keepers and cultural workers.

Read the **Indigenous Screen Office Protocols** - resources and wise practices for working with Indigenous peoples, stories and communities. <https://iso-bea.ca/resources/protocols/>





1. British Columbia's Creative Sector + Scale
2. Creative BC's Role, Context and Services
3. Value Chain + our Programs
4. Supporting the Creative Industries: 9 Enabling Factors
5. Impacts of COVID-19 and Strategic Issues
6. Sector-Wide Stewardship through Creative BC
7. Focus on Motion Picture: Projections, Sustainability + Gig Work



The creative sector consists of five industries, and one segment that contributes to all



Book  
Publishing



Interactive +  
Digital Media



Magazine  
Publishing



Motion  
Picture



Music +  
Sound Recording



Multi-Creative  
Industry Services

# Creative BC built CIERA to measure them

Creative Industries Economic Results Assessment – based 100% on Statistics Canada datasets

COVID YEAR 2020	Total GDP	Direct Output	Total Jobs / est. people
Motion Picture	\$1.83B (-16%)	\$2.35B*	28,018 / 61,892 (-13%)
Interactive + Digital Media (video games only)	\$1.25B (+3%)	\$1.23B	12,583 / na (-1%)
Music + Sound Recording	\$203M (-36%)	\$284M	4,067 / 8,190 (-37%)
Magazine Publishing	\$107M (-34%)	\$133M	1,366 / na (-23%)
Book Publishing	\$25M (-11%)	\$28M	280 / 1,700 (-11%)
Multi-Creative Industry Services	\$1.02B steady	\$1.1B steady	11,899 / na (-15%)
TOTAL	\$4.44B (-10%)	\$5.1B (-15%)	58,213 / 93,000 (-14%)

*\*Creative BC tax credit application insights show motion picture production has returned to pre-pandemic levels: \$3.5B total production spending estimated in 2021 on 450 shows (an industry record count of productions)*



# Creative BC role is to unite and champion the sector

**“Creative BC is a very valued collaborative partner that is a strong asset for the industry, which **takes care of key programs** that support competitiveness and works collaboratively with industry and labour.”**

*~ Motion Picture Industry Organization leader*

Supporting the province's creative sector to reach its economic, social, environmental and creative potential at home and globally.

## Structure and Purpose

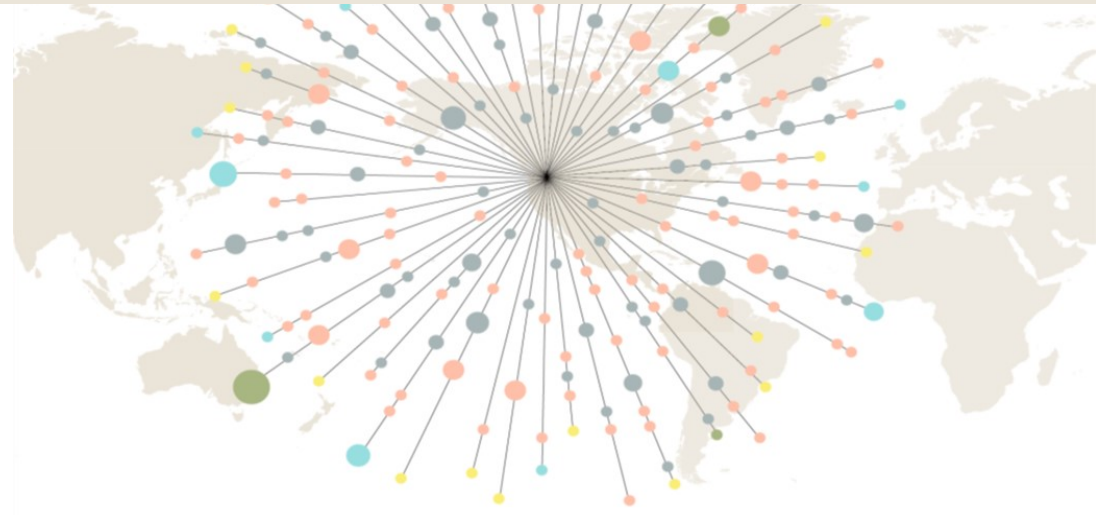
- Independent non-profit society established by government
- economic development organization
- Province's agency of record for creative sector
- Bridging industry and government as a trusted intermediary
- Investment support + strategic leadership

## Mandated Delivery

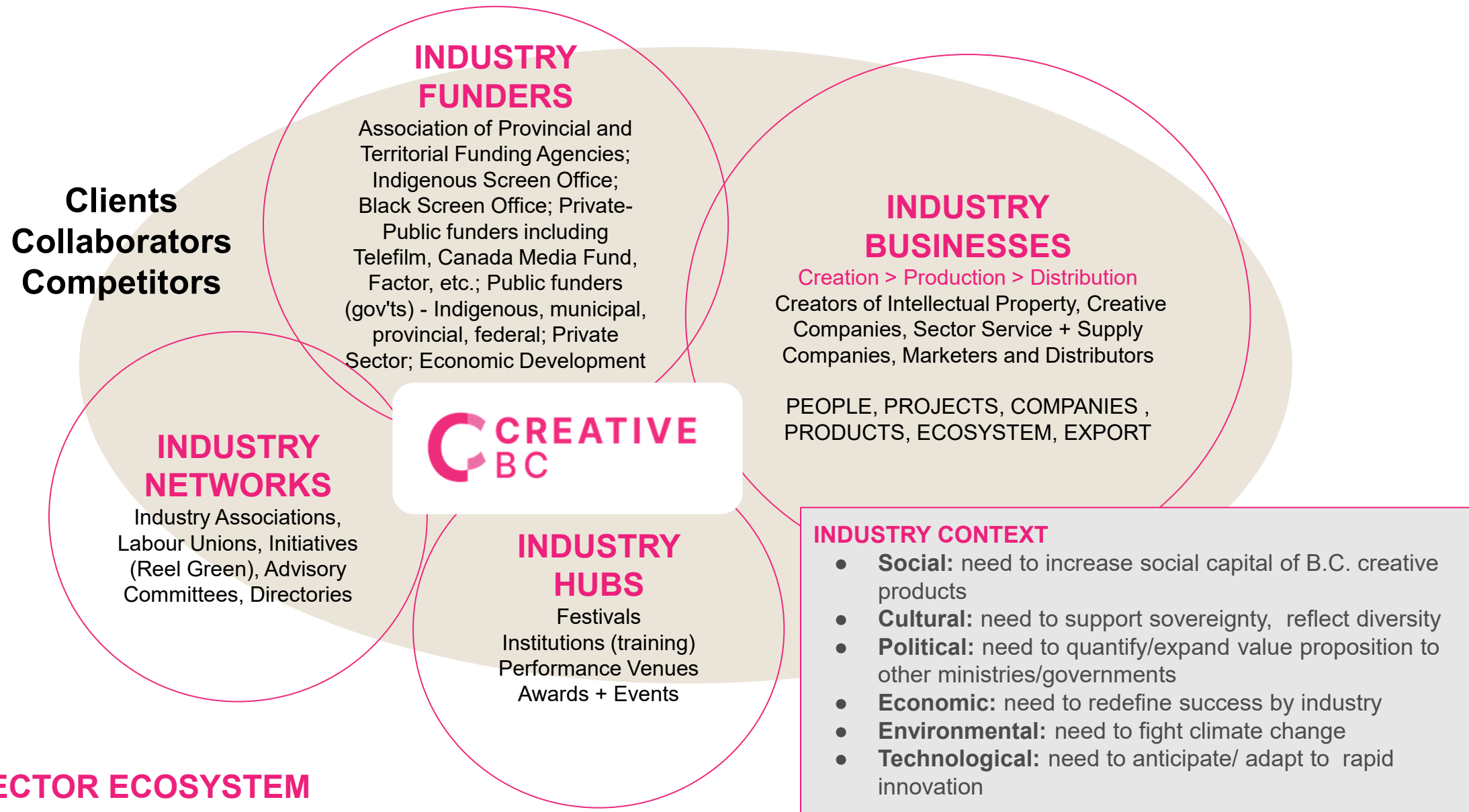
- Funding programs
- Film commission services
- Motion picture tax credits
- Investment attraction and stewardship

## Key Strategic Initiatives

- Creative Pathways (industry funded)
- Reel Green (industry funded)
- Indigenous Fund (industry funded)
- Creative Industries Economic Results Assessment (CIERA)
- Annual Impact Report
- BC Creates



# We facilitate opportunity within a broader ecosystem



# Services and Programs Differ by Industry



	Book Publishing	Interactive + Digital Media	Magazine Publishing	Motion Picture	Music + Sound Recording
Direct Investment via Domestic Funding Programs	✓	✓	✓	✓	✓
Tax Credit Administration	✗	✗	✗	✓	✗
Provincial Commission Services	✗	✗	✗	✓	✗
Local Ecosystem Cultivation	✓	✓	✓	✓	✓
Strategy – Leverage, Export, Business Development	✓	✓	✓	✓	✓
Operational Funding Administration – associations or regional commissions	✓	✗	✓	✓	✓
Expertise, Business & Marketing Intelligence	✓	✓	✓	✓	✓
Communications + Audience Building via traditional and social media, storytelling	✓	✓	✓	✓	✓

Industry Development via Association Partnership and Strategic Initiatives

**BC CREATES**

**ABPBC**  
Association of Book Publishers of BC

**DigiBC**  
The Interactive & Digital Media Industry  
Association of British Columbia

**VR/AR ASSOCIATION**

**Magazine BC**  
association of

**mppia**

**musicbc**

**CMPPA**  
Canadian Media Producers Association  
BC Producers Branch

**Anim & Vfx Alliance**  
OF BRITISH COLUMBIA  
Supported by mppia | DigiBC

**FIRST PEOPLES' CULTURAL COUNCIL**

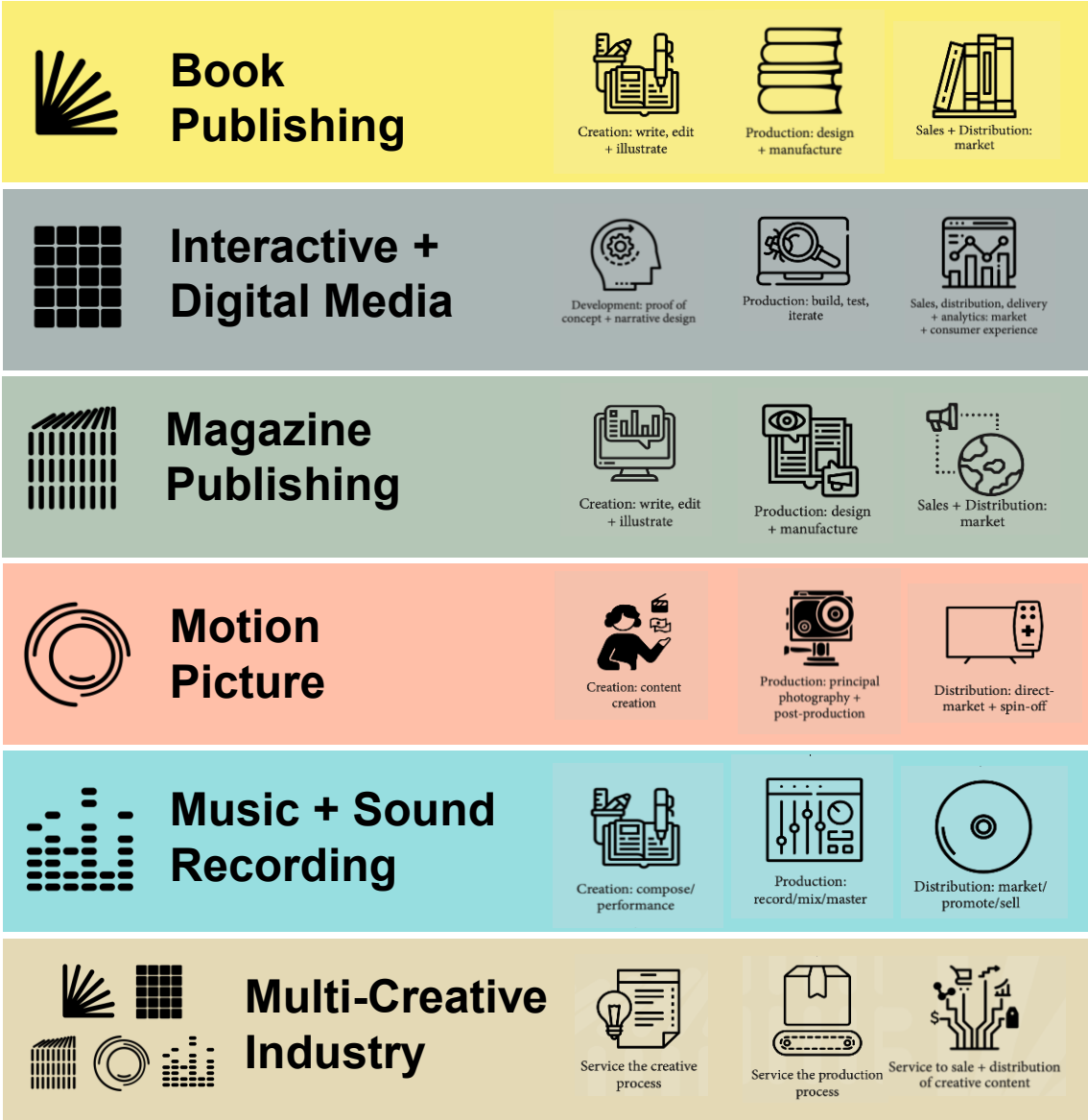
# The Creation Value Chain

Storytelling, and the creation of intellectual property (IP) in the form of “creative content” is largely similar across all 5 industries:

**CREATION**

**PRODUCTION**

**DISTRIBUTION**

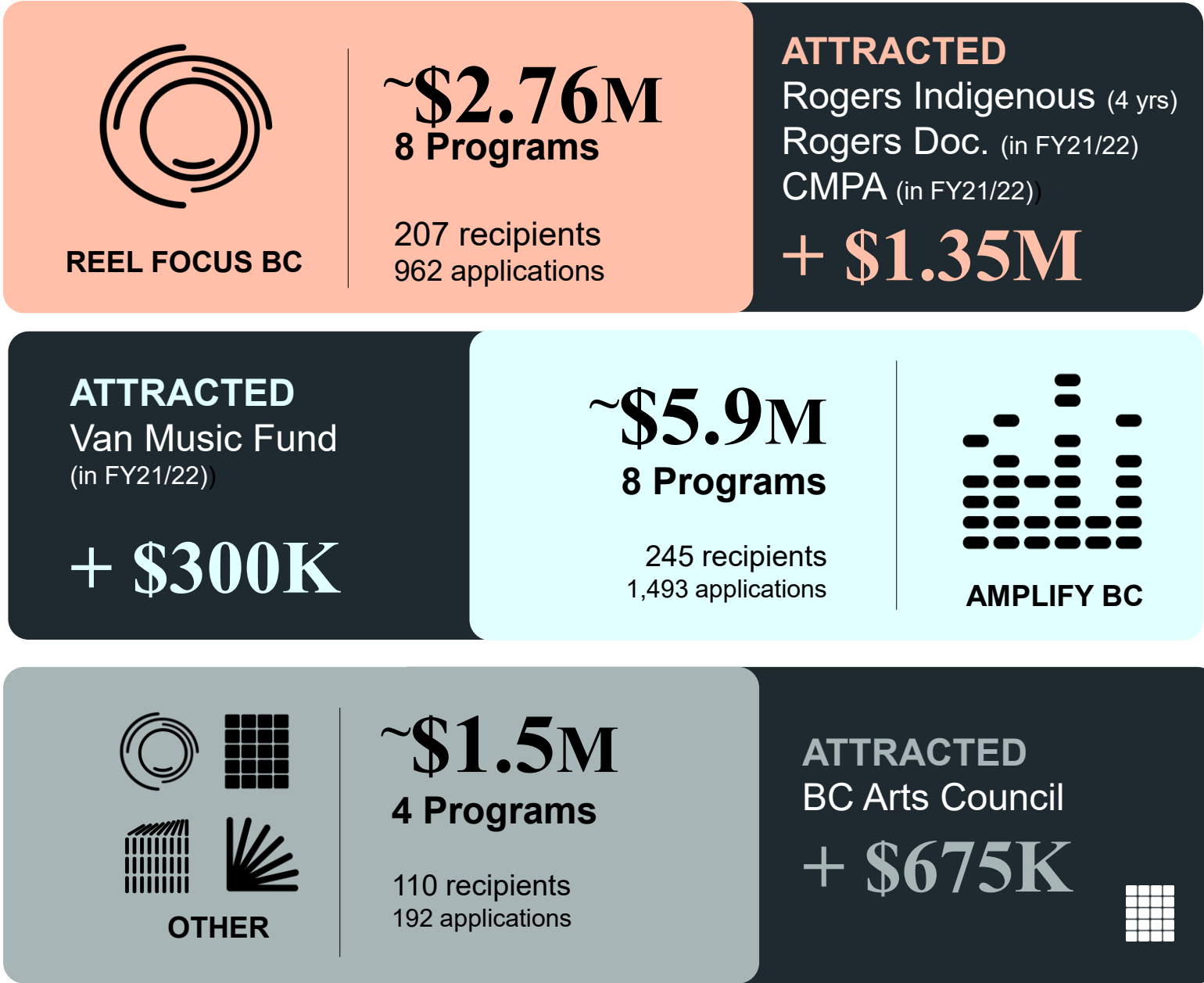


FY2021/22 Programs

**\$10.1M**  
FY 21/22 PROGRAMS

**620**  
RECIPIENTS

**\$2.35M**  
ATTRACTED INVESTMENTS



# 9 Enabling Factors for B.C.'s Creative Industries



The value of B.C.'s creative industries to our provincial culture through the reflection, expression and documentation of our history is important to note.

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

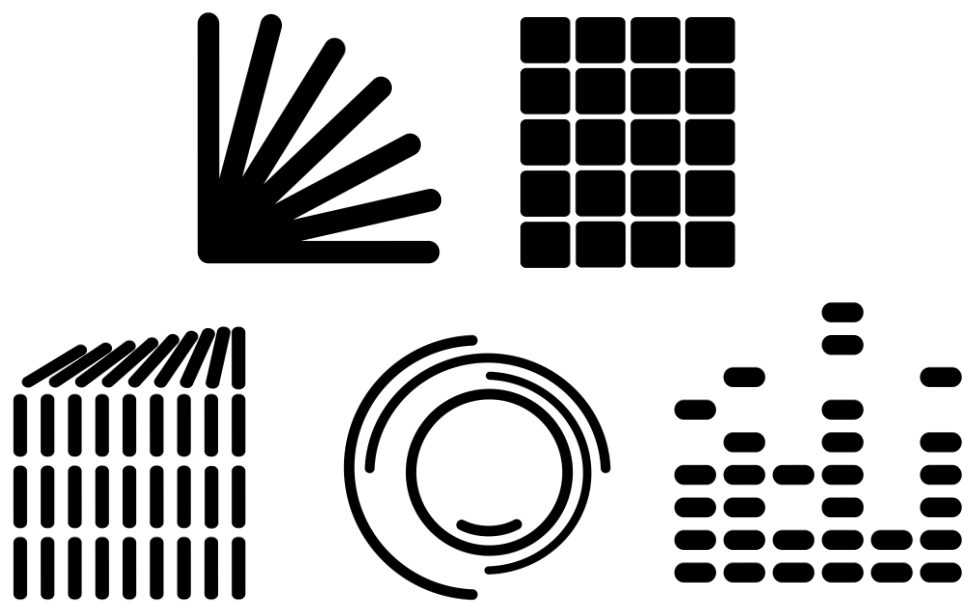


CIERA™

1. Training + Development
2. Networks + Institutions
3. Access to Markets
4. Technology Adoption
5. Access to Funding
6. Facilitative Regulation
7. Justice, Equity, Decolonization, Diversity, Inclusion
8. Infrastructure
9. Other Favourable Business Conditions



## Ongoing Challenges Vary by Industry









# Issues to address across all 5 industries



## Current Position

## Strategic Issues to Address

Global demand for creative content has never been higher		travel to global markets paused and hybrid market models offer new opportunities and challenges
The channels and ways content is consumed is being diversified and disrupted rapidly		digitization and content as a service requires creators to protect their intellectual property
B.C. is truly a global leader in live action, animation/VFX and video games		competitiveness of rapid innovation and other jurisdictions' investment
Creative voices and the stories they tell play a significant role in shaping society's norms and values		Greater visibility, access for Indigenous, Black and creators of colour to funding and creative pathways for jobs needed
Imperative to do the JEDDI work (Justice, Equity, Decolonization, Diversity and Inclusion)		Equity-focused streams and programs, building cultural competence
Heavy carbon footprint of various facets of the industries must be addressed		Real changes need to be made including investments into clean energy and local infrastructure

# Sector-wide stewardship includes new strategic services that address challenges



Advocacy through Insight

**CIERA™**

Bringing public datasets  
into our story

**BC CREATES**  
Coalition + Storytelling



Workforce Development  
with Equity Streams



Cultural Competence  
Tools for Industry

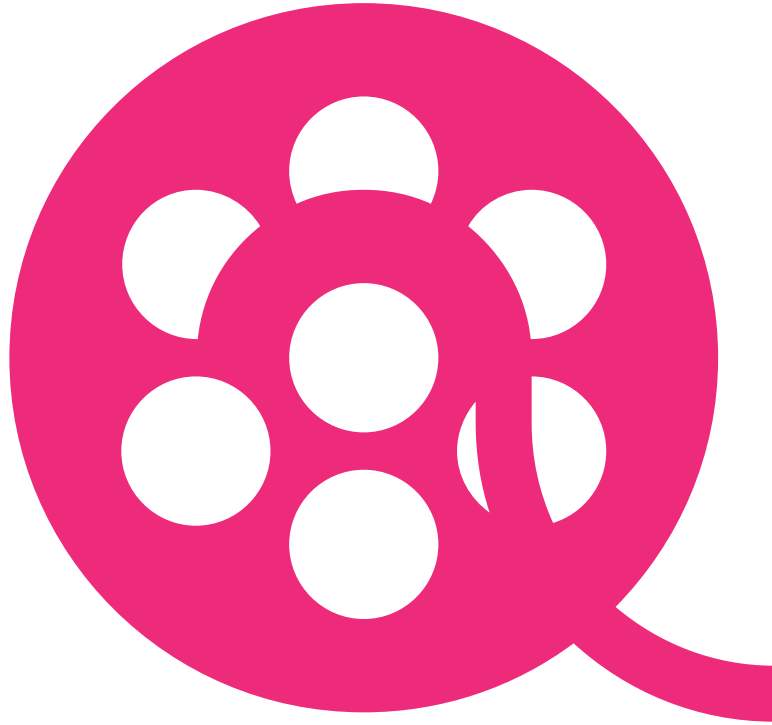


**REEL  
GREEN™**  
AT CREATIVE BC

Service + Leadership



# Projections and the future of film and television production



Activity levels across B.C.'s full-service motion picture industry are at an **all-time high, back to pre-pandemic levels**

Creative BC estimates show **B.C. total production spend of \$3.5B in 2021 on 450 productions**

# Focus on Job Growth in a Gig Economy

Freelance Work – the norm for the creative industries



Traditional Full- and part-time work is measured based on aggregate hours to derive count of jobs



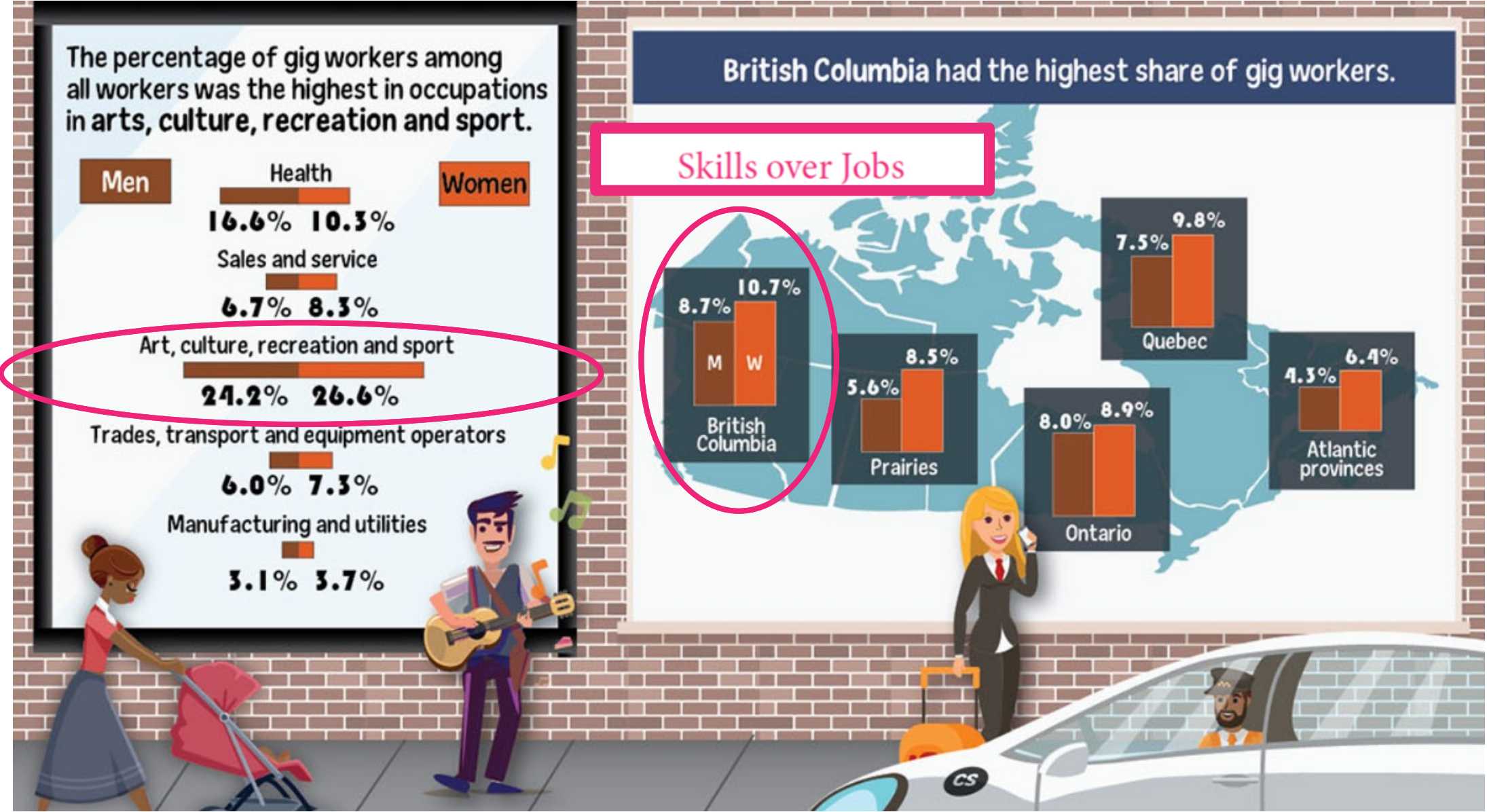
Freelance is about skills over jobs



B.C. Motion Picture Physical Production  
Labour Market Study 2019

- Until the **2019 labour market study**, measurement was difficult as only public datasets existed
- Study found **48,300 people working “below-the-line”** in B.C.’s film industry (directly employed for freelance work)
  - Two payroll companies deliver the vast majority of wages
  - 6 unions and guilds provided data
  - Statisticians integrated the data for headcount
- Contrast that with **StatsCan’s 21,305 direct** and 35,332 total in CIERA 2019 (pre-pandemic)
- Ongoing work and collaboration to contribute to shared knowledge at the provincial and federal levels

# Future Inquiry: Canadian gig workers, 2016 (published by Stats Can in 2019)



# CIERA Expansion under way: Music Research Pilot



**Trade:** Annual results for inter-provincial and international trade

**Linkages:** Quantification of economic interdependence between creative industries and with other industries

**Labour:** Annual results for detailed labour productivity characteristics

**Demographics:** Composition of the the labour force by various demographics

**Regional Analysis:** Quantification of economic activity associated with creative industries in B.C. economic regions

**Environment:** Exploration of environmental datasets and green input calculators associated with creative industries in B.C. economic regions





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COLUMBIA

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